customer portal quick guide

Version 3.0

pipeliner
the unique selling power

www.pipelinersales.com

powered by up time ITechnologies

pipeliner quick guide

customer portal

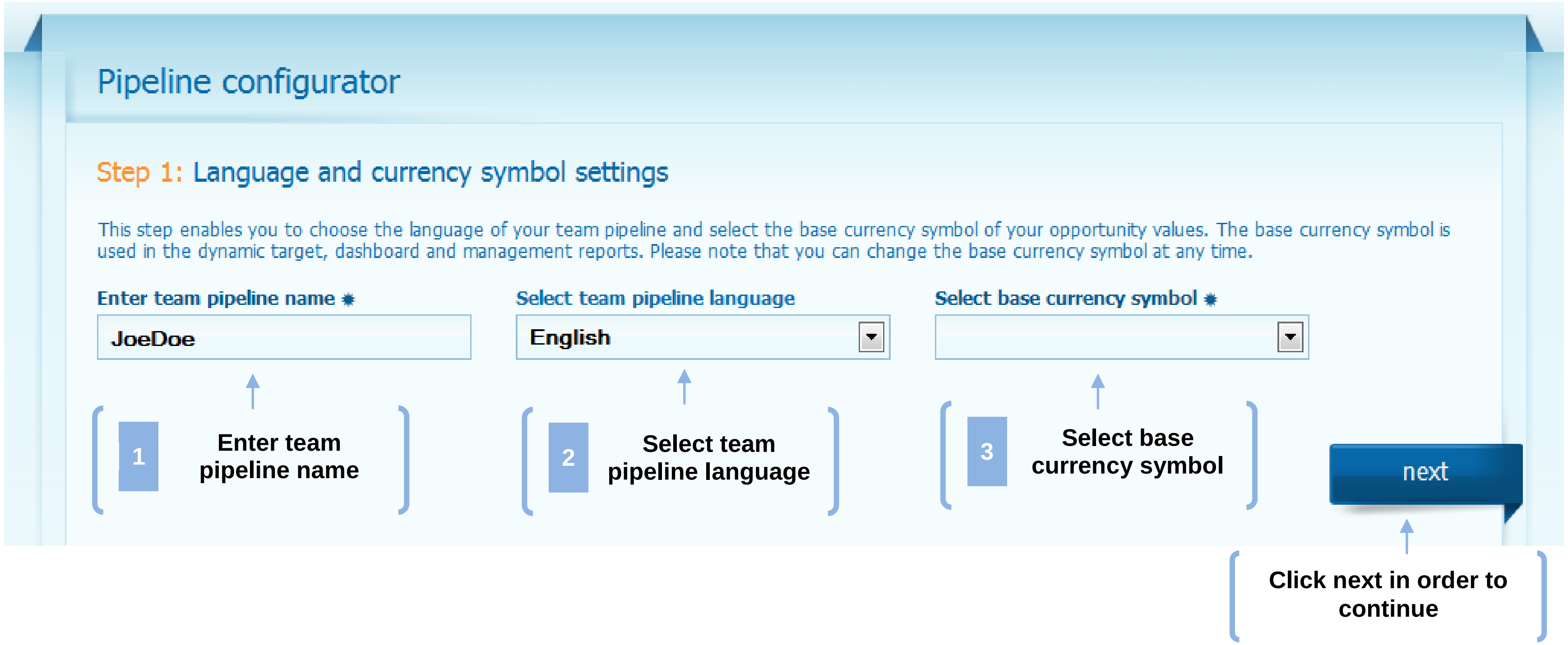
pipelinersales.com a division of uptime ITechnologies GmbH

Team pipeline configuration

After purchasing your pipeliner team version you will receive an email with your product license key and the link where you can start to configure your team pipeline after clicking it. Please follow the instructions below to setup your team pipeline.

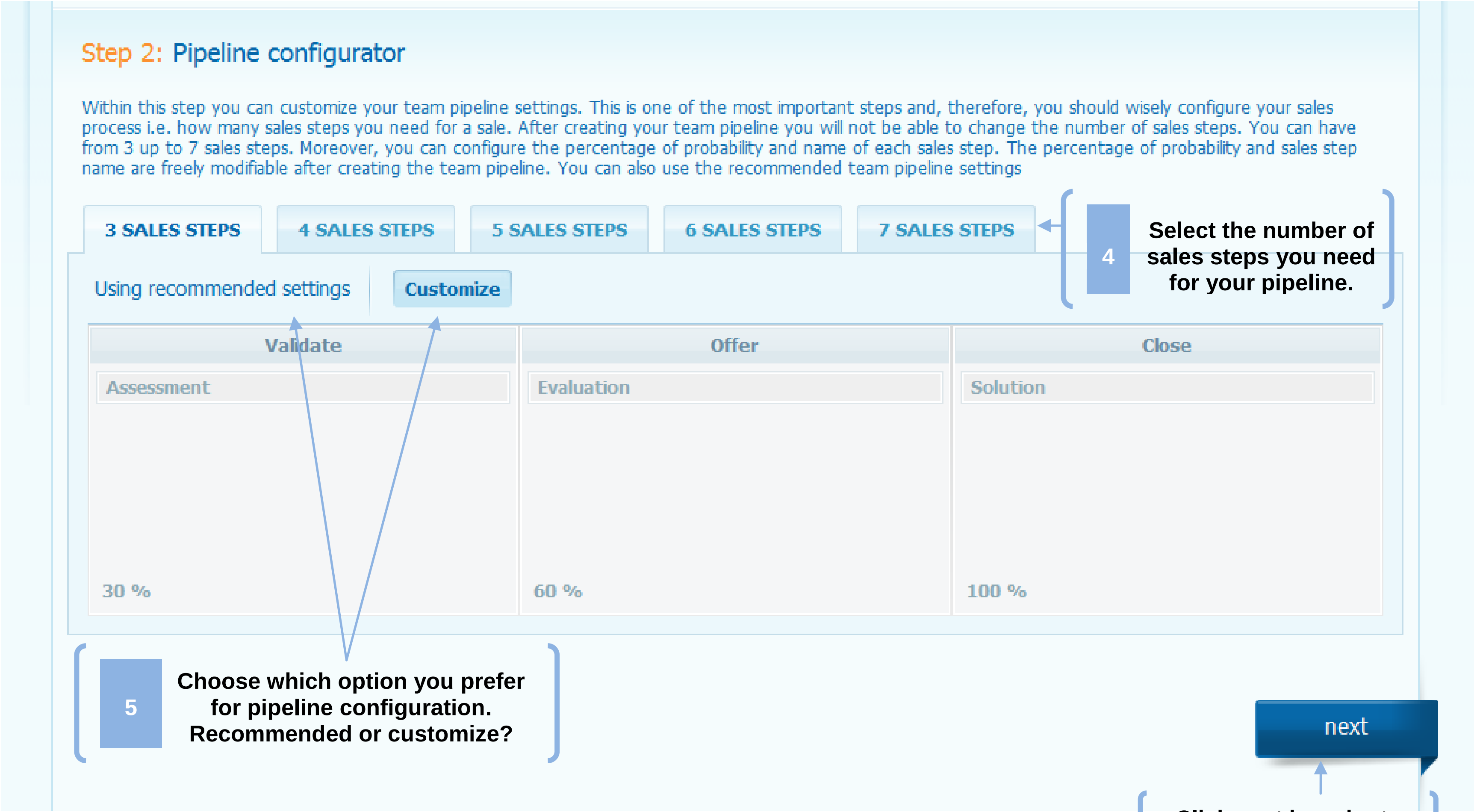
1. **Step – Language and currency symbol settings**

   After clicking the enclosed link, you will be redirected to the pipeliner online service “Customer Portal” where you need to configure your Team Pipeline.



2. Step – Pipeline configuration

Define your sales team pipeline by selecting the number of sales steps your sales process consists of. <u>Please note that you cannot change the number of sales steps after they have been created!</u>

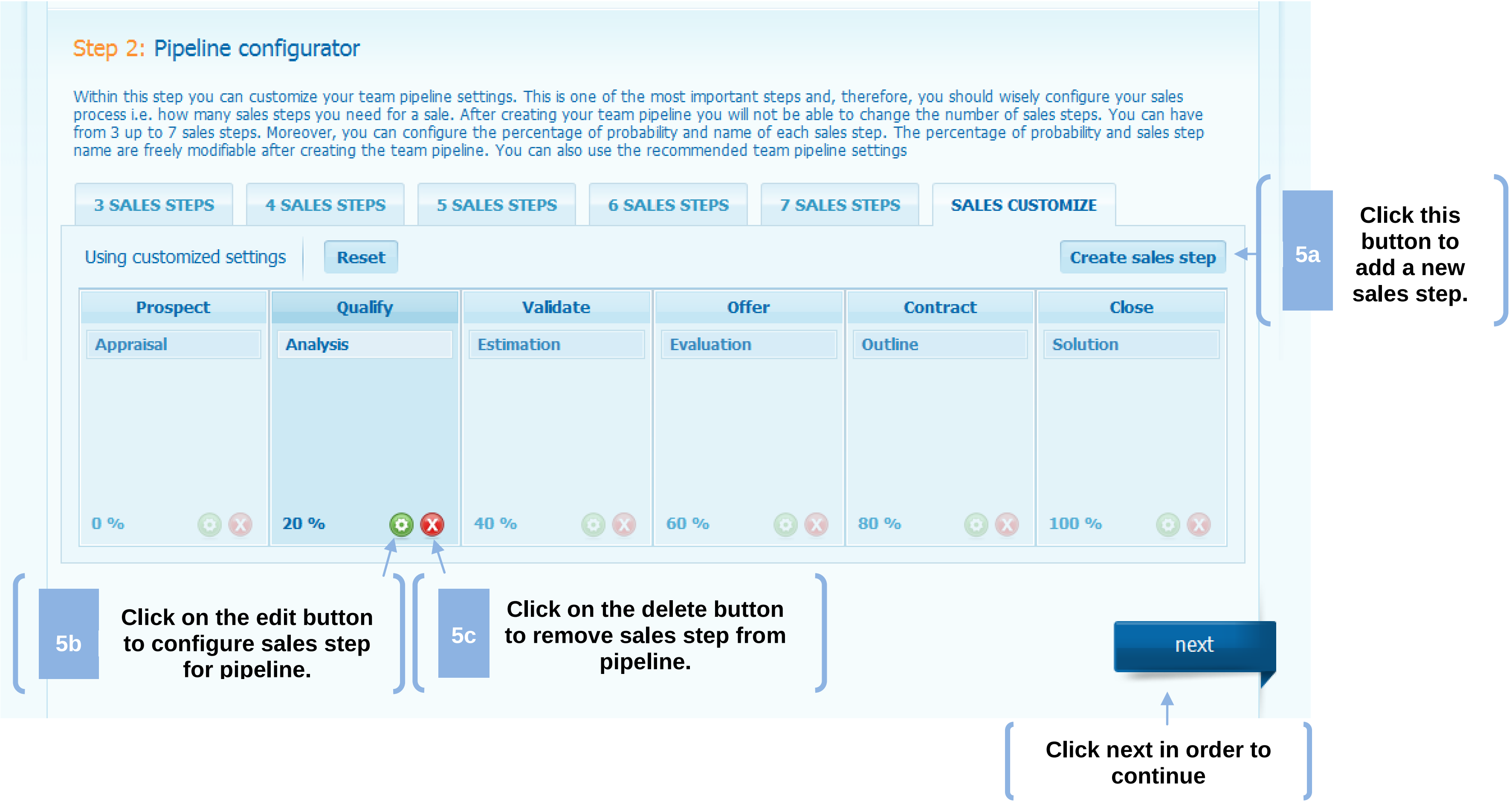


> [I would like to see how to customize my sales steps]()

> [I will use recommended settings and I want to continue]()

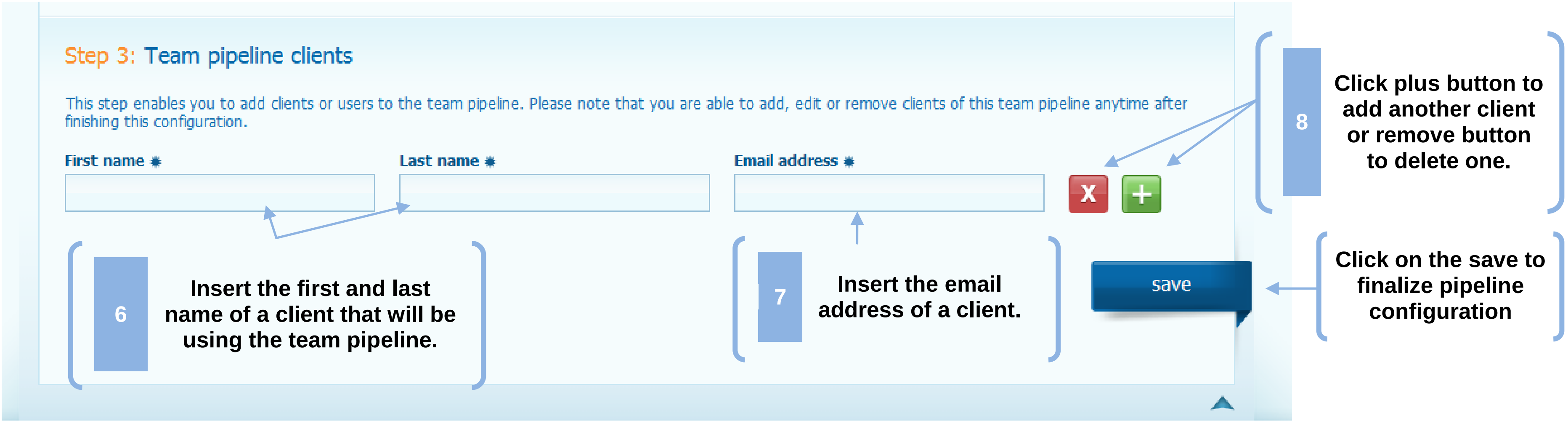
Customizing team pipeline

Here you can customize the names of the sales step, documents and set the percentage of probability to your sales pipeline. Please note that this data is fully modifiable at any time after the configuration process is finished.



3. Step – Team Pipeline Clients

Here you can insert your team pipeline clients. Please note that you can maintain your clients after finishing this configuration. A client is one member of the team. After finishing the team pipeline configuration you will receive login information for all inserted clients via e-mail.

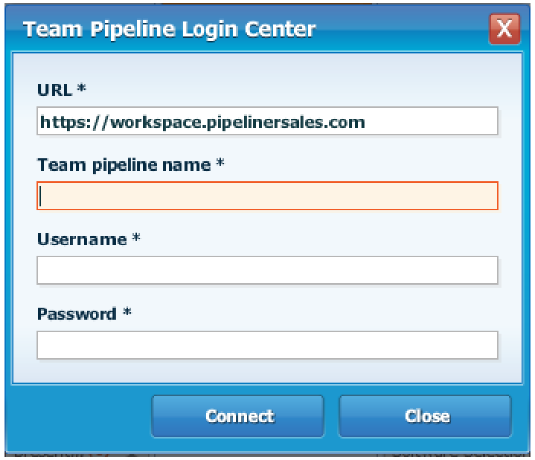


4. **Step – Team pipeline invoice mail**

After finishing the team pipeline configuration, you will receive an e-mail with all login data for your team members (clients). Please see your email inbox.

```
Dear Joe Doe,

You have successfully configured your pipeline on the server!

Below you will find all of the related information in order to get access
to the pipeline that you have created. You are able to access and edit this
information through the customer portal at any time.

The URL for access to your pipeline is:
https://workspace.pipelinersales.com

The name of your pipeline is: TEAMPIPELINENAME

You have created the following users that will have access to the pipeline.
You can edit these users at any time over the customer portal:


User 1: joe <joe@doe.com>:
Username: j.doe
Password: [illegible]


We would like to thank you for your interest in pipeliner!

Kind regards,
Your pipeliner Team
```

Here you can find your login data for connecting to the team pipeline.



Important Warning: If you would like to switch from single to team version without losing already existing p-free/p-one data you need to convert your p-free/p-one pipeline! Continue reading…

Upgrading from p-free/p-one to cloud version

If you would like to switch from the single (p-free/p-one) to team version without losing already existing data, you need to convert your p-free/p-one pipeline to team pipeline otherwise, you can just connect you to team pipeline.

Note: Please use your login data for connection, which you have received via email after finishing your team pipeline configuration.

- *KEEPS EXISTING p-free/p-one DATA*

  Converting single pipeline to team pipeline

  If you have been using a p-free/p-one version and you would like to switch to a team version without losing already existing data, you need to convert your local sales pipeline to the cloud team pipeline (for more information see pipeliner user-guide http://www.pipelinersales.com/fileadmin/editorupload/documents/manuals/doc_pipelinermanual30en.pdf on the page 84). Please follow all migration steps, click on the "convert" button (on the upper left side of pipeliner) and click on the convert button in the final screen.

  After converting your local pipeline to the team pipeline, you should also have your team pipeline configuration locally in pipeliner.

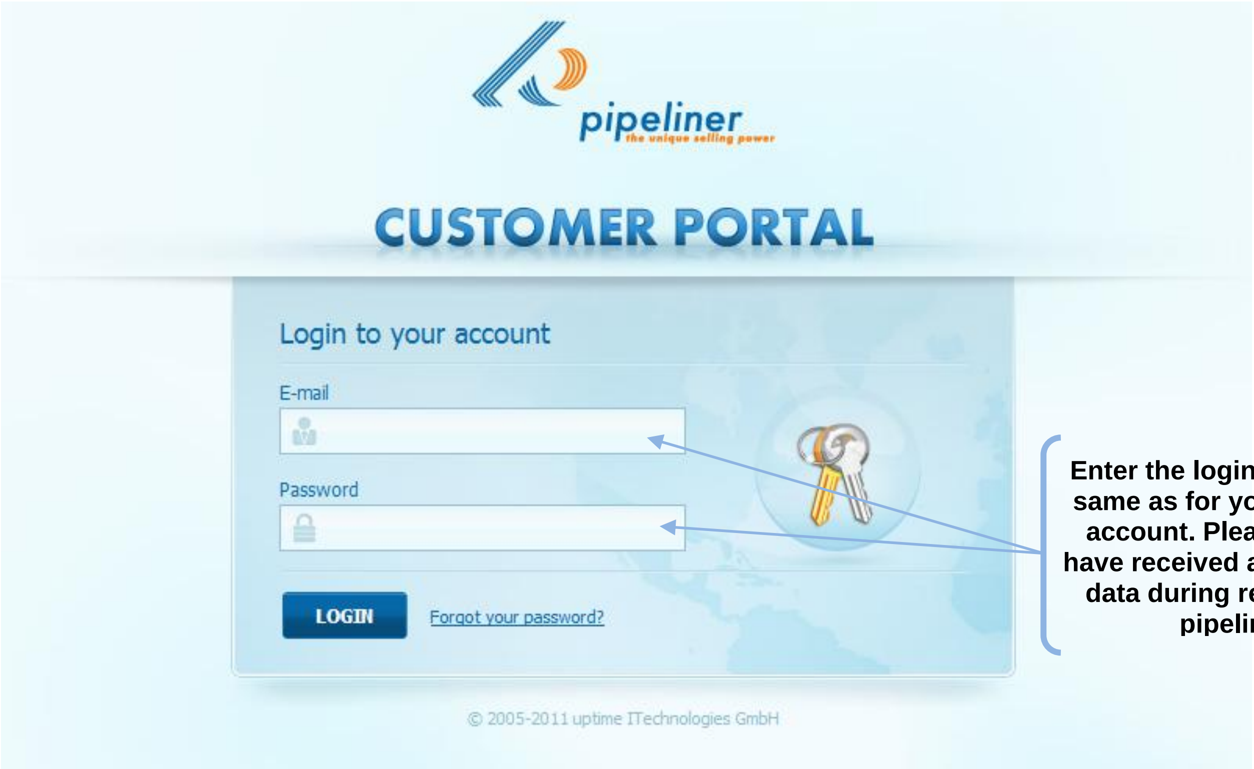
- *STARTS NEW DATA*

  Connecting to the team pipeline

  If you have not been using the p-free/p-one version **or** you do not need to save the already existing p-free data, you can directly connect to your team pipeline (for more information see user-guide http://www.pipelinersales.com/fileadmin/editorupload/documents/manuals/doc_pipelinermanual30en.pdf on page 83). During connection your web-server data will be loaded into your local pipeline.

Using the pipeliner customer portal – graphic user interface (GUI)

If you would like to maintain your team pipeline data please follow this link https://workspace.pipelinersales.com to log into the pipeliner Customer Portal.



Enter the login data which is the same as for your pipeliner shop account. Please note that you have received an email with login data during registration in the pipeliner shop.

After a successful login to the customer portal, you can see its home graphic interface.

Click here to add users of customer portal.

Here you can configure your team pipelines.

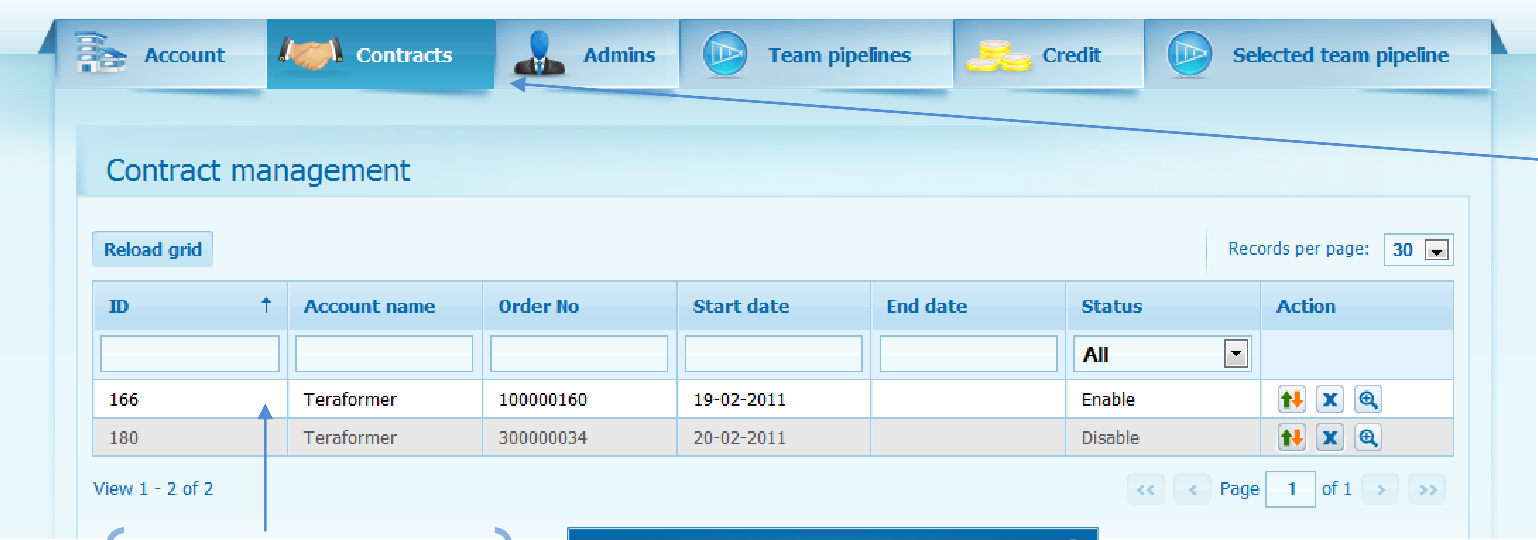
Here you can configure your credit size.

Here you can configure your contract e.g. you would like to upgrade from p-one to p-prime etc.

Here you have information about your account

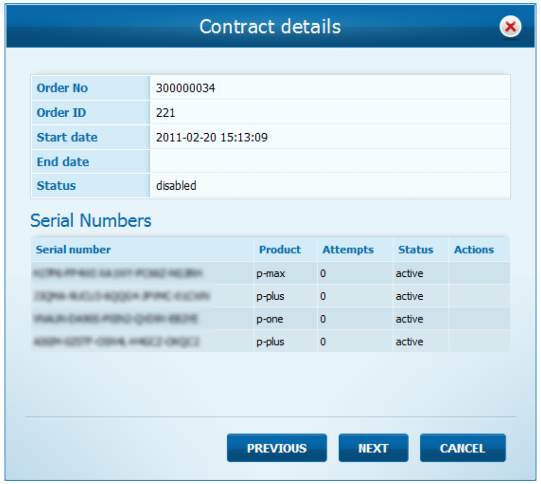
Step 1 Working with your Contracts

Every purchase of a pipeliner product creates a contract in the customer portal i.e. one order in the pipeliner shop is related to one contract in the customer portal. This contract includes all purchased licenses. Using the customer portal, you are able to order new licenses and upgrade or downgrade already existing licenses.

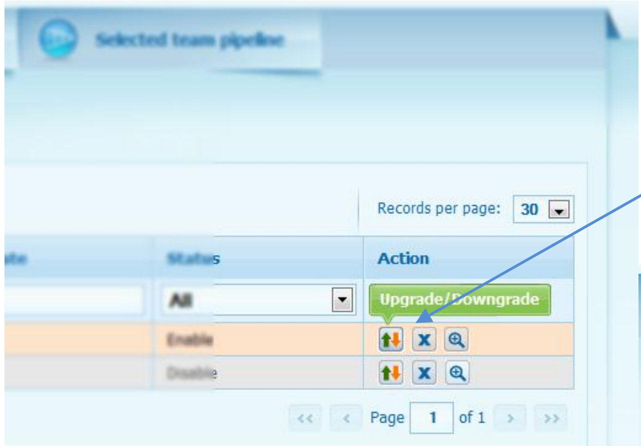


1 Click on the "Contracts" tab.

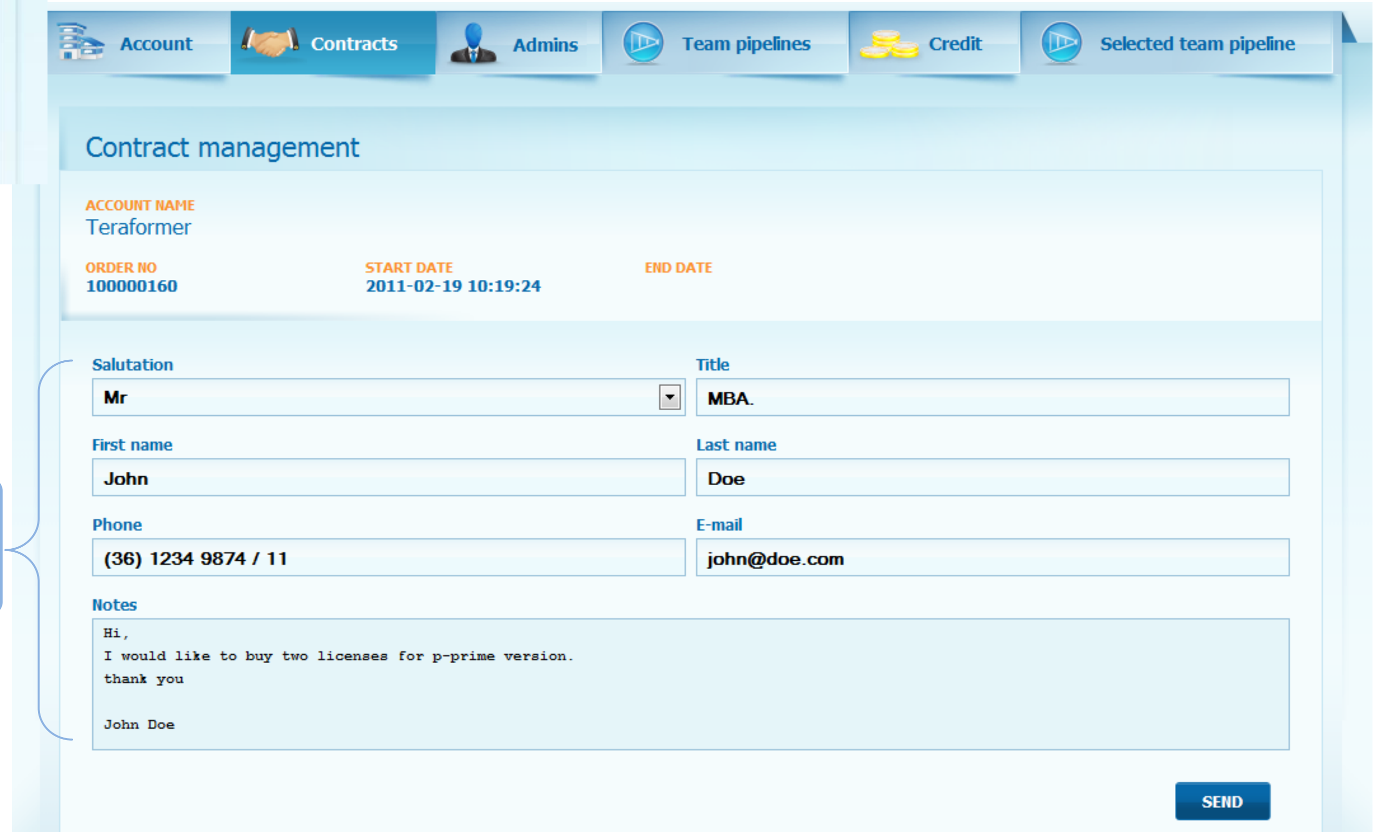
2 Double click on the contract opens its details info with all licenses related to it.



If you would like to upgrade, downgrade or purchase a new license for an already existing contract then follow the instructions below.



1 Click on the Upgrade/Downgrade button to proceed.



2 Fill out the inquiry form and in the note section describe your wishes.

Step 2 Working with your Credit

The credit amount in the customer portal is related to the currency values of each product i.e. 10 Credits are related to 10 Euros/Dollars etc. The credit page informs you about your actual credit size and your monthly credit withdrawal. If your credit size is lower than your monthly withdrawal you need to recharge your credit. Please see instructions below.

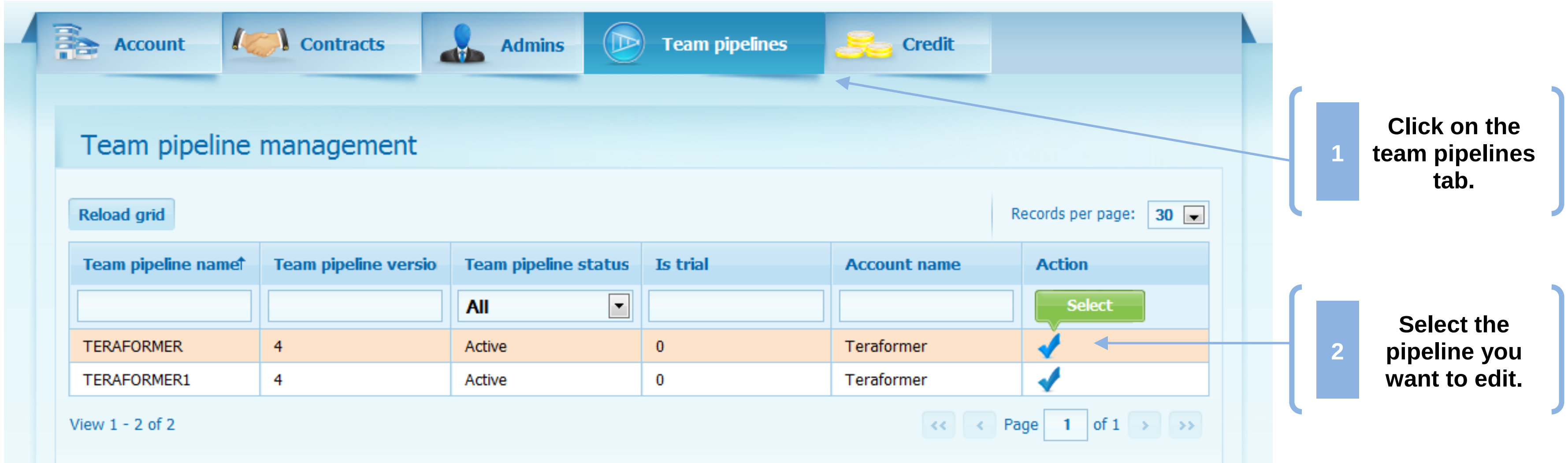
1 Click on the credit tab.

2 Click on the recharge credit

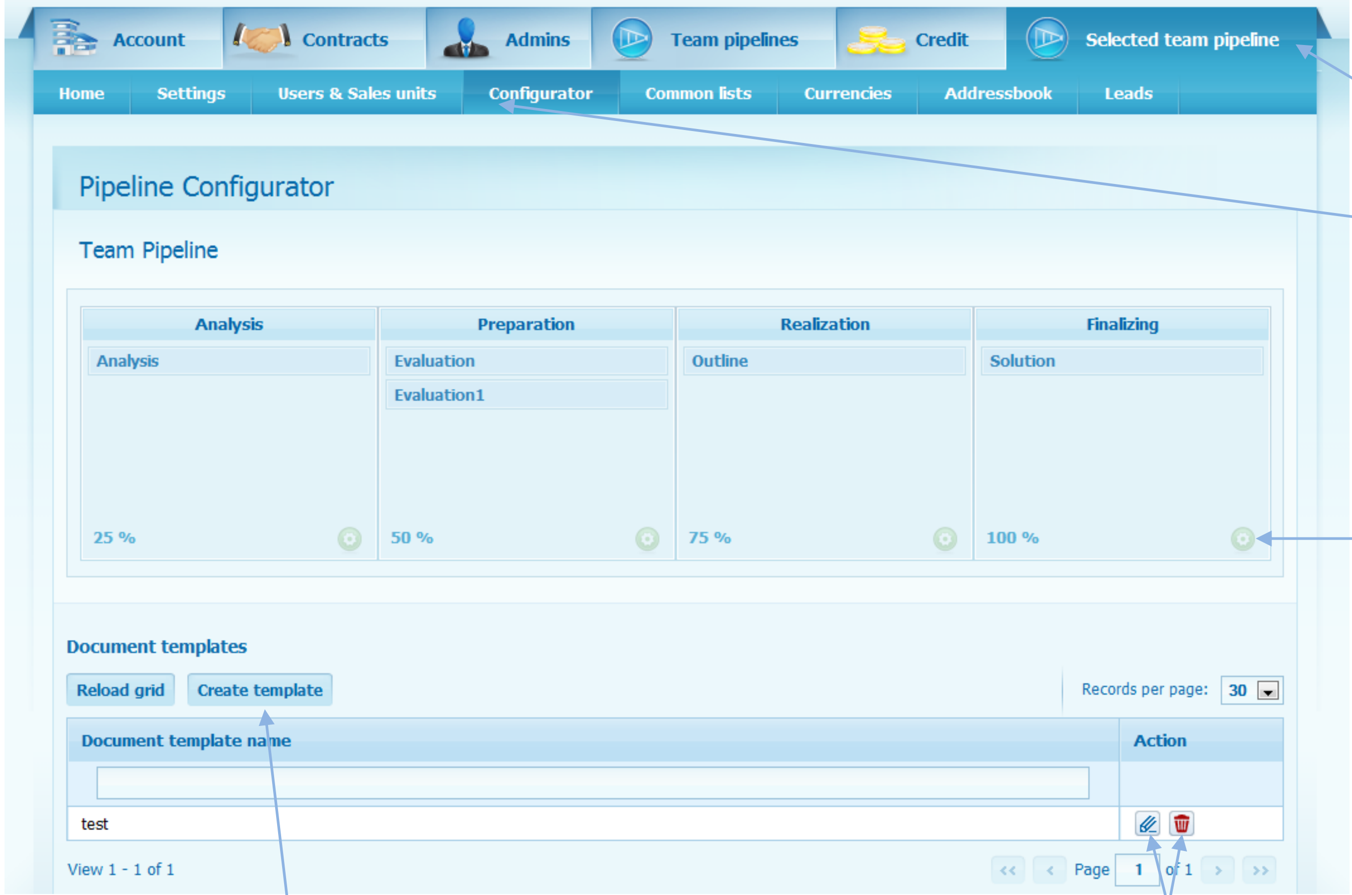
After clicking the “Recharge credit” button you will be redirected to the pipeliner shop.

Step 3 Working with your sales pipeline

Your pipeline consists of sales steps, its percentage of probability and document templates. Setting up the configuration of all these features will help you to follow your business sales strategy. Select the team pipeline which you want to edit.



After selecting one of the team pipelines, you can maintain its configuration settings.



1 Click on the tab “Selected team pipeline”.

2 Click on the tab “Configurator”.

3 Click on the edit button to configure your sales step information.

You can add up to 5 fixed documents. Please note that after creating one fixed document it cannot be removed.

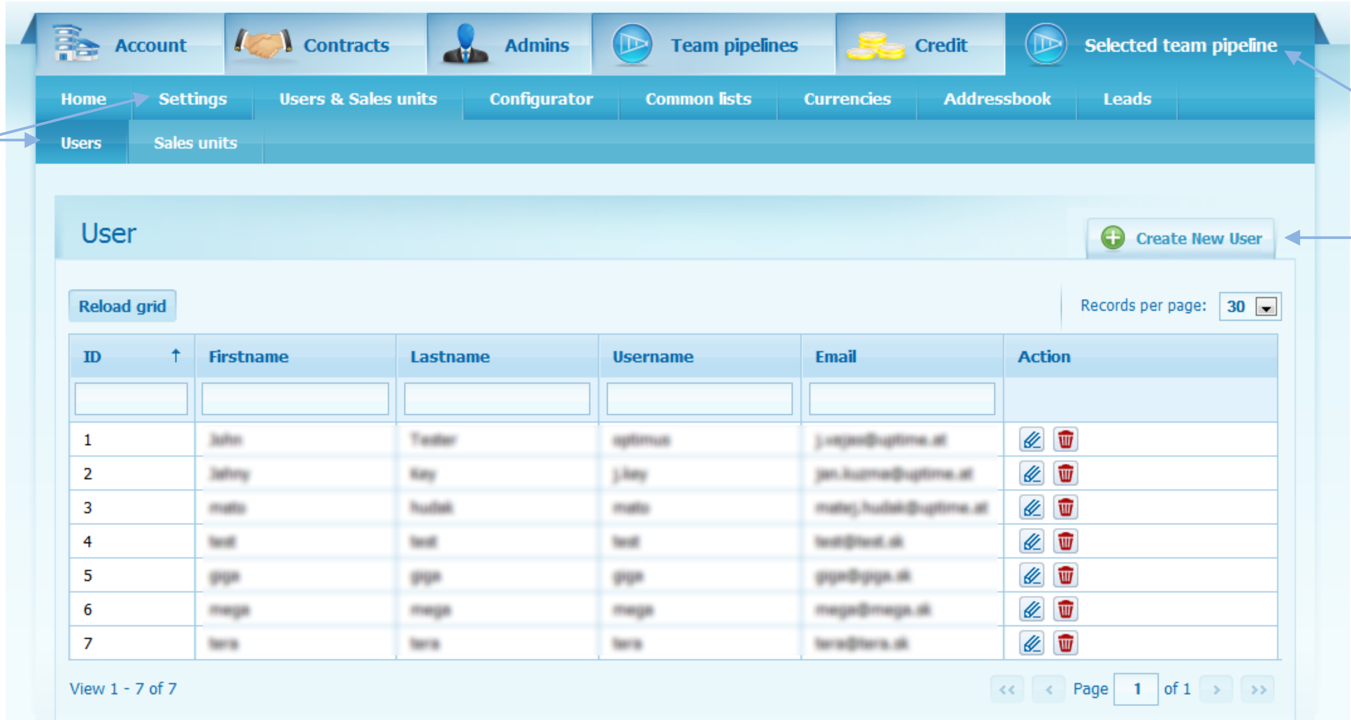
4 Click here to create templates

5 Click here to edit or delete document template

Step 4Setting up your sales team members

You need to specify login data for every team member using your team pipeline. One team member in the customer portal is one client. Please insert your team members here and create their login data. <u>Please note that every client needs to have its own team license in order to be able to connect to the team pipeline via pipeliner.</u>

2 Click on the tab “Clients”.



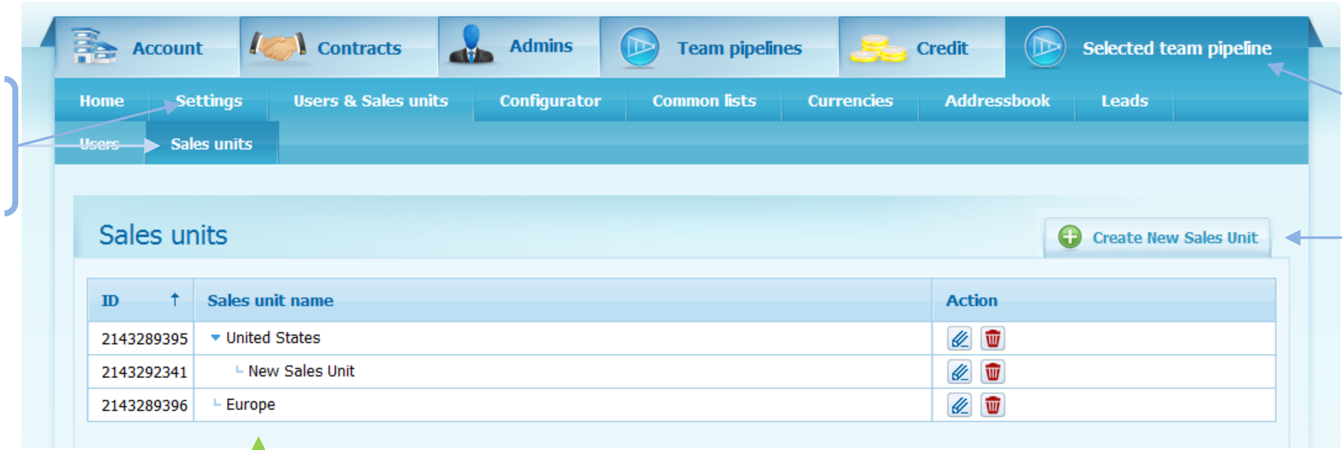
1 Click on the tab “Selected team pipeline”.

3 Click on the “Create new client” button.

Step 5 Working with Sales Units

You can create and maintain specific sales units or regions according to your needs. Please insert and divide your company into sales units or regions. All team members should then be placed into their related sales unit.

2 **Click on the tab "Sales units".**



1 **Click on the tab "Selected team pipeline".**

3 **Click on the "Create new sales unit" button.**

Here you can see all your company divided into the subunits based on the tradition tree division.