

REBEL SOFTWARE · RebelPSA

Sales & Quoting Guide

Leads, Pipeline & CPQ

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Contents

1. About This Guide
2. Leads: Capturing & Qualifying Interest
3. Converting a Lead to an Opportunity
4. Opportunities: Tracking a Deal
5. Pipelines & Stages
6. The Pipeline Workspace
7. Building a Quote (CPQ)
8. Approvals & E-Signature
9. The Public Quote Page
10. What Happens After a Quote Is Won
11. Common Workflows
12. Quick Reference & Glossary

1. About This Guide

This guide covers RebelPSA's Sales module — from capturing a raw lead through to a signed, won quote. It's aimed at sales staff running deals day to day, and at technicians who may need to understand where a customer's agreement came from.

Tip. *The Sales module deliberately doesn't rebuild anything the CRM already provides — tags, the activity timeline, health scores, saved views, and the Contact-to-Company relationship model are all the same shared foundations covered in the CRM Technician User Guide. If a concept here looks familiar from that guide, it's because it's the same underlying system.*

2. Leads: Capturing & Qualifying Interest

A Lead is where a sales relationship starts — before there's a confirmed deal, just a person and company you're evaluating. The Lead record is built to capture enough detail to qualify almost any kind of prospect, not just a typical MSP (Managed Service Provider) client:

- **Identity & firmographic details** -- name, title, company, industry, revenue, employee count, and similar background fields.
- **Source & marketing tracking** -- where the lead came from, including campaign and UTM tracking, so you can trace a deal back to what actually generated it.
- **Qualification fields** -- a standard Budget/Authority/Need/Timeline (BANT) set, with more advanced qualification frameworks available as custom fields if your organization uses them.
- **MSP-specific fields** -- endpoint count, server count, site count, user count, current MSP (if any) and their contract end date, primary pain point, and relevant compliance frameworks (HIPAA, PCI, SOC 2, CMMC) — useful even outside a pure MSP context if your organization tracks similar technical footprint data.
- **Status & routing** -- New, Working, Nurture, Qualified, or Unqualified, with an owner and territory assignment.
- **Scoring** -- a manual score you (or your team) assign based on your own rubric.

Leads use the same duplicate-detection approach as the rest of the CRM, so importing or manually entering a lead that already exists gets flagged rather than silently creating a second record.

3. Converting a Lead to an Opportunity

When a Lead is ready to become a real, tracked deal, converting it creates the downstream records automatically — a Contact, a Company (or links to an existing one), and an Opportunity — while preserving the lead's history and marking it converted rather than deleting it.

Tip. Because a Contact can belong to multiple Companies in RebelPSA, converting a lead whose contact already exists elsewhere in your CRM links them appropriately rather than creating a confusing duplicate person record.

4. Opportunities: Tracking a Deal

An Opportunity is the deal itself, with a field set built around recurring-revenue selling rather than a single one-time sale amount:

Field Group	What It Captures
Revenue structure	Amount, MRR, ARR, and NRR (non-recurring revenue), plus total contract value, contract start/end dates, term length, and renewal date.
Classification	Opportunity type (New, Renewal, Expansion, Cross-Sell, Amendment), competitors involved, and any partner account associated with the deal.
Win/loss capture	A required reason on close (win or loss), free-text detail, which competitor won if lost, and the decision maker/influencers involved.
MSP-specific fields	Endpoint/server/site counts, service lines, security tier, compliance scope, and estimated onboarding hours and complexity — feeding directly into onboarding planning once a deal closes.
Tracking	Days in current stage and days in pipeline, computed automatically, plus the last stage-change date.

Line items live underneath the Opportunity — each with a SKU (Stock Keeping Unit), quantity, list price, sale price, discount, and whether it's recurring, plus its own contribution to the deal's MRR or NRR total.

5. Pipelines & Stages

A Pipeline is a named, tenant-configurable sequence of stages — you're not limited to one fixed sales process. A Pipeline has a type (Sales, Onboarding, Renewal, or Processing), can be marked as your default, and can be scoped to a specific team.

Each Stage within a pipeline carries a name, a win probability percentage, an order position, and optional required-field rules that must be satisfied before a deal can move out of that stage — a lightweight way to enforce your own sales discipline without hardcoding it into the platform.

- A stage can be flagged as an entry stage, a won stage, or a lost stage, which is what drives win/loss reporting and forecast calculations.

6. The Pipeline Workspace

All of your pipeline views live in one unified workspace, switching between four views without leaving the page:

View	What It Shows
Kanban	Deals as cards in columns by stage, drag-and-drop to move between stages. Won/Lost columns are visually distinct, and hygiene badges flag deals that need attention (stale, missing required fields, etc.).
List	A sortable, filterable grid view of every deal, with inline Mark Won/Lost actions.
Forecast	A merged forecasting and dashboard view — pipeline value by stage, forecast category, and expected close timing.
Calendar	Deals plotted by their expected close date.

Tip. Dragging a deal to a Won or Lost column in Kanban view opens a close dialog prompting for the required win/loss reason — this isn't a separate step you have to remember, it's built into the drag action itself.

7. Building a Quote (CPQ)

Once a deal is ready to quote, the Quote Builder gives you a guided configure-price-quote flow rather than a blank document:

- Start a new quote from the Opportunity.
- Add line items — from your catalog or entered manually — each with quantity, pricing, and discount.
- Set contact/point-of-contact details, review the associated company, and select the brand the quote should be presented under if your organization operates multiple brands.
- Set a valid-until date (defaults to 7 days out, but is fully editable).
- Generate the quote as a PDF and send it to the customer.

Tip. Quote creation itself is solid, verified, day-to-day functionality. A few of the newer surrounding pieces — the public quote landing page experience, PDF formatting polish, and the Convert-to-Order flow — are recent additions still being smoothed out, so treat minor rough edges there as expected rather than alarming if you encounter one.

8. Approvals & E-Signature

A quote can route through an internal approval workflow before it's sent, if your organization requires sign-off above a certain value or discount level. Once approved (or if no approval is required), the quote can be sent out for e-signature through either DocuSign or Adobe Sign — both are fully connected options, not a single locked-in choice.

9. The Public Quote Page

Customers accept quotes through a standalone, branded public page — no login, no internal application interface, just the quote itself presented under your organization's (or the relevant brand's) identity. This is the page a customer receives a link to and interacts with directly.

- The page reflects your brand selection made at quote-build time.
- A draft quote can be deleted before it's sent if it was created in error.
- Sending a quote prompts for the recipient, rather than assuming it should go to a default contact.

10. What Happens After a Quote Is Won

Converting a won quote to an order is a distinct step from winning the Opportunity itself — Convert to Order is available once a quote has been accepted.

Tip. A direct bridge from a won Sales quote straight into a Finance-side order or invoice is on the roadmap but not yet available — for now, treat the handoff from a signed quote into your billing/agreement setup as a manual step your team completes, rather than an automatic one.

11. Common Workflows

Qualifying and converting a new inbound lead

- Fill in the lead's BANT and any MSP-specific technical footprint fields as you learn them.
- Move its status from New through Working to Qualified as your qualification progresses.
- Convert to an Opportunity once it's genuinely a deal you're pursuing.

Moving a deal through the pipeline

- Work the deal from the Kanban view, dragging it forward as it progresses.
- Address any hygiene badges (stale deal, missing required fields) before they accumulate.
- Use the close dialog's required win/loss reason honestly — this data feeds your own future forecasting.

Sending a customer a quote

- Build the quote from the won-in-principle Opportunity, adding line items and setting the valid-until date.
- Route it through approval if your organization requires it for this value/discount.
- Send for e-signature and share the public quote page link with the customer.

12. Quick Reference & Glossary

Term	Meaning
Lead	A person/company being evaluated before a confirmed deal exists.
Opportunity	A tracked, in-progress deal, with revenue structure, stage, and forecast fields.
Pipeline	A named, configurable sequence of stages a deal moves through.
Stage	A single step within a pipeline, with a win probability and optional required fields.
MRR / ARR / NRR	Monthly / Annual Recurring Revenue, and Non-Recurring Revenue — the revenue components of a deal.
CPQ	Configure-Price-Quote — the guided flow for building a customer-facing quote.
Public Quote Page	The standalone, branded, no-login page a customer uses to review and accept a quote.
Convert to Order	The step that turns an accepted quote into an order, separate from winning the Opportunity itself.