

# Pipeline Signals App

## User Guide

PIPELINESIGNALS 

# Table of Contents



01

**The Pipeline Signals  
App Overview**



02

**First Time Login**



03

**Navigating the App**



04

**Basic Troubleshooting  
Guidelines**

**01**

# **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

# First Time Login

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

Hello! Your account with the email address [sabbir@salesforlife.com](mailto:sabbir@salesforlife.com) has requested an OTP. Please see it below.

OTP: 501584

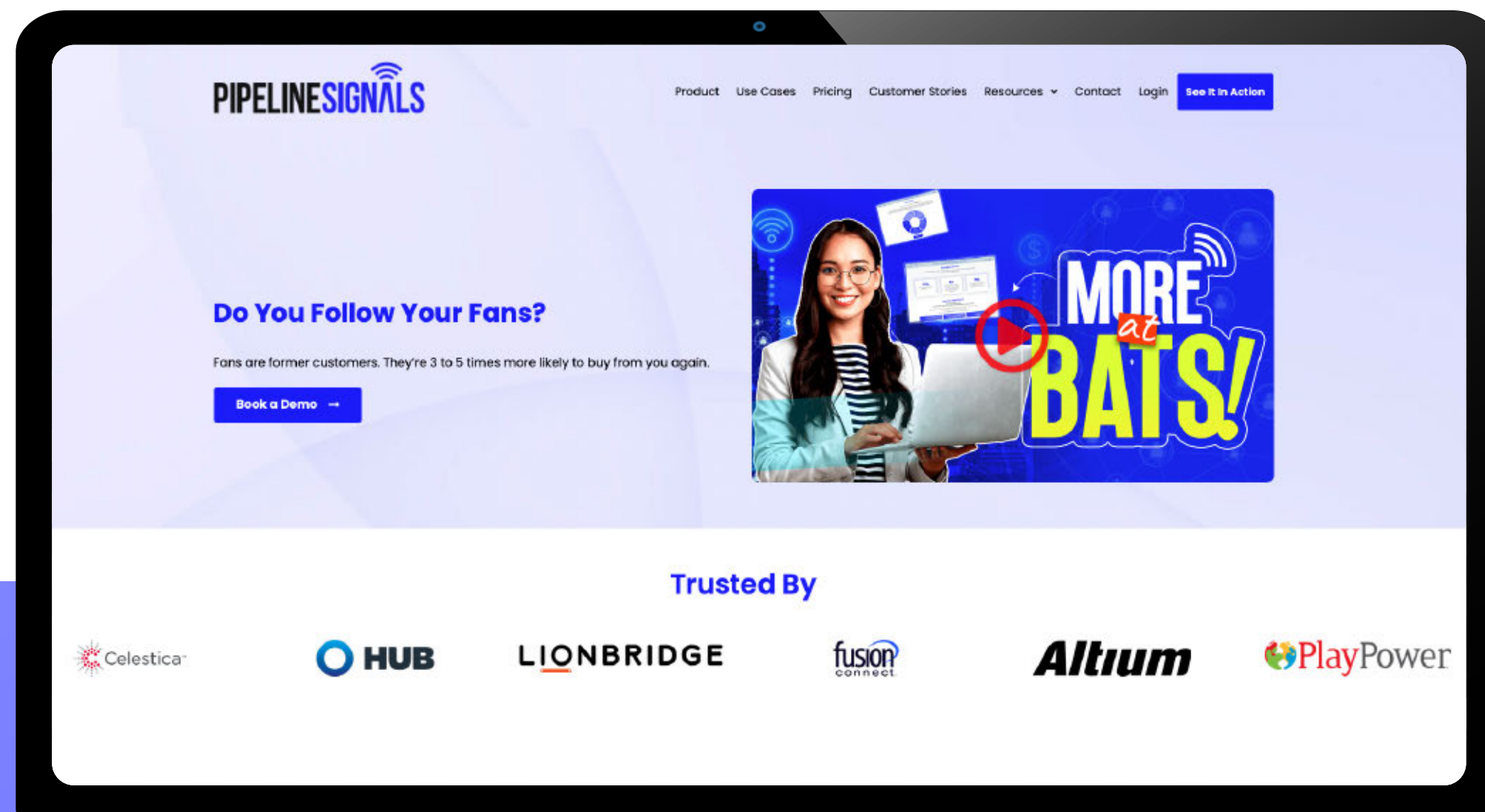
Thanks,

The Pipeline Signals Team

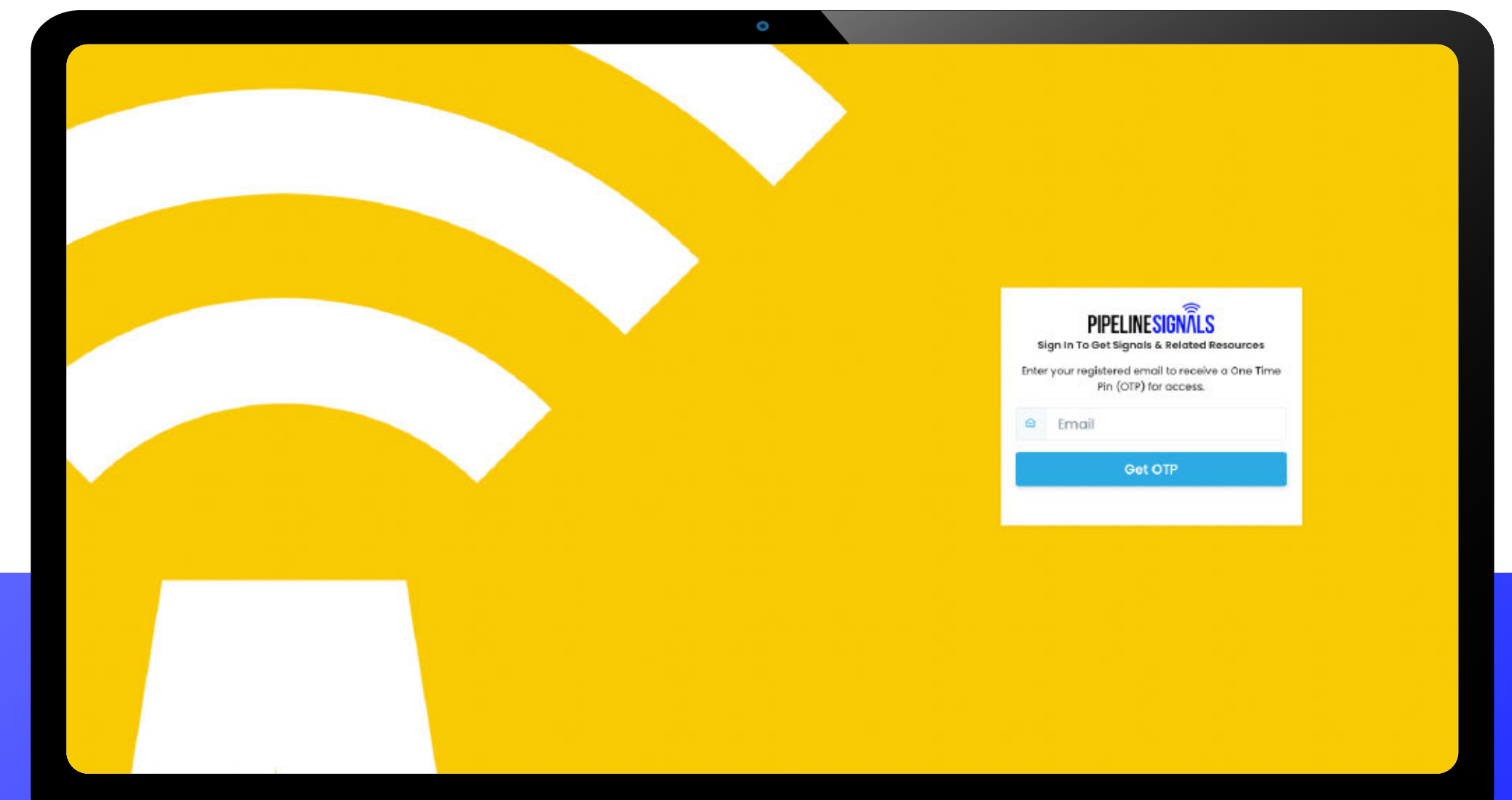
If this was not you, please contact us on [support@pipelinesignals.com](mailto:support@pipelinesignals.com)

# First Time Login

1



2

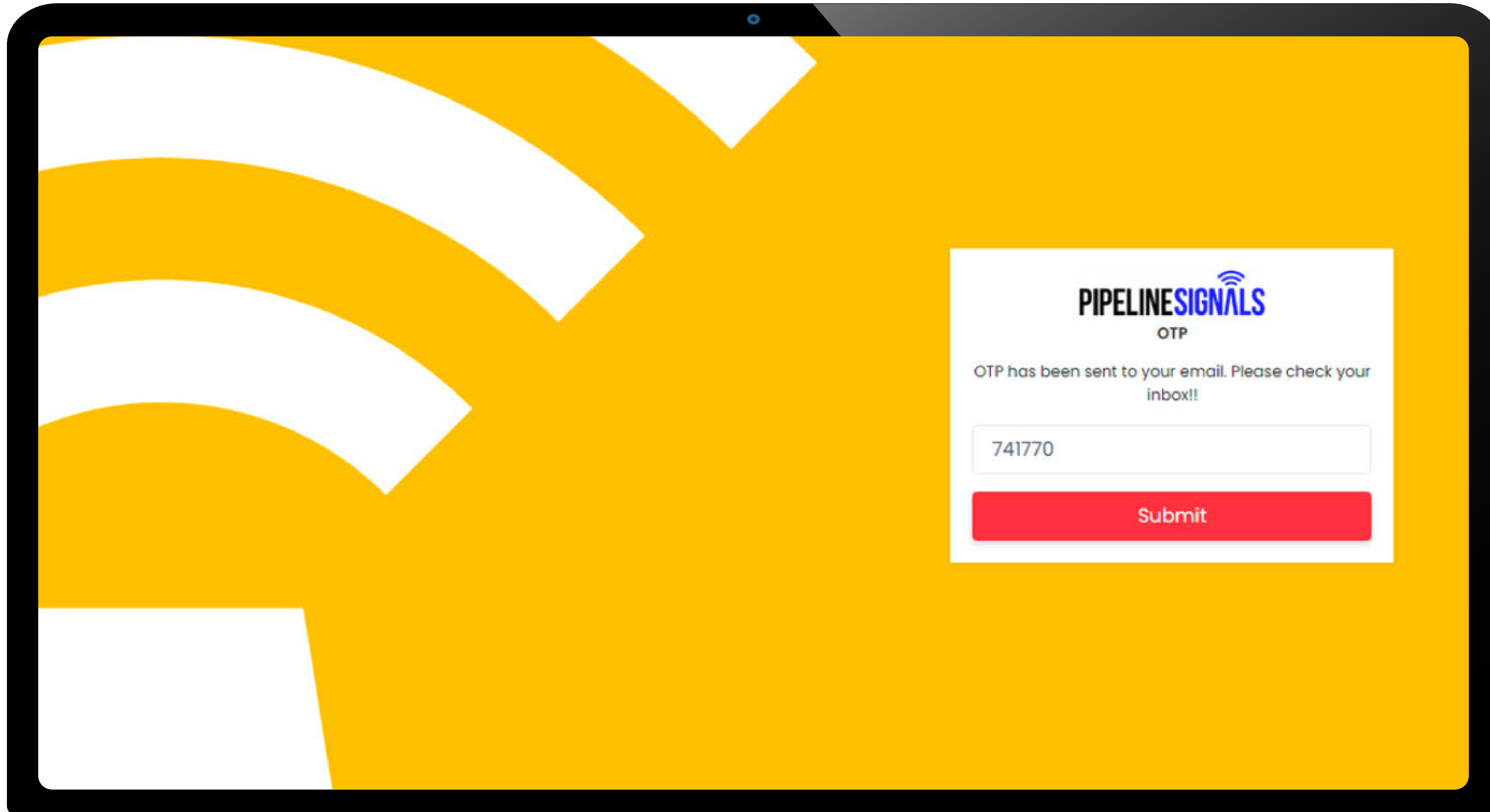


To access the app go to <https://www.pipelinesignals.com> and click on log in at the top right.

Enter your registered email and get an OTP.

# First Time Login

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



PIPELINESIGNALS  
OTP

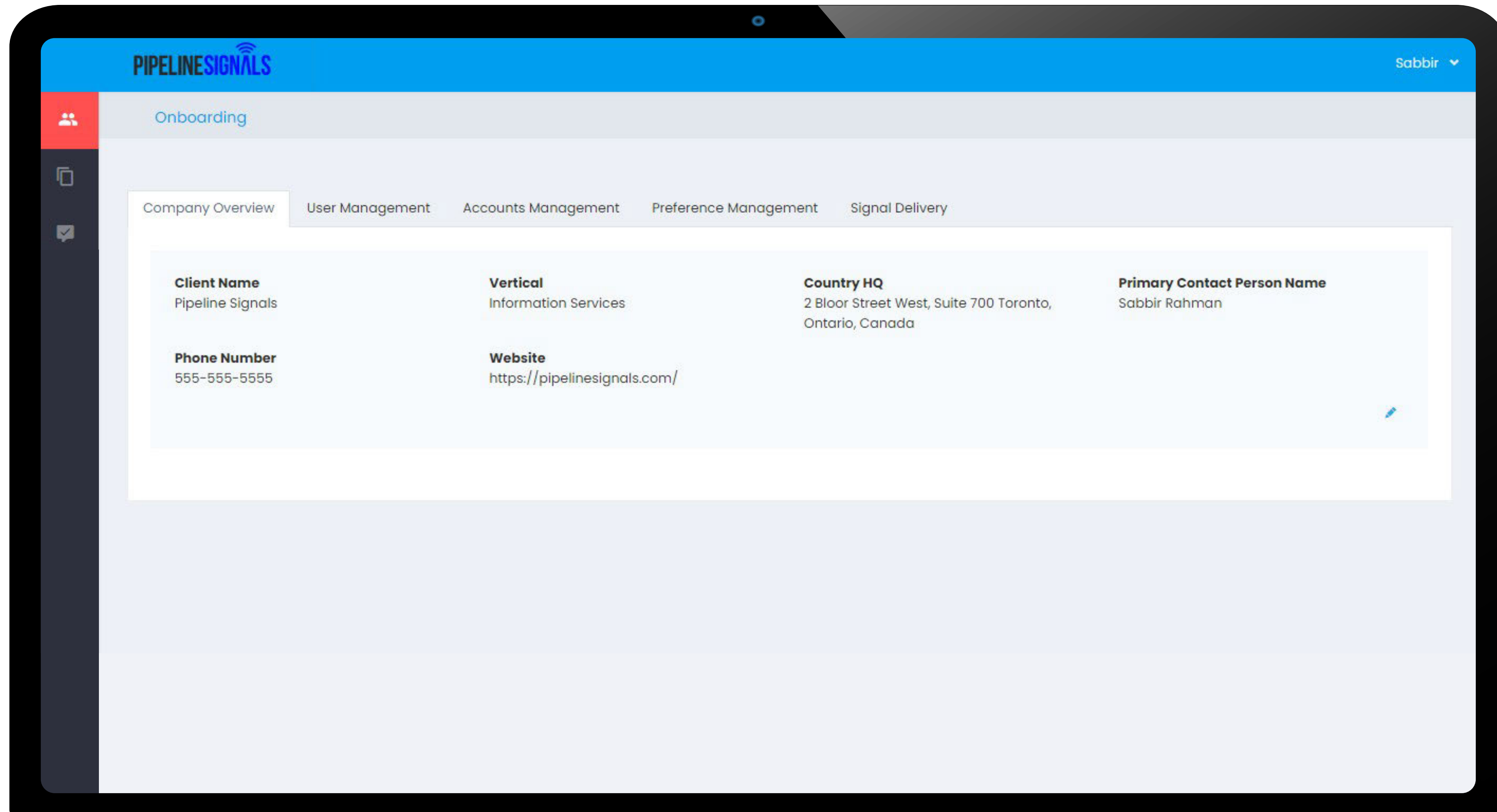
OTP has been sent to your email. Please check your inbox!!

Submit



# First Time Login

You will be directed to the Onboarding Dashboard.





03

# Navigating the App

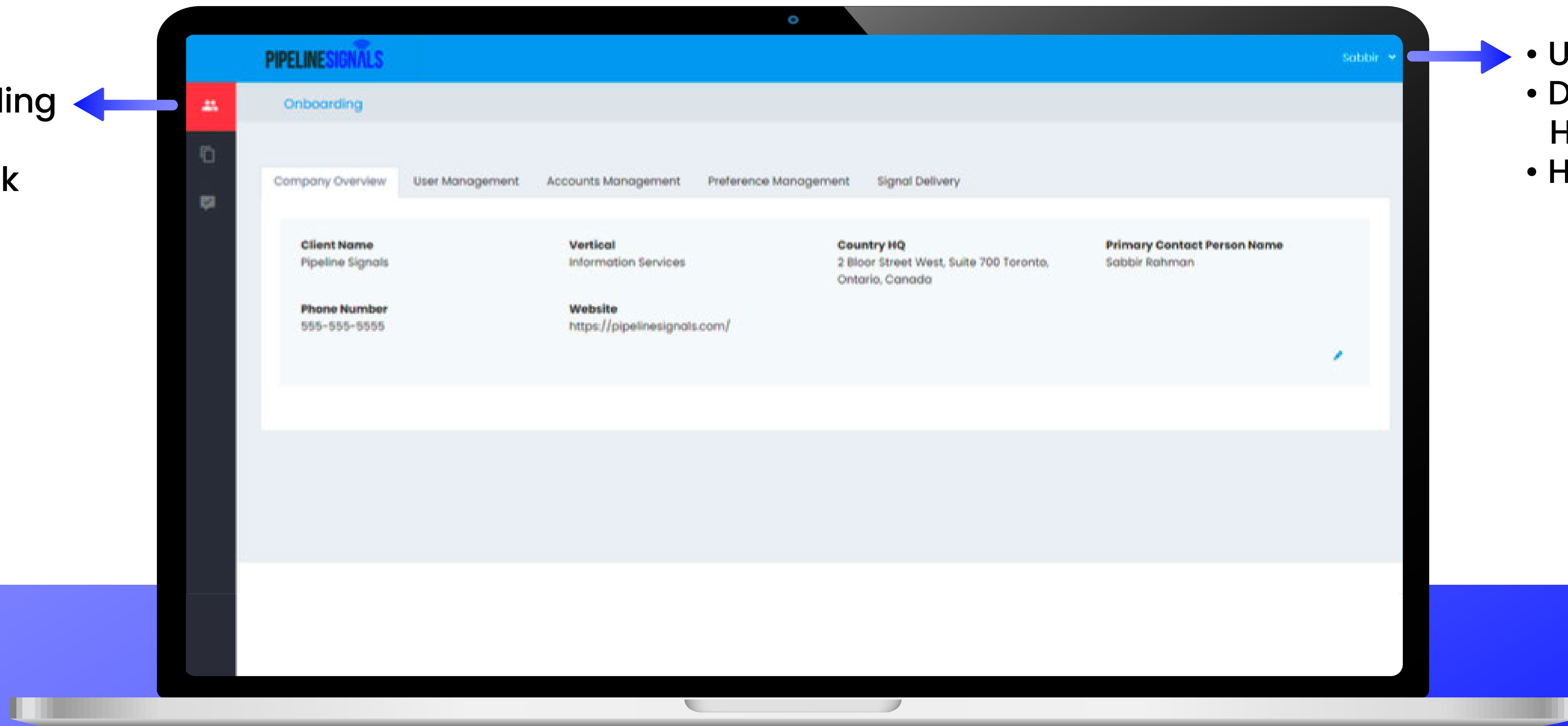
# Navigating the App

Here are the features of the App:

## Dashboard

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

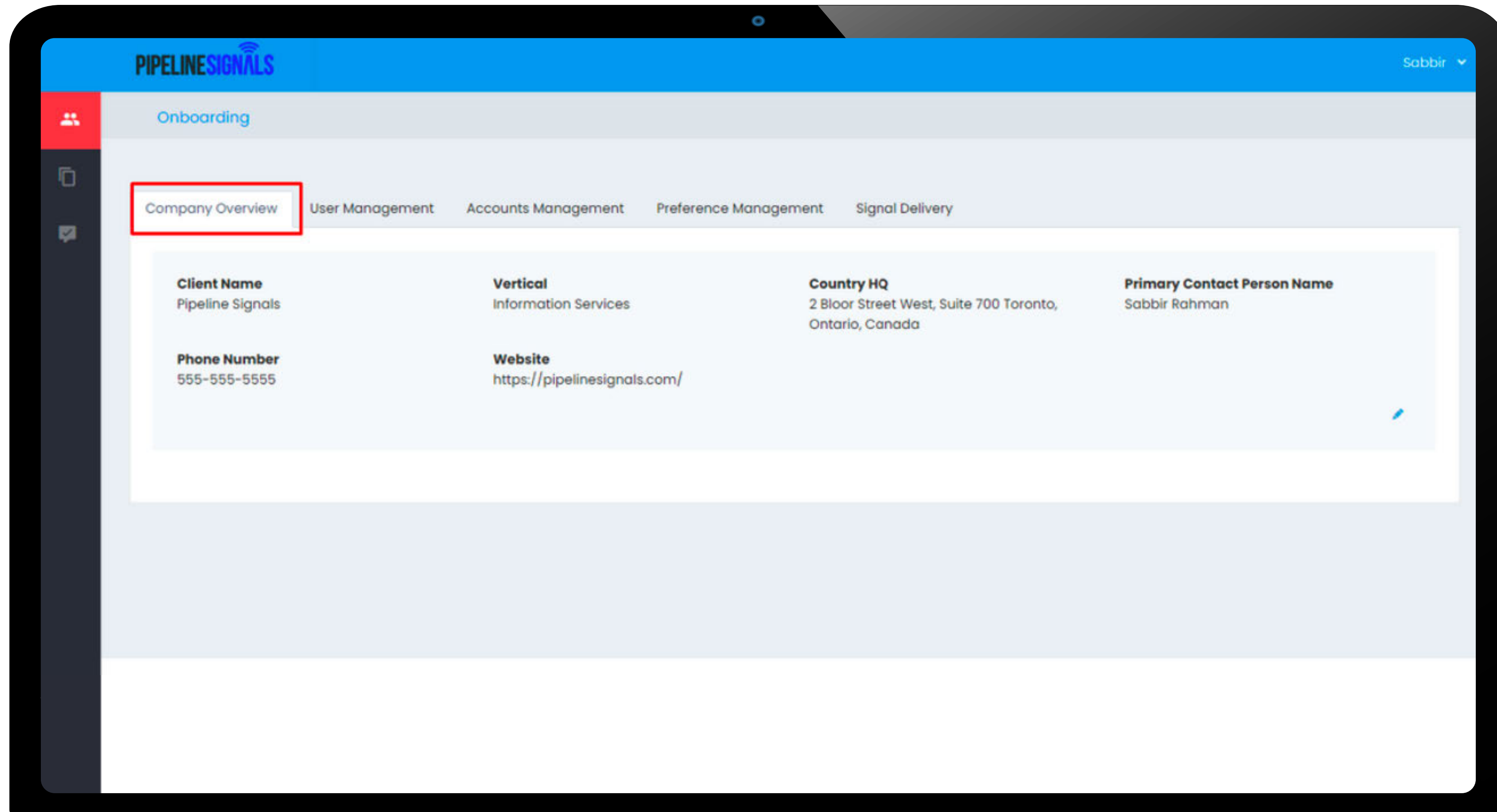
- Onboarding
- Courses
- Feedback



- User Settings
- Daily Coaching Hotline
- Help Page

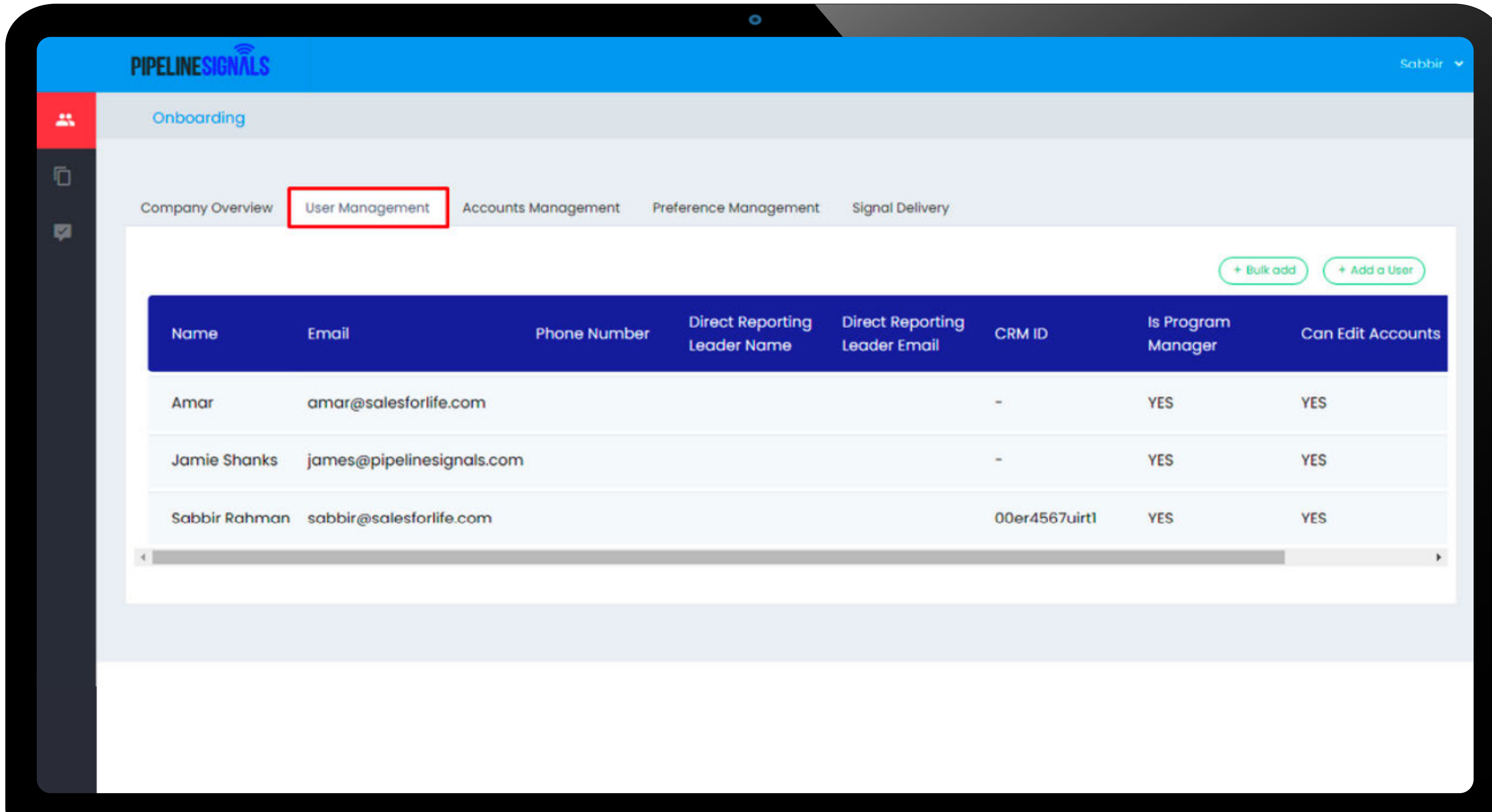
# Navigating the App: Onboarding - Company Overview

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



# Navigating the App: Onboarding – User Management

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



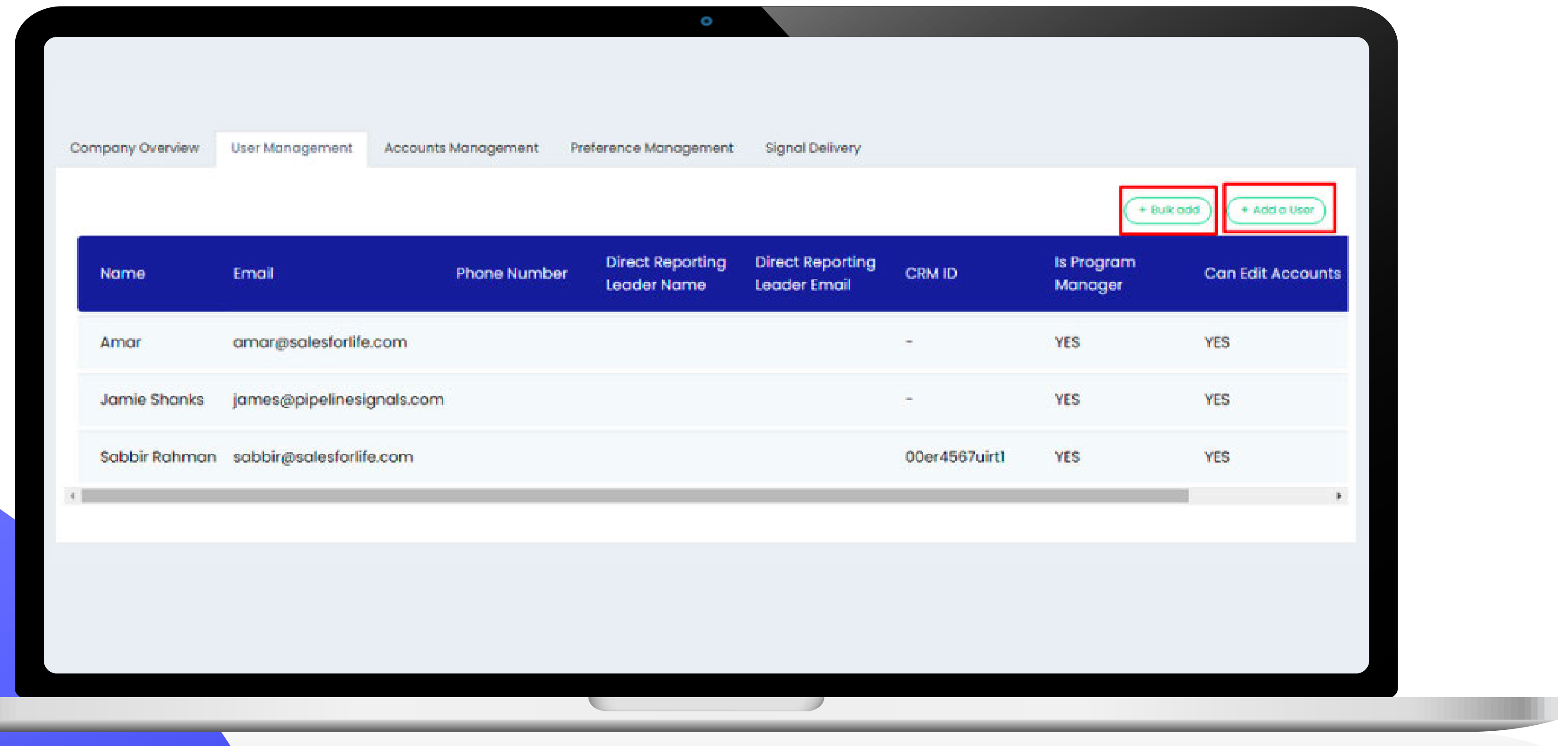
The screenshot displays the PIPELINESIGNALS application interface. At the top, the logo 'PIPELINESIGNALS' is visible on the left, and the user name 'Sabbir' is on the right. Below the logo, a red sidebar contains icons for users, documents, and messages. The main content area is titled 'Onboarding' and features a horizontal navigation bar with five tabs: 'Company Overview', 'User Management' (highlighted with a red box), 'Accounts Management', 'Preference Management', and 'Signal Delivery'. In the top right corner of the main content area, there are two green buttons: '+ Bulk add' and '+ Add a User'. Below these buttons is a table with the following columns: Name, Email, Phone Number, Direct Reporting Leader Name, Direct Reporting Leader Email, CRM ID, Is Program Manager, and Can Edit Accounts. The table contains three rows of user data.

Name	Email	Phone Number	Direct Reporting Leader Name	Direct Reporting Leader Email	CRM ID	Is Program Manager	Can Edit Accounts
Amar	amar@salesforlife.com				-	YES	YES
Jamie Shanks	james@pipelinesignals.com				-	YES	YES
Sabbir Rahman	sabbir@salesforlife.com				00er4567uirt1	YES	YES

# 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



### Add User ✕

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email	Phone Number
<input type="text"/>	<input type="text"/>
Direct Reporting Leader Name	Direct Reporting Leader Email
<input type="text"/>	<input type="text"/>
CRM ID	<input type="checkbox"/> Can Edit Accounts
<input type="text"/>	

## 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.

	Email	First Name	Last Name	User CRM ID	Phone	Direct Reporting Leader Name	Direct Reporting Leader Email	Can Edit Accounts (Yes/No)
1								▼
2								▼
3								▼
4								▼
5								▼
6								▼
7								▼
8								▼
9								▼
10								▼
11								▼
12								▼
13								▼
14								▼
15								▼



# Navigating the App: Onboarding - Accounts Management

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

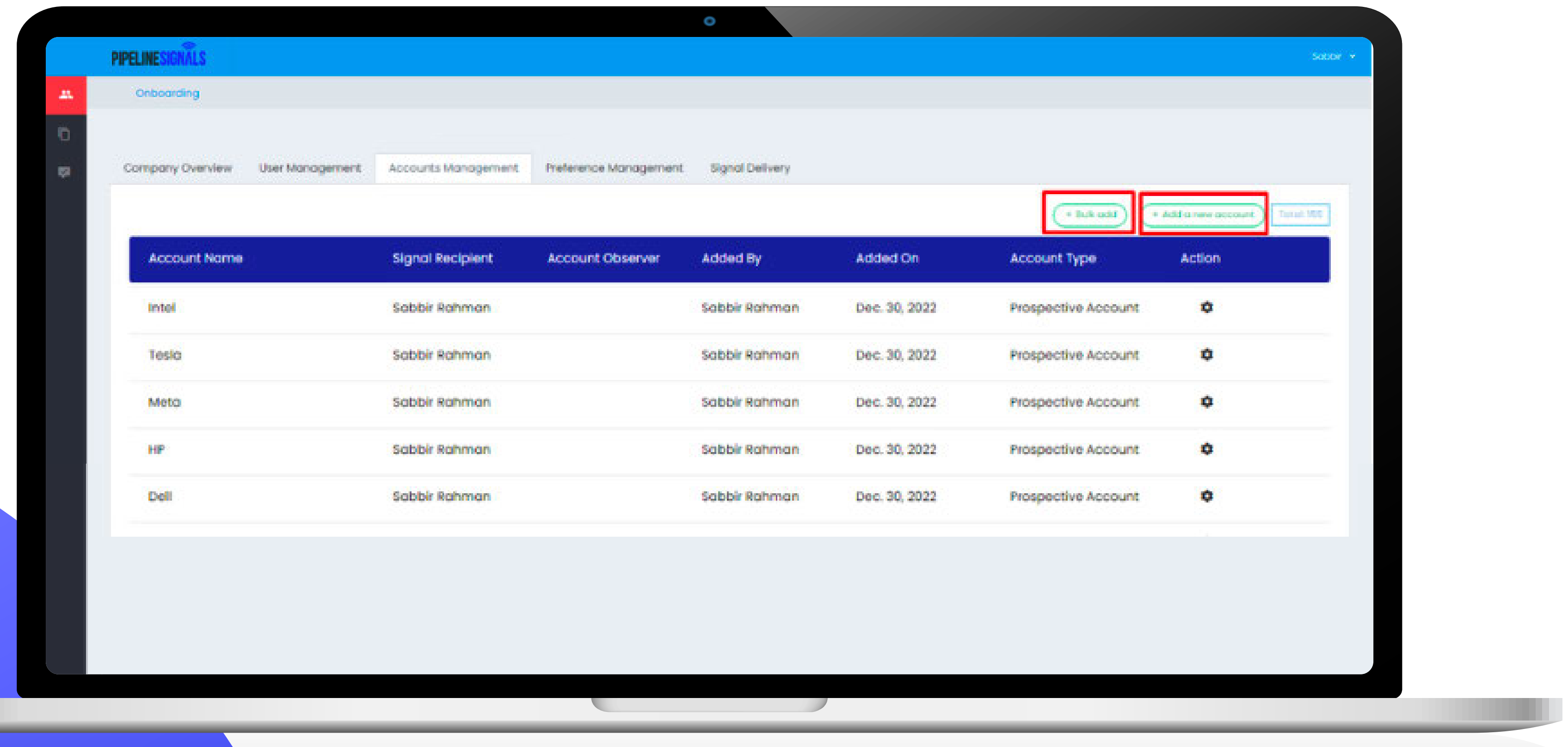
The screenshot displays the 'Accounts Management' module within the 'Onboarding' section of the PIPELINESIGNALS application. The 'Accounts Management' tab is highlighted with a red box. The interface includes a navigation bar with 'Company Overview', 'User Management', 'Accounts Management', 'Preference Management', and 'Signal Delivery'. Below the navigation bar, there are buttons for '+ Bulk add', '+ Add a new account', and a 'Total: 155' indicator. The main content area features a table with the following data:

Account Name	Signal Recipient	Account Observer	Added By	Added On	Account Type	Action
Intel	Sabbir Rahman		Sabbir Rahman	Dec. 30, 2022	Prospective Account	⚙️
Tesla	Sabbir Rahman		Sabbir Rahman	Dec. 30, 2022	Prospective Account	⚙️
Meta	Sabbir Rahman		Sabbir Rahman	Dec. 30, 2022	Prospective Account	⚙️
HP	Sabbir Rahman		Sabbir Rahman	Dec. 30, 2022	Prospective Account	⚙️
Dell	Sabbir Rahman		Sabbir Rahman	Dec. 30, 2022	Prospective Account	⚙️

# 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



### Add Account ✕

Signal Recipient Sabbir Rahman	Account Observer Jamie Shanks
Account Name Kendra Scott	Account Type Prospective Account
CRM Account ID 12rt667	Extra Field 1
Extra Field 2	Extra Field 3
Extra Field 4	Extra Field 5

Cancel Add Account

## Navigating the App: Onboarding - Accounts Management

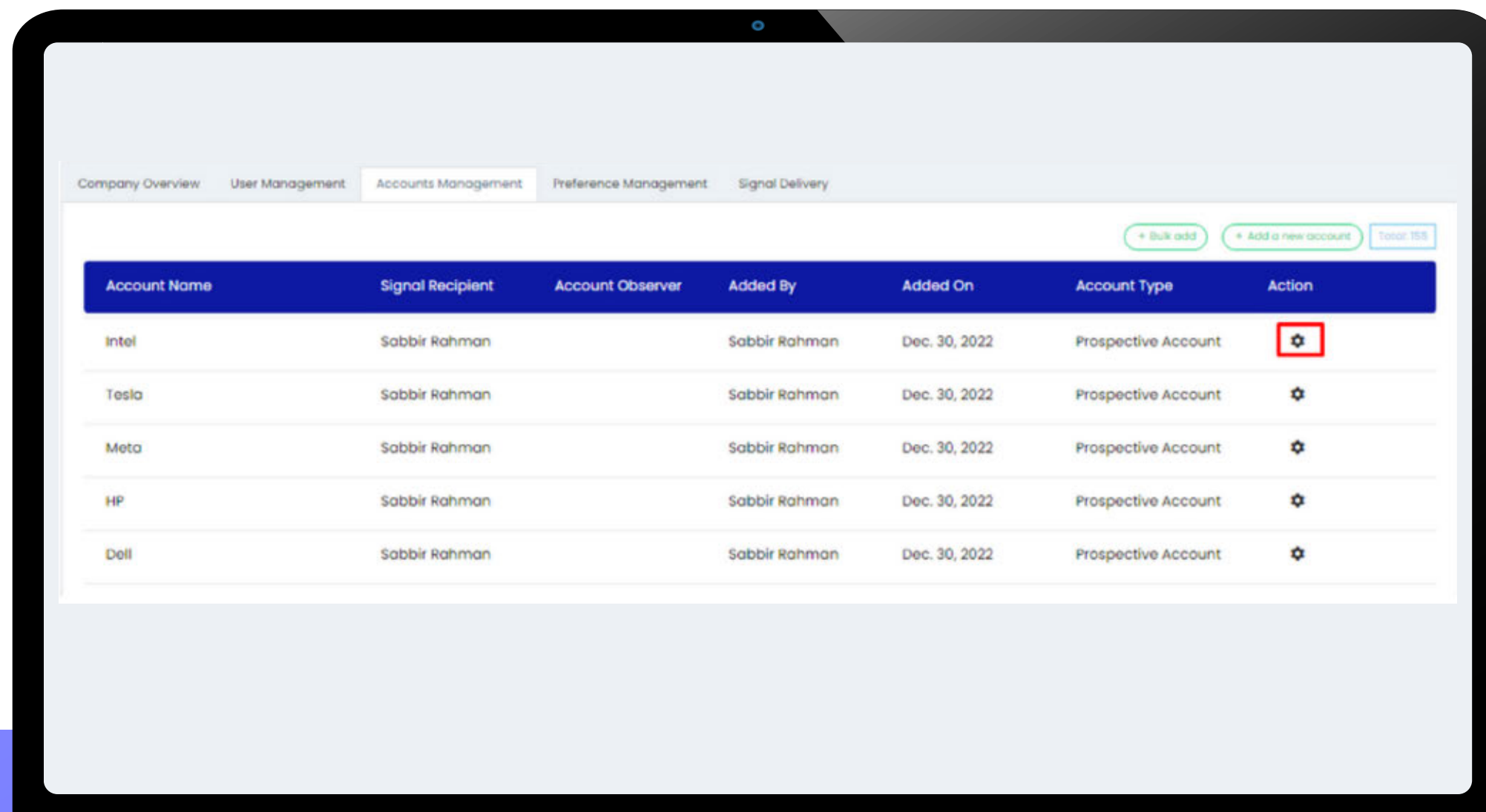
### Add an Account:

- 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

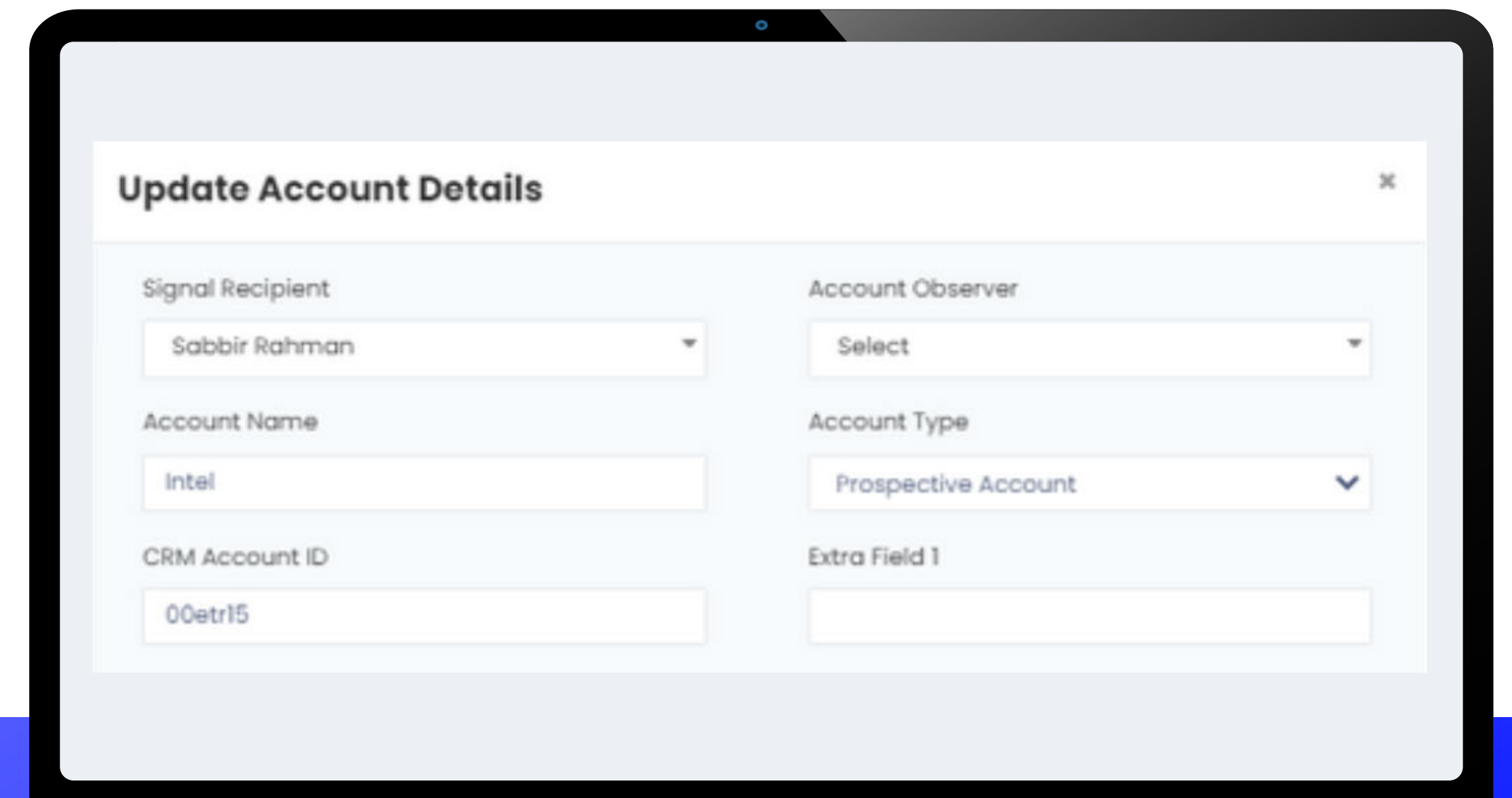
**Update/Delete an Account:** Click on the gear icon, then on the next window you can update details or also can delete the account.



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

+ Bulk add | + Add a new account | Total: 105

Account Name	Signal Recipient	Account Observer	Added By	Added On	Account Type	Action
Intel	Sabbir Rahman	Sabbir Rahman	Sabbir Rahman	Dec. 30, 2022	Prospective Account	
Tesla	Sabbir Rahman	Sabbir Rahman	Sabbir Rahman	Dec. 30, 2022	Prospective Account	
Meta	Sabbir Rahman	Sabbir Rahman	Sabbir Rahman	Dec. 30, 2022	Prospective Account	
HP	Sabbir Rahman	Sabbir Rahman	Sabbir Rahman	Dec. 30, 2022	Prospective Account	
Dell	Sabbir Rahman	Sabbir Rahman	Sabbir Rahman	Dec. 30, 2022	Prospective Account	



### Update Account Details

Signal Recipient:

Account Observer:

Account Name:

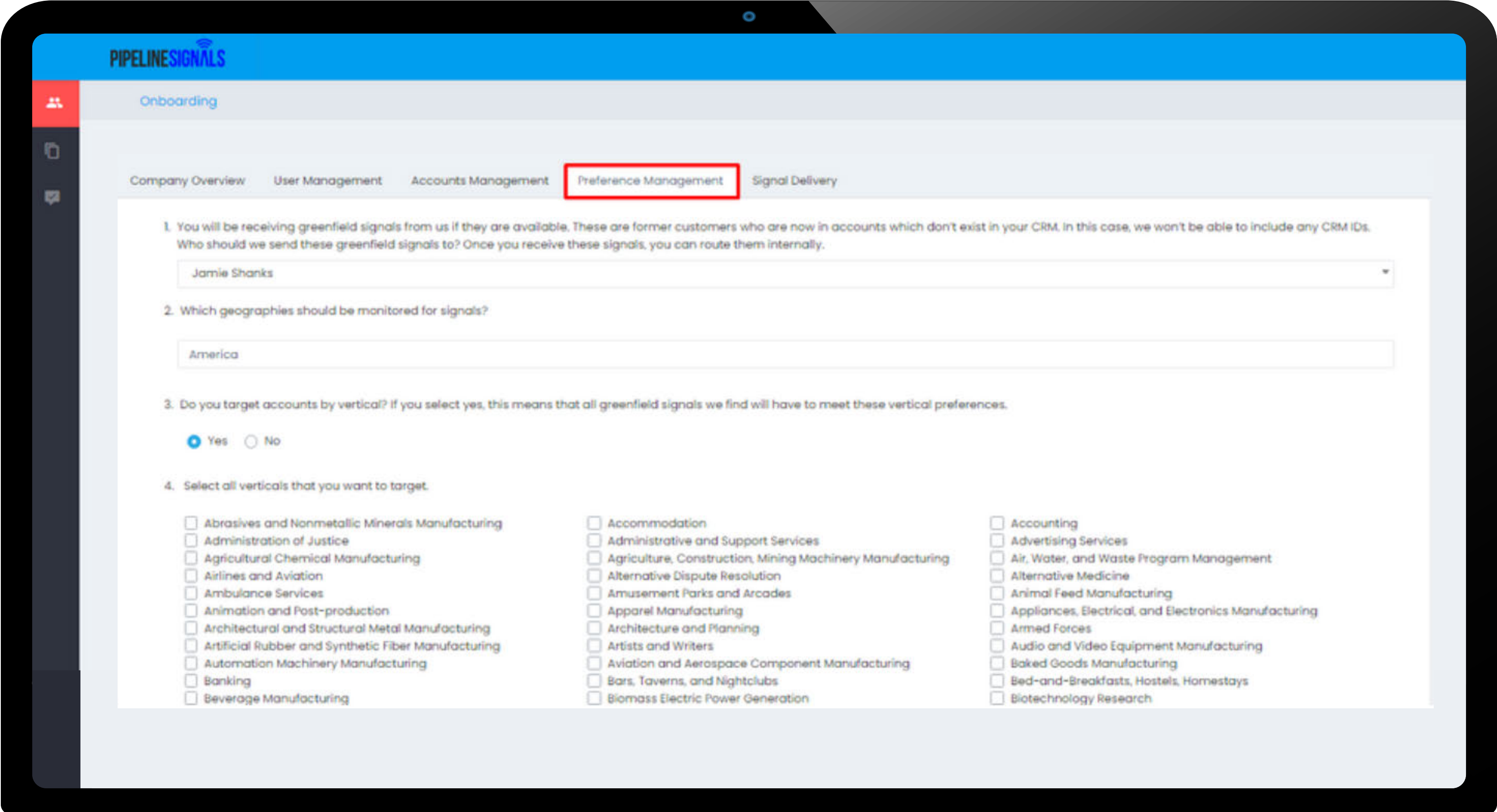
Account Type:

CRM Account ID:

Extra Field 1:

# 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.

PIPELINESIGNALS

Onboarding

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

1. Please tell us which systems you'd like signals sent to.

CSV  Hubspot CRM  Microsoft Dynamics 365 CRM  
 SalesLoft  Outreach.io  Slack  
 Teams

Other (Please specify)  
Google Sheet

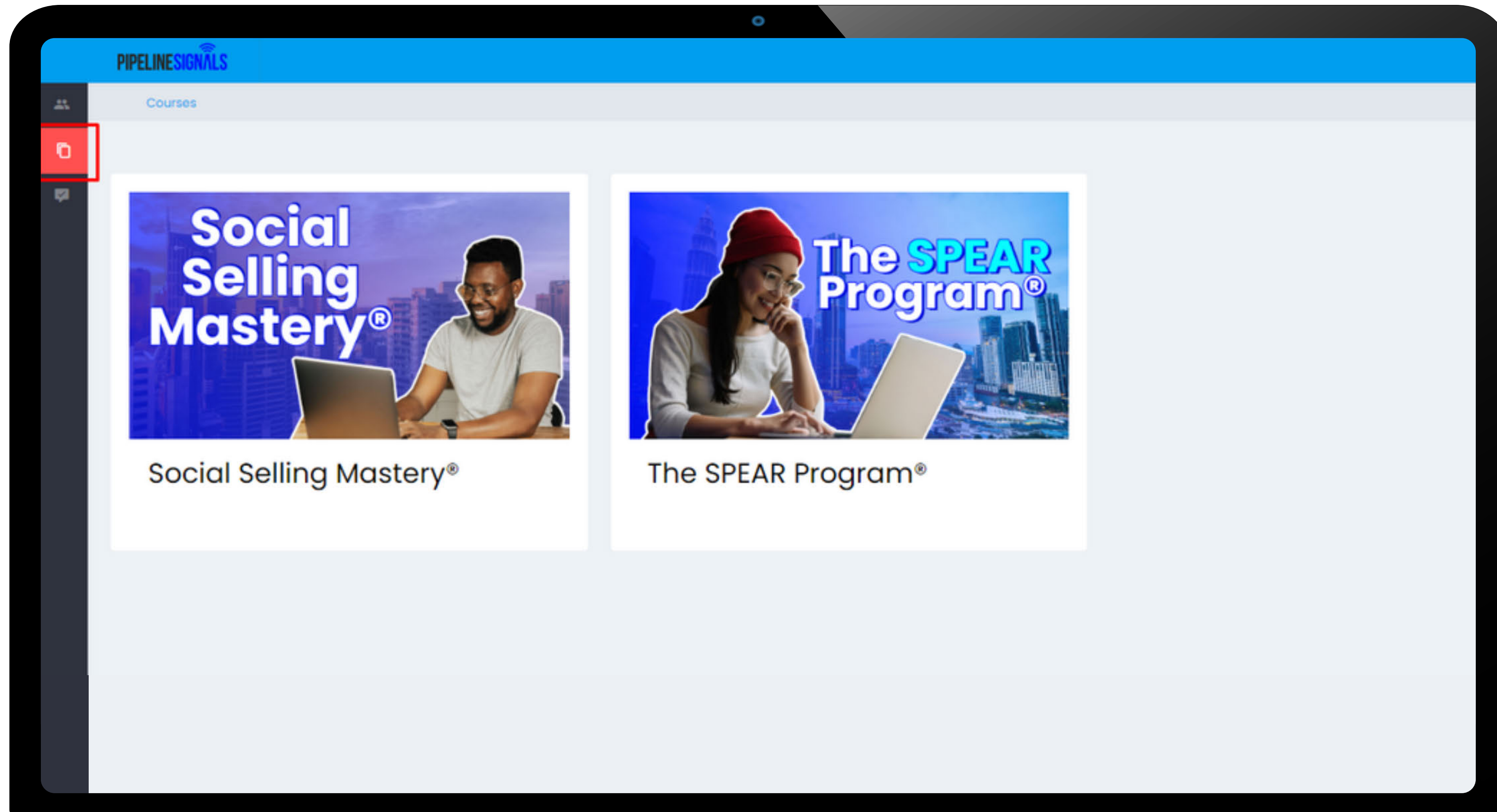
2. It's highly recommended to integrate signals into your Sales Engagement platform. Which platform will you be integrating to?

SalesLoft  Outreach.io  Not Applicable  
 Other (Please specify)

Update

# Navigating the App: Courses

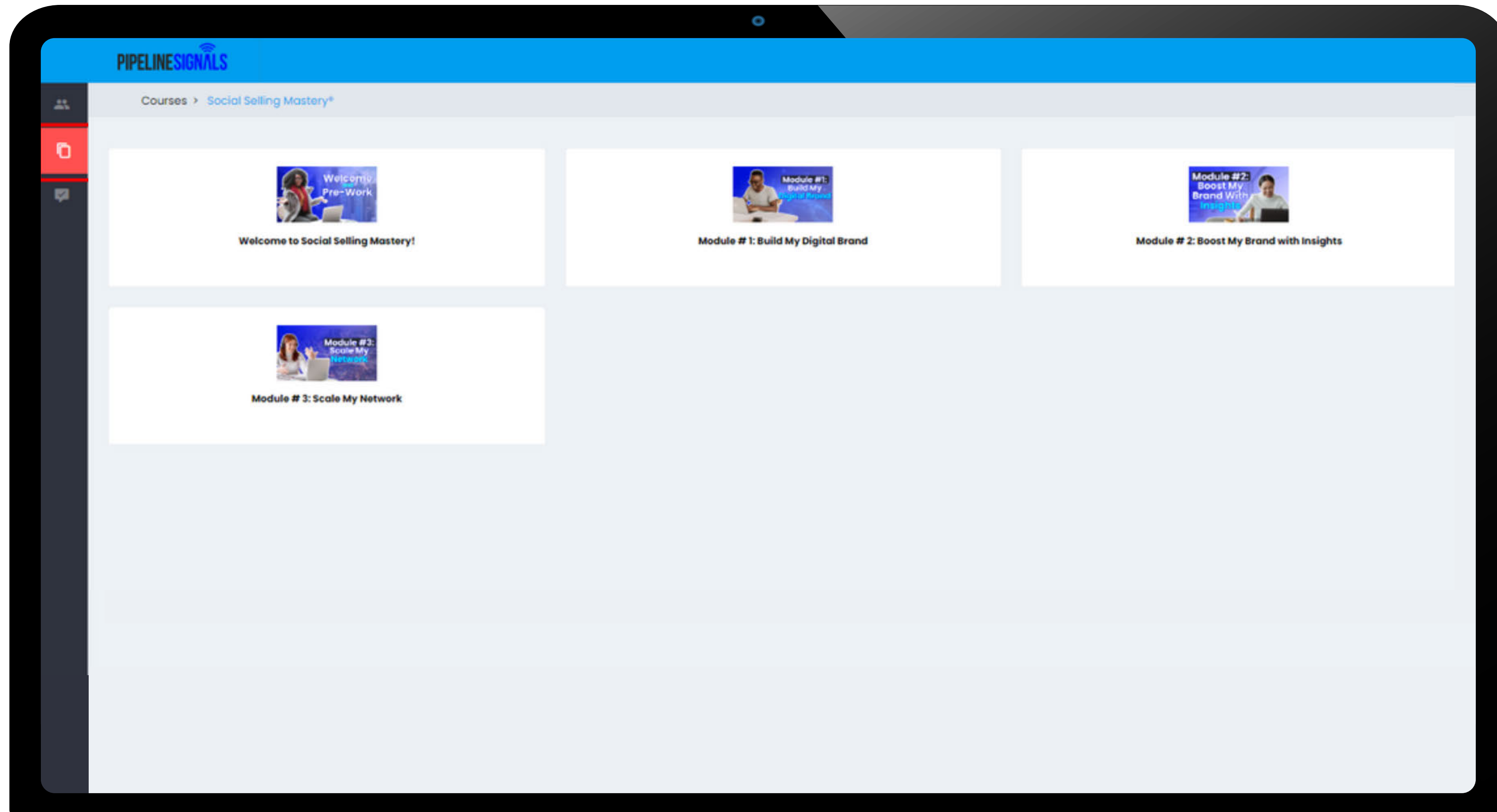
The **Courses Page** contains coursewares.





# Navigating the App: Courses

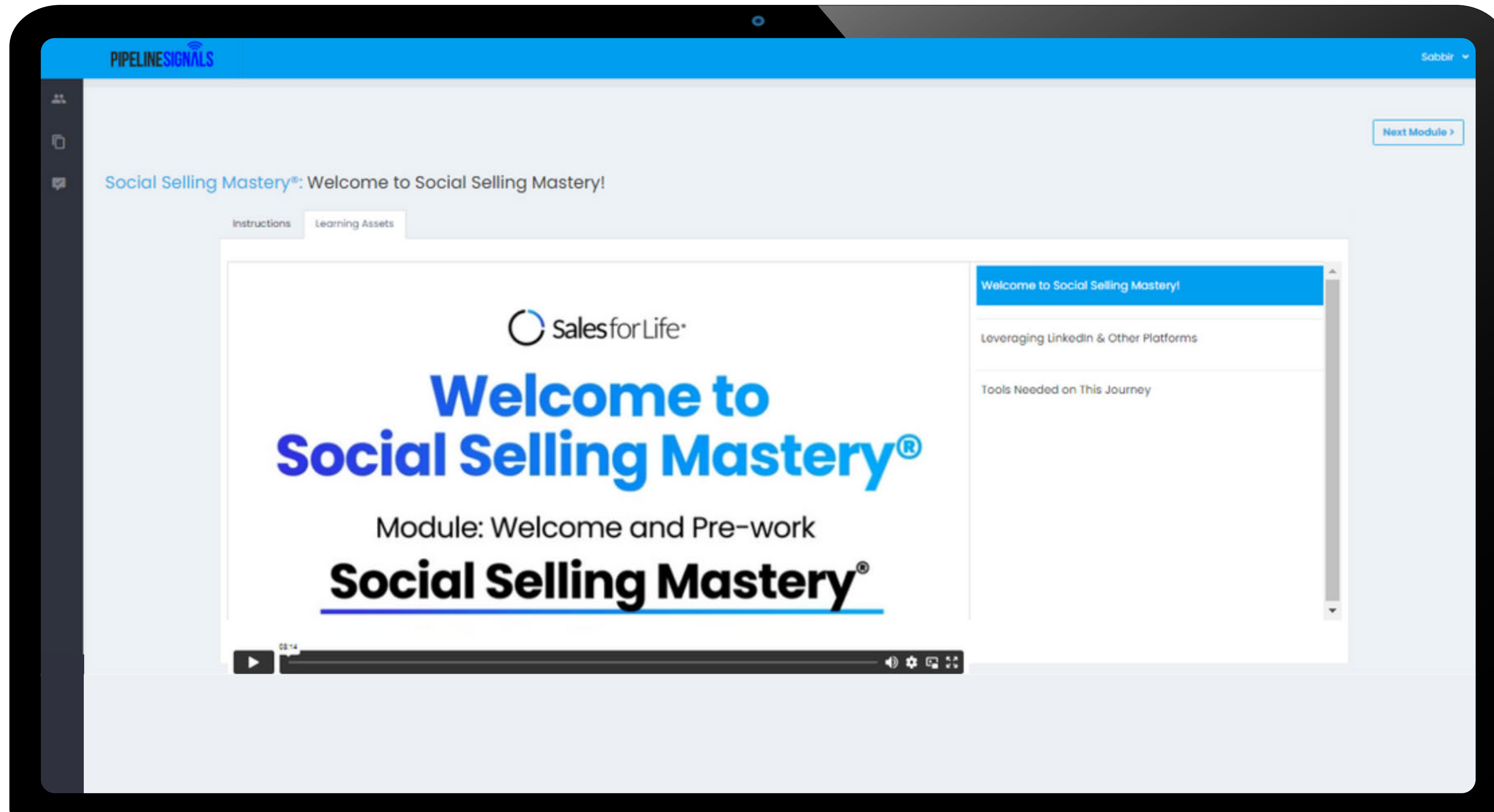
After selecting a course, you will be directed to the module selection page. On this page, each module is divided into tiles and the link to the courses.



# Navigating the App: Courses

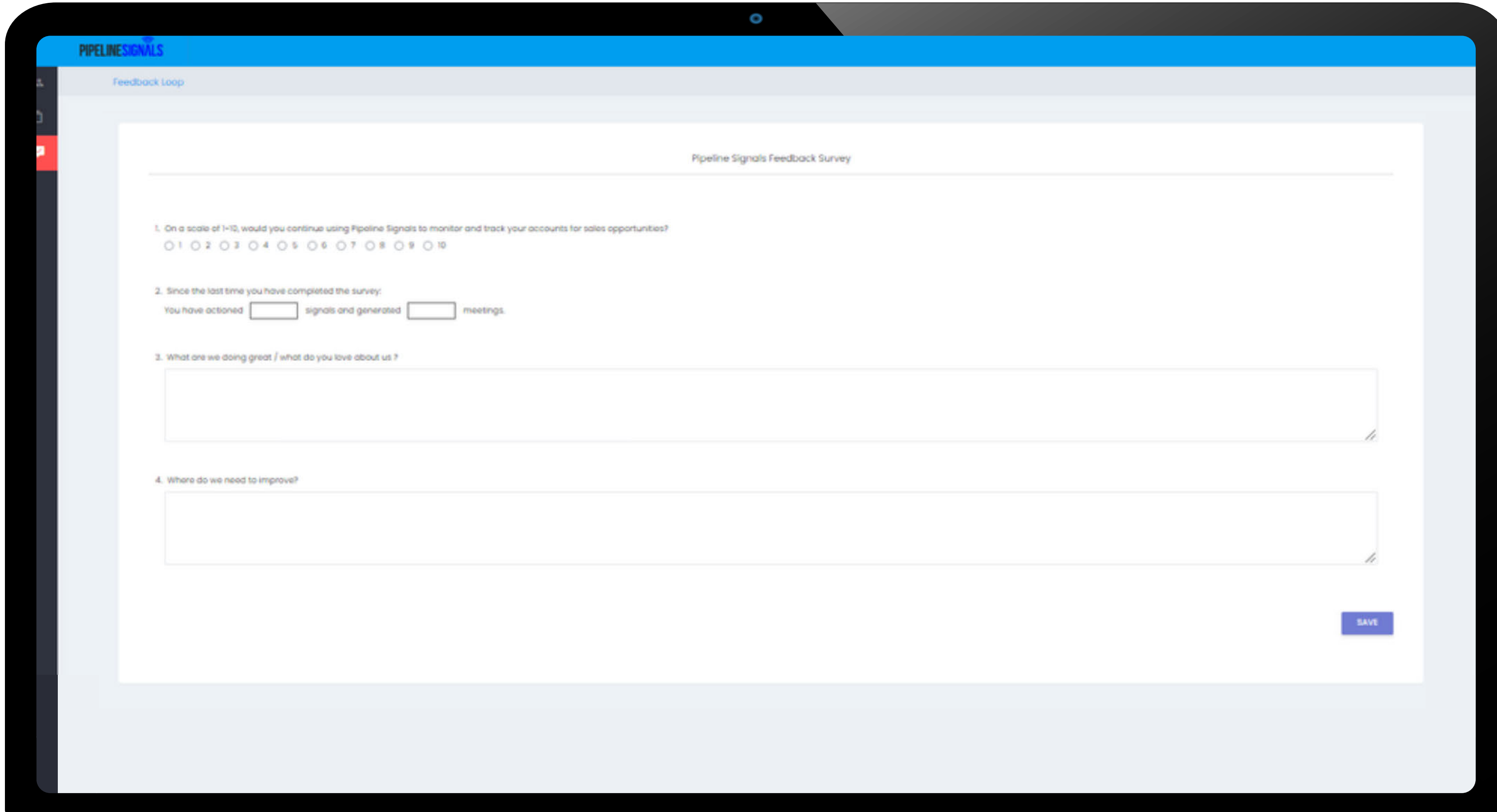
After selecting a module, it will show a page that has two tabs:

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.



The screenshot shows a laptop displaying the Pipeline Signals Feedback Survey form. The form is titled "Pipeline Signals Feedback Survey" and is part of a "Feedback Loop". It contains four questions:

1. On a scale of 1-10, would you continue using Pipeline Signals to monitor and track your accounts for sales opportunities?  
 1  2  3  4  5  6  7  8  9  10
2. Since the last time you have completed the survey:  
You have actioned  signals and generated  meetings.
3. What are we doing great / what do you love about us?
4. Where do we need to improve?

A "SAVE" button is located at the bottom right of the form.



# 04

## Basic

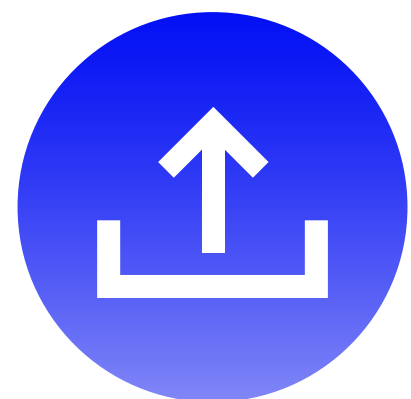
# Troubleshooting

# Guidelines

# 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 fields

A blue-tinted background image showing several call center agents wearing headsets and working at their desks. The image is semi-transparent, allowing the text to be clearly visible.

**Need Help or Guidance?**

**Please contact your CSM for help.**

PIPELINESIGNALS 