

# Pipeline Signals App

## User Guide



# Table of Contents



01

**The Pipeline Signals  
App Overview**



02

**First Time Login**



03

**Navigating the App**



04

**Basic Troubleshooting  
Guidelines**

A photograph of a woman with dark hair and glasses, wearing a light blue and white striped button-down shirt. She is smiling and looking towards the camera while sitting at a desk and working on a silver laptop. The background is slightly blurred, showing an office environment.

# 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

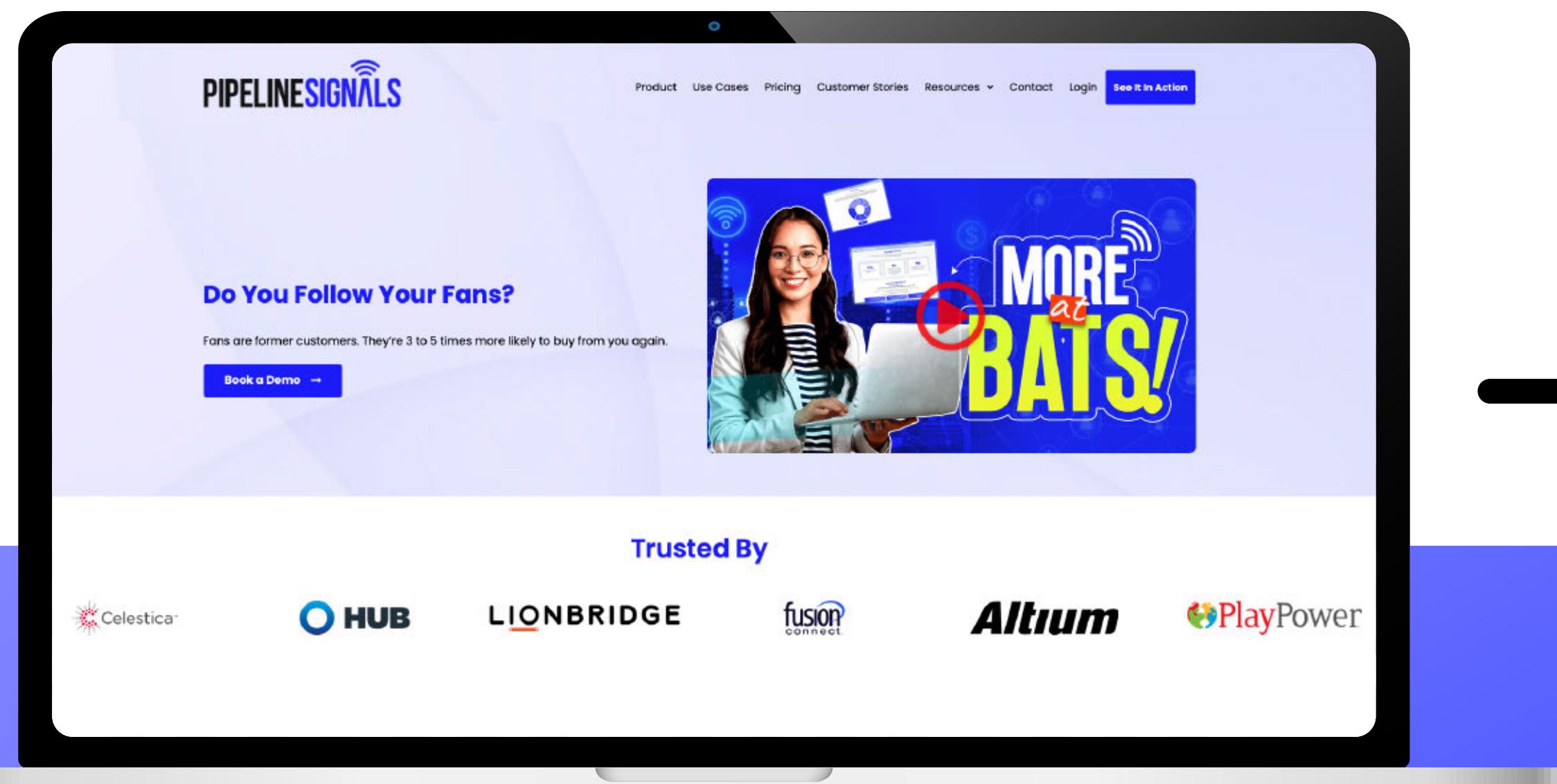
Thanks,

The Pipeline Signals Team

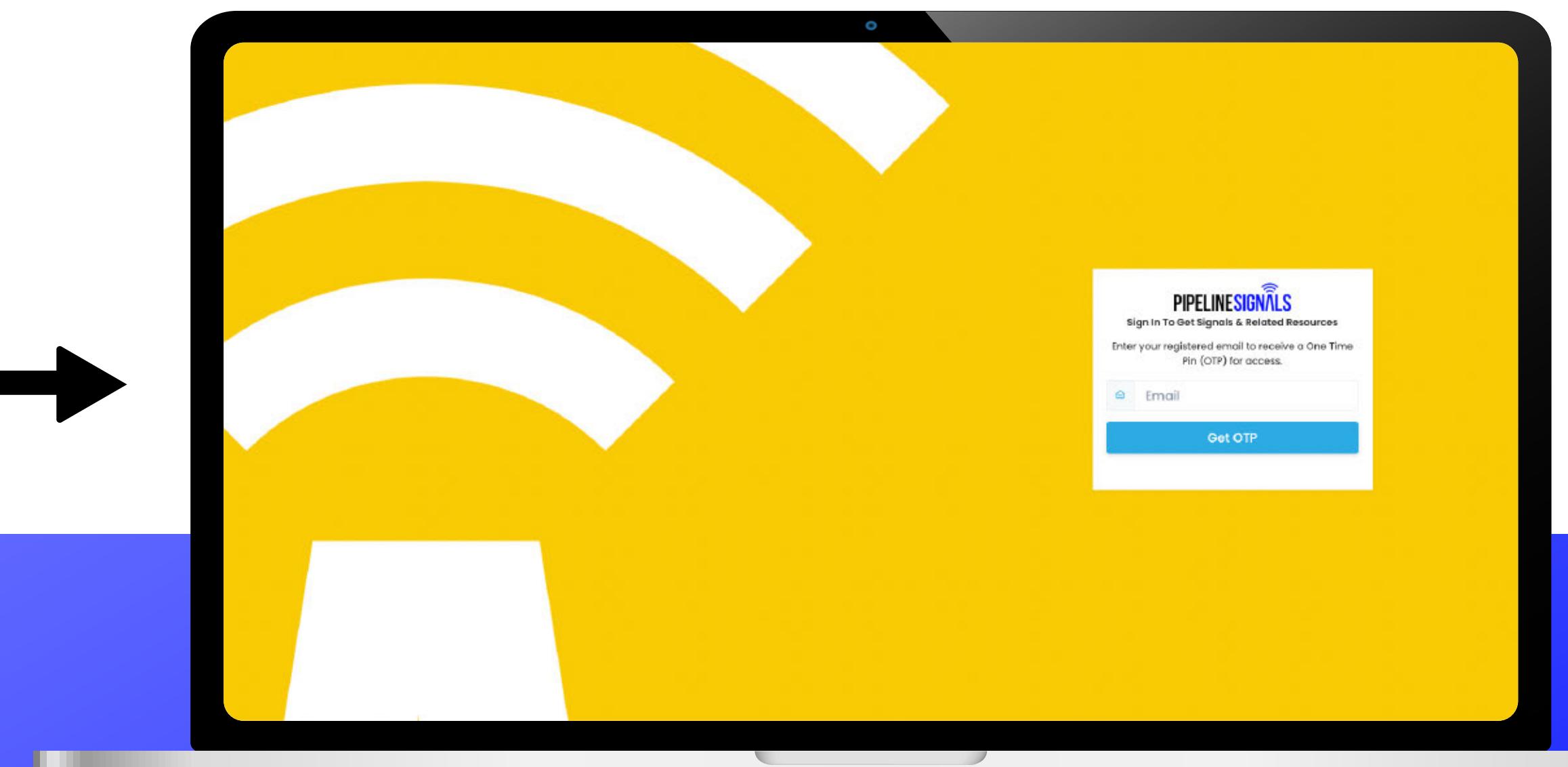
If this was not you, please contact us on [support@pipelinesignals.com](mailto:support@pipelinesignals.com)

# First Time Login

1



2

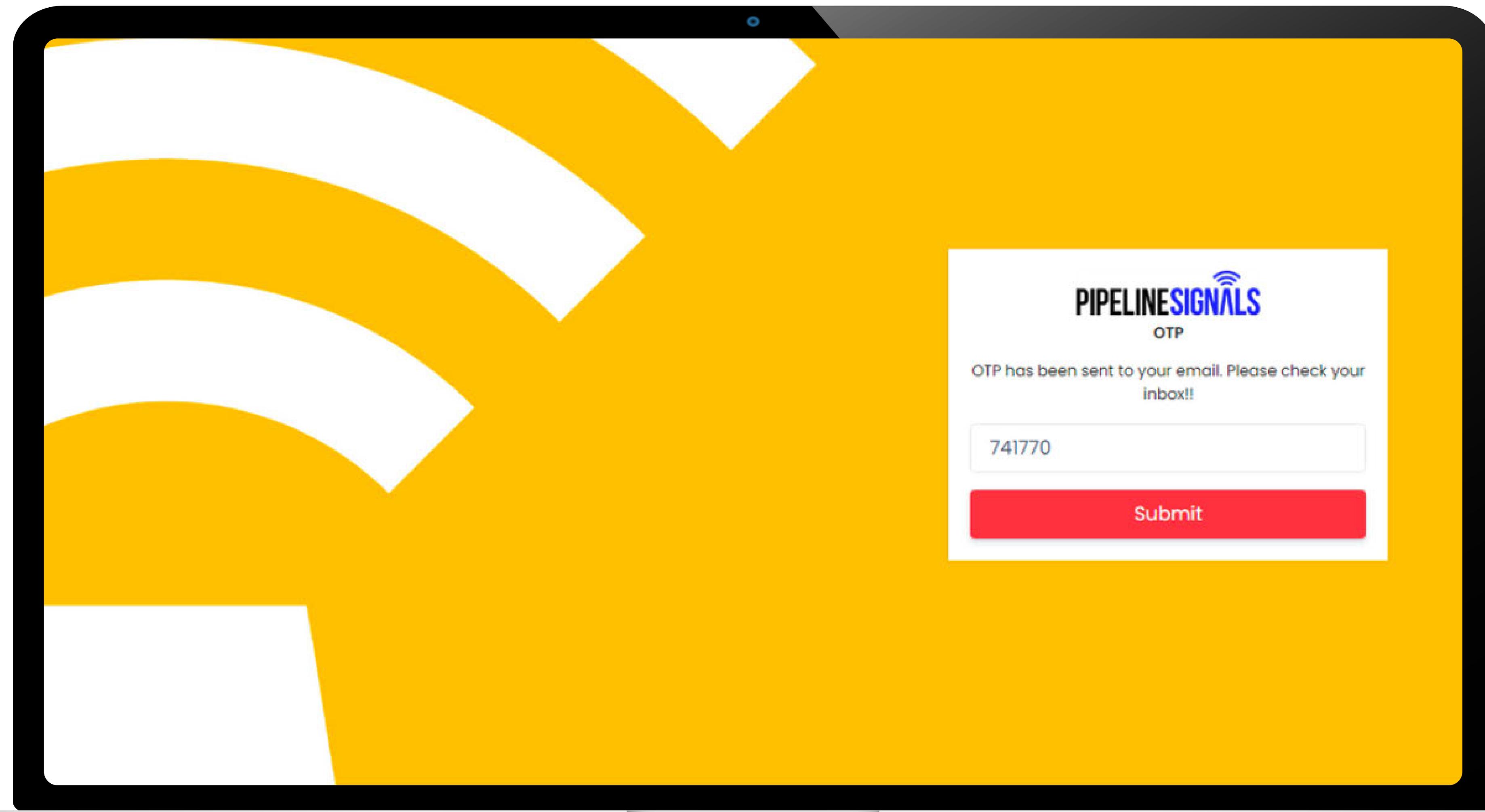


To access the app go to <https://www.pipelinesignals.com> and click on log in at the top right.

Enter your registered email and get an OTP.

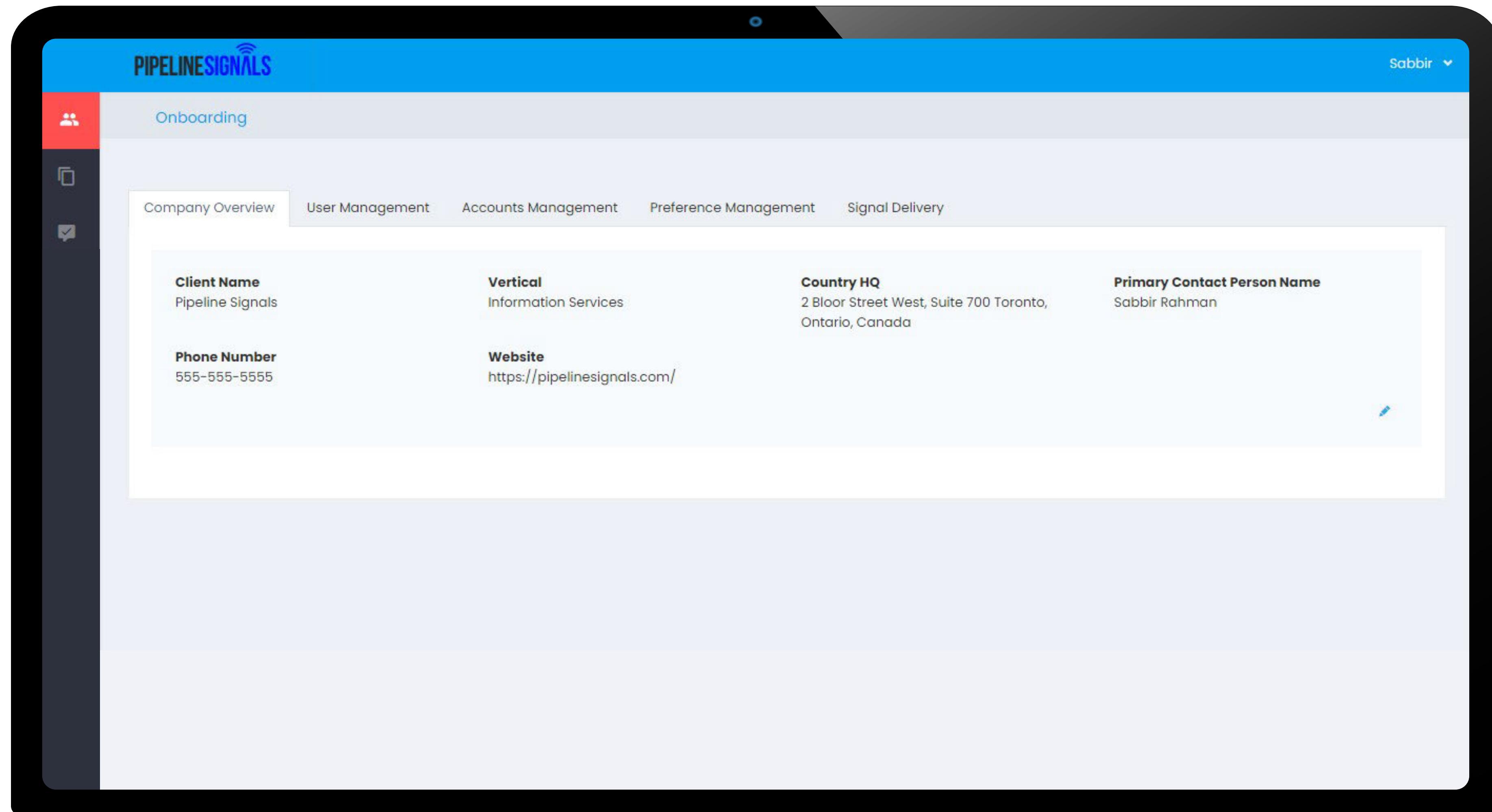
# First Time Login

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



# First Time Login

You will be directed to the Onboarding Dashboard.



# 03

# Navigating the App

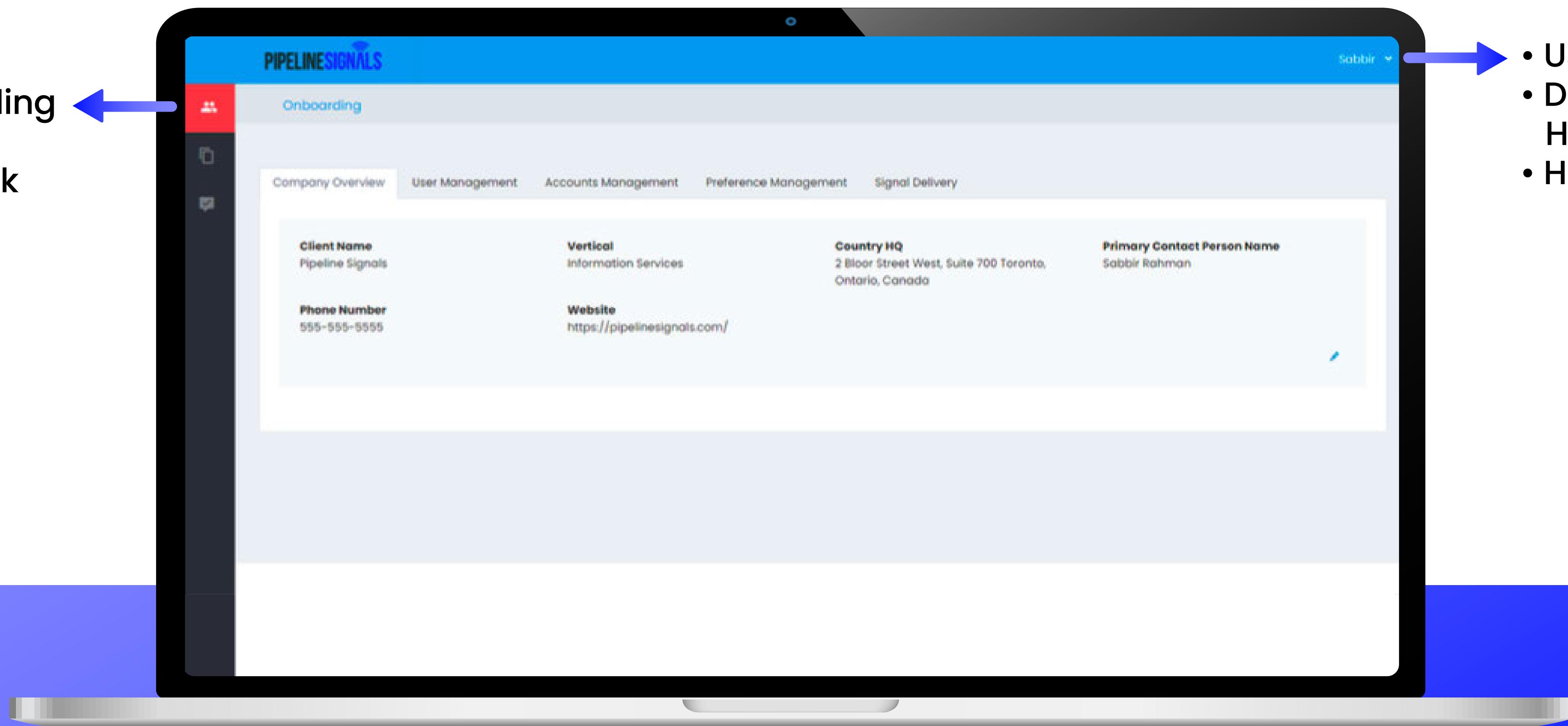


# Navigating the App

Here are the features of the App:

## Dashboard

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



# Navigating the App: Onboarding - Company Overview

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

The screenshot shows a tablet displaying the Pipeline Signals Onboarding interface. The top navigation bar is blue with the Pipeline Signals logo on the left and a user dropdown on the right. Below the navigation is a secondary header with a red 'Onboarding' tab and a grey 'Company Overview' tab, which is highlighted with a red border. The main content area contains several data fields:

<b>Client Name</b> Pipeline Signals	<b>Vertical</b> Information Services	<b>Country HQ</b> 2 Bloor Street West, Suite 700 Toronto, Ontario, Canada	<b>Primary Contact Person Name</b> Sabbir Rahman
<b>Phone Number</b> 555-555-5555	<b>Website</b> <a href="https://pipelinesignals.com/">https://pipelinesignals.com/</a>		

# Navigating the App: Onboarding – User Management

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

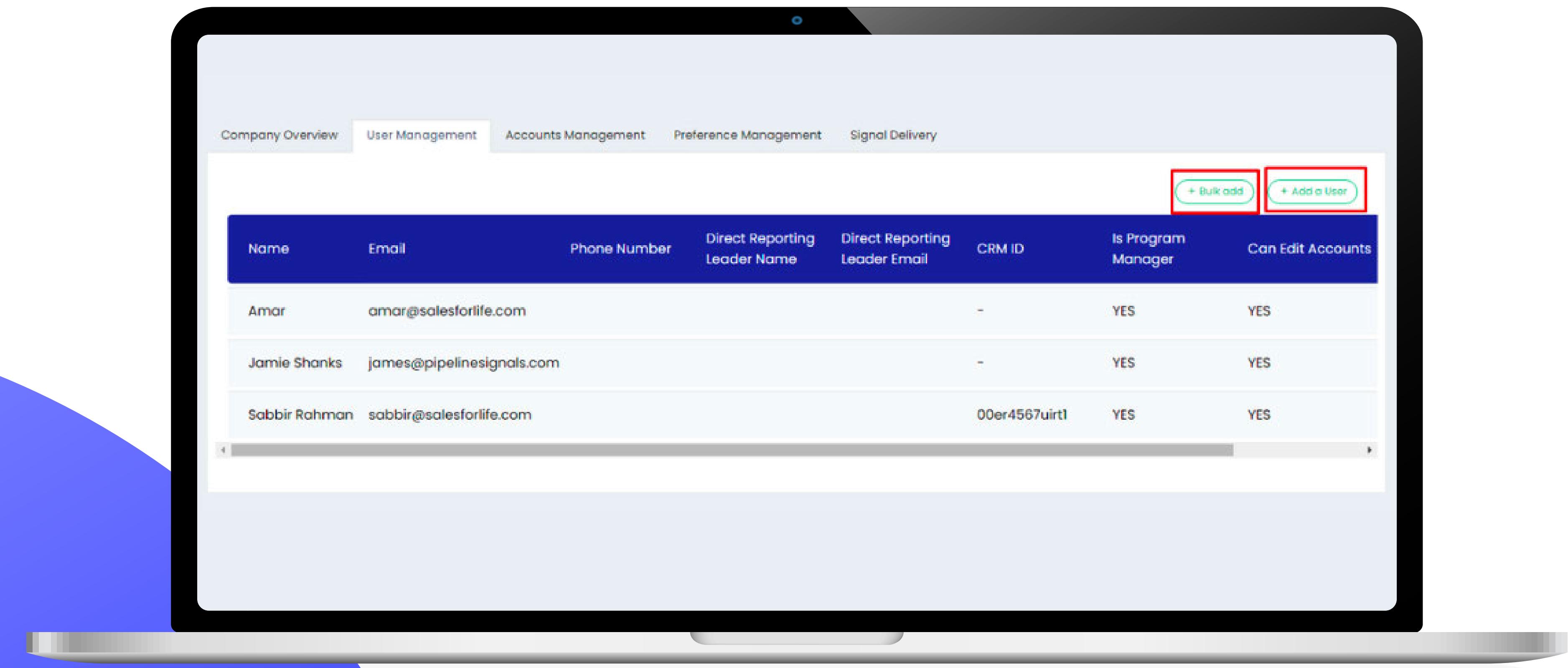
The screenshot shows the Pipeline Signals Onboarding interface. The top navigation bar is blue with the Pipeline Signals logo on the left and a user dropdown on the right. Below the header, there's a secondary navigation bar with icons for users (highlighted in red), company overview, accounts management, preference management, and signal delivery. The main content area is titled "Onboarding" and contains a table of users. The table has columns for Name, Email, Phone Number, Direct Reporting Leader Name, Direct Reporting Leader Email, CRM ID, Is Program Manager, and Can Edit Accounts. Three users are listed: Amar (amar@salesforlife.com), Jamie Shanks (james@pipelinesignals.com), and Sabbir Rahman (sabbir@salesforlife.com). The "User Management" tab is currently selected. At the bottom of the table, there are buttons for "+ Bulk add" and "+ Add a User".

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				00er4567uir1	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



# Navigating the App: Onboarding – User Management

Add User

First Name

Last Name

Email

Phone Number

Direct Reporting Leader Name

Direct Reporting Leader Email

CRM ID

Can Edit Accounts

**Cancel** **ADD**

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.

The screenshot shows a mobile application interface for 'Onboarding > User Bulk Upload'. At the top, there's a blue header bar with the 'PIPELINE SIGNALS' logo. Below it, the main title is 'Onboarding > User Bulk Upload'. A large green 'Upload' button is positioned on the right side of the screen. The central part of the screen is a table with 15 rows, each containing fields for 'Email', 'First Name', 'Last Name', 'User CRM ID', 'Phone', 'Direct Reporting Leader Name', 'Direct Reporting Leader Email', and 'Can Edit Accounts (Yes/No)'. The first two columns ('Email' and 'First Name') have red backgrounds, while the others have white backgrounds. The 'User CRM ID' column has a red background for all rows. The bottom right corner of the screen features the 'PIPELINE SIGNALS' logo again.

	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.

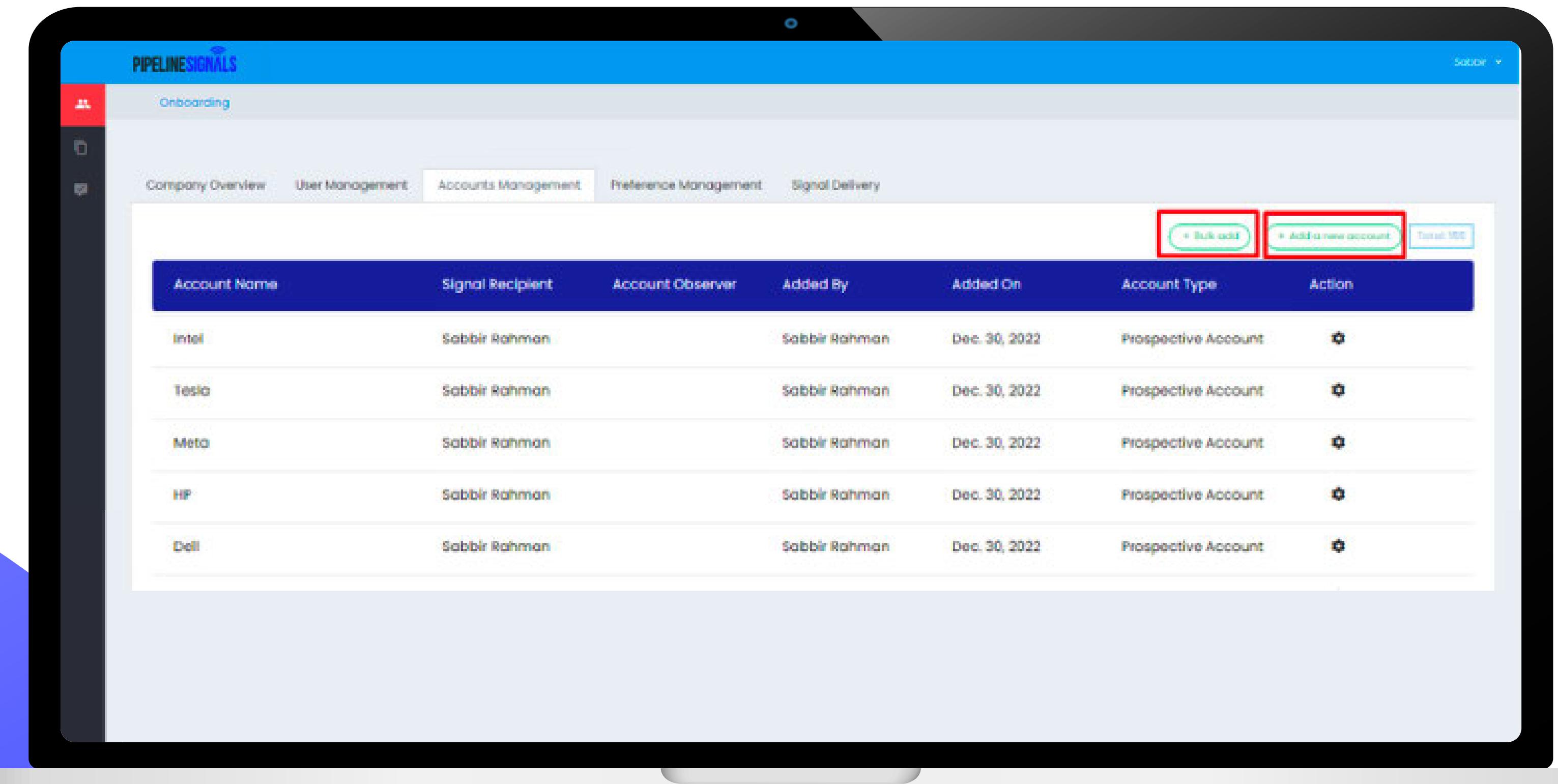
The screenshot shows a mobile application interface for 'PIPELINE SIGNALS'. At the top, there's a blue header bar with the app's logo on the left and a user profile icon on the right. Below the header is a navigation bar with several icons: a person (highlighted in red), a document, a gear, and a magnifying glass. The main content area has a title 'Onboarding' followed by a sub-navigation bar with five items: 'Company Overview', 'User Management', 'Accounts Management' (which is highlighted with a red box), 'Preference Management', and 'Signal Delivery'. To the right of these items are three buttons: '+ Bulk add', '+ Add a new account', and a blue button labeled 'Total: 155'. The main table area has a dark blue header row with columns: 'Account Name', 'Signal Recipient', 'Account Observer', 'Added By', 'Added On', 'Account Type', and 'Action'. Below the header are five rows of data, each representing a company: Intel, Tesla, Meta, HP, and Dell. Each row includes the signal recipient (Sabbir Rahman), account observer (Sabbir Rahman), added by (Sabbir Rahman), added on (Dec. 30, 2022), account type (Prospective Account), and an 'Action' column with a gear icon.

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	⚙️

# 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



# 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

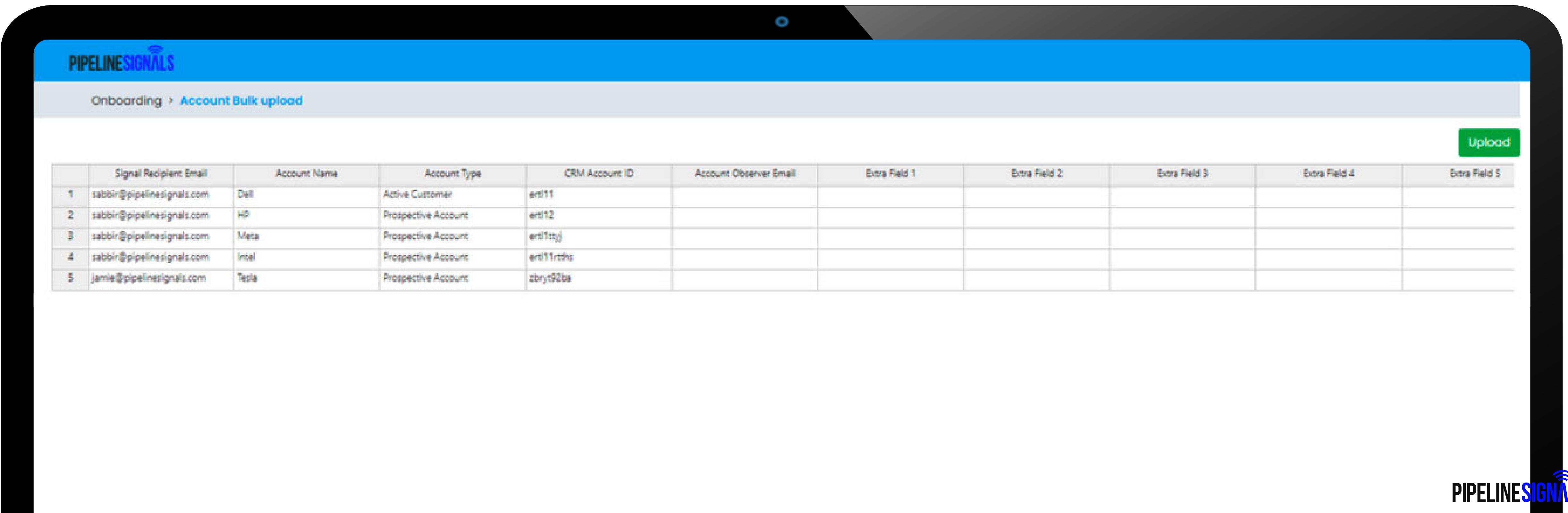
**Add Account**

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

**Cancel** **Add Account**

# 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)



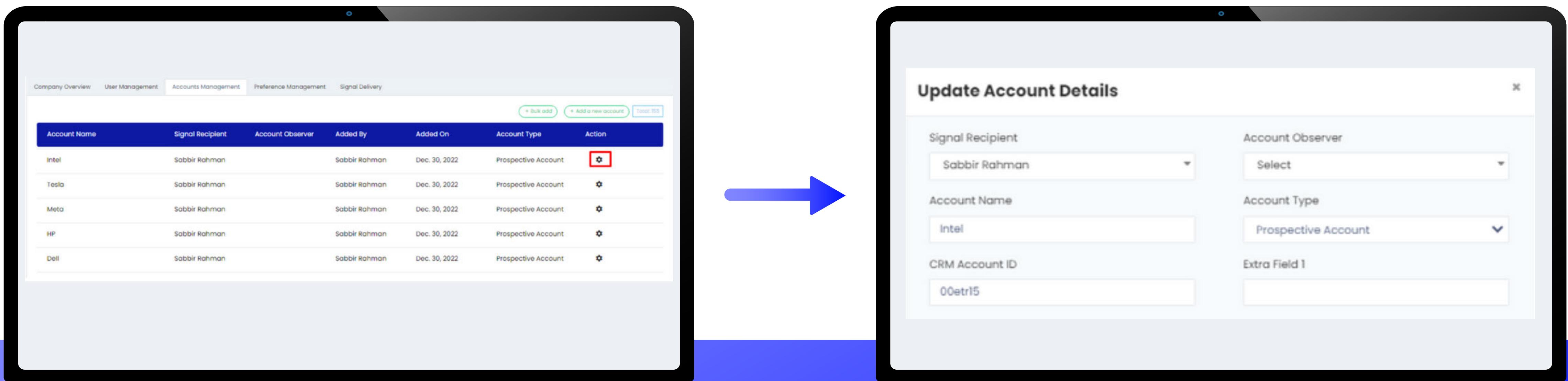
The screenshot shows a mobile application interface for account management. At the top, there's a navigation bar with the Pipeline Signals logo and a back arrow. Below it, the title 'Onboarding > Account Bulk upload' is displayed. On the right side of the screen is a large green 'Upload' button. The main area contains a table with 5 rows and 11 columns. The columns are labeled: Signal Recipient Email, Account Name, Account Type, CRM Account ID, Account Observer Email, Extra Field 1, Extra Field 2, Extra Field 3, Extra Field 4, and Extra Field 5. The data in the table is as follows:

	Signal Recipient Email	Account Name	Account Type	CRM Account ID	Account Observer Email	Extra Field 1	Extra Field 2	Extra Field 3	Extra Field 4	Extra Field 5
1	sabbir@pipelinesignals.com	Dell	Active Customer	ent11						
2	sabbir@pipelinesignals.com	HP	Prospective Account	ent12						
3	sabbir@pipelinesignals.com	Meca	Prospective Account	ent1tbgj						
4	sabbir@pipelinesignals.com	Intel	Prospective Account	ent11rtdhp						
5	jamie@pipelinesignals.com	Tesla	Prospective Account	zbry92ba						

At the bottom right corner of the app interface is a small Pipeline Signals logo.

# 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.



# Navigating the App: Onboarding - Preference Management

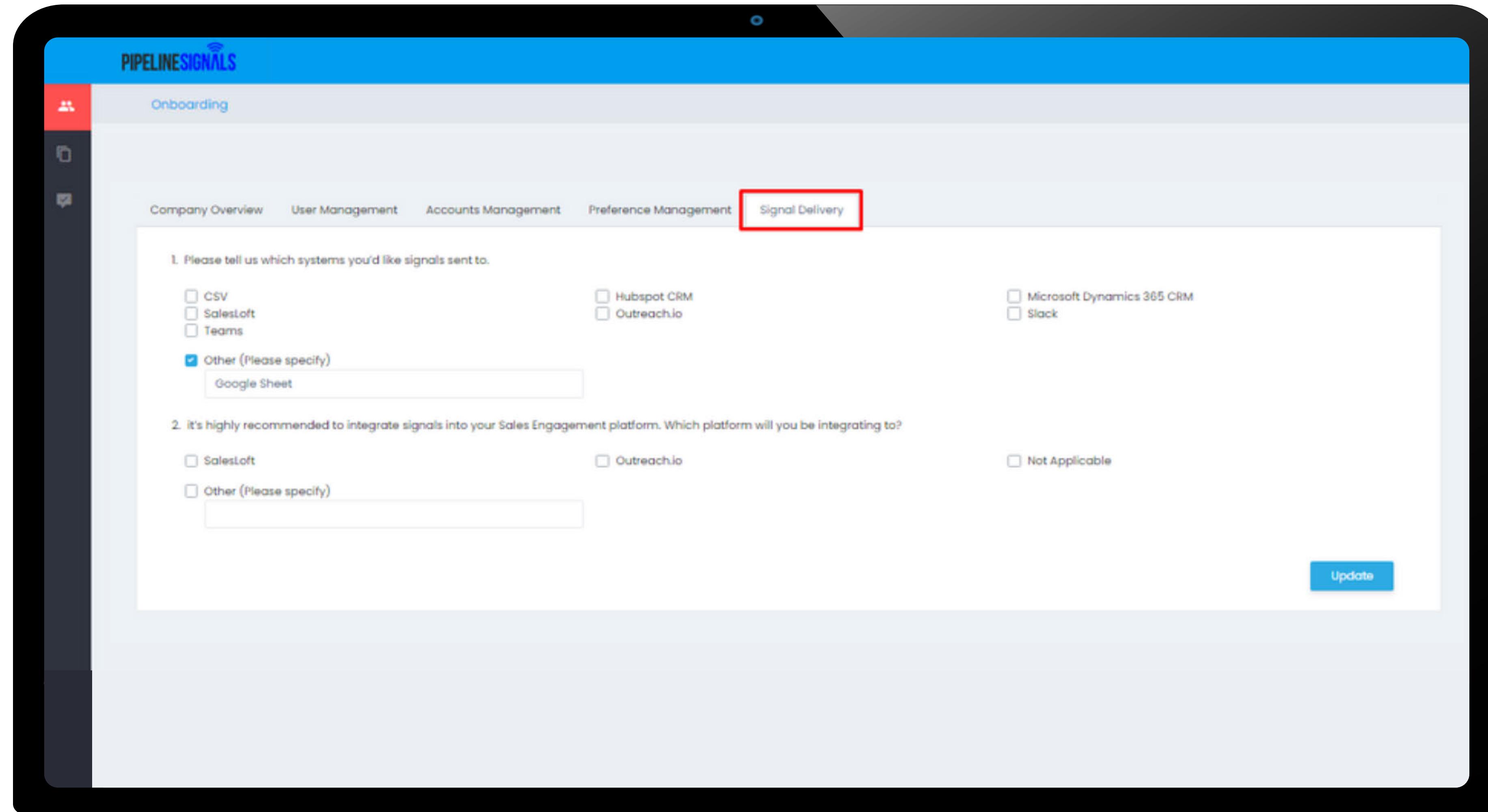
On this module, please input all of your signal monitoring preferences, such as target geography and target titles. When finished, click the "Update" button to save your preferences.

The screenshot shows a mobile application interface for 'PIPELINE SIGNALS' titled 'Onboarding'. The top navigation bar includes icons for user management, accounts management, preference management (which is highlighted with a red border), and signal delivery. The main content area contains the following steps:

1. You will be receiving greenfield signals from us if they are available. These are former customers who are now in accounts which don't exist in your CRM. In this case, we won't be able to include any CRM IDs. Who should we send these greenfield signals to? Once you receive these signals, you can route them internally.  
Input field: Jamie Shanks
2. Which geographies should be monitored for signals?  
Input field: America
3. Do you target accounts by vertical? If you select yes, this means that all greenfield signals we find will have to meet these vertical preferences.  
Radio buttons: Yes (selected) and No
4. Select all verticals that you want to target.  
List of verticals (checkboxes):
  - Abrasives and Nonmetallic Minerals Manufacturing
  - Administration of Justice
  - Agricultural Chemical Manufacturing
  - Airlines and Aviation
  - Ambulance Services
  - Animation and Post-production
  - Architectural and Structural Metal Manufacturing
  - Artificial Rubber and Synthetic Fiber Manufacturing
  - Automation Machinery Manufacturing
  - Banking
  - Beverage Manufacturing
  - Accommodation
  - Administrative and Support Services
  - Agriculture, Construction, Mining Machinery Manufacturing
  - Alternative Dispute Resolution
  - Amusement Parks and Arcades
  - Apparel Manufacturing
  - Architecture and Planning
  - Artists and Writers
  - Aviation and Aerospace Component Manufacturing
  - Bars, Taverns, and Nightclubs
  - Biomass Electric Power Generation
  - Accounting
  - Advertising Services
  - Air, Water, and Waste Program Management
  - Alternative Medicine
  - Animal Feed Manufacturing
  - Appliances, Electrical, and Electronics Manufacturing
  - Armed Forces
  - Audio and Video Equipment Manufacturing
  - Baked Goods Manufacturing
  - Bed-and-Breakfasts, Hostels, Homestays
  - Biotechnology Research

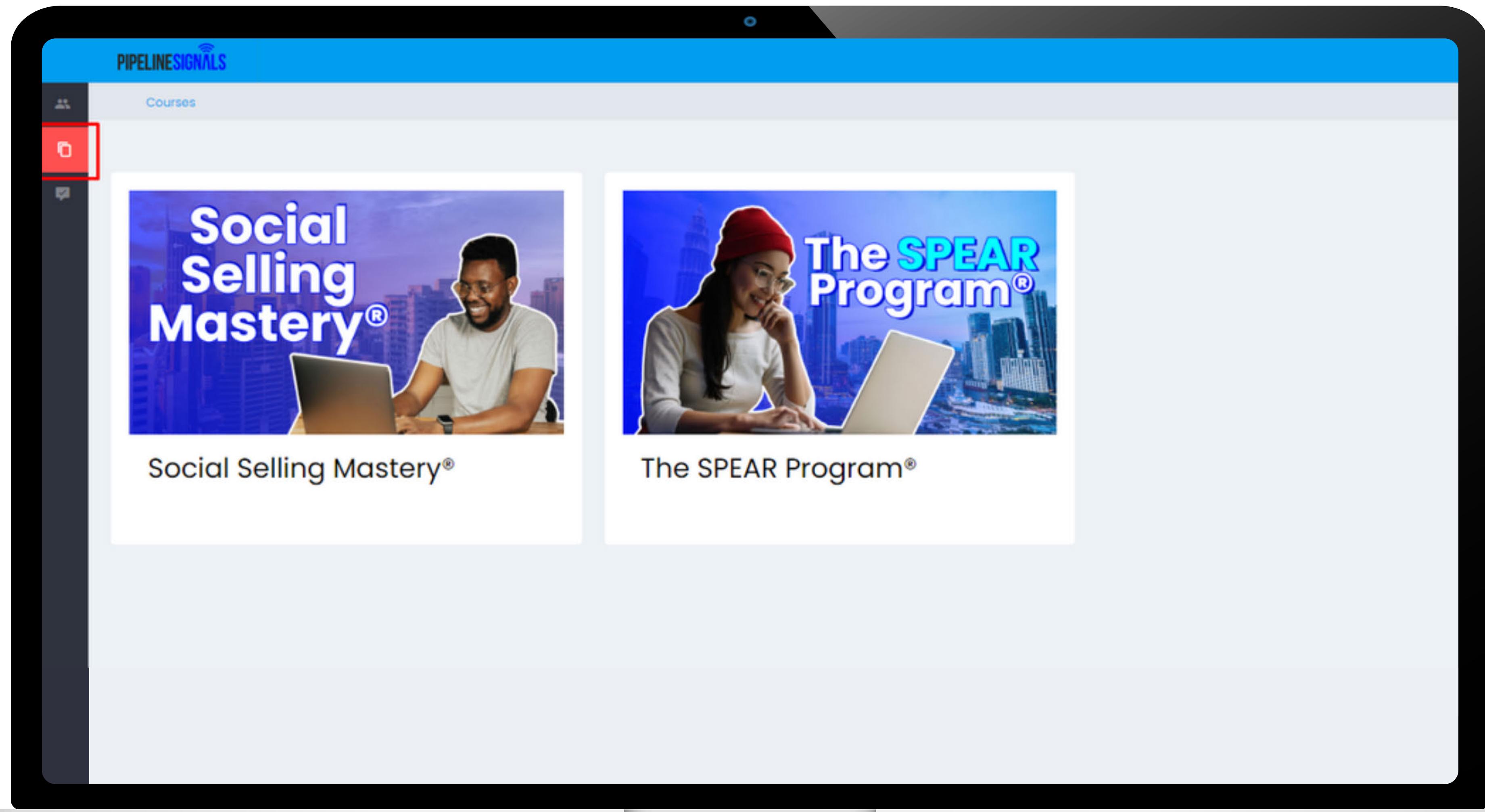
# Navigating the App: Onboarding – Signal Delivery

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



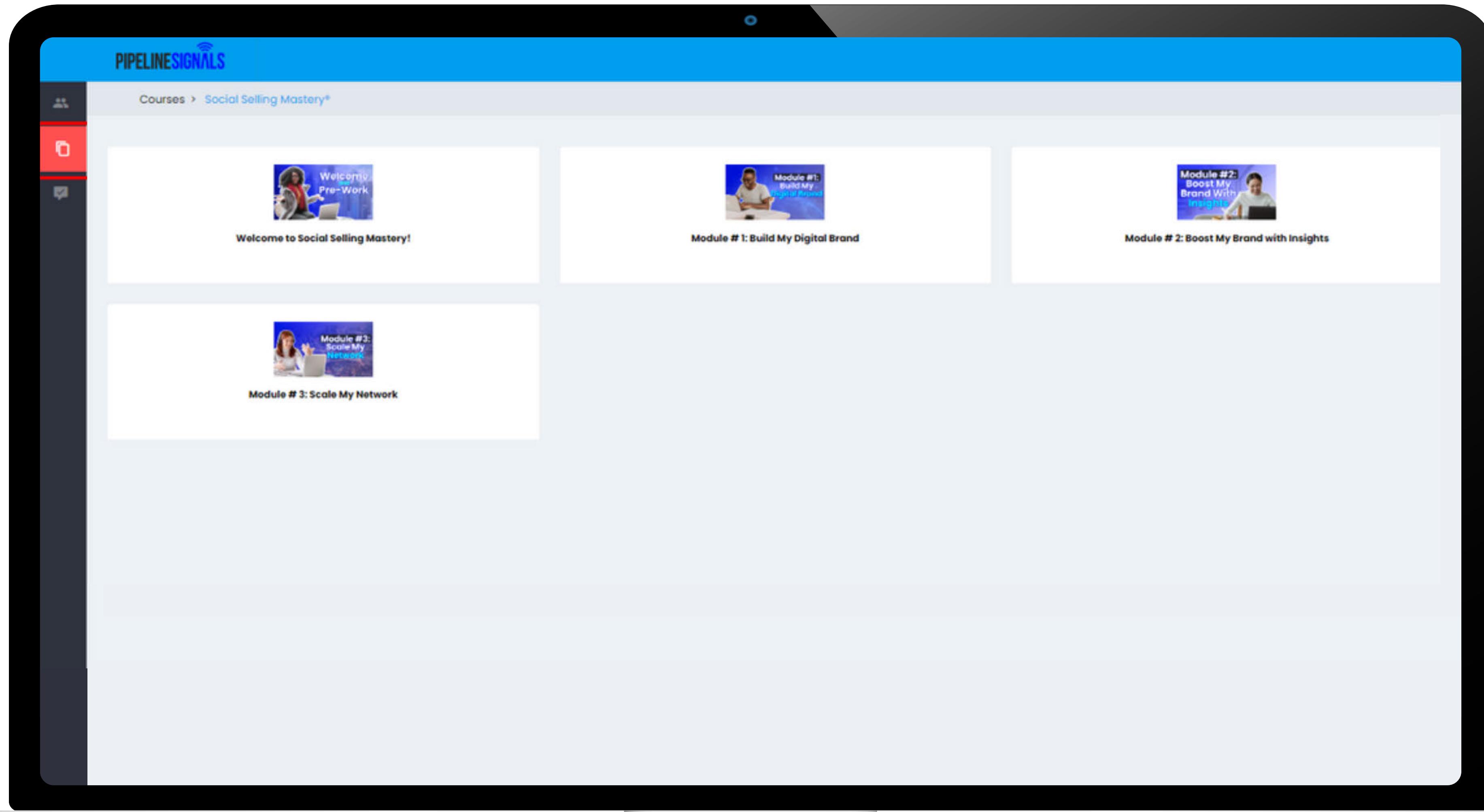
# Navigating the App: Courses

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.

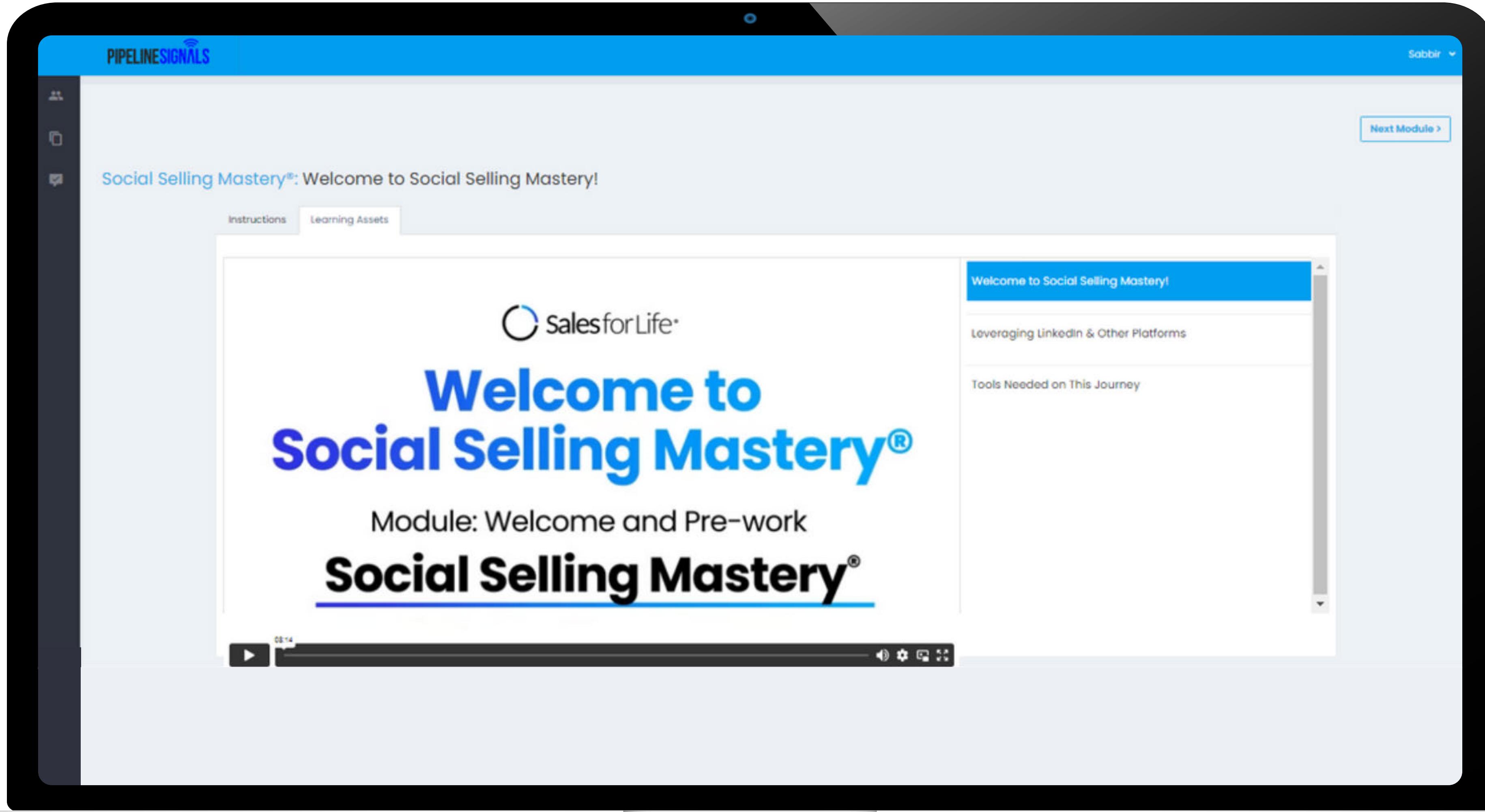


# Navigating the App: Courses

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.

Pipeline Signals

Feedback Loop

Pipeline Signals Feedback Survey

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?

SAVE



# **04**

# **Basic**

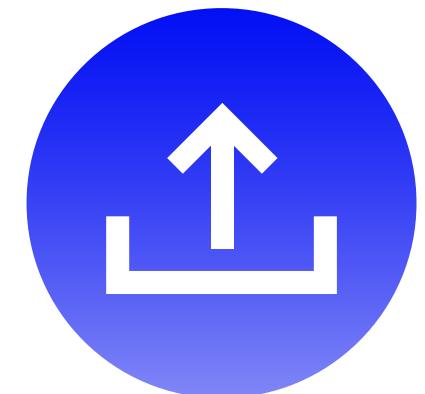
# **Troubleshooting**

# **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



# Need Help or Guidance?

**Please contact your CSM for help.**

PIPELINESIGNALS