Pipeline Signals App
User Guide

PIPELINESIGNALS

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Pipeline Signals App Overview

Pipeline Signals App Overview

Congratulations!

You are now enrolled in Pipeline Signals App.

The App is designed as a companion tool for you, where you can add details about your company, add users, manage your target accounts, add your signals preferences and delivery preferences.

We want this to be a fun & easy process for you. You'll find all the courseware & assets you need all in one place. And, you can complete things at your own pace.

02 First Time Login

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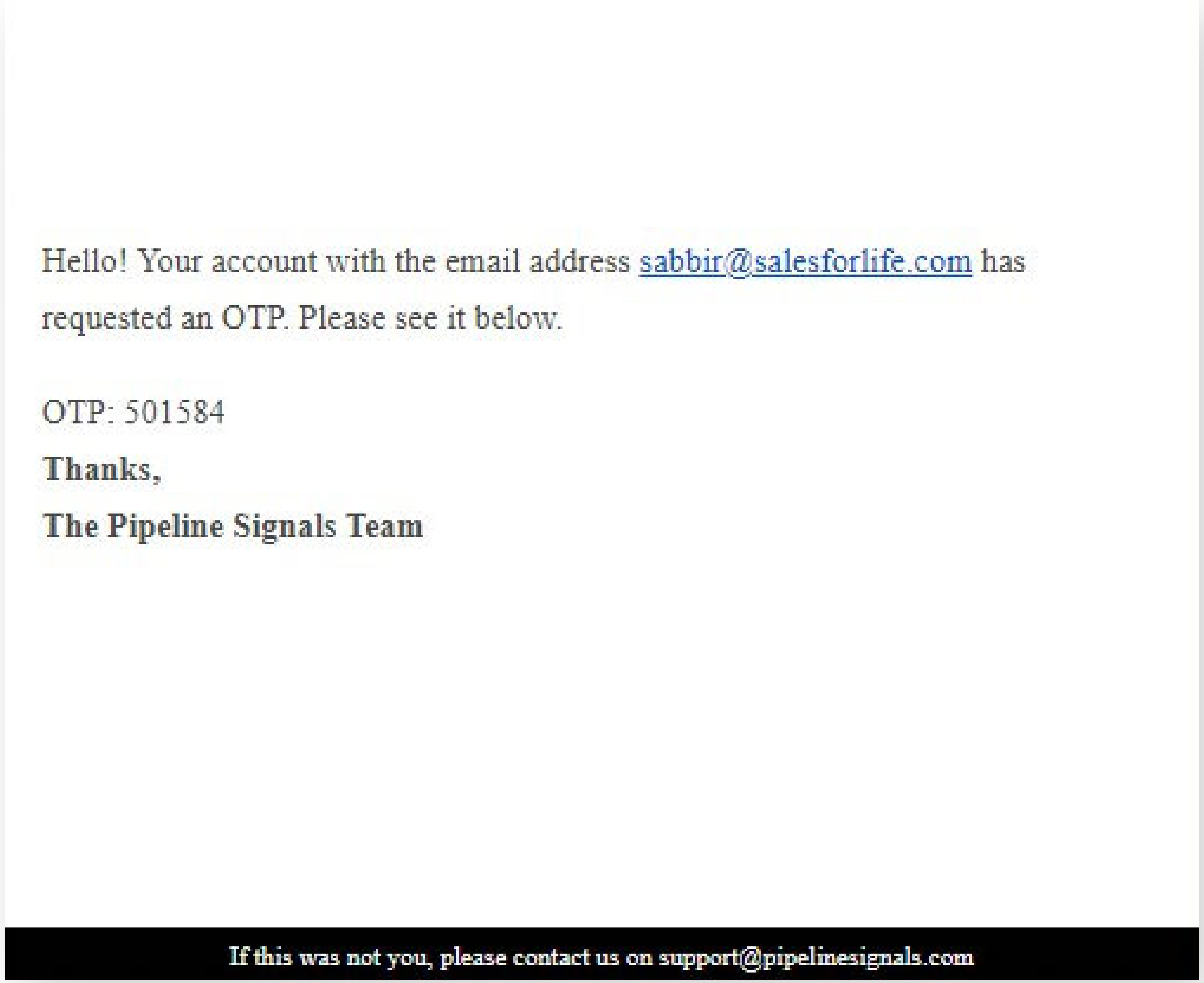
First Time Login

Upon onboarding, login credentials will be sent to your company email addres containing the following information:


Hello! Your account with the email address sabbir@salesforlife.com has requested an OTP. Please see it below.

OTP: 501584

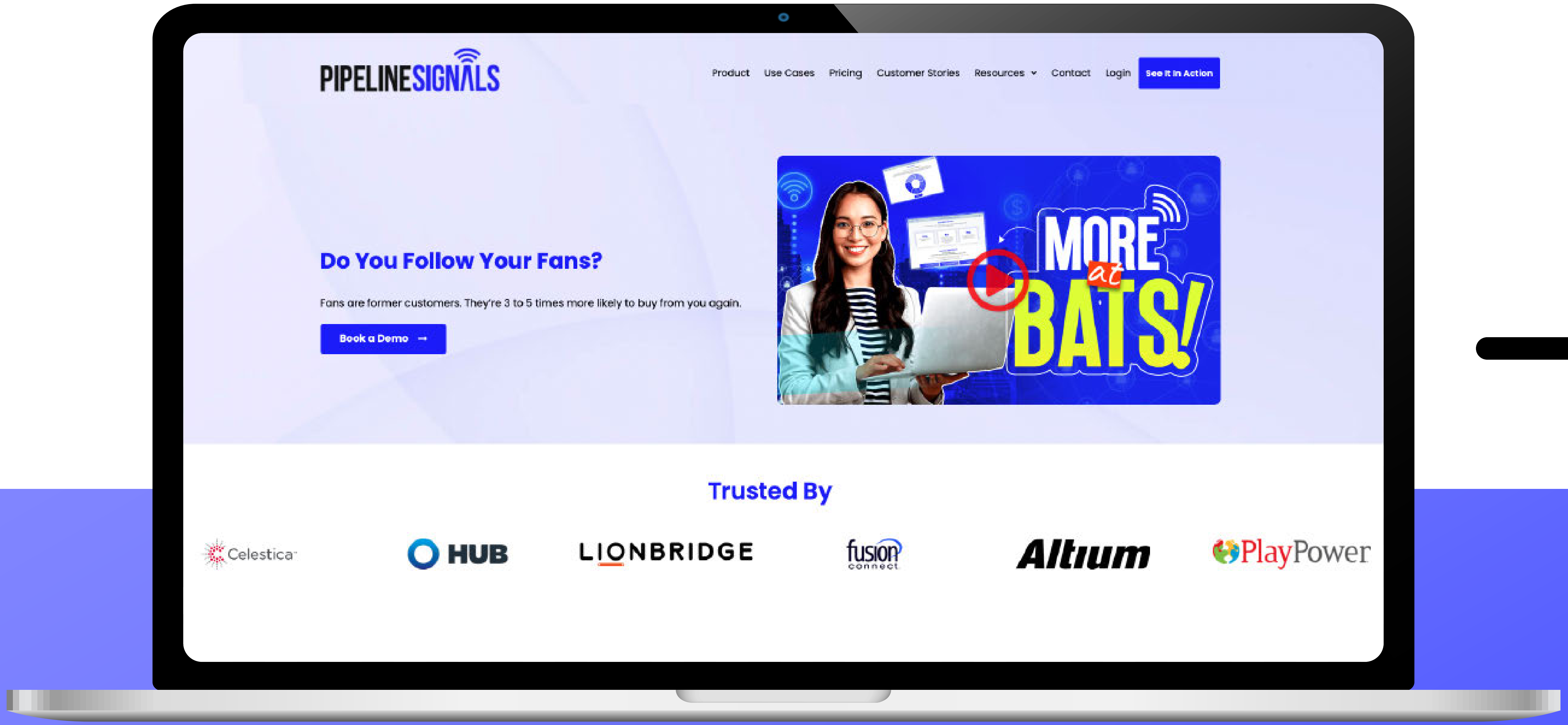
Thanks,

The Pipeline Signals Team

If this was not you, please contact us on support@pipelinesignals.com

First Time Login

1



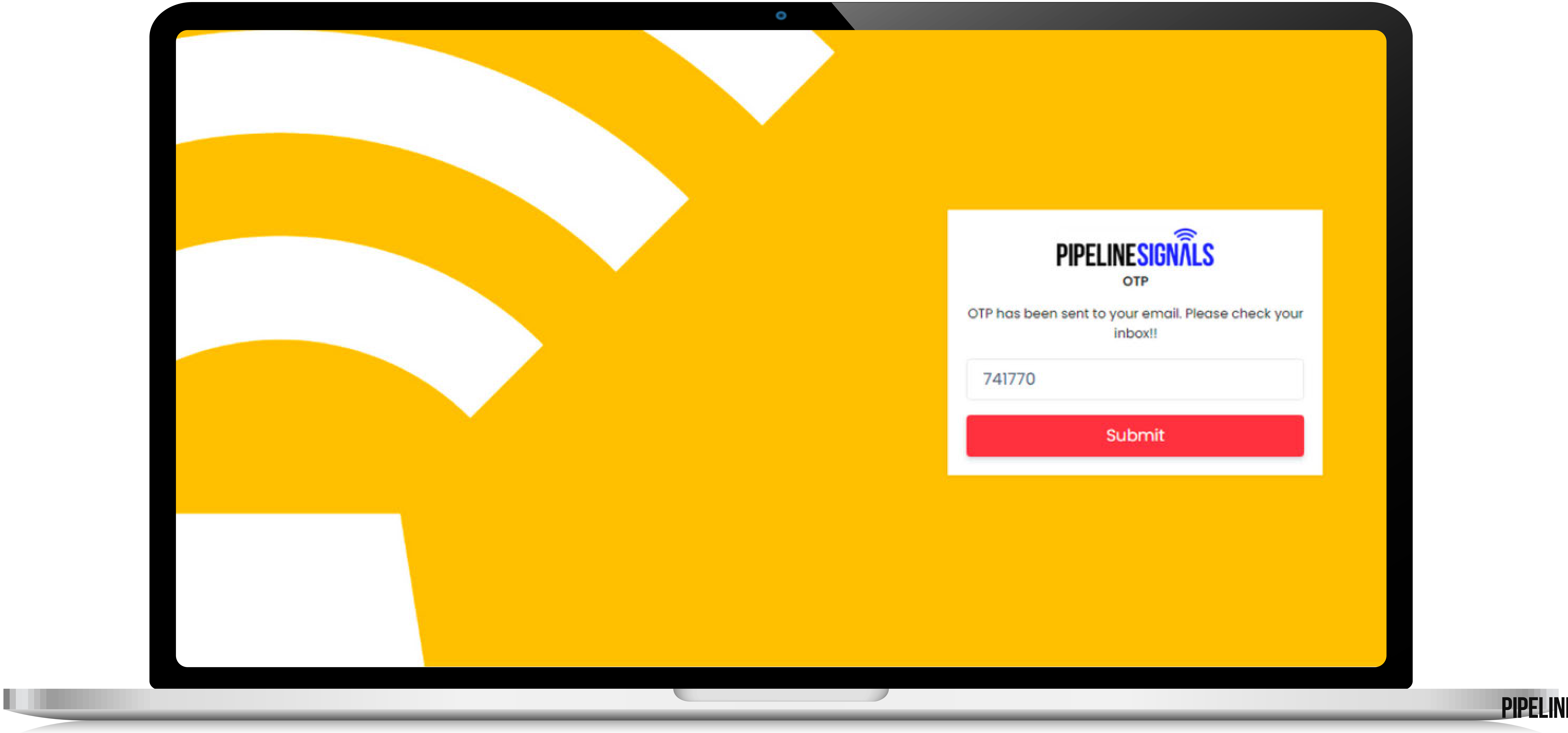
To access the app go to **https://www.pipelinesignals.com** and click on log in at the top right.

2

Enter your registered email and get an OTP.

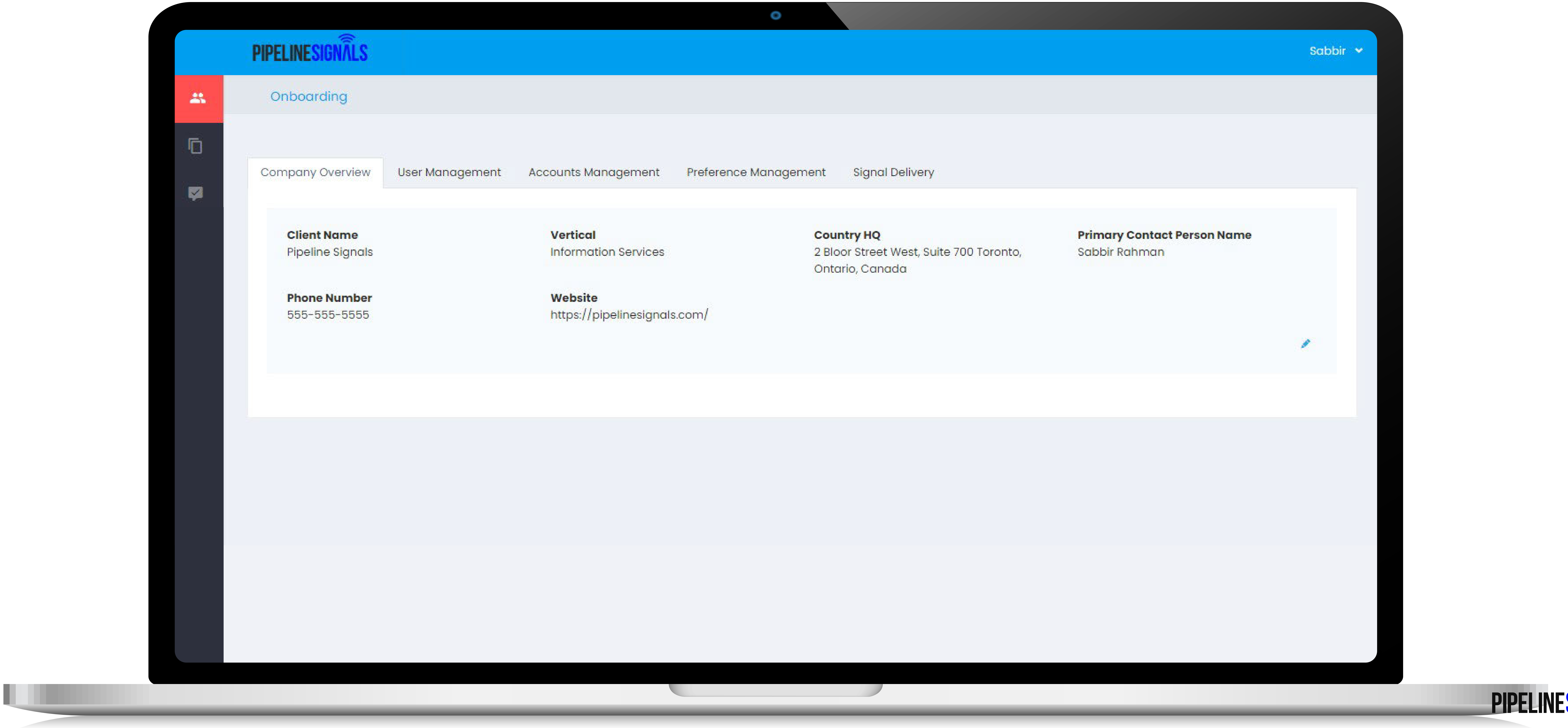
First Time Login

Upon receiving the OTP by email, enter it, and then click **Submit.**



First Time Login

You will be directed to the Onboarding Dashboard.



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Navigating the App

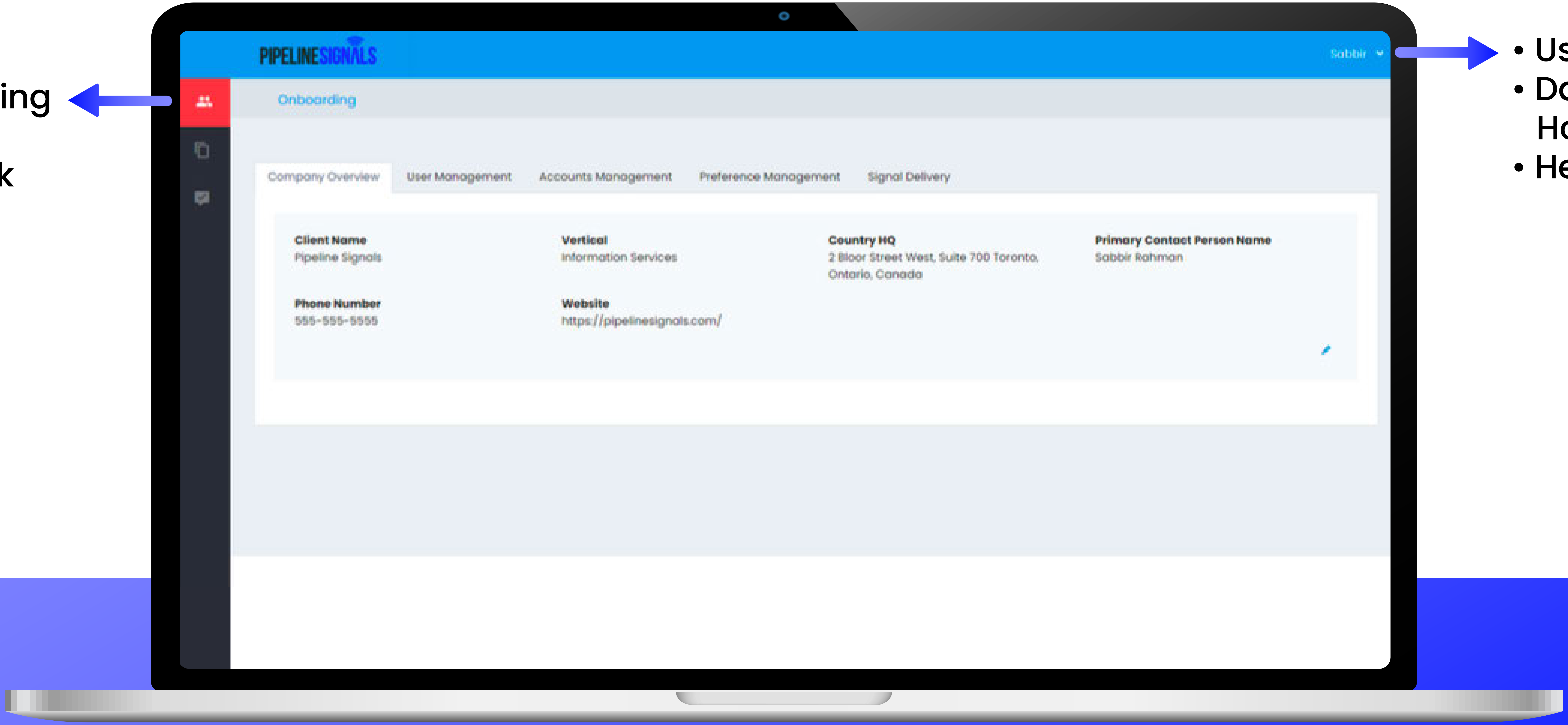
Navigating the App

Here are the features of the App:

Dashboard

- Company Overview
- User Management
- Accounts Management
- Preference Management
- Signal Delivery

- Onboarding
- Courses
- Feedback



- User Settings
- Daily Coaching Hotline
- Help Page

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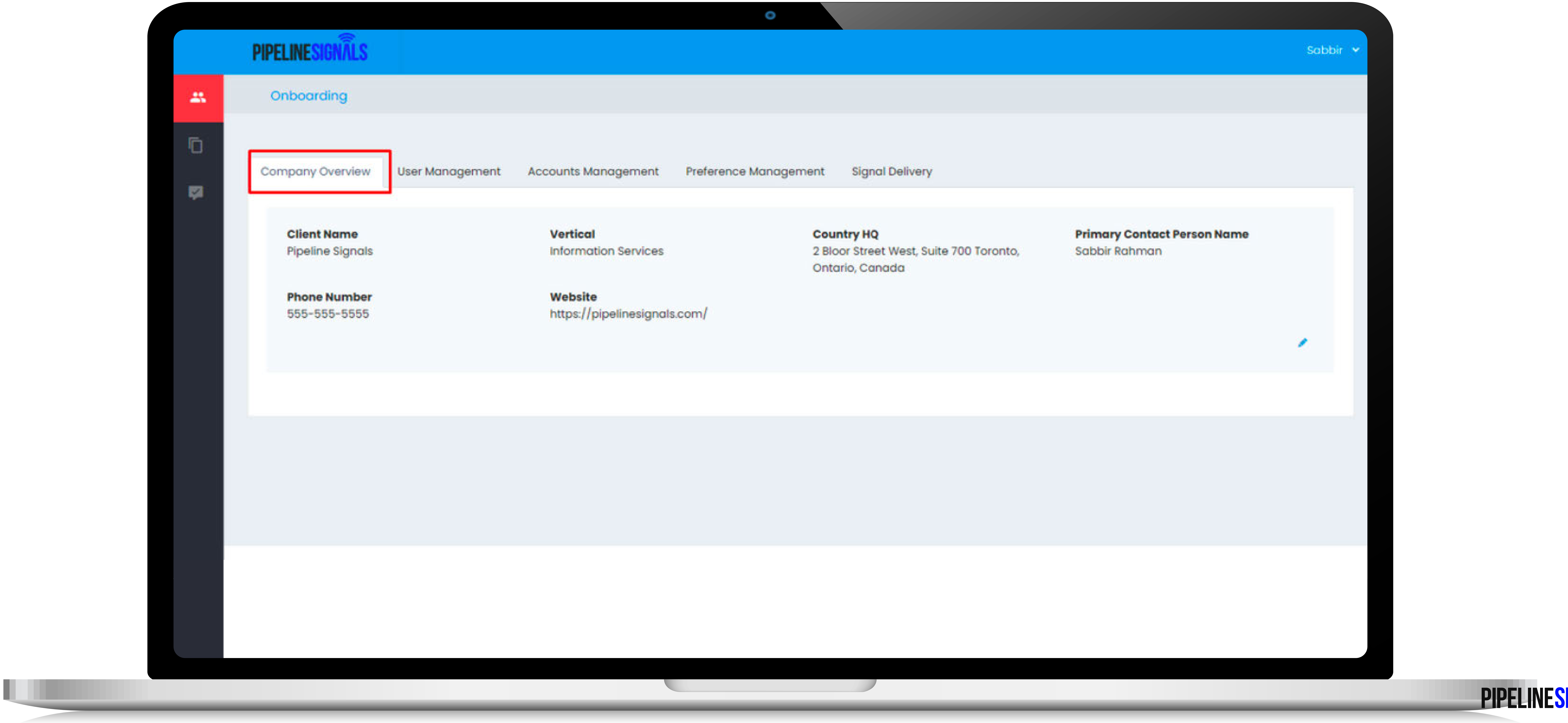
Navigating the App: Onboarding - Company Overview

On this page you can add the details about your company.



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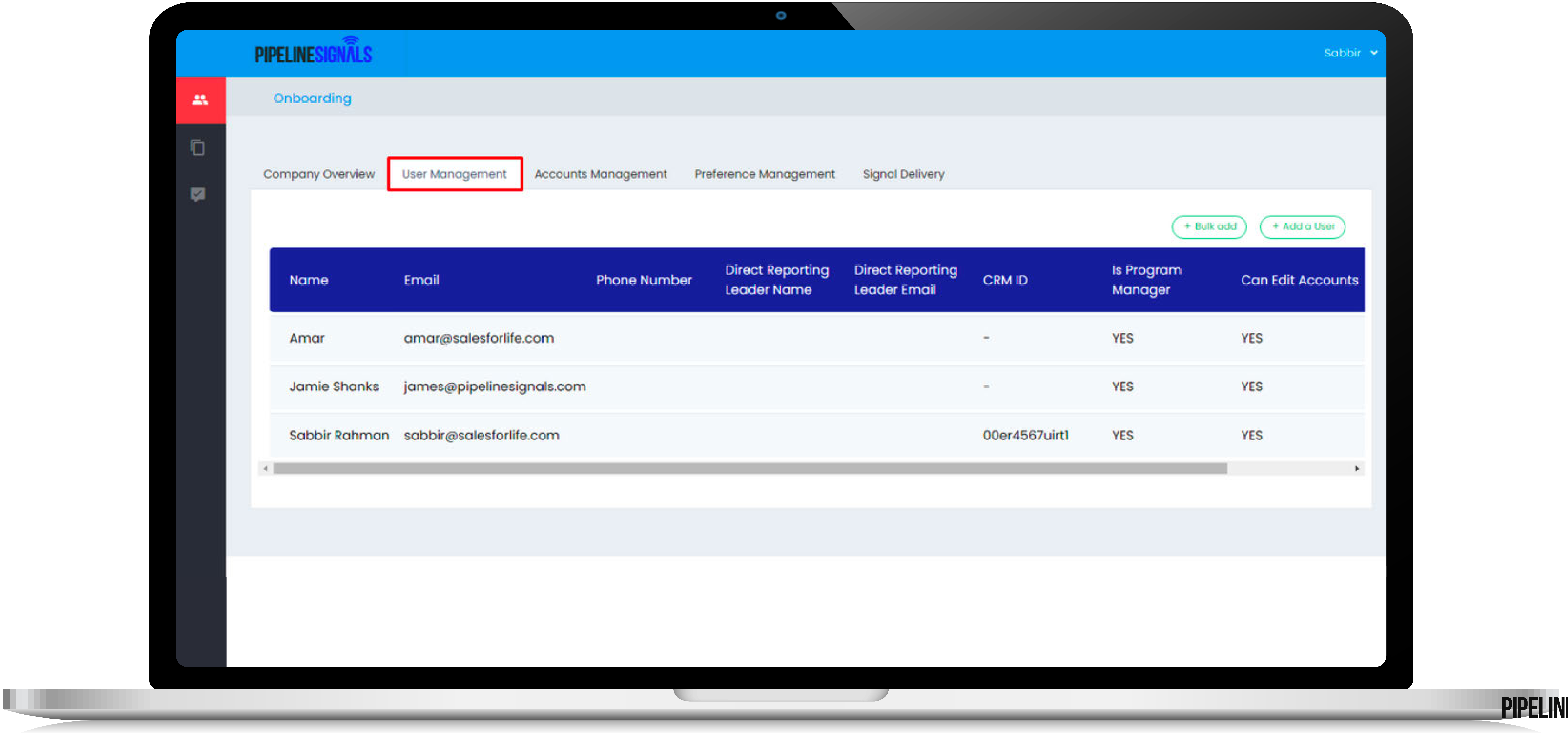
Navigating the App: Onboarding - User Management

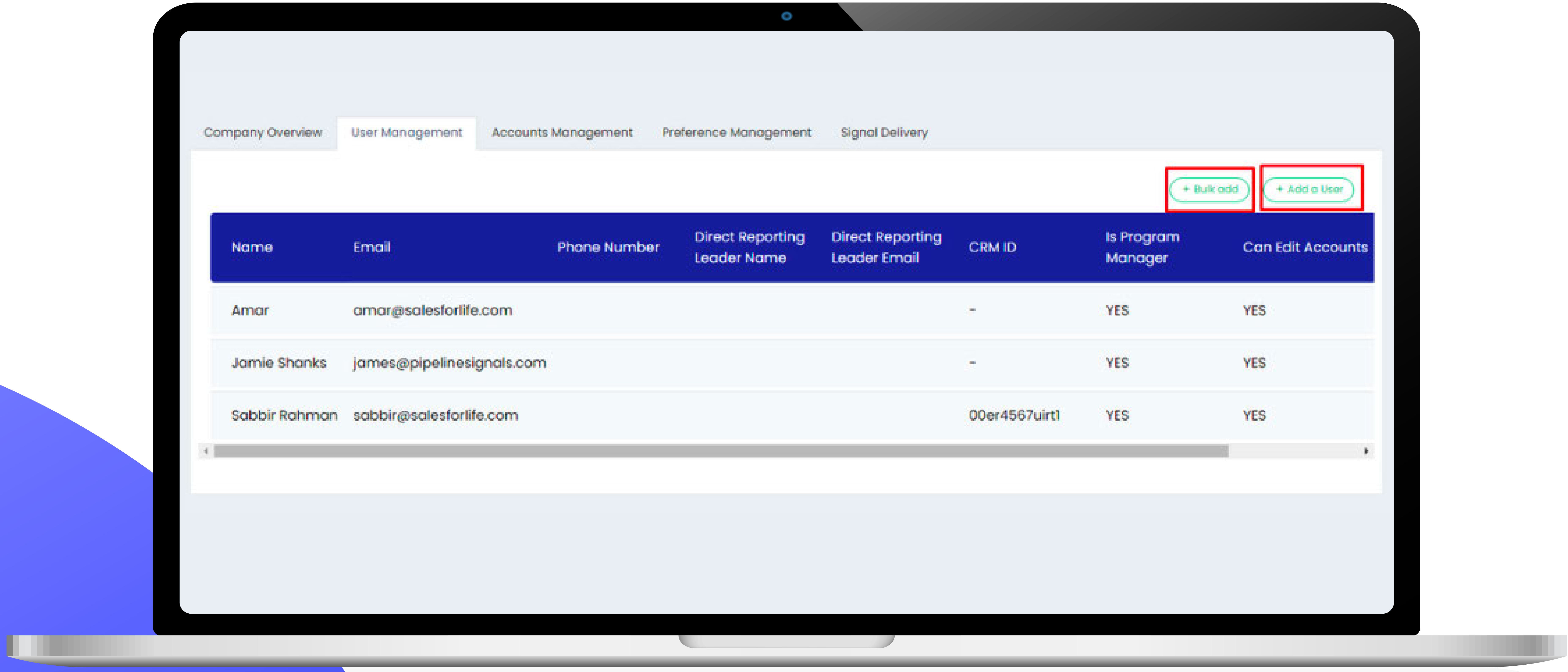
Being the program manager you can add/delete/edit users.

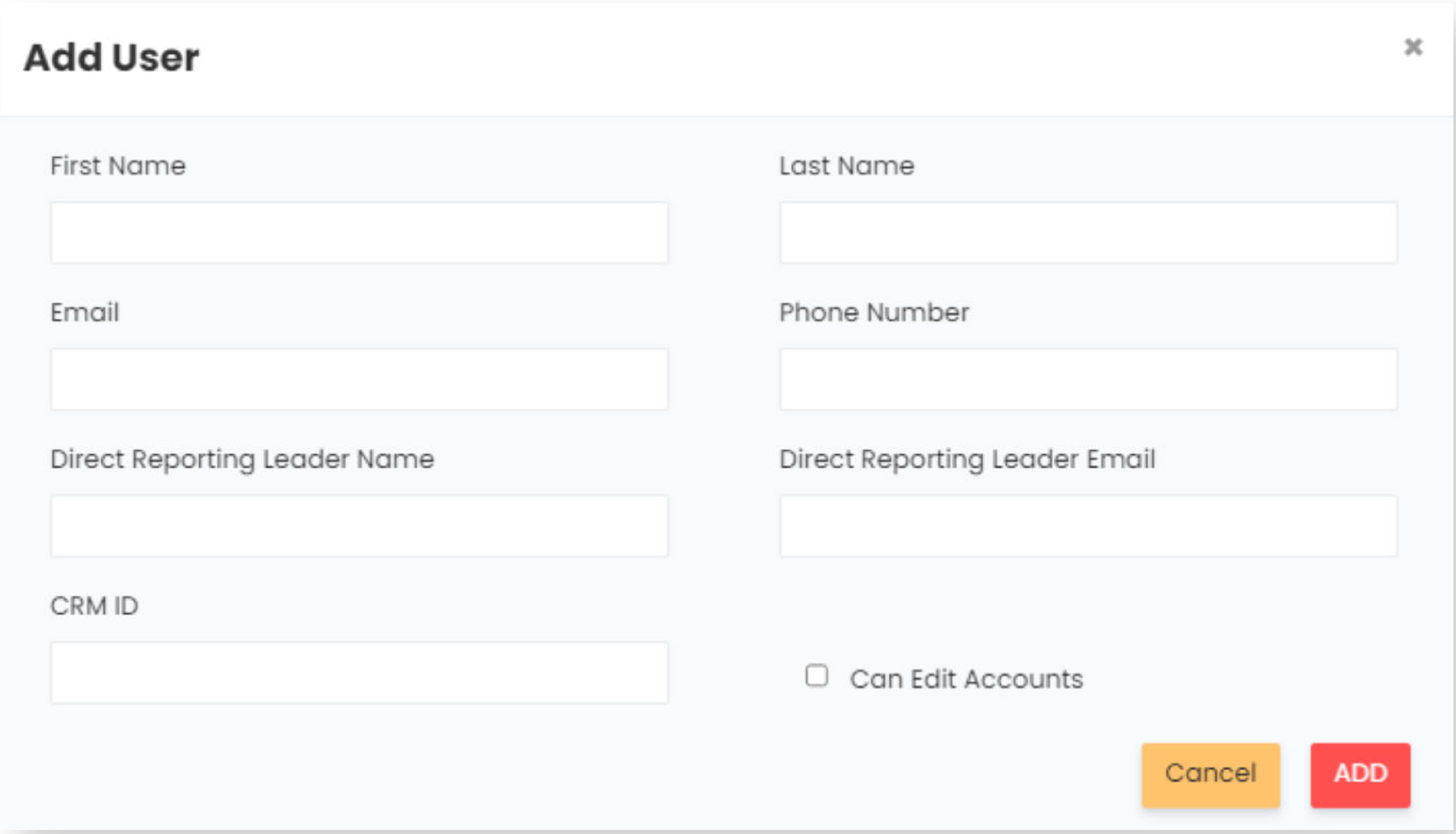


Navigating the App: Onboarding - User Management

For adding users there are two options:

1. You can add users one by one
2. You can bulk upload users





Navigating the App: Onboarding - User Management

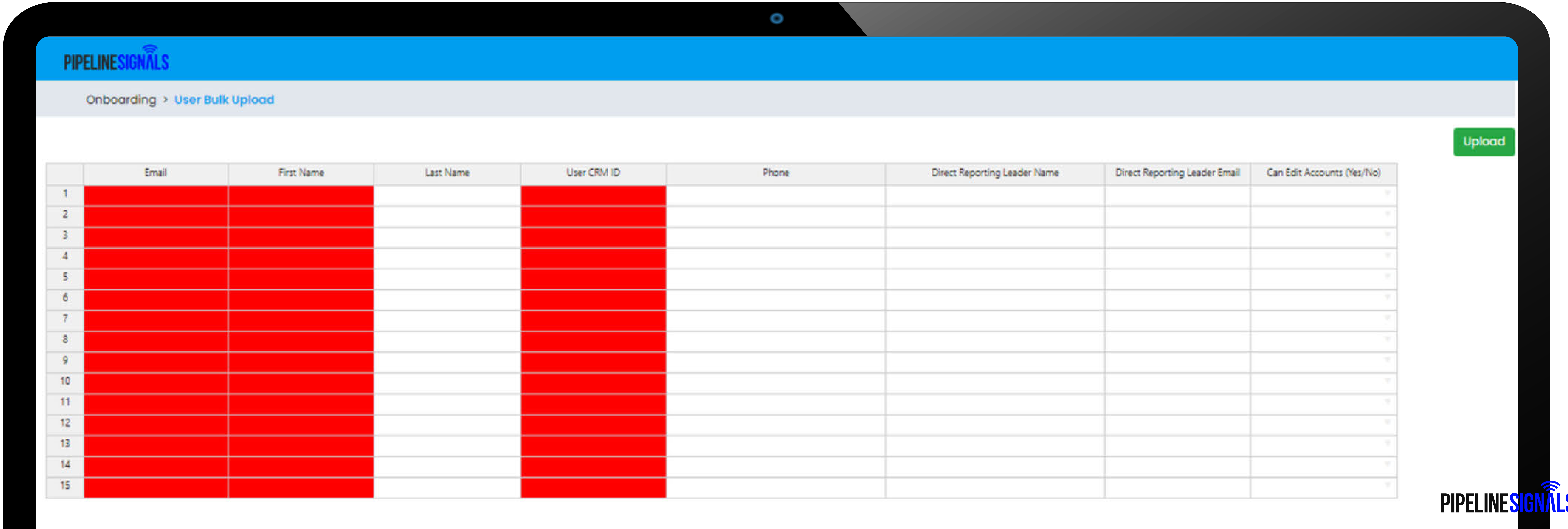
First Name, Last Name, Email and CRM ID are mandatory fields, and then Phone Number, Direct Reporting Leader Name and Direct Reporting Leader Email are optional data fields.

While adding a user you can give that user account edit access. **Please Note:** this is recommended only for program managers.
If you are not planning to integrate or upload our signals on your CRM, then please add 111 as the CRM ID.

Navigating the App: Onboarding - User Management

Bulk Add: After opening the bulk upload feature you can add multiple users in bulk by adding their details on the table form. First Name, Last Name, Email and CRM ID are mandatory fields, and then Phone Number, Direct Reporting Leader Name and Direct Reporting Leader Email are optional data fields.

While adding a user you can give that user account edit access. **Please Note:** this is recommended only for program managers. If you are not planning to integrate or upload our signals on your CRM, then please add 111 as the CRM ID.



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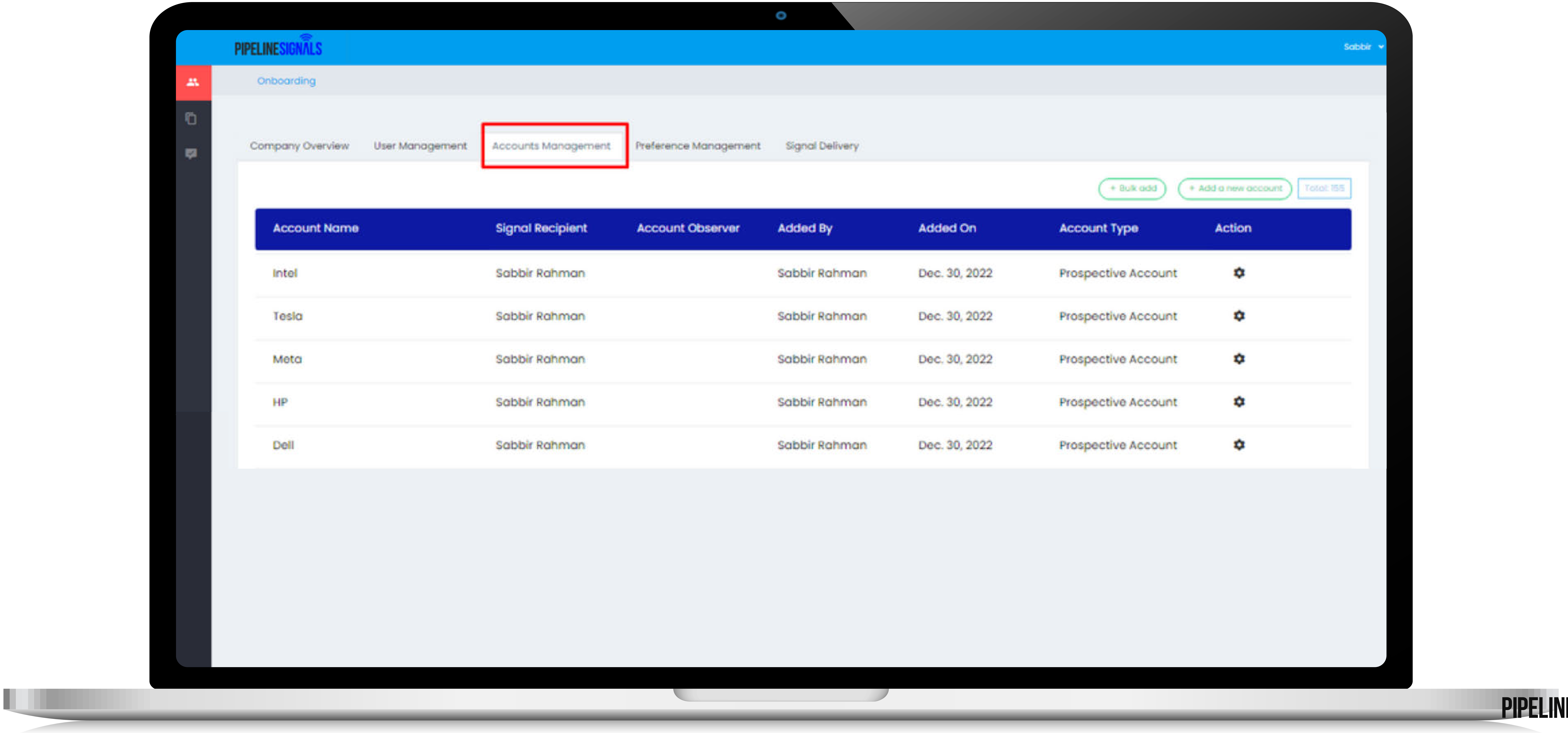
Navigating the App: Onboarding - Accounts Management

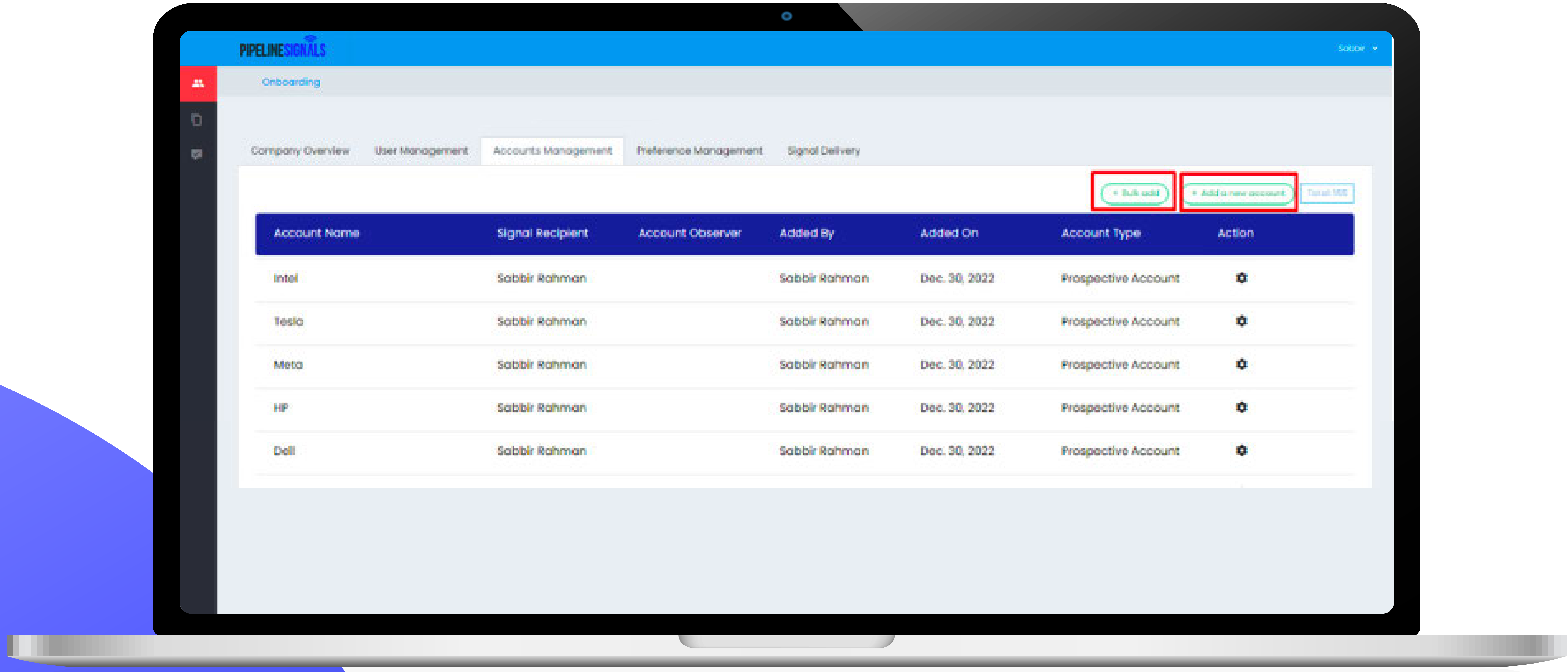
On the Account Management module you can add/update/delete your accounts.



Navigating the App: Onboarding - Accounts Management

For adding Accounts, there are two options:

1. You can add Accounts one by one
2. You can bulk upload Accounts



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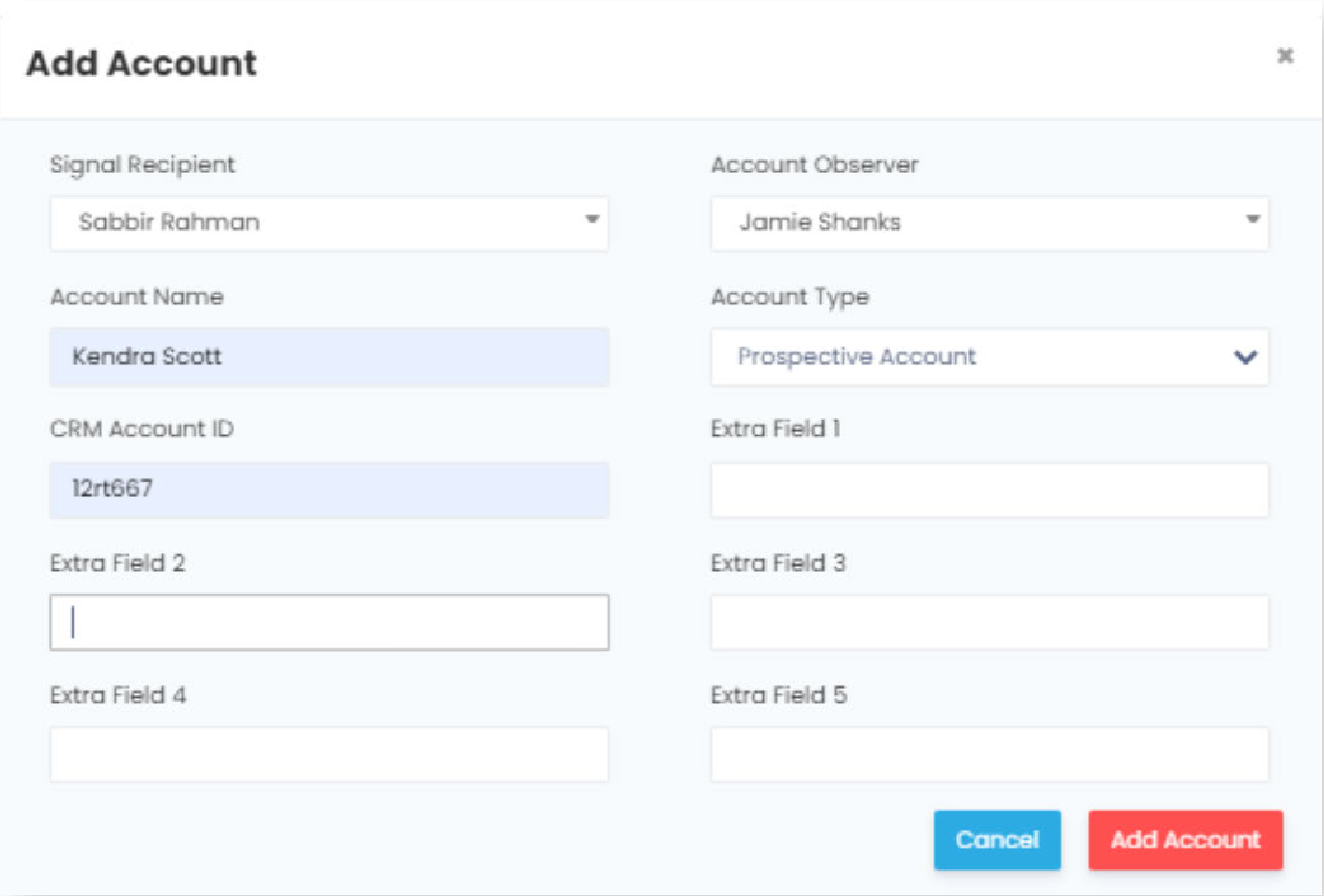


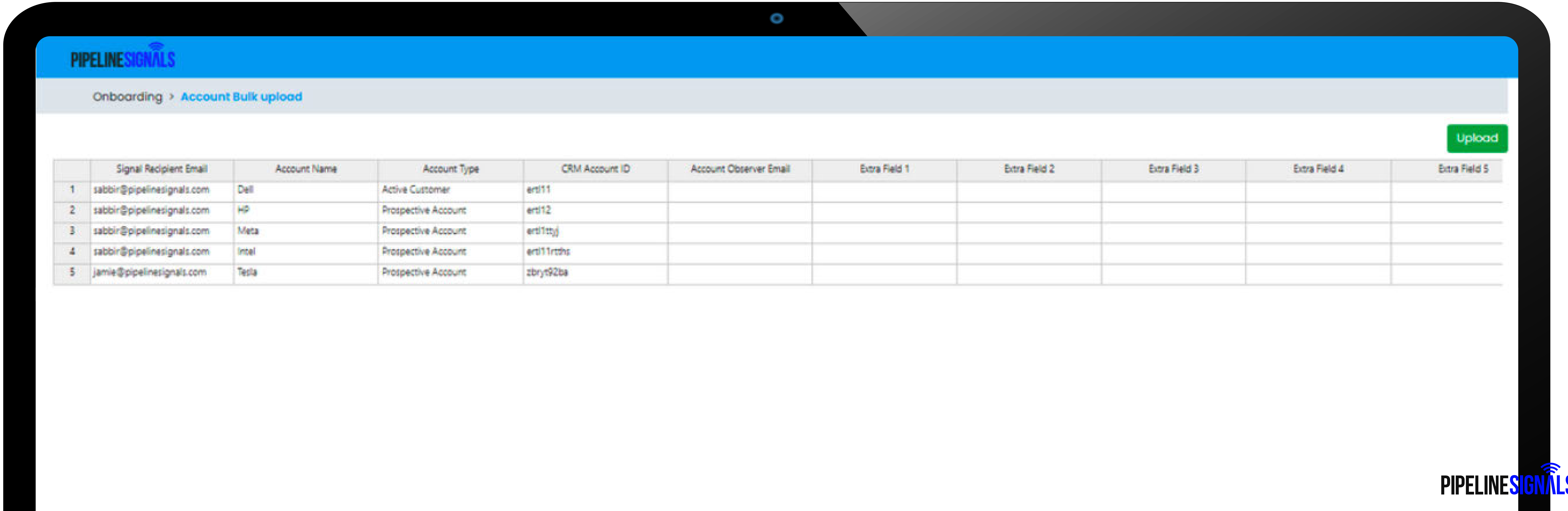
Navigating the App: Onboarding - Accounts Management

Add an Account:

- Select the Signal Recipient
- Select the Account Observer if applies
- Add Account Name
- Select Account Type from the dropdown
- Add CRM Account ID (If you are not planning to integrate or upload our signals on your CRM, then please add 111 as the CRM Account ID)
- You can utilize Extra Field 1-5 for adding any additional details about the Account
- Then hit the "Add Account" button

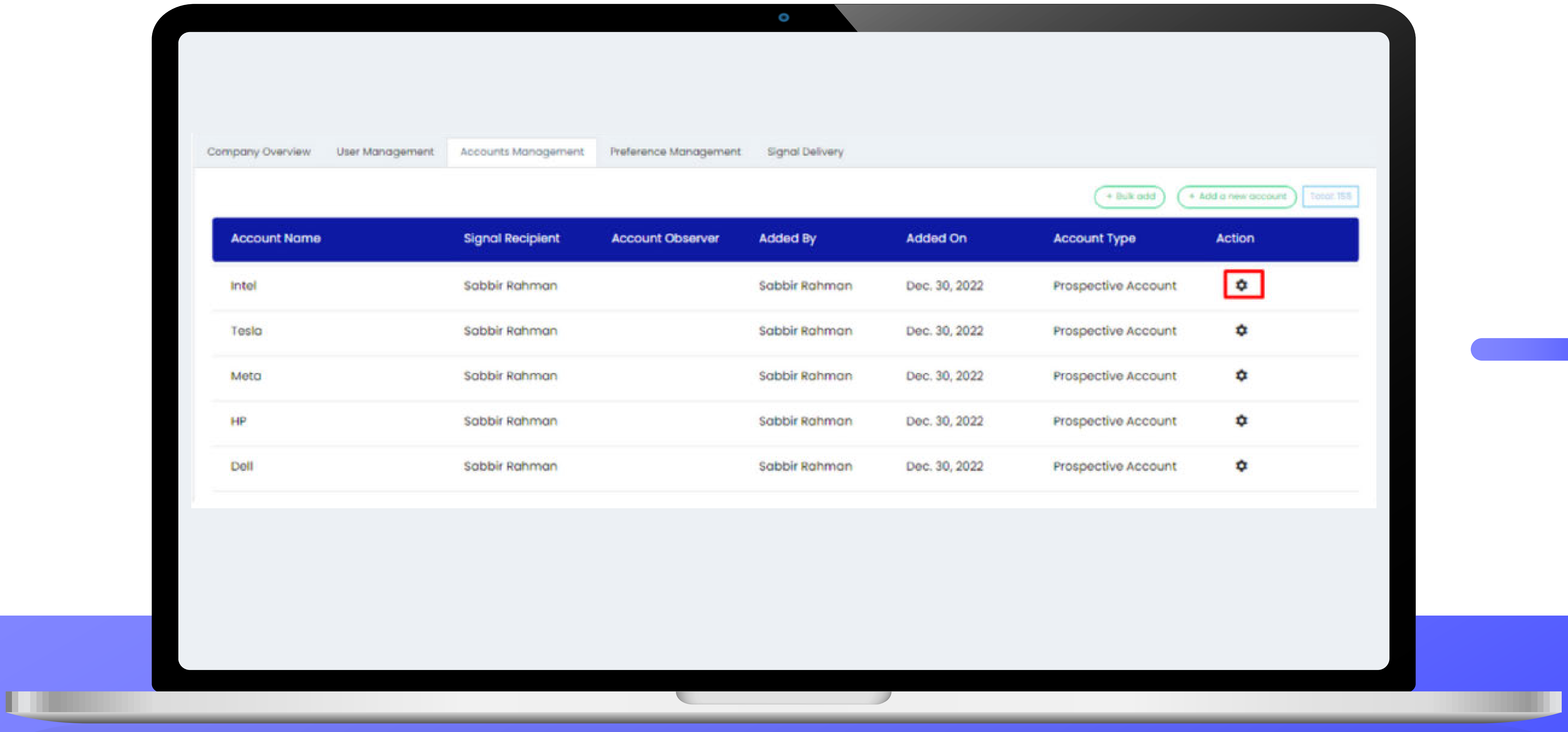
Navigating the App: Onboarding - Accounts Management

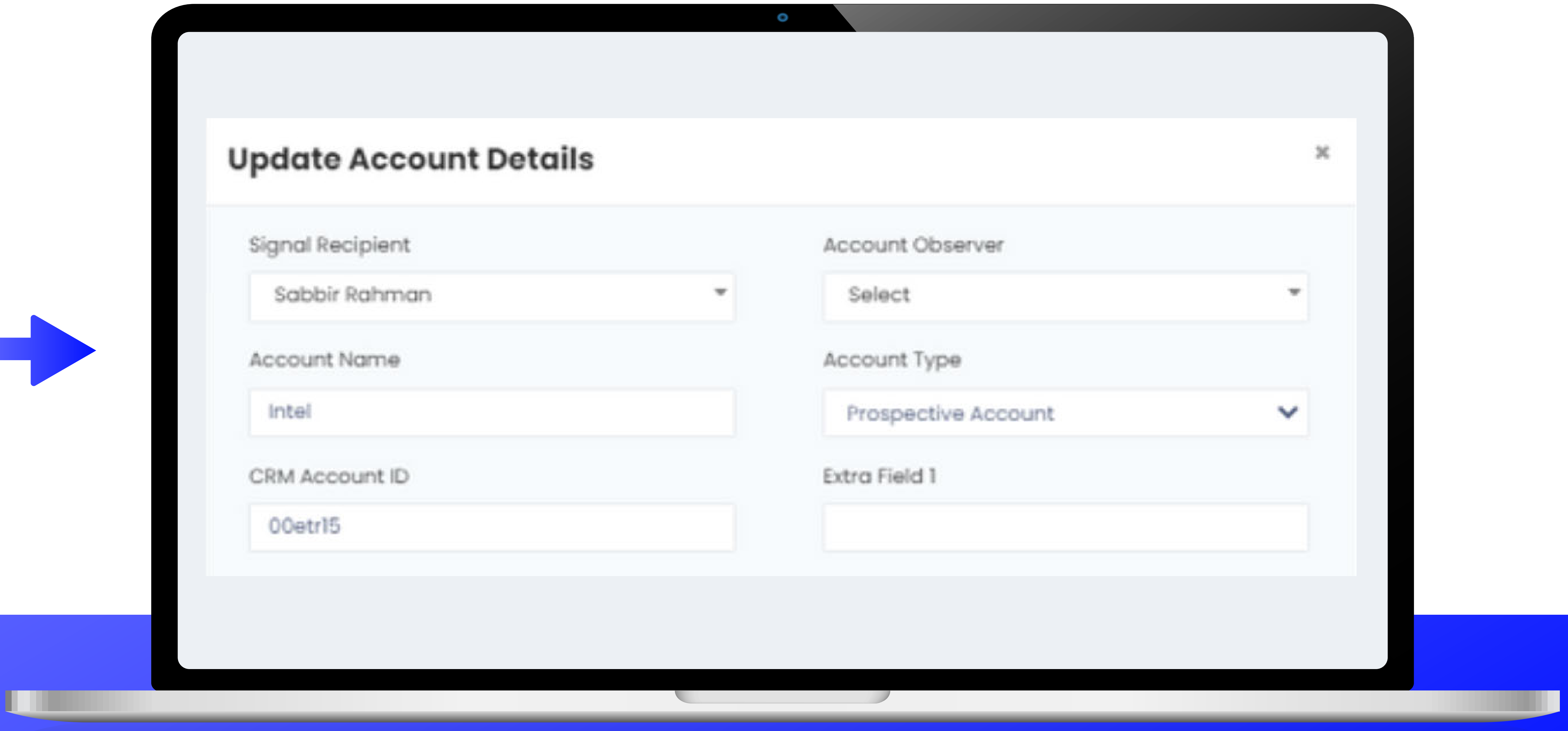
Bulk Add: After opening the bulk upload feature you can add multiple accounts in bulk by adding their details on the table form. Below are the compulsory data fields for adding accounts: Signal Recipient Email, Account Name, Account Type, CRM Account ID. After adding all of the required data click "upload". (If you are not planning to integrate or upload our signals on your CRM, then please add 111 as the CRM Account ID)



Navigating the App: Onboarding - Accounts Management

Update/Delete an Account: Click on the gear icon , then on the next windown you can update details or also can delete the account.





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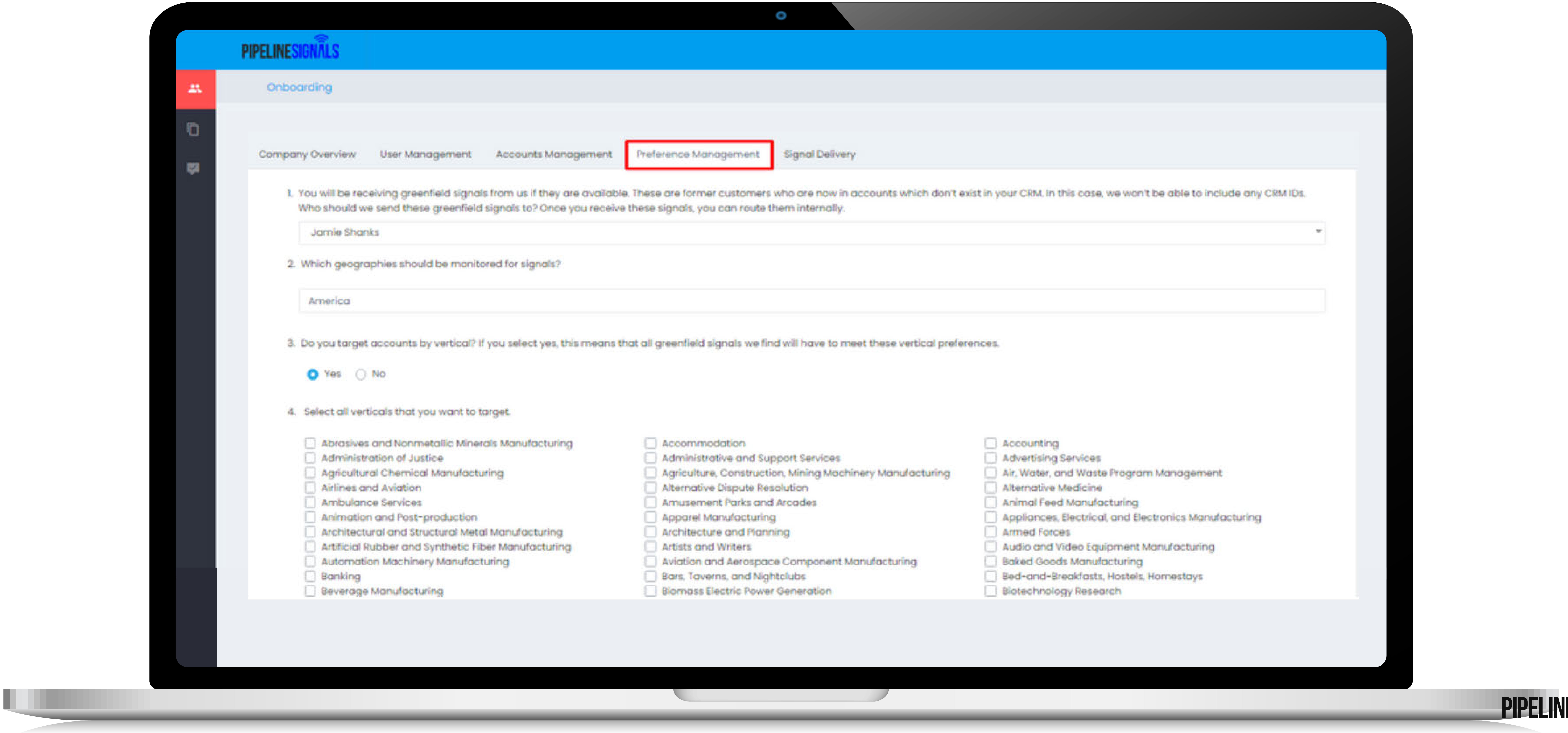
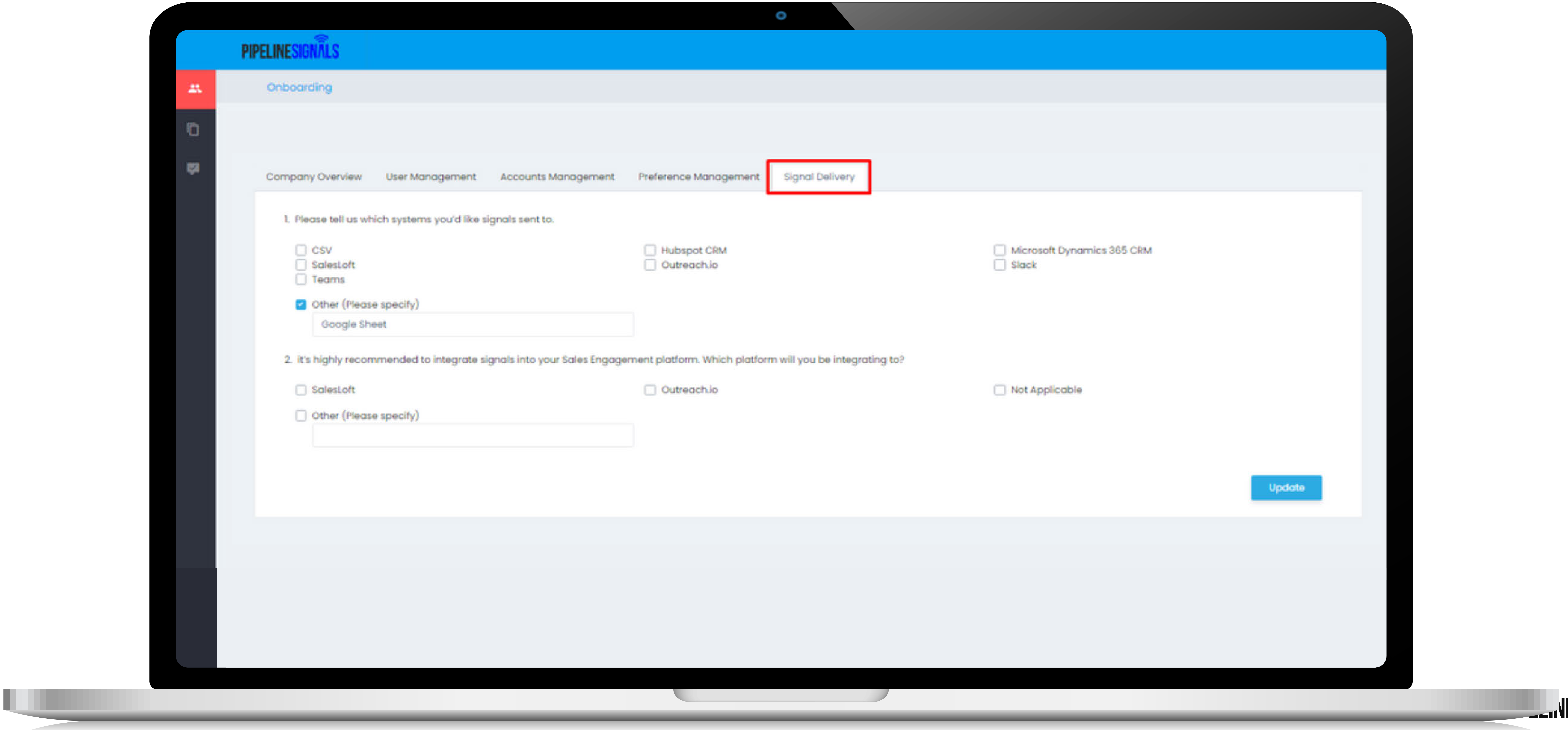
Navigating the App: Onboarding - Preference Management

On this module, please input all of your signal monitoring preferences, such as target geography and target titles. When finished, click the "Update" button to save your preferences.



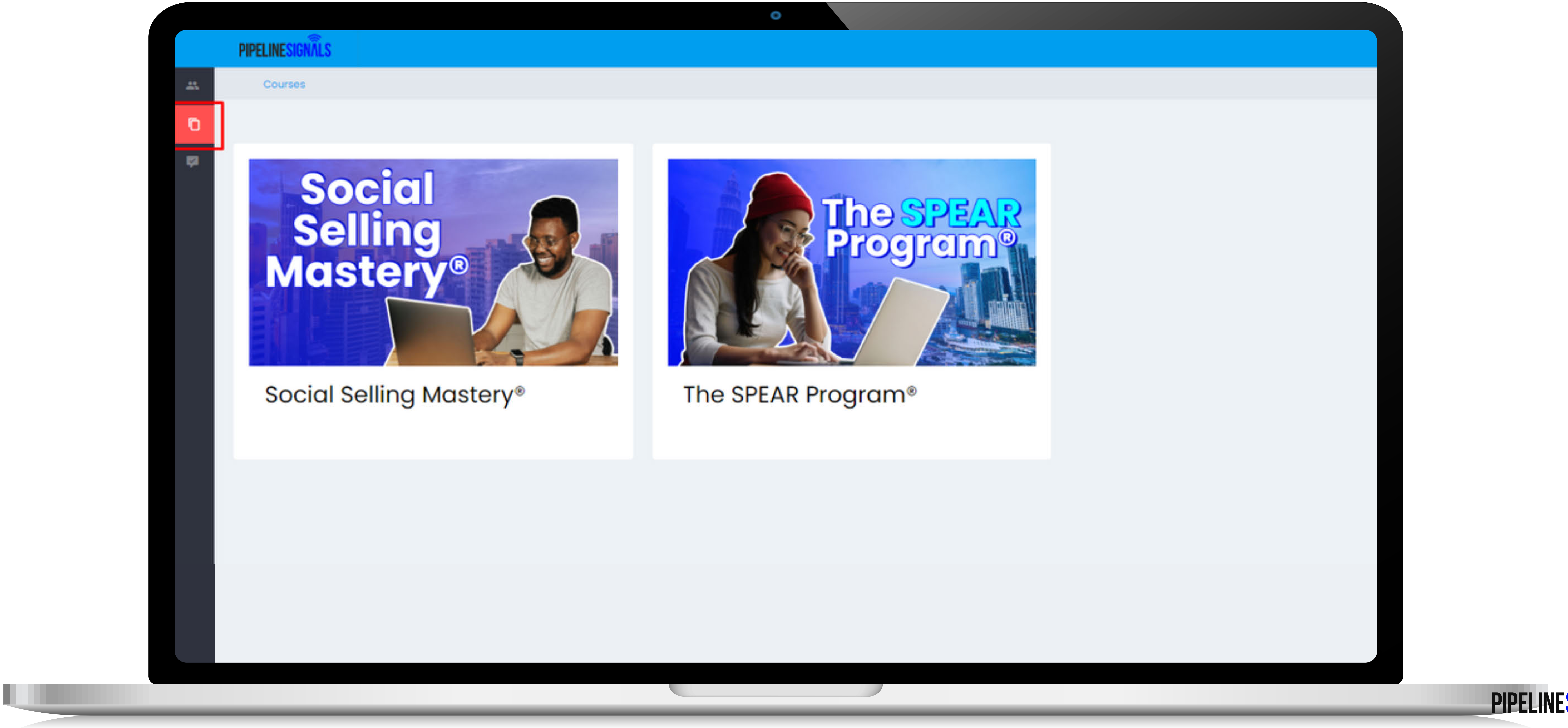
Navigating the App: Onboarding - Signal Delivery

In the Signal Delivery module, you can specify your delivery preferences. Once you have added your preferences, click the "Update" button to save them.



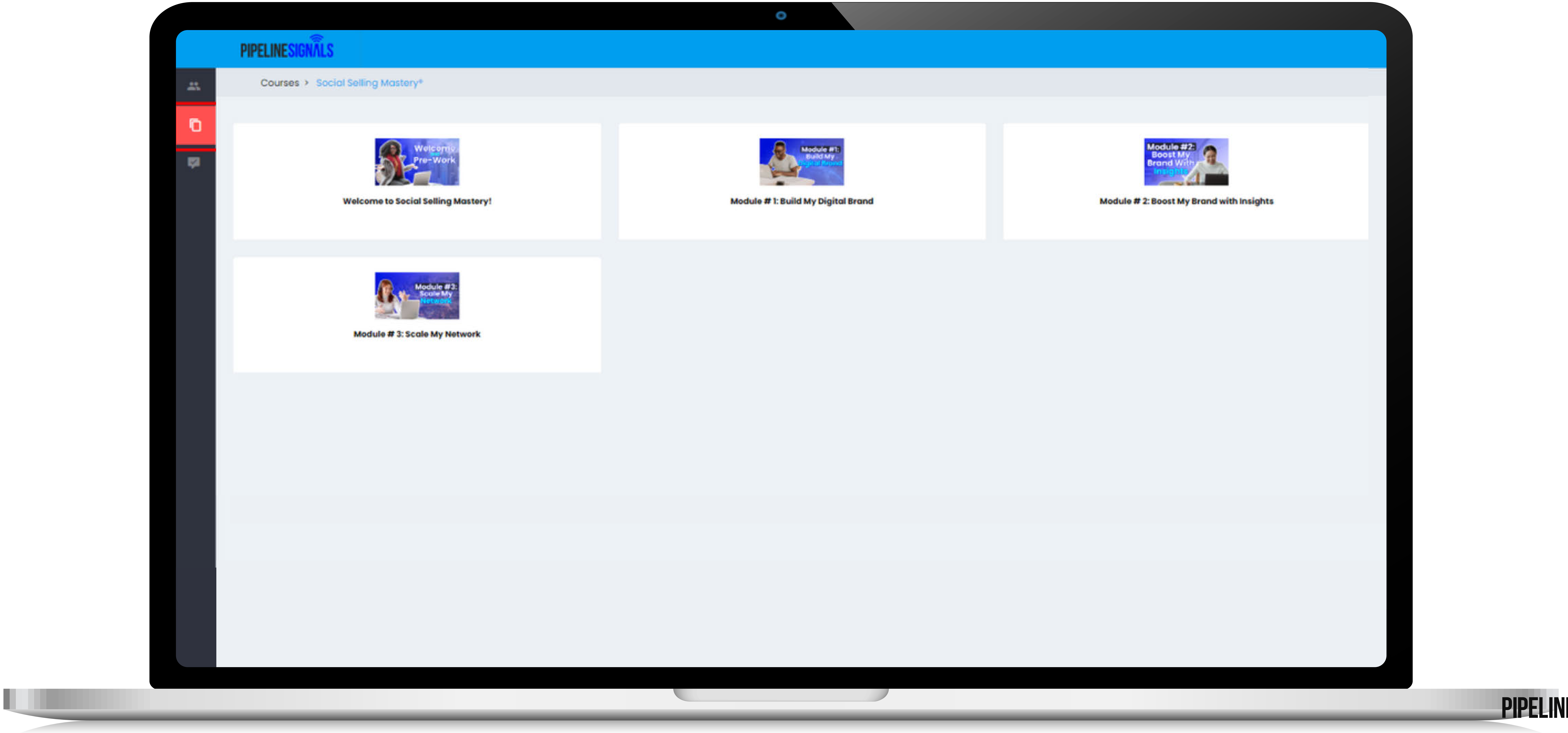
Navigating the App: Courses

The **Courses Page** contains coursewares.



Navigating the App: Courses

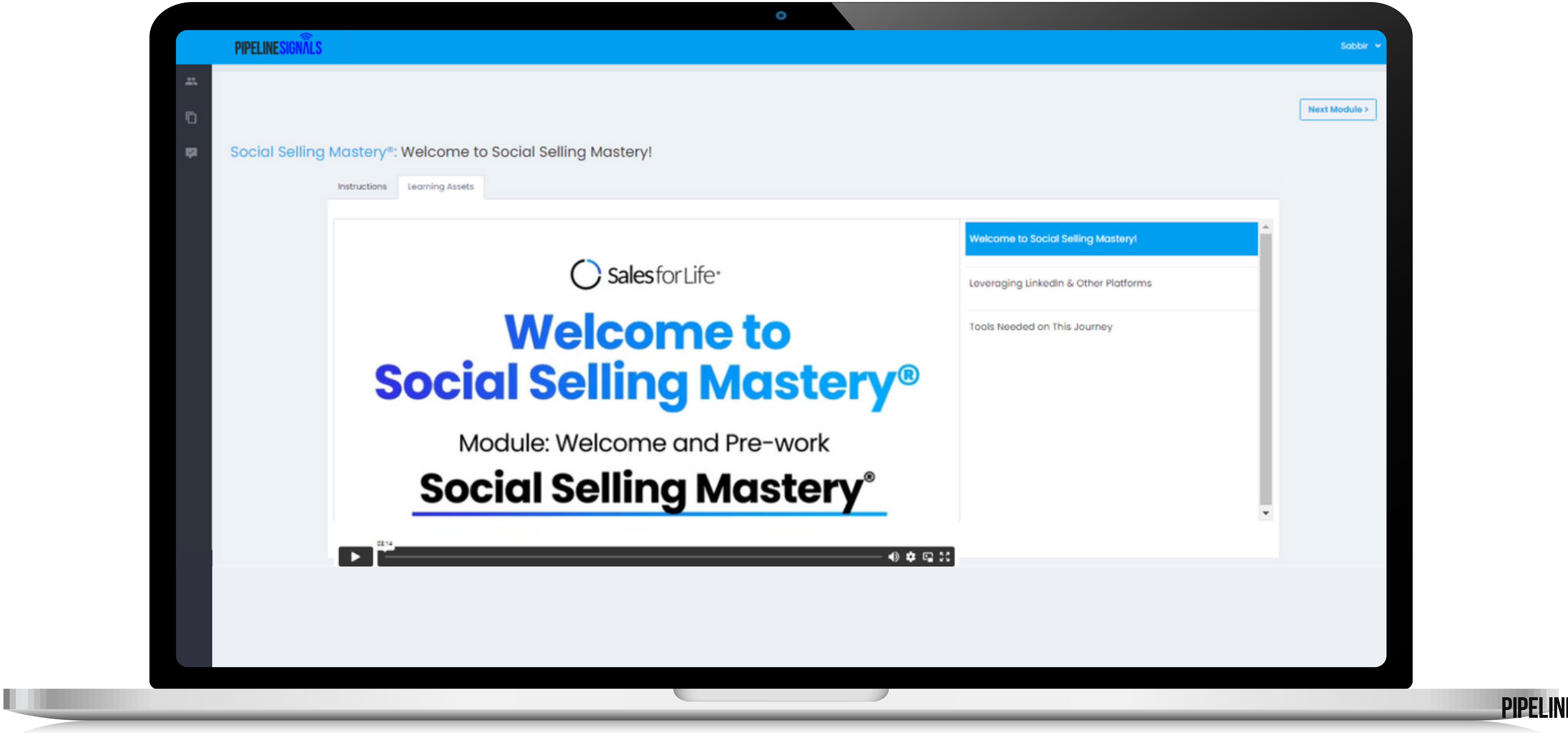
After selecting a course, you will be directed to the module selection page. On this page, each module is divided into tiles and the link to the courses.



Navigating the App: Courses

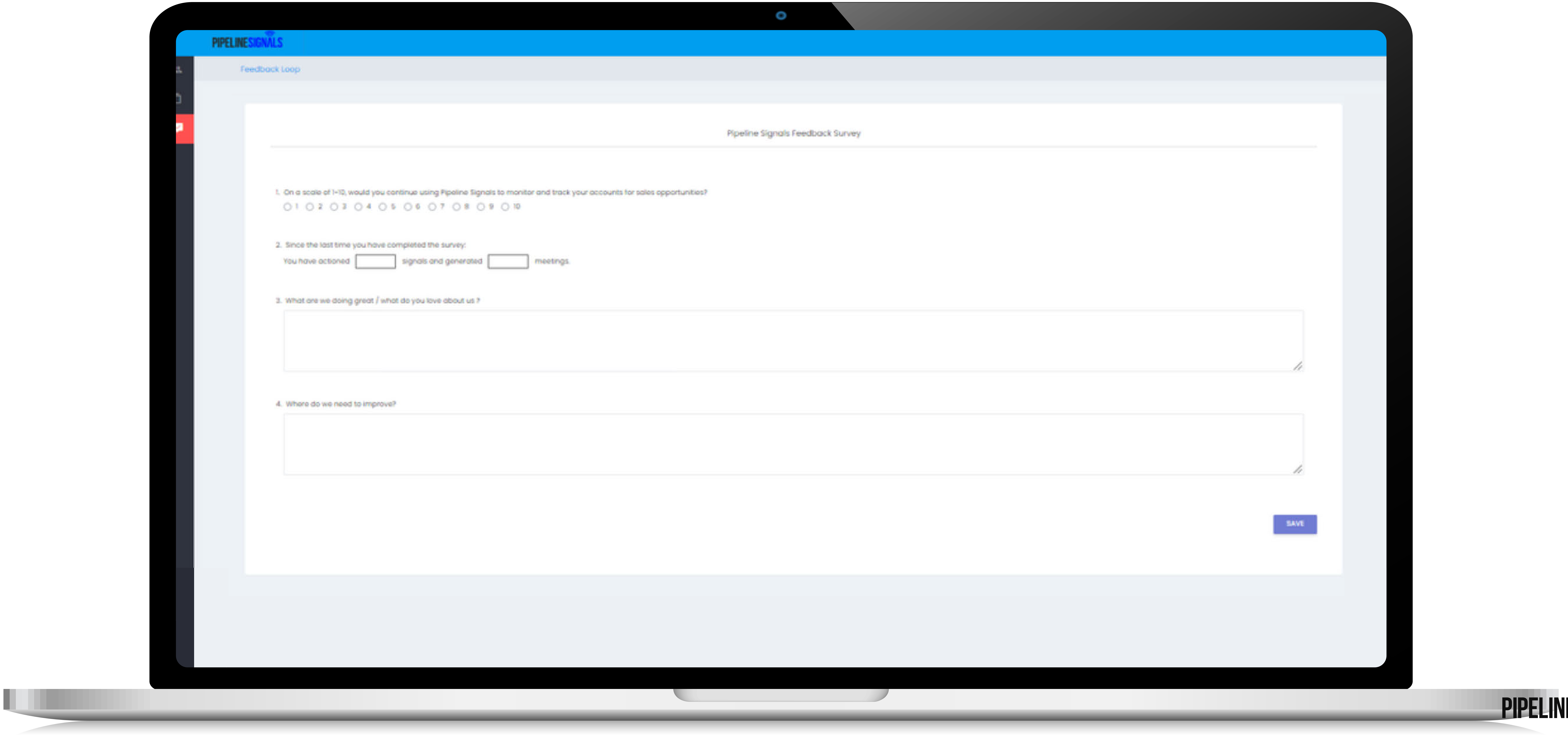
After selecting a module, it will show a page that has two tabs:

1. Instructions
2. Learning Assets containing Training Videos



Navigating the App: Feedback

By utilizing the feedback form, you have the ability to submit a feedback survey.



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Basic Troubleshooting Guidelines

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Basic Troubleshooting Guidelines

I did not receive an email notification upon onboarding
Please check your spam or promotions folder

I'm having an error during User/Account upload
Please double check to see if you have missed any compulsory data flields

Need Help or Guidance?

Please contact your CSM for help.

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