



pipeliner
the unique selling power

www.pipelinersales.com

powered by  **up
time**
ITechnologies

customer portal

Version 3.0

quick guide

pipeliner quick guide

customer portal

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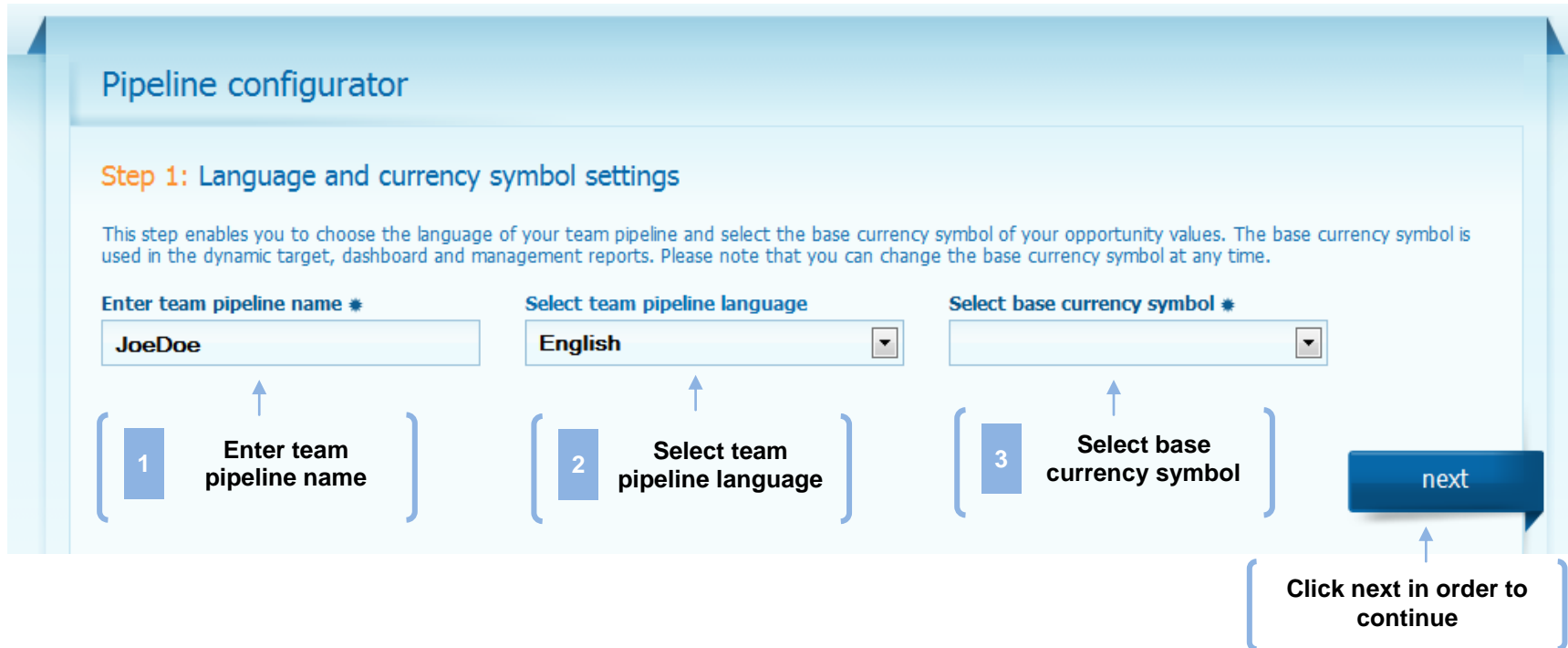
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Team pipeline configuration

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.



Pipeline configurator

Step 1: Language and currency symbol settings

This step enables you to choose the language of your team pipeline and select the base currency symbol of your opportunity values. The base currency symbol is used in the dynamic target, dashboard and management reports. Please note that you can change the base currency symbol at any time.

Enter team pipeline name *
JoeDoe

Select team pipeline language
English

Select base currency symbol *

1 Enter team pipeline name

2 Select team pipeline language

3 Select base currency symbol

next

Click next in order to continue

2. Step – Pipeline configuration

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

Step 2: Pipeline configurator

Within this step you can customize your team pipeline settings. This is one of the most important steps and, therefore, you should wisely configure your sales process i.e. how many sales steps you need for a sale. After creating your team pipeline you will not be able to change the number of sales steps. You can have from 3 up to 7 sales steps. Moreover, you can configure the percentage of probability and name of each sales step. The percentage of probability and sales step name are freely modifiable after creating the team pipeline. You can also use the recommended team pipeline settings

3 SALES STEPS 4 SALES STEPS 5 SALES STEPS 6 SALES STEPS 7 SALES STEPS

Using recommended settings **Customize**

Validate	Offer	Close
Assessment	Evaluation	Solution
30 %	60 %	100 %

4 Select the number of sales steps you need for your pipeline.

5 Choose which option you prefer for pipeline configuration. Recommended or customize?

next

Click next in order to continue

- > [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.

Step 2: Pipeline configurator

Within this step you can customize your team pipeline settings. This is one of the most important steps and, therefore, you should wisely configure your sales process i.e. how many sales steps you need for a sale. After creating your team pipeline you will not be able to change the number of sales steps. You can have from 3 up to 7 sales steps. Moreover, you can configure the percentage of probability and name of each sales step. The percentage of probability and sales step name are freely modifiable after creating the team pipeline. You can also use the recommended team pipeline settings

3 SALES STEPS 4 SALES STEPS 5 SALES STEPS 6 SALES STEPS 7 SALES STEPS SALES CUSTOMIZE

Using customized settings **Reset** **Create sales step**

Prospect	Qualify	Validate	Offer	Contract	Close
Appraisal	Analysis	Estimation	Evaluation	Outline	Solution
0 %	20 %	40 %	60 %	80 %	100 %

5a Click this button to add a new sales step.

5b Click on the edit button to configure sales step for pipeline.

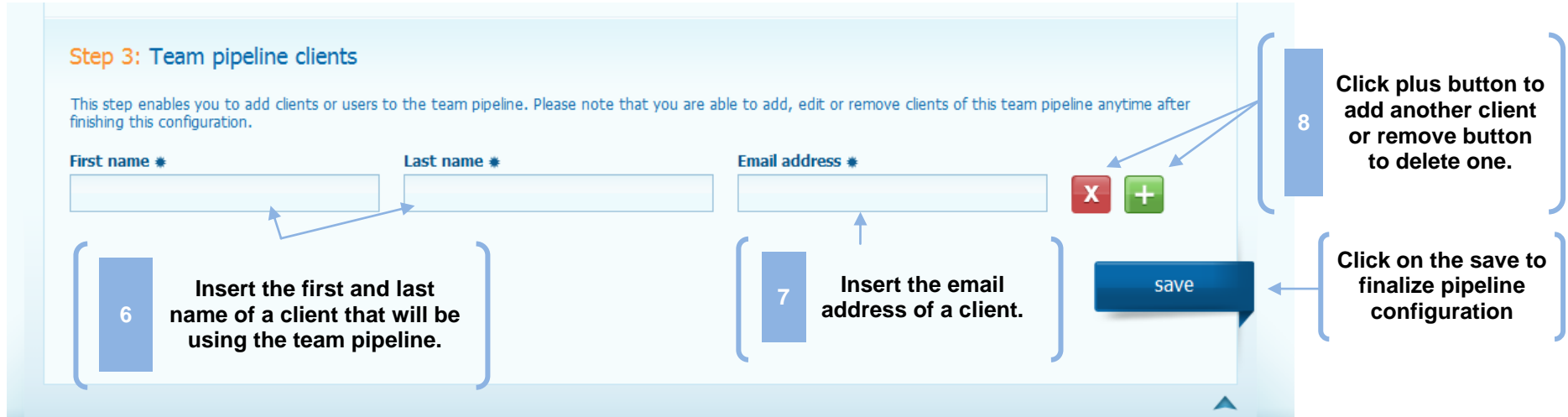
5c Click on the delete button to remove sales step from pipeline.

next

Click next in order to continue

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.



Step 3: Team pipeline clients

This step enables you to add clients or users to the team pipeline. Please note that you are able to add, edit or remove clients of this team pipeline anytime after finishing this configuration.

First name * Last name * Email address *

6 Insert the first and last name of a client that will be using the team pipeline.

7 Insert the email address of a client.

8 Click plus button to add another client or remove button to delete one.

save Click on the save to finalize pipeline configuration

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:

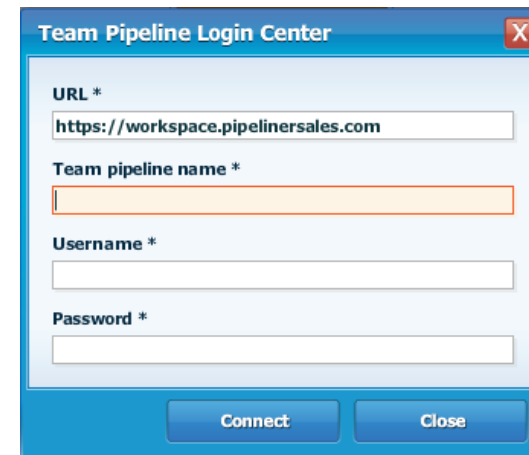
User 1: joe <joe@doe.com>
Username: j.doe
Password: *********

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

Kind regards,
Your pipeliner Team

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...](#)

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



Team Pipeline Login Center

URL *

Team pipeline name *

Username *

Password *

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.

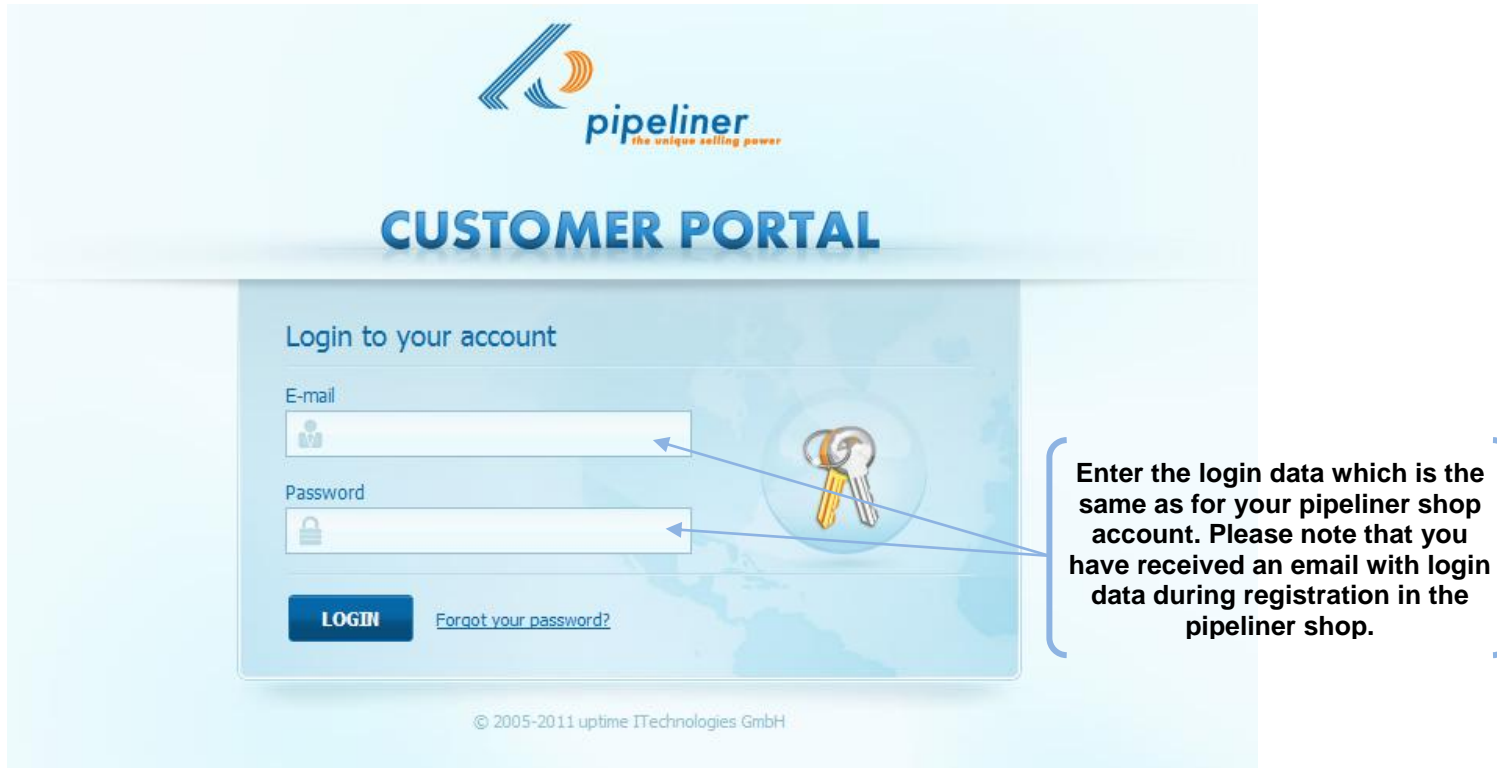
- *STARTS NEW DATA*

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.



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CUSTOMER PORTAL

Login to your account

E-mail

Password

LOGIN [Forgot your password?](#)

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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.



The screenshot shows the Pipeliner customer portal home interface. At the top, there is a navigation bar with the Pipeliner logo, a 'Select team pipeline' dropdown, an 'English' language selector, a user profile section with a '(view details)' link and a 'LOGOUT' button, and a secondary navigation bar with icons for 'Account', 'Contracts', 'Admins', 'Team pipelines', and 'Credit'. The main content area is titled 'Home' and features a 3D-style display with five circular icons on shelves. Each icon is labeled with a category: 'Admins' (person icon), 'Team pipelines' (funnel icon), 'Contracts' (handshake icon), 'Credit' (coins icon), and 'Account' (building icon). Callout boxes with arrows point to these icons, providing instructions on how to use them.

Click here to add users of customer portal. (points to Admins icon)

Here you can configure your team pipelines. (points to Team pipelines icon)

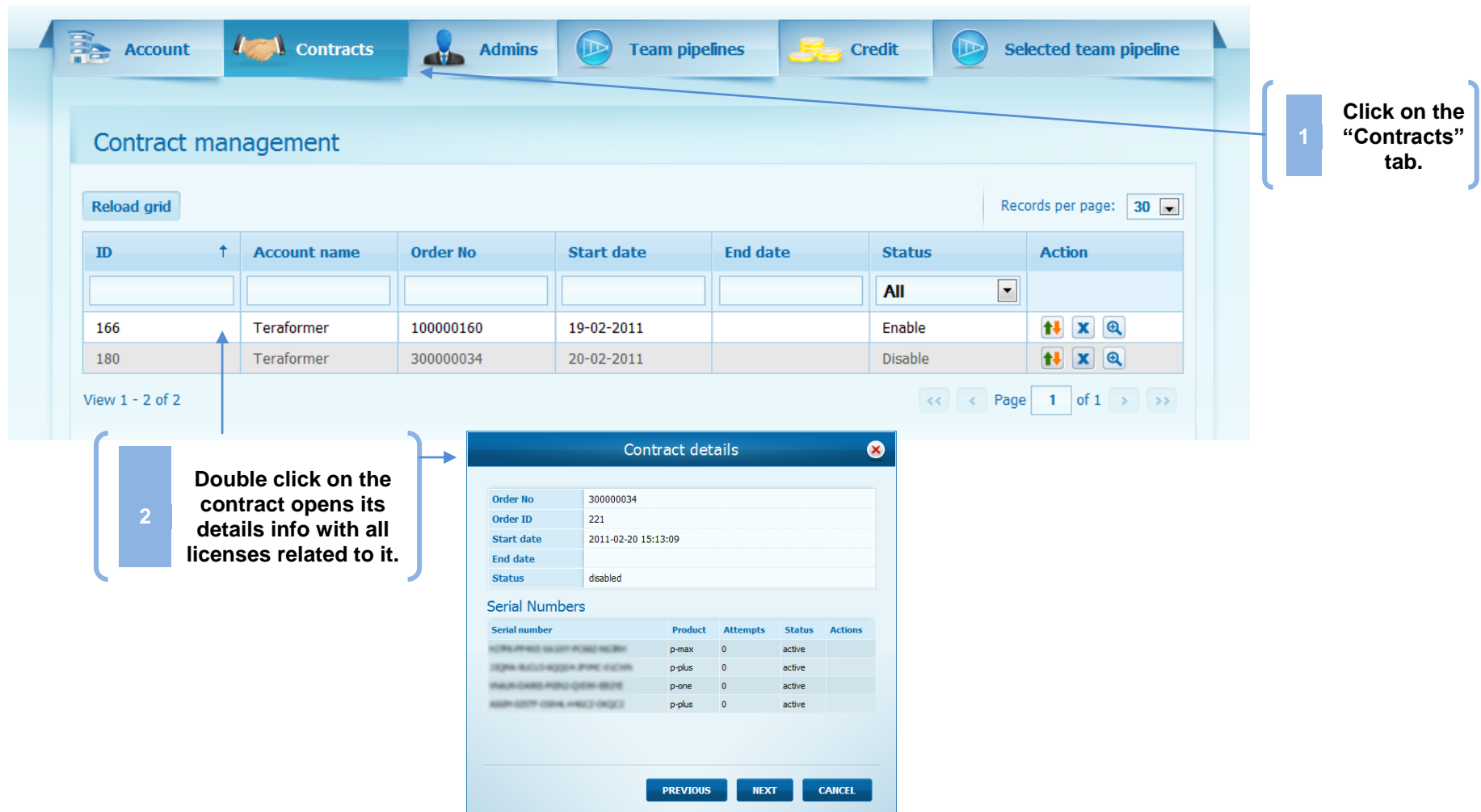
Here you can configure your credit size. (points to Credit icon)

Here you can configure your contract e.g. you would like to upgrade from p-one to p-prime etc. (points to Contracts icon)

Here you have information about your account (points to Account icon)

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.

Contract management

Reload grid Records per page: 30

ID	Account name	Order No	Start date	End date	Status	Action
166	Teraformer	100000160	19-02-2011		Enable	↑ ↓ × 🔍
180	Teraformer	300000034	20-02-2011		Disable	↑ ↓ × 🔍

View 1 - 2 of 2 Page 1 of 1

Contract details

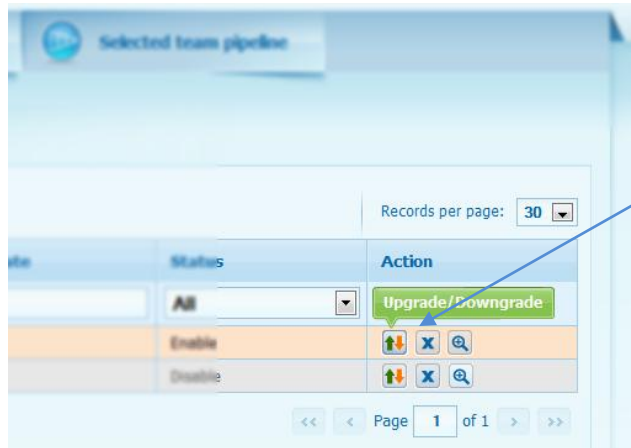
Order No: 300000034
 Order ID: 221
 Start date: 2011-02-20 15:13:09
 End date:
 Status: disabled

Serial Numbers

Serial number	Product	Attempts	Status	Actions
1076-4742-8437-4242-4238	p-max	0	active	
2294-4433-4224-4742-4238	p-plus	0	active	
1944-2442-4242-4242-4238	p-one	0	active	
4237-2277-2244-4422-4232	p-plus	0	active	

PREVIOUS NEXT CANCEL

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.



A screenshot of the 'Contract management' form in a web application. The form includes a navigation bar with 'Account', 'Contracts', 'Admins', 'Team pipelines', 'Credit', and 'Selected team pipeline'. The main content area shows contract details for 'Teraformer' with order number '100000160' and start date '2011-02-19 10:19:24'. Below this is an inquiry form with fields for Salutation (Mr), Title (MBA), First name (John), Last name (Doe), Phone ((36) 1234 9874 / 11), and E-mail (john@doe.com). A 'Notes' section contains the text: 'Hi, I would like to buy two licenses for p-prime version. thank you John Doe'. A 'SEND' button is located at the bottom right.

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

Credit detail - Teraformer (Credit size: 2621.8) [+ Recharge credit](#)

Monthly withdrawals

Contract ID	Order No.	Number of products	Monthly withdrawal
256	100000266	1	37.9 \$
166	100000160	1	17.9 \$
264	100000268	1	17.9 \$
Total:		3	73.7

Credit transactions history

[Reload grid](#) Records per page:

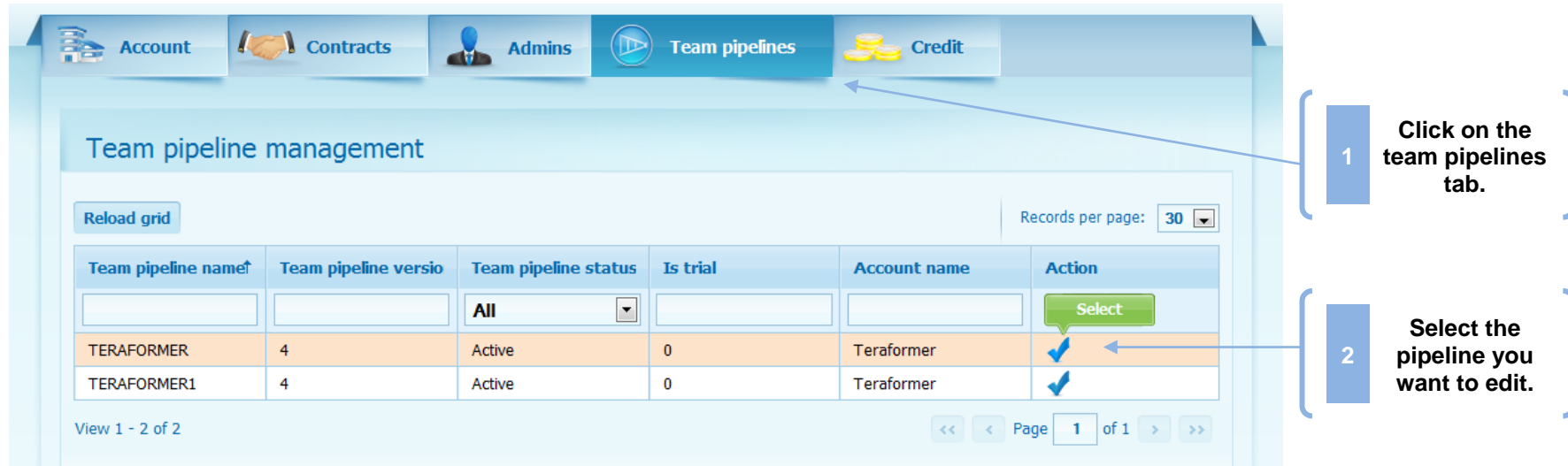
Contract ID	Order No.	Transaction date	Amount	Note
	100000160	19-02-2011	1864.8 \$	credit charge from pipeliner st
	300000034	20-02-2011	932.4 \$	credit charge from pipeliner st
166		23-03-2011	-175.4 \$	credit withdrawal

View 1 - 3 of 3 Page 1 of 1

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.



1 Click on the team pipelines tab.

2 Select the pipeline you want to edit.

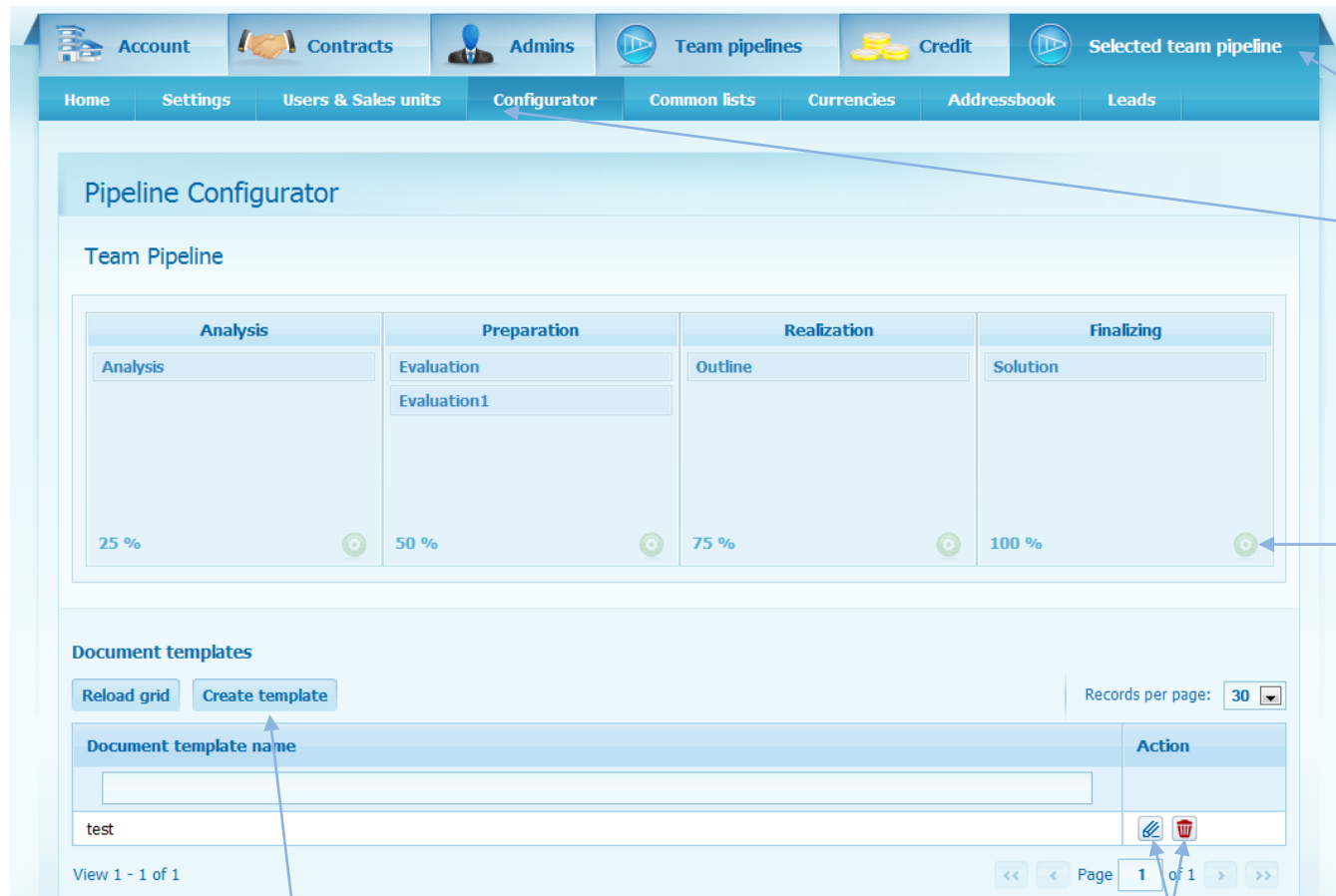
Team pipeline name	Team pipeline versio	Team pipeline status	Is trial	Account name	Action
		All			Select
TERAFORMER	4	Active	0	Teraformer	✓
TERAFORMER1	4	Active	0	Teraformer	✓

View 1 - 2 of 2

Records per page: 30

Page 1 of 1

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



The screenshot shows the Pipeline Configurator interface. At the top, there are navigation tabs: Account, Contracts, Admins, Team pipelines, Credit, and Selected team pipeline. Below these are sub-tabs: Home, Settings, Users & Sales units, Configurator, Common lists, Currencies, Addressbook, and Leads. The main content area is titled 'Pipeline Configurator' and 'Team Pipeline'. It contains a table with four columns: Analysis, Preparation, Realization, and Finalizing. Each column has a list of steps and a progress indicator. Below the table is a 'Document templates' section with a 'Create template' button and a table with columns for 'Document template name' and 'Action'. The table contains one row with the name 'test' and edit/delete icons. At the bottom, there are pagination controls showing 'Page 1 of 1'.

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.

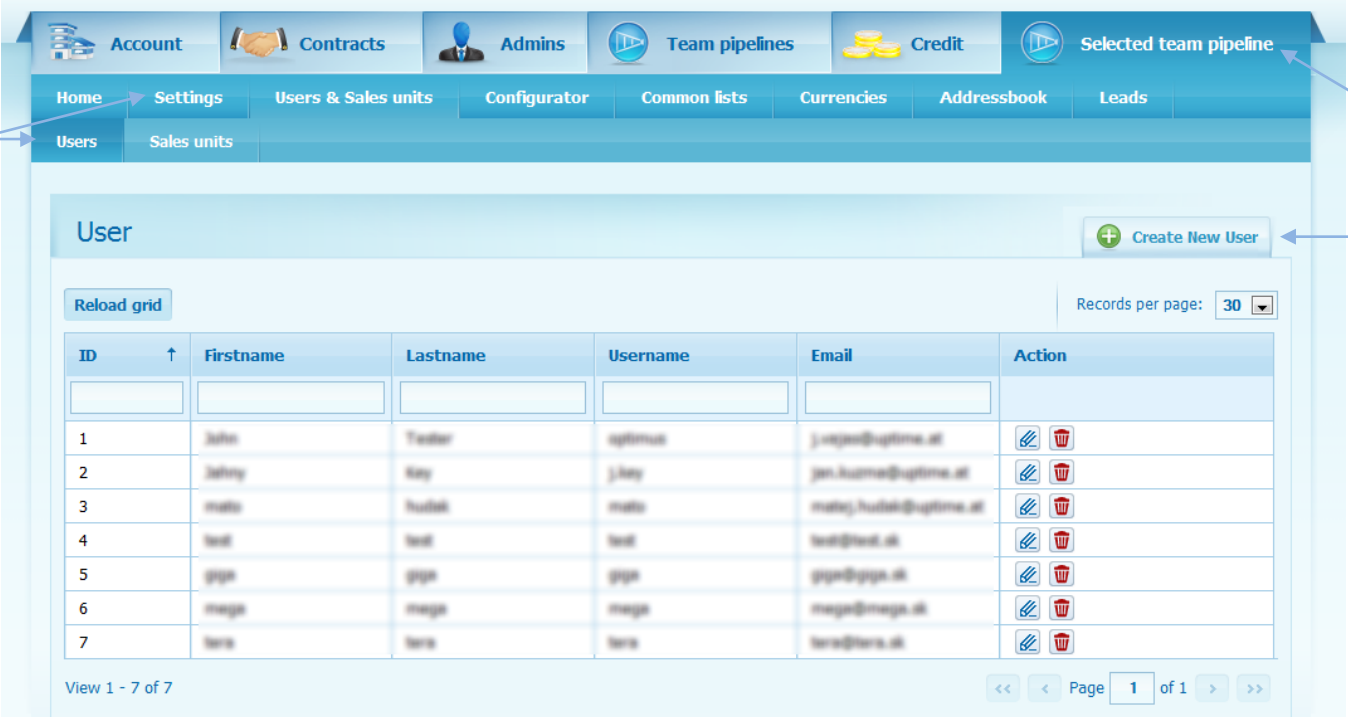
You can add up to 5 fixed documents. Please note that after creating one fixed document it cannot be removed.

4 Click here to create templates

5 Click here to edit or delete document template

Step 4 Setting 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. 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.



1 Click on the tab "Selected team pipeline".


2 Click on the tab "Clients".

3 Click on the "Create new client" button.

ID	Firstname	Lastname	Username	Email	Action
1	John	Tester	optimus	j.test@uptime.at	
2	Johny	Key	j.key	john.kuenn@uptime.at	
3	matej	hudek	matej	matej.hudek@uptime.at	
4	test	test	test	test@test.at	
5	gpgn	gpgn	gpgn	gpgn@gpgn.at	
6	mega	mega	mega	mega@mega.at	
7	tera	tera	tera	tera@tera.at	

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.







1 Click on the tab "Selected team pipeline".

2 Click on the tab "Sales units".

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.

ID	Sales unit name	Action
2143289395	United States	 
2143292341	New Sales Unit	 
2143289396	Europe	