GETTING STARTED

Getting started with Zyrft

Set up your workspace, bring in your data, invite your team and start working the pipeline in about 30 minutes.

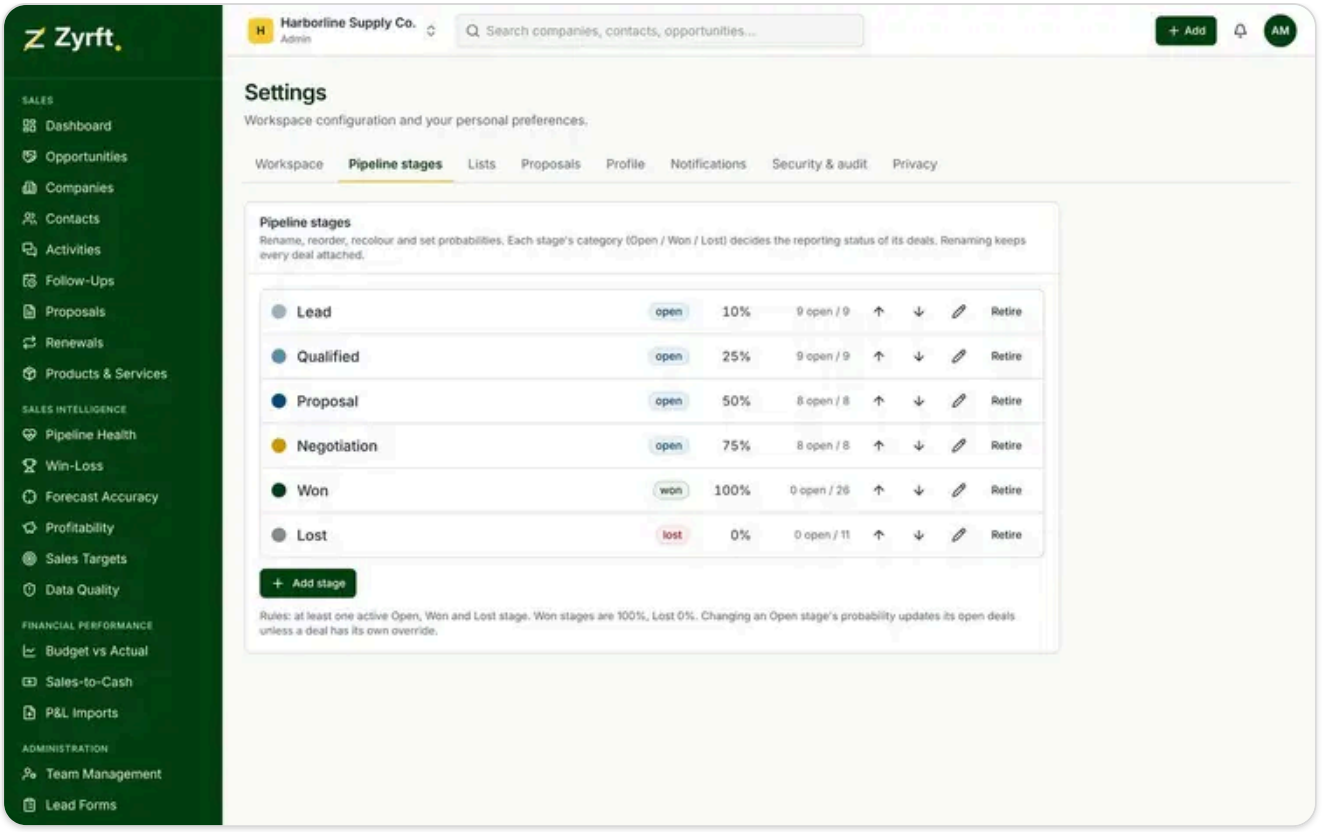
Download as PDF All help articles

1. Create your workspace

1. Click Start free and sign up with your work email and a password.
2. Open the confirmation email and click the link. Zyrft only lets confirmed email addresses sign in.
3. Name your company workspace and choose its currency and time zone. Forecast windows and reminders use this time zone.
4. Every new workspace starts on the Free Forever plan (1 user), no card needed.

2. Check your pipeline stages

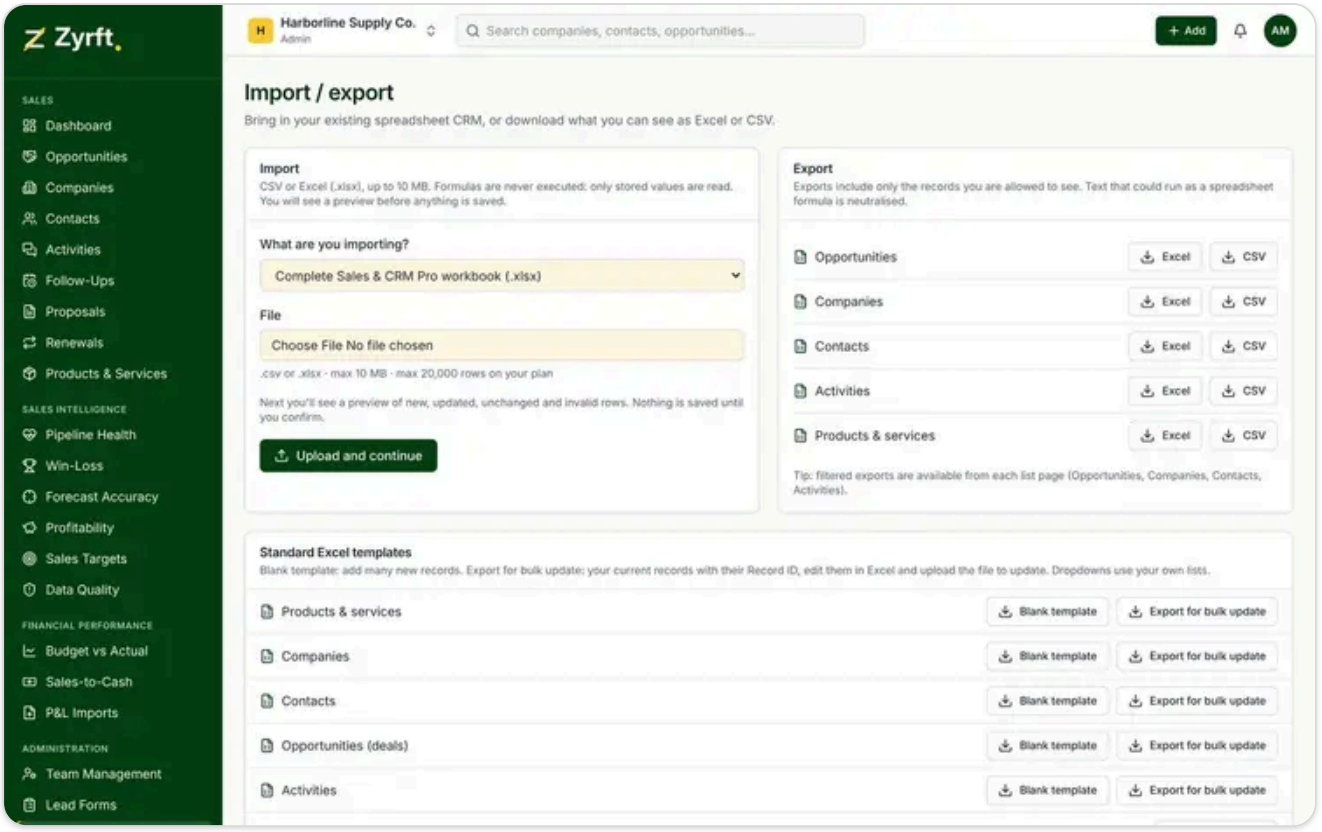
Settings → Pipeline stages lists your stages. Each stage belongs to Open, Won or Lost and has a default win probability that drives the weighted forecast. Rename, reorder or retire stages to match how you sell. Retiring a stage never deletes deals.



3. Bring in your data

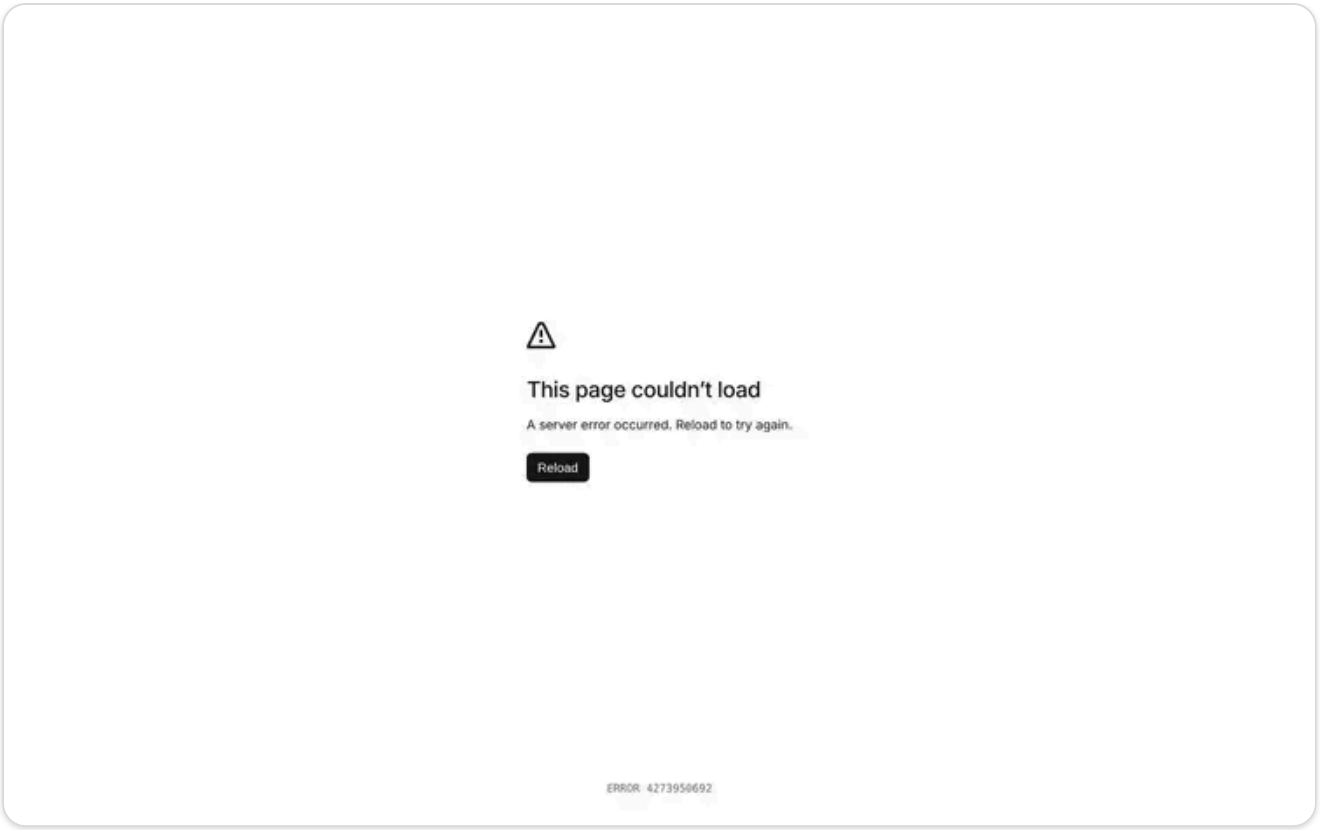
Want to practise first? Download the fictional demo dataset (Harborline Supply Co.) from the help center and import it into a test workspace, never into your real one.

1. Go to Import / Export and download a blank template, or upload the Excel/CSV file you already use.
2. Match your columns to Zyrft fields and review the preview: new, updated, unchanged, invalid and conflict rows are shown before anything is saved.
3. Confirm the import. Imports never delete records and blank cells never erase data.



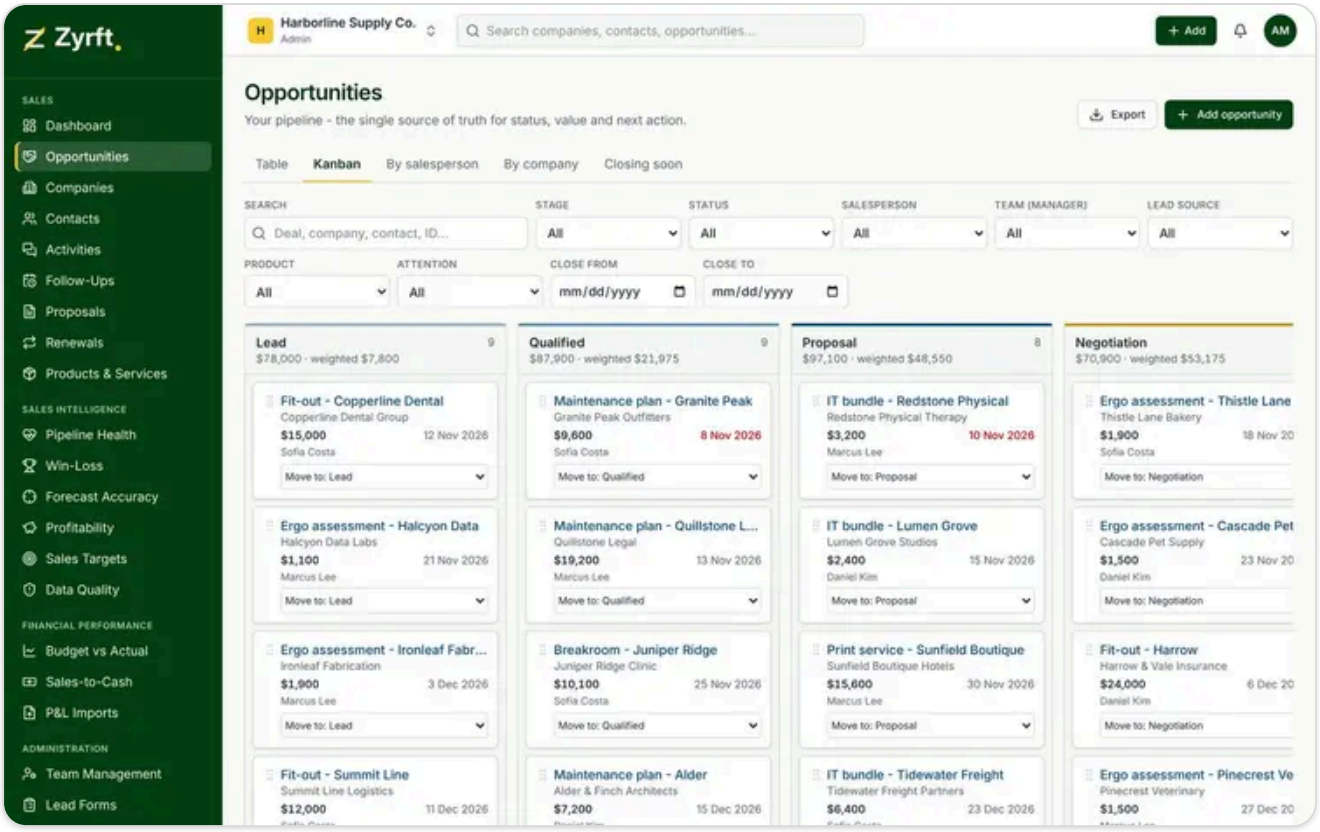
4. Invite your team

In Team Management, invite salespeople and sales managers by email. Admins see everything; managers see their team; salespeople see their own records unless you widen their visibility. On the Free plan the workspace is for one user; upgrade to Pro from Billing to add people (14-day free trial the first time).



5. Work the pipeline every day

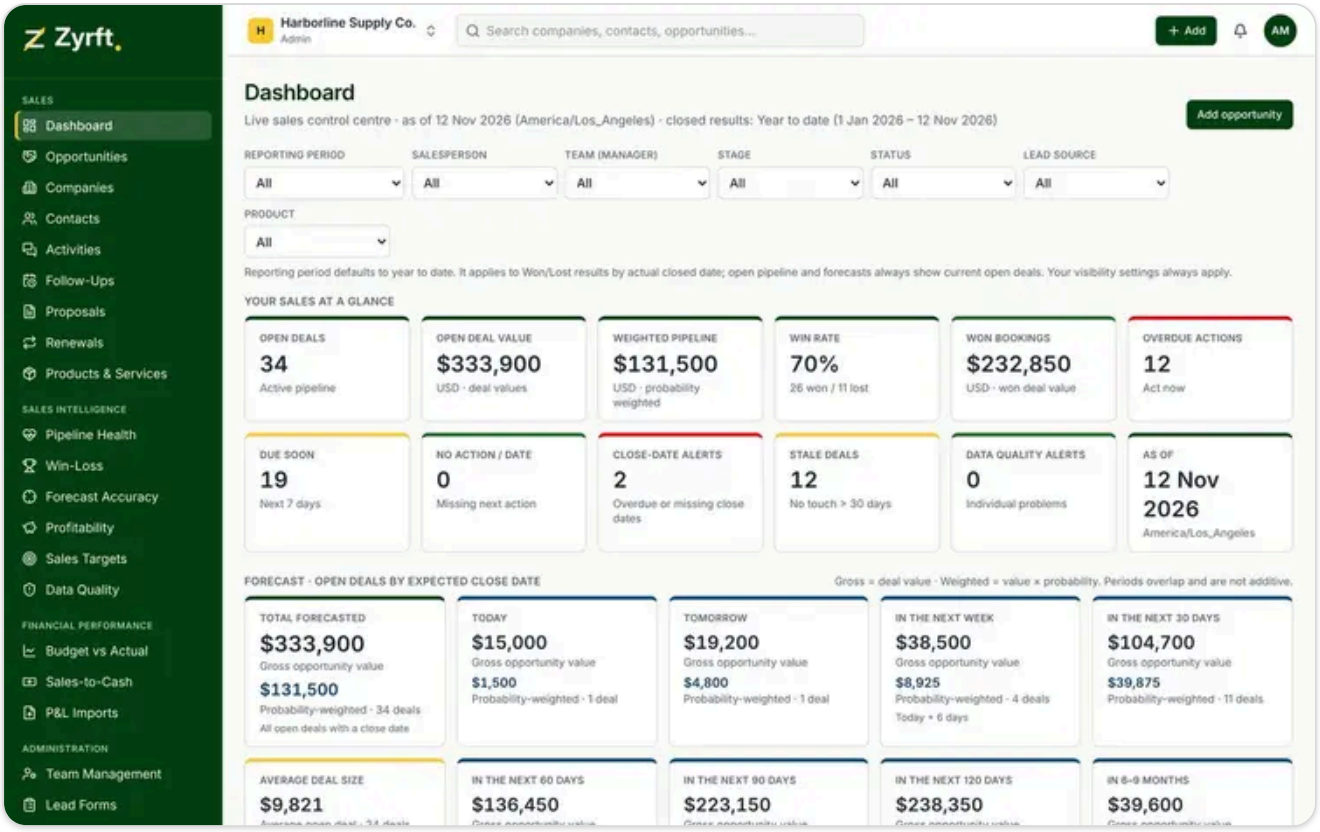
1. Add opportunities with a value, stage, expected close date and a next action with a date.
2. Use Opportunities → Kanban to move deals between stages.
3. Start each day on Follow-Ups: overdue, due soon, missing next step and stale deals.
4. Log calls, emails and meetings on the opportunity so everyone can see what happened.



6. Read the dashboard and forecast

The Dashboard shows open deals, pipeline value, weighted pipeline, win rate, won bookings and alerts. On Pro, the forecast block shows gross and probability-weighted value for today, tomorrow, the next 7 to 120 days and 6 to 9 months.

Weighted value = deal value × win probability. Periods overlap, so don't add them up. Won deal value is a sales booking, not accounting revenue.


Zyrft.
Harborline Supply Co.
Admin
Search companies, contacts, opportunities...
+ Add
AM
SALES
Dashboard
Opportunities
Companies
Contacts
Activities
Follow-Ups
Proposals
Renewals
Products & Services
SALES INTELLIGENCE
Pipeline Health
Win-Loss
Forecast Accuracy
Profitability
Sales Targets
Data Quality
FINANCIAL PERFORMANCE
Budget vs Actual
Sales-to-Cash
P&L Imports
ADMINISTRATION
Team Management
Lead Forms
Dashboard
Live sales control centre · as of 12 Nov 2026 (America/Los_Angeles) · closed results: Year to date (1 Jan 2026 – 12 Nov 2026)
Add opportunity
REPORTING PERIOD
SALESPERSON
TEAM (MANAGER)
STAGE
STATUS
LEAD SOURCE
PRODUCT
All
Reporting period defaults to year to date. It applies to Won/Lost results by actual closed date; open pipeline and forecasts always show current open deals. Your visibility settings always apply.
YOUR SALES AT A GLANCE
OPEN DEALS
34
Active pipeline
OPEN DEAL VALUE
$333,900
USD · deal values
WEIGHTED PIPELINE
$131,500
USD · probability weighted
WIN RATE
70%
26 won / 11 lost
WON BOOKINGS
$232,850
USD · won deal value
OVERDUE ACTIONS
12
Act now
DUE SOON
19
Next 7 days
NO ACTION / DATE
0
Missing next action
CLOSE-DATE ALERTS
2
Overdue or missing close dates
STALE DEALS
12
No touch > 30 days
DATA QUALITY ALERTS
0
Individual problems
AS OF
12 Nov 2026
America/Los_Angeles
FORECAST · OPEN DEALS BY EXPECTED CLOSE DATE
Gross = deal value · Weighted = value × probability. Periods overlap and are not additive.
TOTAL FORECASTED
$333,900
Gross opportunity value
$131,500
Probability-weighted · 34 deals
All open deals with a close date
TODAY
$15,000
Gross opportunity value
$1,500
Probability-weighted · 1 deal
TOMORROW
$19,200
Gross opportunity value
$4,800
Probability-weighted · 1 deal
IN THE NEXT WEEK
$38,500
Gross opportunity value
$8,925
Probability-weighted · 4 deals
Today + 6 days
IN THE NEXT 30 DAYS
$104,700
Gross opportunity value
$39,875
Probability-weighted · 11 deals
AVERAGE DEAL SIZE
$9,821
IN THE NEXT 60 DAYS
$136,450
IN THE NEXT 90 DAYS
$223,150
IN THE NEXT 120 DAYS
$238,350
IN 6–9 MONTHS
$39,600