



• **PIPELINER** •

Proactive Support



Introduction

Why Education?

Many people in many industries talk about revolution. We are actually leading a revolution in our industry space, mainly through our [product approach and through clear principles](#).

One such principle is that of educating our users. Here at Pipeliner we're big believers in educating people to help themselves—simply have a look through our sales library or many of our other complimentary ebooks.

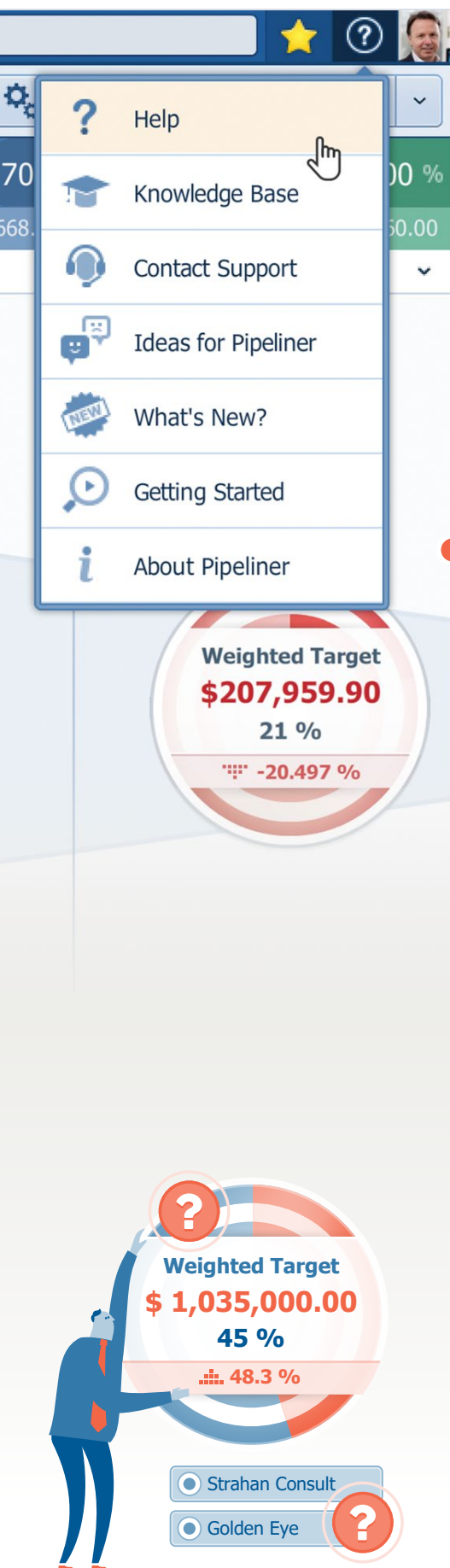
The real importance of education is, in our modern age where global statistics can be easily measured, finally coming to light. 25 years ago, 50% of the world's population was still in extreme poverty. Today, it's only 10%—and much of the reason for this fantastic advance has to do with education. This is very good news and we believe we can drive this even further.

Education in Pipeliner

[Pipeliner CRM](#) is a simple yet powerful product. It can be onboarded in hours instead of days or weeks. It is intuitive, visual and logical. Users actually take to it because they love using it.

It is meant to almost be self-educating—and, in fact, we actually build learning into the program. This is in contrast to conventional CRM solutions which have, through the years, been traditionally complex and have not resulted in user learning and, much of the time, adoption.

So in line with our belief in the power of education, we educate our users, too. While we offer the standard type of tech support—reactive to situations and issues—we also offer proactive support as well.



With this white paper, we'll show you how we have embedded education right into Pipeliner. Our approach means that users can learn the product much faster. They don't have to remember every feature, every time—if they forget, they can simply click on Help from within that screen or functionality. Our method also means that users will be able to get more out of their Pipeliner experience.

Through this approach we have dramatically reduced CRM onboarding and user training, saving companies time, energy and money.

Built in the Product

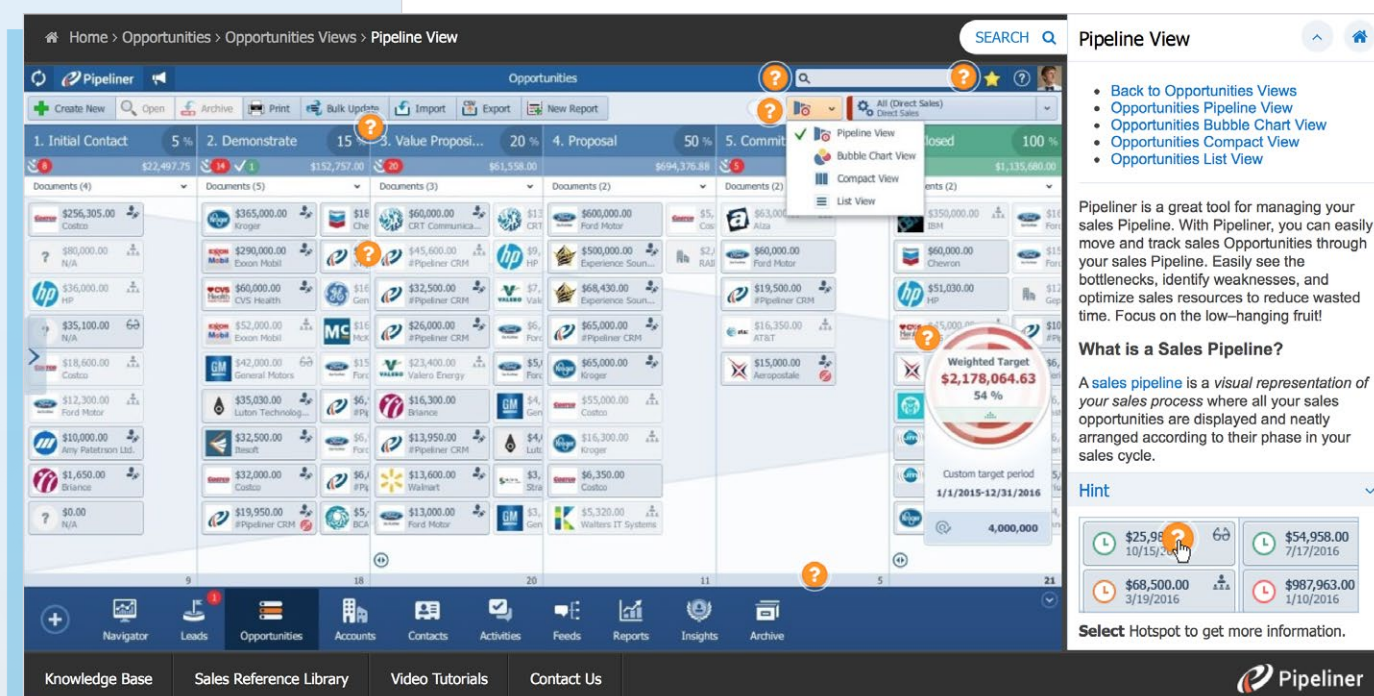
Context-Sensitive Help

The Help functions with a software app can be problematic. In the old days, you had to leaf through a thick, hard-copy manual. Later on it was a little better—help was available electronically. But you still had to scroll through it, find what you were looking for, and then relate it back to the app.

Our own experience with application help prior to Pipeliner is exactly what inspired us to create the totally unique built-in Help functionality we have in the product today.

You can access Help from any feature in the software, and a Help screen about that feature appears. “Hot spots” are embedded throughout – click and an explanation of that particular functionality (where that “hot spot” was located) will then show up on the right-hand side.

Our Built-In Help improves the effectiveness of (and time spent on) user training. For many features, a user can simply go to that feature in Pipeliner, select Help from the Tab Menu and learn all about it themselves. This is also handy if a user forgets some of the training they received. They can just select Help about any feature – and always be able to refresh their knowledge.



Home > Opportunities > Opportunities Views > Pipeline View

SEARCH

Opportunities

1. Initial Contact 5% 2. Demonstrate 15% 3. Value Proposition 20% 4. Proposal 50% 5. Commitment 100%

Documents (4) Documents (5) Documents (3) Documents (2) Documents (2)

Weighted Target: \$2,178,064.63 54%

Custom target period: 1/1/2015-12/31/2016

4,000,000

Hint

Select Hotspot to get more information.

Conversely, from any Help screen in the product, simply click on the Home icon button. This will give you an index of all the Help topics available, and they can be explored this way, too, along with the same graphical assistance. This can be a great way to explore Pipeliner and all of its functionality.

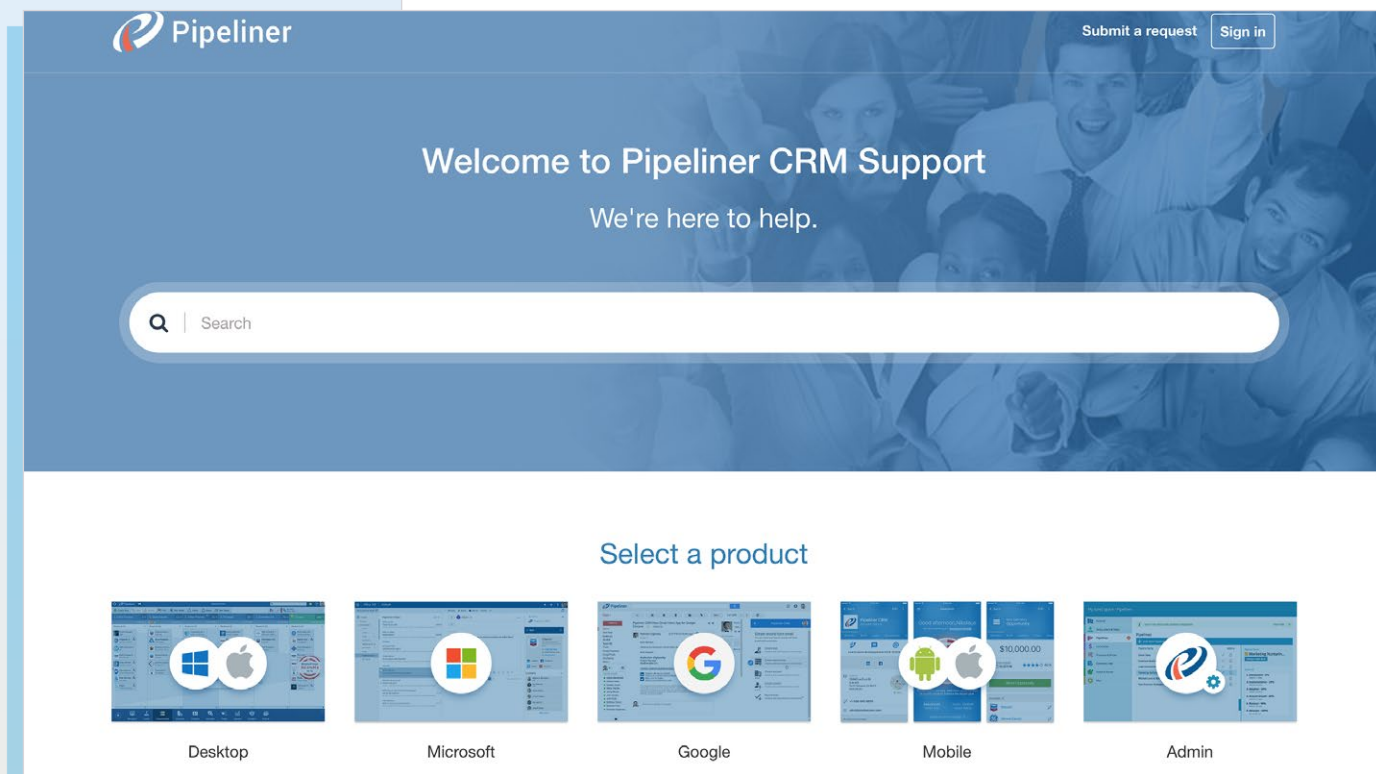
Knowledge Base

From the main Help menu, simply click on Knowledge Base, and you are taken directly to [Customer Knowledge and Ideas](#). Scroll down the page and you will see “Knowledge Base” and a comprehensive list of topics for Pipeliner. Click on a topic, and you will see a list of frequently-asked questions about that topic. Click on any question for a detailed, illustrated answer to that question.

A vast array of information is available in the Knowledge Base, useful for salespeople, sales leaders, or any Pipeliner user.



At the top of this same page you will see comments users have left about various features, and it is here that any Pipeliner user can leave a comment or suggestion about the product. We are always reviewing user comments and often incorporate user feature requests into Pipeliner.



CONTACT SUPPORT

Subject *

Bug

Issue Description *

Archive is not working

Priority

Normal

Low

Normal

High

Urgent

Submit

Close

Contact Support

Also available from the main Help menu right in Pipeliner, you can directly contact Support by email with any question or issue you may have. This feature is available at no extra charge.



What's New

From the Pipeliner Help menu, click on What's New to see brief descriptions and videos of each of the latest Pipeliner features. What's New is available right from the main screen following the upgrade to the latest version, and is available at any time from the Help menu.


WHAT'S NEW

Step 1/4

Web Reports

Introducing a brand-new way for you to work with reports in Pipeliner CRM.

Create and manage standard, pivot and now advanced reports inside Pipeliner CRM!



Build powerful reports now!

Owner	Value
Golden, John	\$25
Golden, John	\$15
Kattnigg, Thomas	\$2
Kimia, Nikolaus	\$3
Oglansky, Radoslav	\$7
Golden, John	\$17
Kimia, Nikolaus	\$120
Golden, John	\$24
Oglansky, Radoslav	\$15
Oglansky, Radoslav	\$1
Golden, John	\$24
Golden, John	\$32
Oglansky, Radoslav	\$3
Golden, John	\$3

Current Pipeline: All Pipelines

View Role Filter Target

Advanced Report Open Report Builder

Display columns Choose

Opportunity

Name

Closing Date

Pipelines & Steps

Owner


Opportunity Value

GETTING STARTED WITH PIPELINER

Step 2/6

Accounts

Now create or import one of your Accounts (the companies your are selling to).



This step is already done!

Create Account or Import Accounts

Detail

Leads

Opportunities

Accounts

Contacts

Org Chart

Activities

Feeds

Documents

Creating new...

ACCOUNT: Detail

VCF Copy Delete

Account *

Sales unit * Australia

Home page

INDUSTRIES_ID

Google Maps

☒ Do not show on next start

Next

Getting Started

Also available from the main Help menu is Getting Started, a quick-start guide that will rapidly get any user up and running with Pipeliner. Includes immediate steps to import data, set up accounts, create or import contacts, enter leads, qualify a lead to an opportunity, and create tasks and activities.





About Pipeliner

For anyone new to CRM or to Pipeliner, the About Pipeliner help feature offers an introductory video, a screen to sign up for an free demo webinar, Pipeliner Release Notes detailing all of Pipeliner's features and functionality version by version, and the Pipeliner CRM Terms and Conditions.

Off and Running

As you can see, between Pipeliner's visual, intuitive design and its built-in help, Pipeliner is designed to be user-enabling and, with as little outside help as possible, enables the user to be off and running—and winning—with Pipeliner.

If you need our help, by all means call, text or email us! But you may find that all the help you need is right within the product itself.

Discover Pipeliner Proactive Support

LEARN MORE



Pipeliner CRM – Your Sales Management Worktool, Visualized

Twitter
@PipelinerCRM

Website
pipelincrm.com

Sales POP!
salespop.pipelinersales.com