

The ScalePipeline App

User Guide



Table of **Contents**

1. The ScalePipeline App Overview
2. First Time Login
3. Navigating the App
4. Basic Troubleshooting Guidelines



The ScalePipeline App Overview



The ScalePipeline App **Overview**

Congratulations!

You are now enrolled in The ScalePipeline System by Sales for Life.

The ScalePipeline App is designed as a companion tool to improve your learning experience.

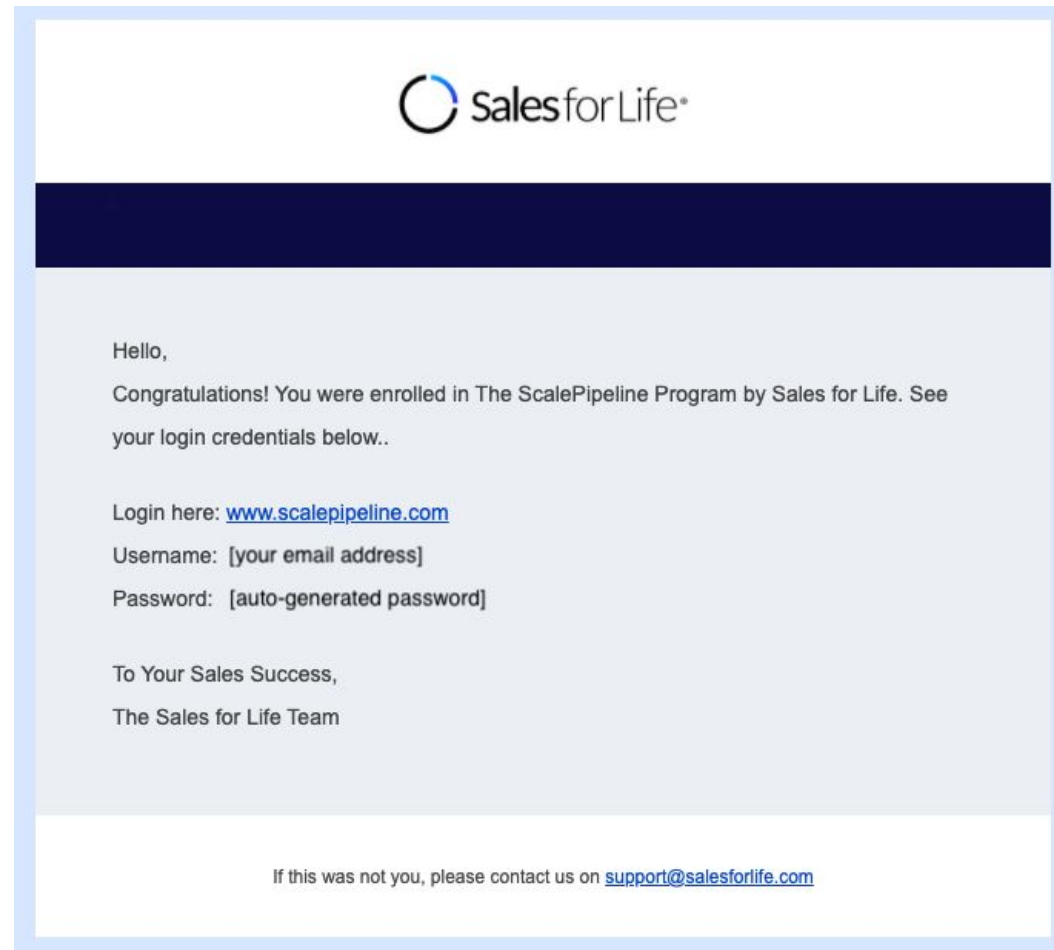
We want this to be a fun & easy process for you. You'll find all the courseware & assets you need all in one place. And, you can complete things at your own pace.

Enjoy the program and the app!

First Time Login

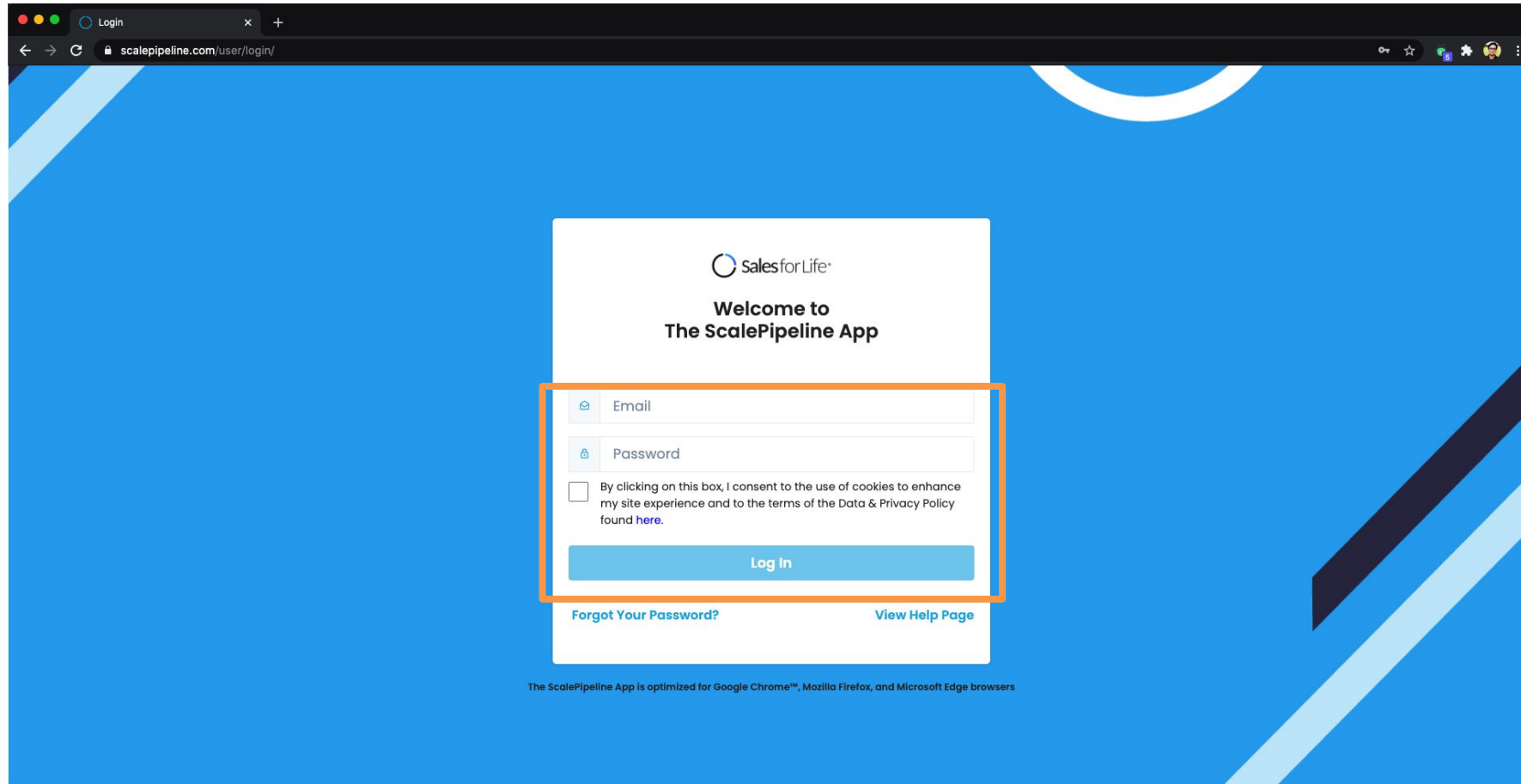
First Time Login

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



First Time Login

Log in to www.scalepipeline.com using the credentials.



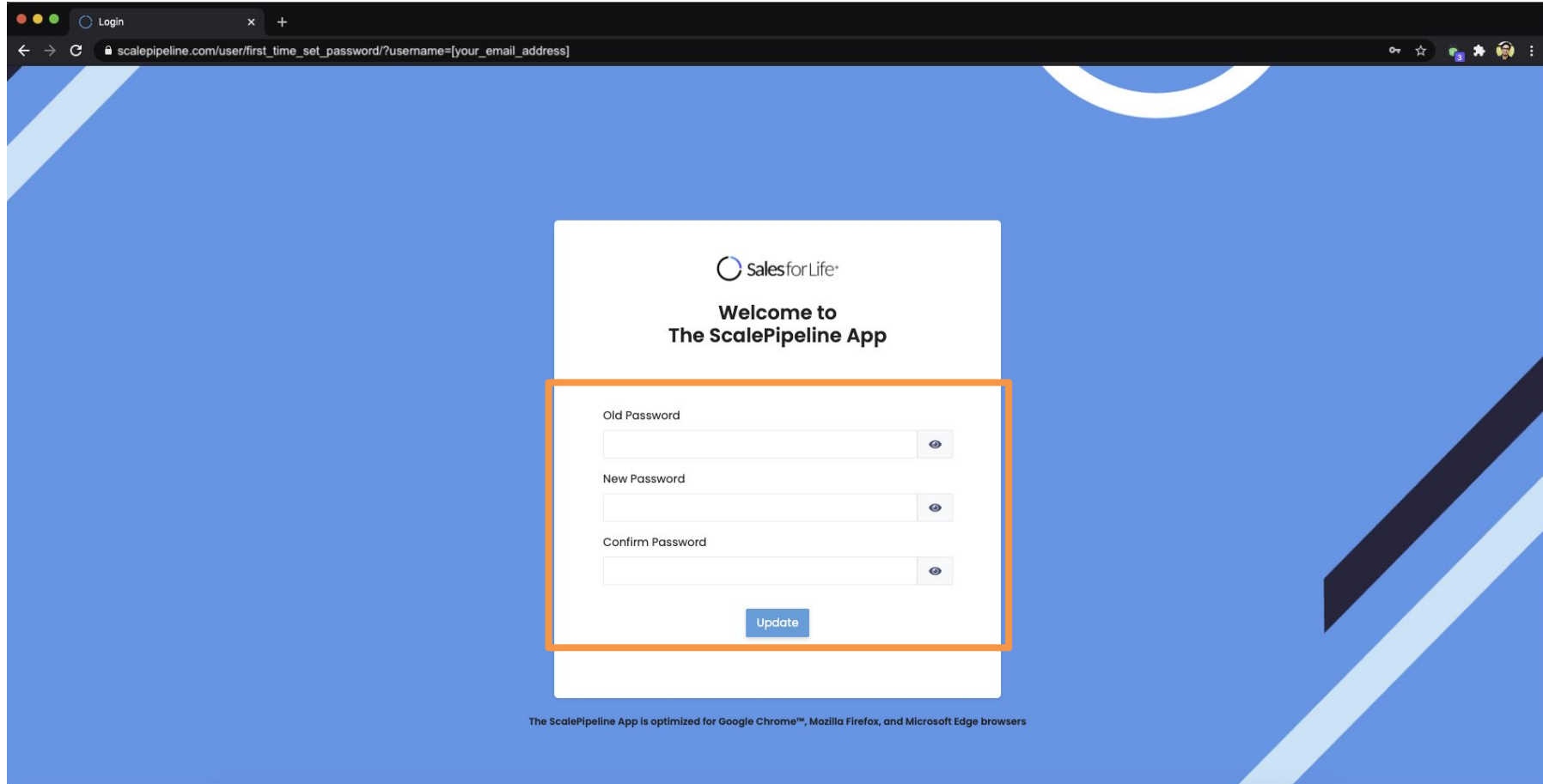
The screenshot shows a web browser window with the URL `scalepipeline.com/user/login/`. The page has a blue background with a white login form in the center. The form contains the following elements:

- Logo: SalesforLife®
- Text: Welcome to The ScalePipeline App
- Input fields: Email and Password (both highlighted with an orange border)
- Consent checkbox: ☐ By clicking on this box, I consent to the use of cookies to enhance my site experience and to the terms of the Data & Privacy Policy found [here](#).
- Log In button
- Links: [Forgot Your Password?](#) and [View Help Page](#)

At the bottom of the page, a small note states: "The ScalePipeline App is optimized for Google Chrome™, Mozilla Firefox, and Microsoft Edge browsers."

First Time Login

You will be prompted to change your password then click **Update**.



The screenshot shows a web browser window with the address bar displaying `scalepipeline.com/user/first_time_set_password/?username=[your_email_address]`. The page has a blue background with a white central box. At the top of the white box is the SalesforLife logo and the text "Welcome to The ScalePipeline App". Below this, there are three password input fields labeled "Old Password", "New Password", and "Confirm Password", each with a toggle icon to its right. These fields and the "Update" button below them are enclosed in an orange rectangular box. At the bottom of the white box, there is a small line of text: "The ScalePipeline App is optimized for Google Chrome™, Mozilla Firefox, and Microsoft Edge browsers".

ScalePipeline App

Old Password

New Password

Confirm Password

Update

The ScalePipeline App is optimized for Google Chrome™, Mozilla Firefox, and Microsoft Edge browsers

First Time Login

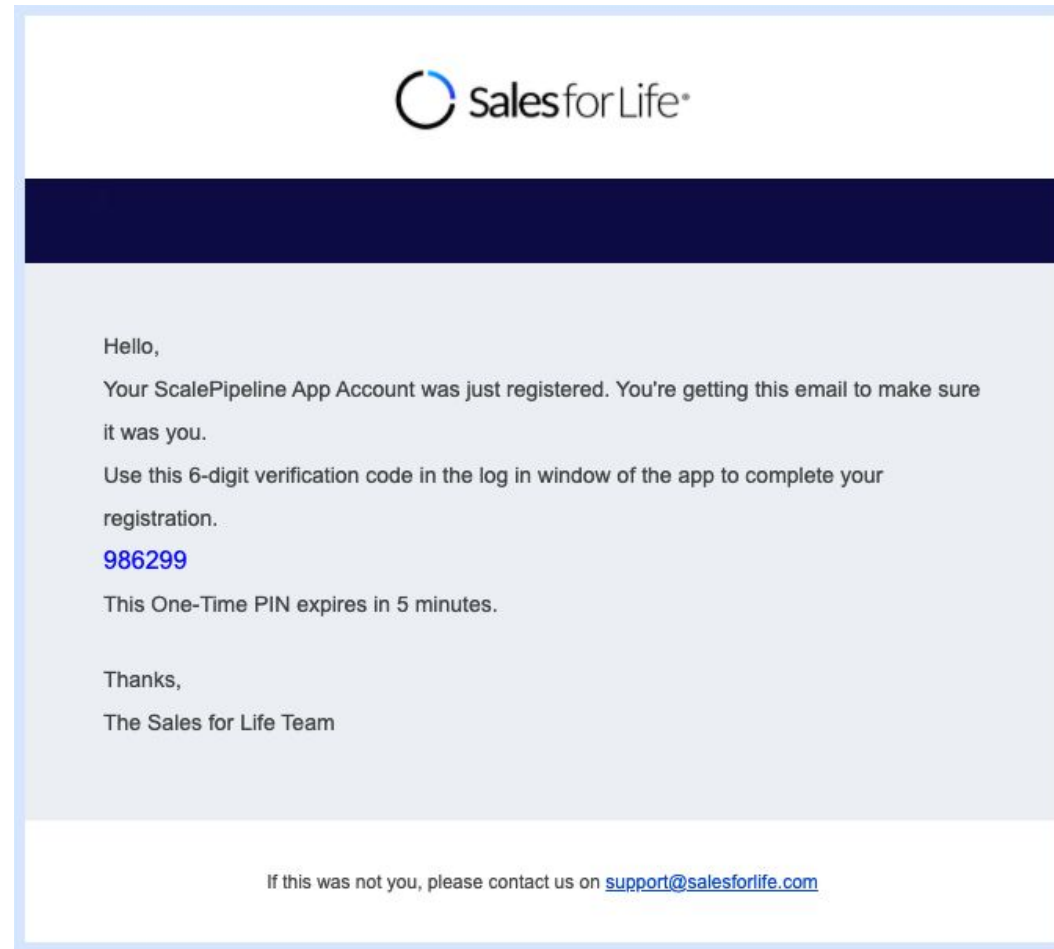
After a successful password change, you will be prompted to log in again.

Your Password has been changed successfully

Login

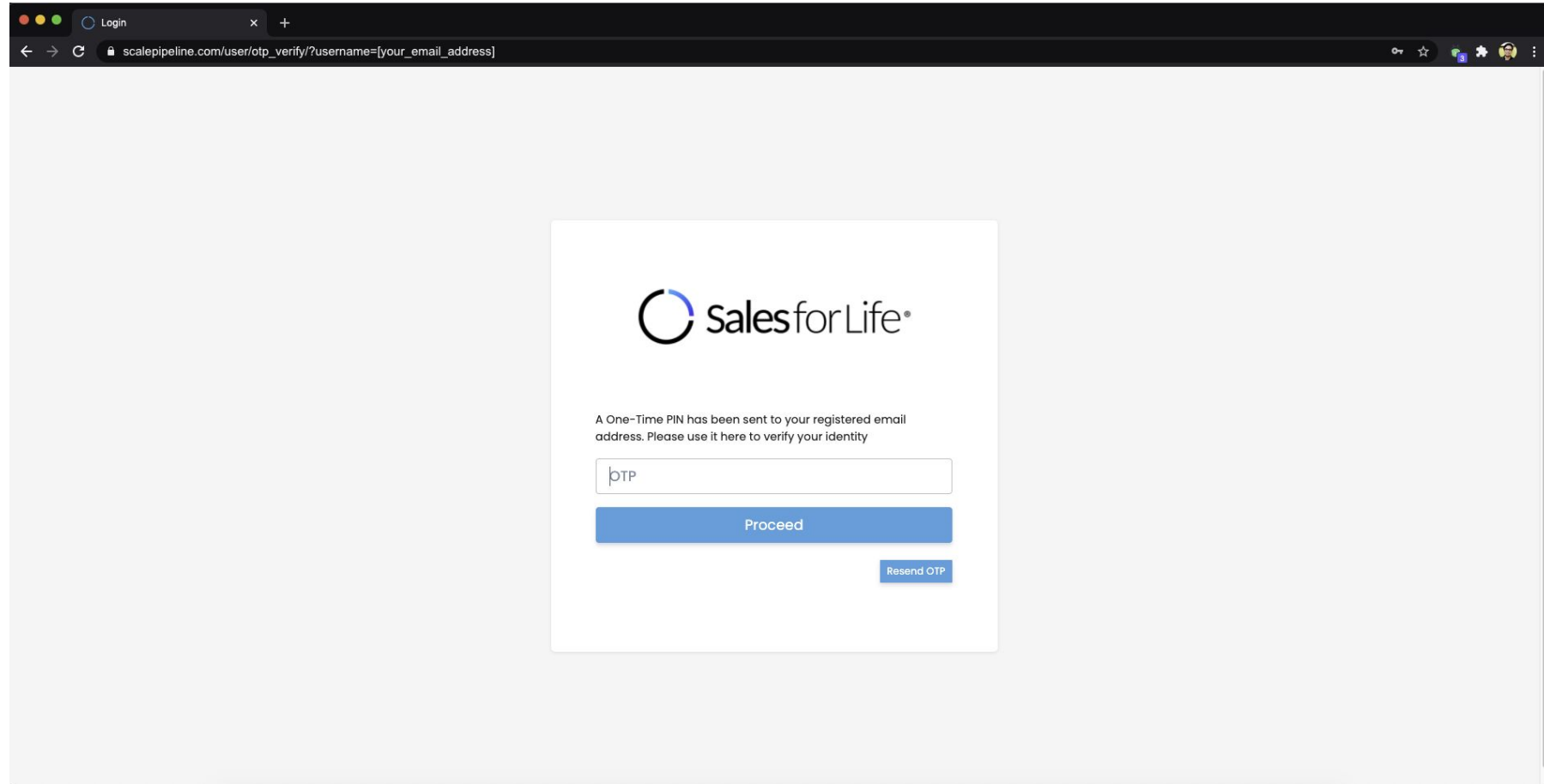
First Time Login

After initial log in using the new password, a One-Time PIN will be sent to your registered email address.



First Time Login

Enter the One-Time PIN at the login page and then **Proceed**.

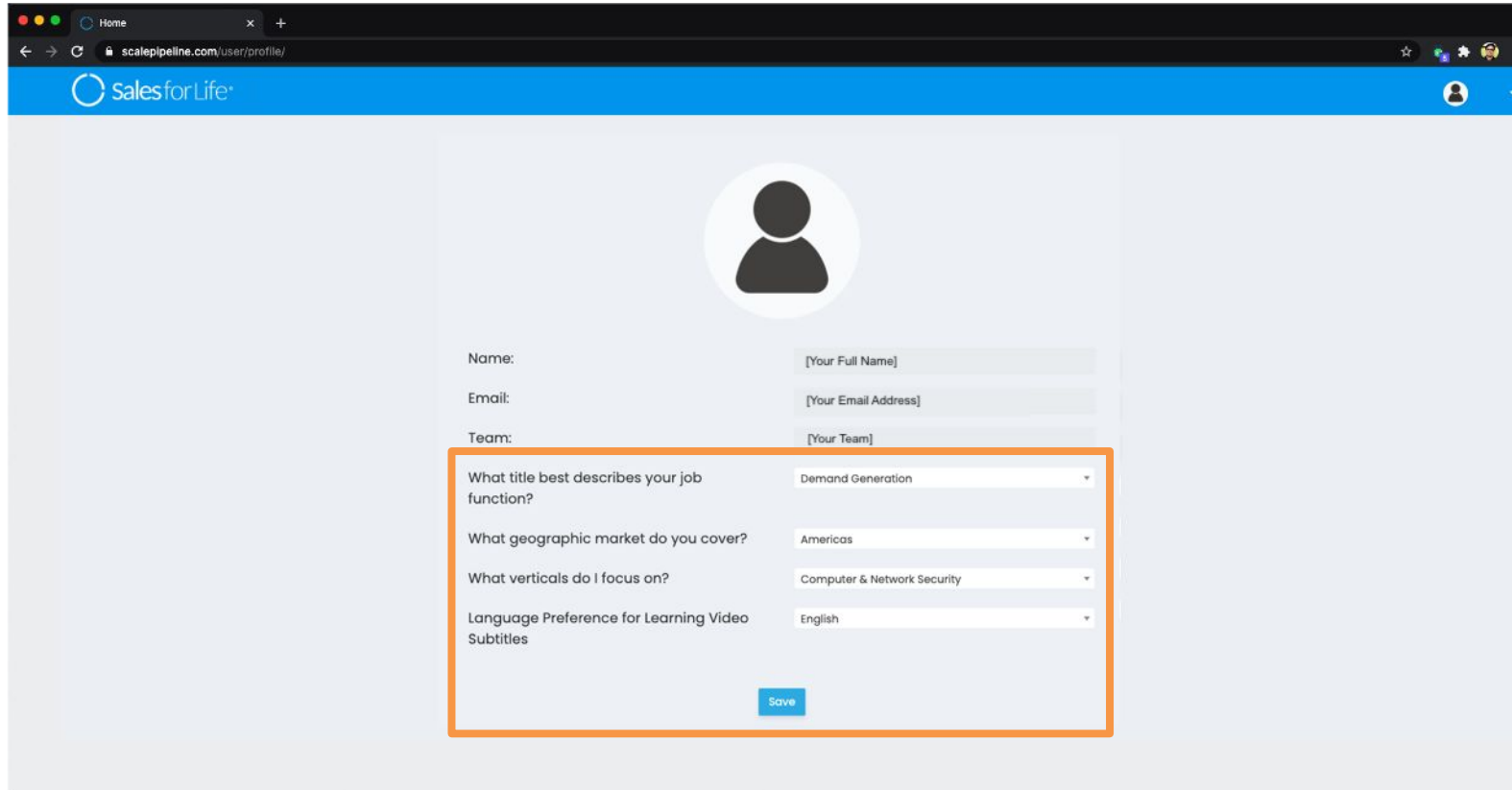


The screenshot shows a web browser window with the address bar displaying "scalepipeline.com/user/otp_verify?username=[your_email_address]". The page content features the SalesforLife logo at the top. Below the logo, a message states: "A One-Time PIN has been sent to your registered email address. Please use it here to verify your identity". There is a text input field labeled "OTP" with a cursor inside. Below the input field is a large blue button labeled "Proceed". To the right of the "Proceed" button is a smaller blue button labeled "Resend OTP".

First Time Login

You will be asked to indicate the following information, then click **Save**:

- Your job function
- The geographic market you cover
- The verticals you focus on
- Your language preference for the learning video subtitle



The screenshot displays a web browser window with the URL `scalepipeline.com/user/profile/`. The page header features the "Sales for Life" logo and a user profile icon. The main content area shows a user profile setup form. At the top is a circular placeholder for a profile picture. Below it are three text input fields: "Name:" with a placeholder "[Your Full Name]", "Email:" with a placeholder "[Your Email Address]", and "Team:" with a placeholder "[Your Team]". Below these are four dropdown menus, each with a label and a selected value: "What title best describes your job function?" (Demand Generation), "What geographic market do you cover?" (Americas), "What verticals do I focus on?" (Computer & Network Security), and "Language Preference for Learning Video Subtitles" (English). A blue "Save" button is located at the bottom right of the form. An orange rectangular box highlights the four dropdown menus and the "Save" button.

First Time Login

You will be directed to the Dashboard containing the Learning Summary and Intelligence data.

The screenshot displays the 'ScalePipeline System' dashboard for a user named Roberto. The dashboard is titled 'The ScalePipeline System Dashboard' and shows 'My Learning Progress' for two programs. The first program, 'Modern Branding Fundamentals', has five modules, four of which are 'Completed' and one is 'Not Started'. The second program, 'The SPEAR Program', has two modules, one 'Not Started' and one 'Submitted for Grading'. All modules have a due date of May 13, 2021, except for the last module in the SPEAR program which has a due date of May 24, 2021. Each module row includes a link icon in the 'Grading Summary' column.

Modern Branding Fundamentals	Progress	Due Date	Grading Summary
Welcome & Pre-Work	Completed	May 13, 2021	Link
Module #1: Enhance Your Social Presence	Completed	May 13, 2021	Link
Module #2: Share Content to Boost Your Reputation	Completed	May 13, 2021	Link
Module #3: Grow Your Network	Completed	May 13, 2021	Link
Module #4: Program Summary & Certification	Not Started	May 13, 2021	Link

The SPEAR Program	Progress	Due Date	Grading Summary
Welcome & Pre-Work	Not Started	May 24, 2021	Link
Module #1: Select & Prioritize Accounts	Submitted for Grading	May 24, 2021	Link



Navigating the App



Navigating the App

Here are the features of the App:

Dashboard Summary

1. My Learning Progress
2. Live Training
3. Personal Coaching

Menu

1. My Team (Leader View)
2. Learning Library
3. Intelligence

User Settings

1. View Profile
2. Email Support
3. Daily Coaching Hotline
4. Change Password
5. Help Page
6. Logout

Help Videos

The ScalePipeline System Dashboard

My Learning Progress

Modern Branding Fundamentals	Progress	Due Date	Grading Summary
Welcome & Pre-Work	Completed	May 13, 2021	
Module #1: Enhance Your Social Presence	Completed	May 13, 2021	
Module #2: Share Content to Boost Your Reputation	Completed	May 13, 2021	
Module #3: Grow Your Network	Completed	May 13, 2021	
Module #4: Program Summary & Certification	Not Started	May 13, 2021	

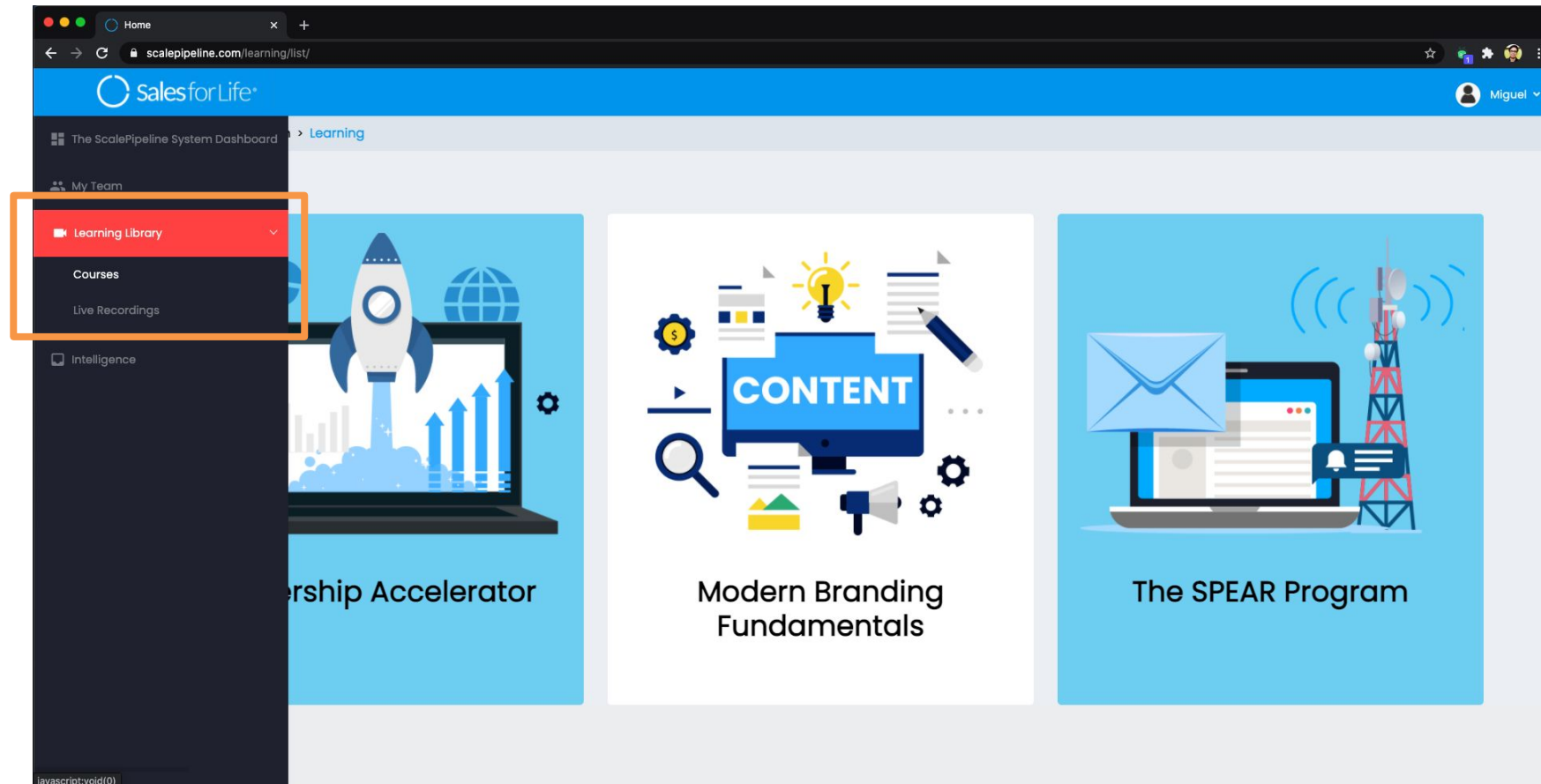
The SPEAR Program	Progress	Due Date	Grading Summary
Welcome & Pre-Work	Not Started	May 24, 2021	
Module #1: Select & Prioritize Accounts	Submitted for Grading	May 24, 2021	

Need Help? Watch this!

Navigating the App: Learning Library Module

The **Learning Library Module** contains the following sub-menu:

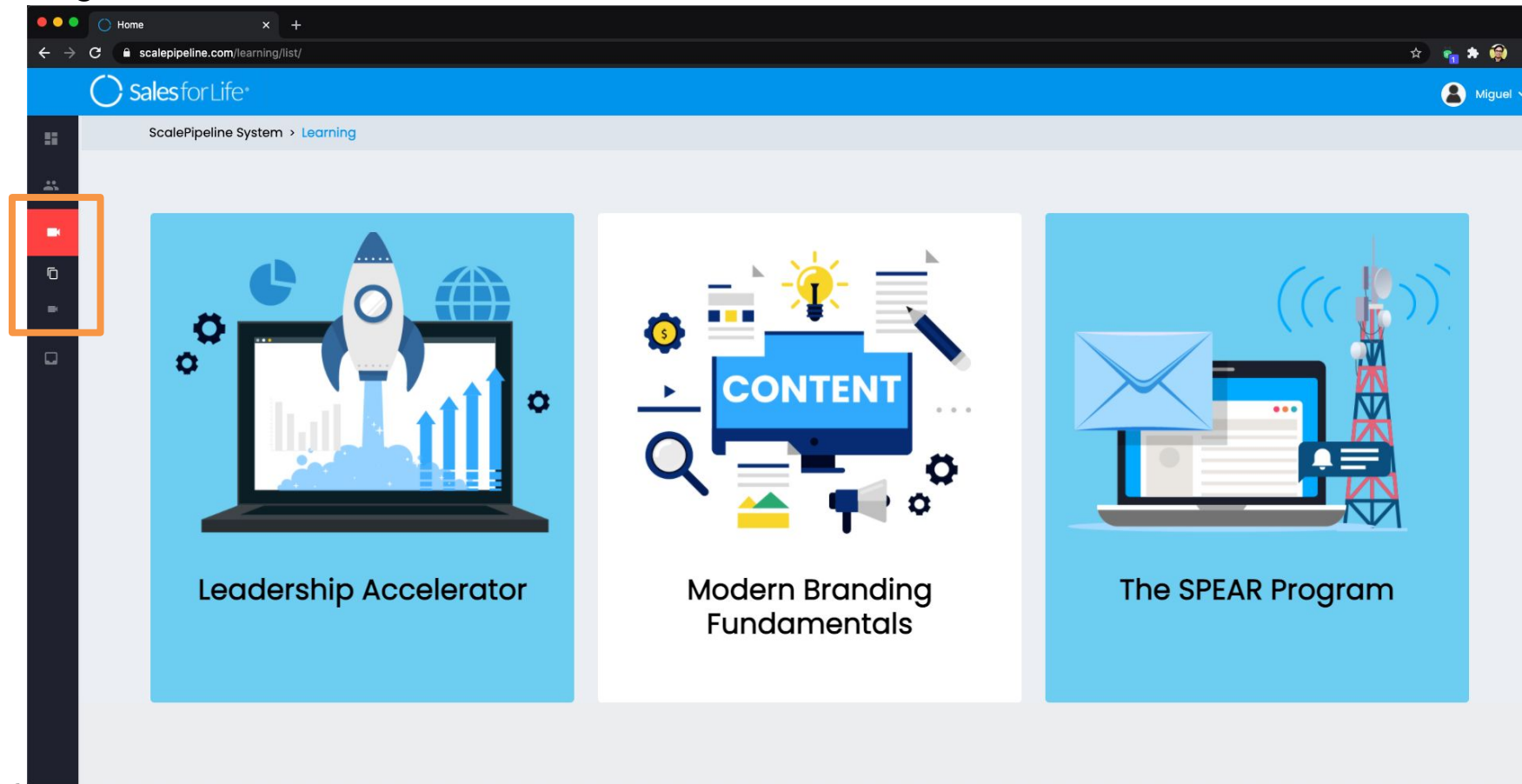
1. Courses
2. Live Recordings



Navigating the App: Learning Library Module – Courses Page

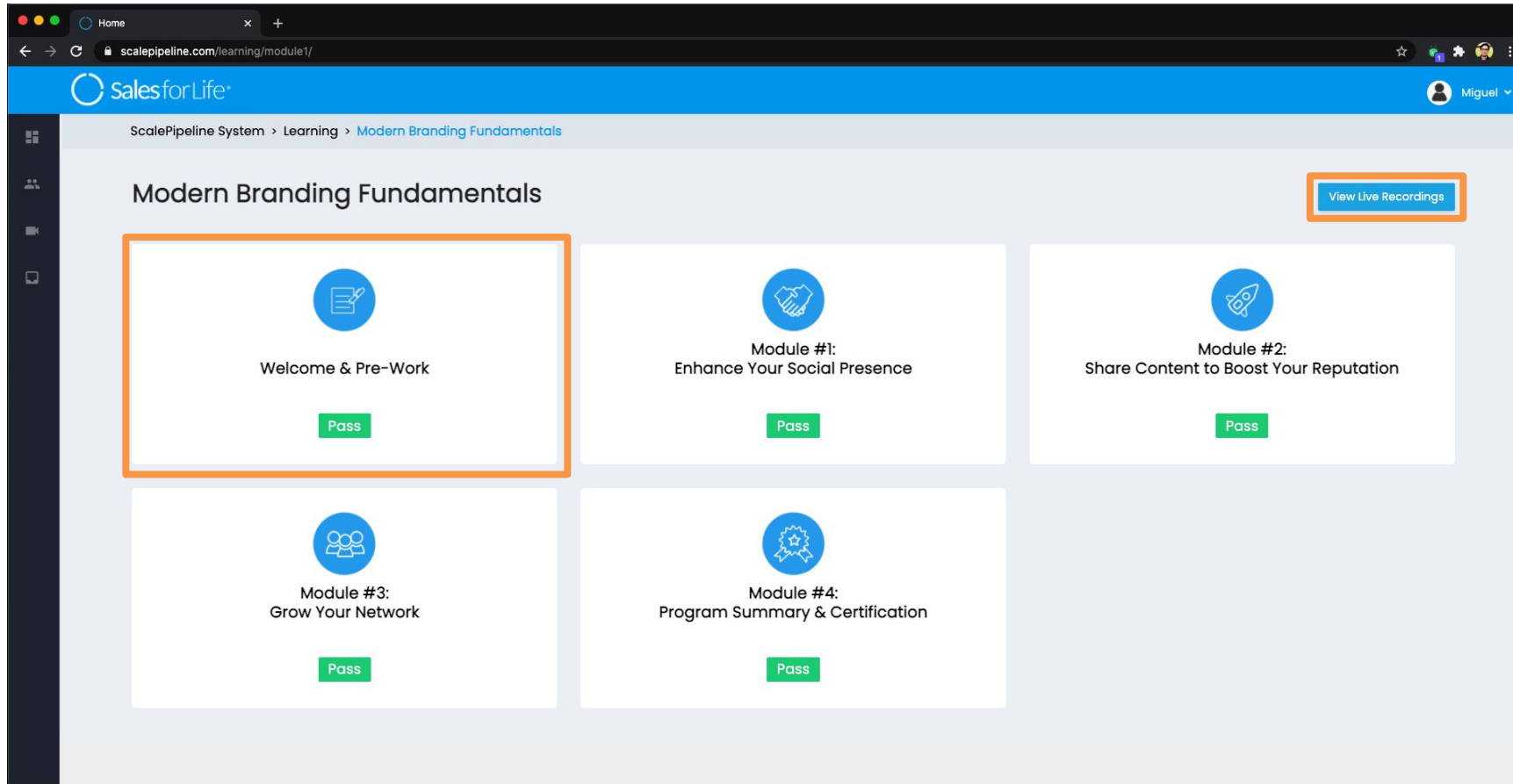
The [Courses Page](#) contains courseware under The ScalePipeline System:

1. Leadership Accelerator – for Leaders
2. Modern Branding Fundamentals – for Sellers & Leaders
3. The SPEAR Program – for Sellers & Leaders



Navigating the App: Learning Library Module – Courses Page

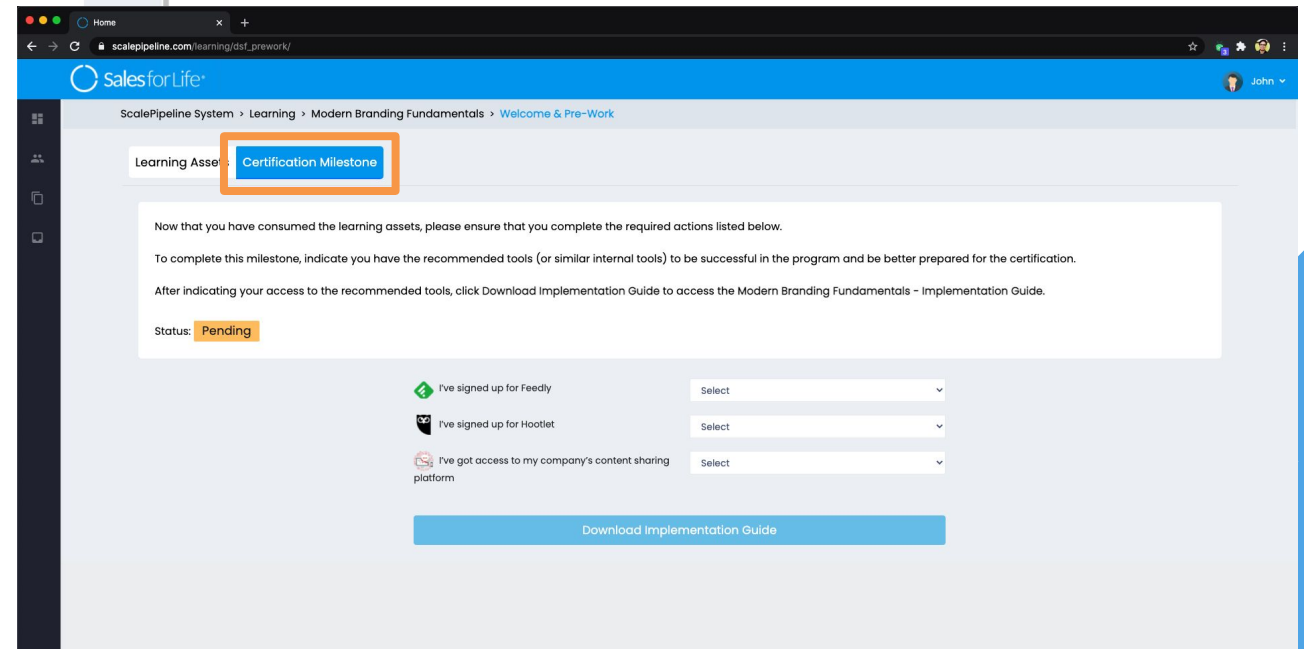
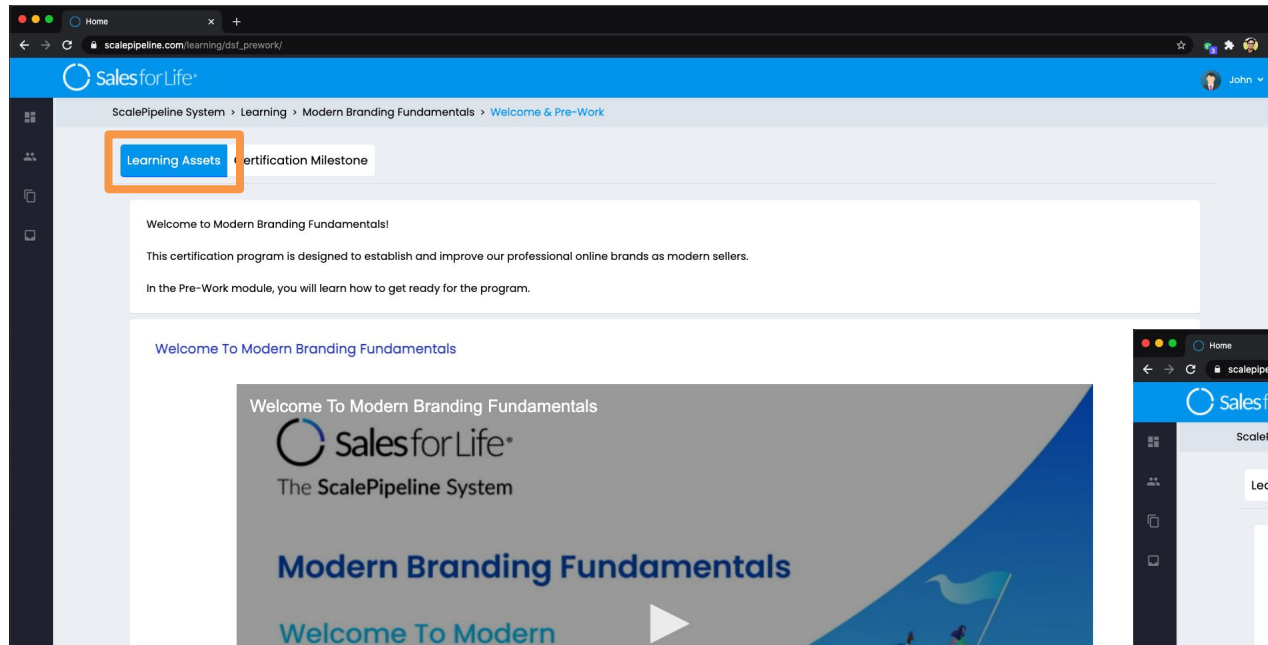
After selecting a course, you will be directed to the module selection page. In this page, each module is divided into tiles and the link to the Live Recordings Page can be found in the top rightmost part.



Navigating the App: Learning Library Module – Courses Page

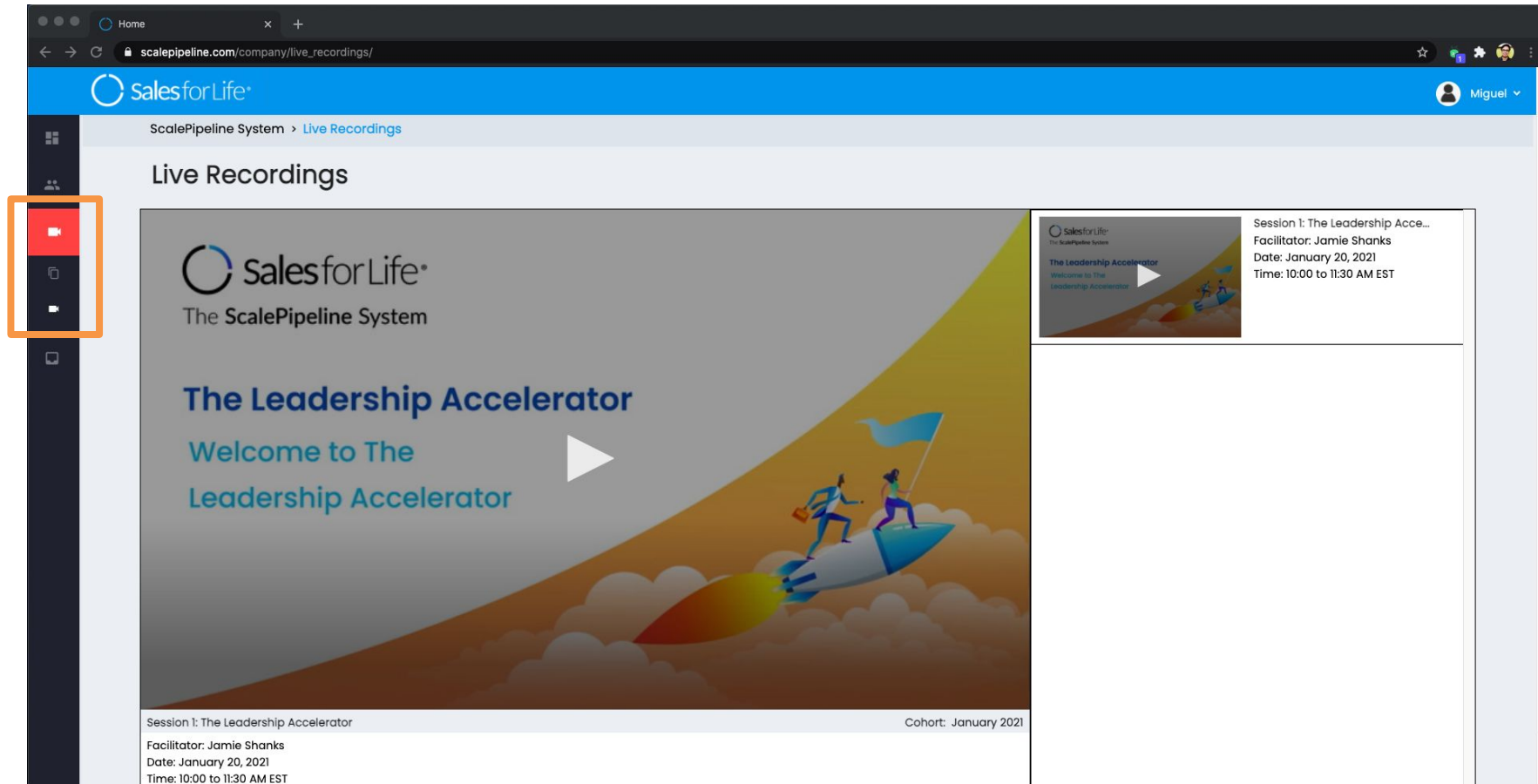
After selecting a module, it will show a page that has two tabs:

1. **Learning Assets** containing Training Videos.
2. **Certification Milestone** containing guidelines and exercises to complete the module milestone.



Navigating the App: Learning Library Module – Live Recordings Page

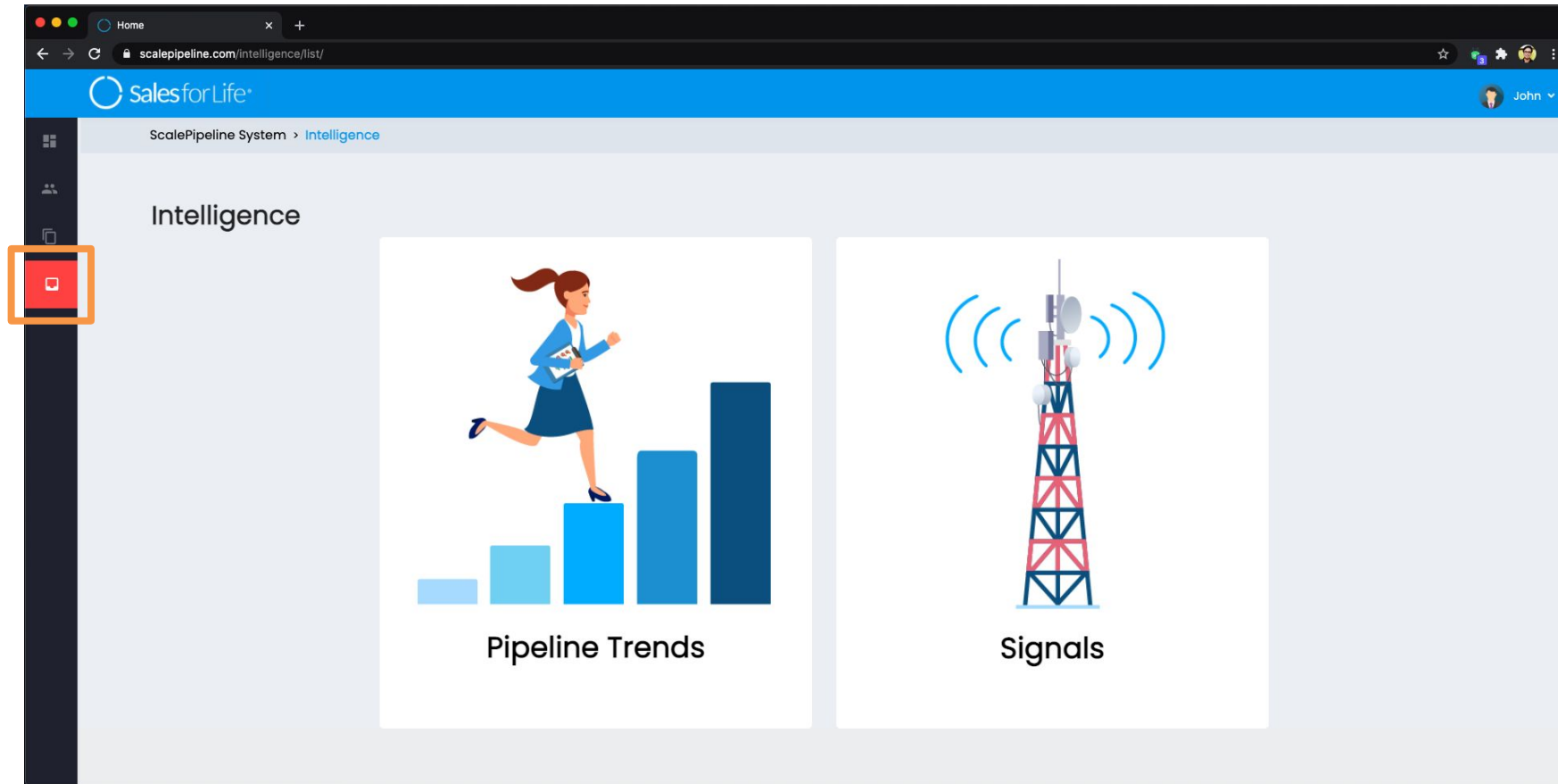
The [Live Recordings Page](#) contains recording of sessions with a facilitator from Sales for Life.



Navigating the App: Intelligence Module

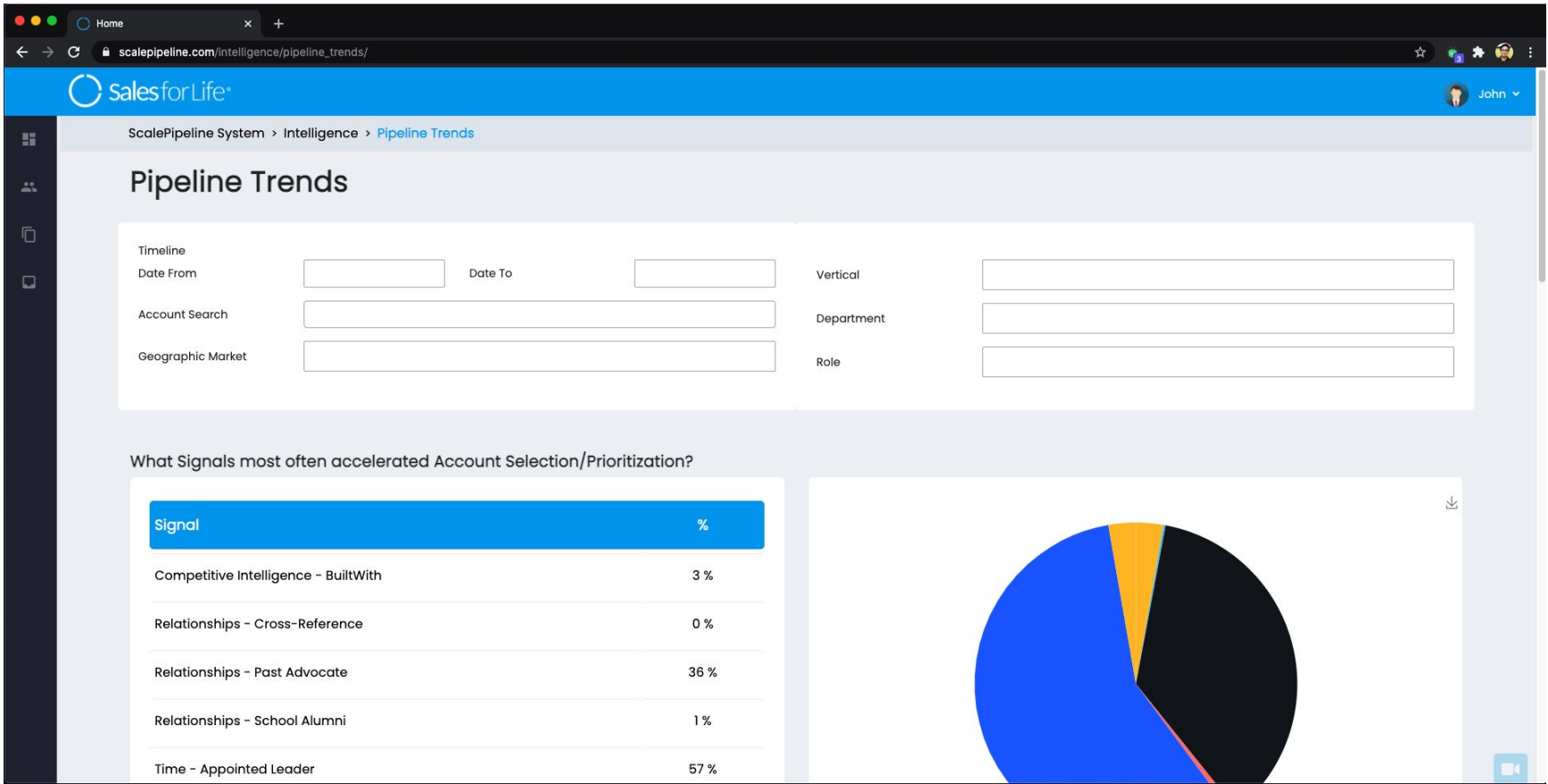
The **Intelligence Module** contains two sections:

1. Pipeline Trends
2. Signals



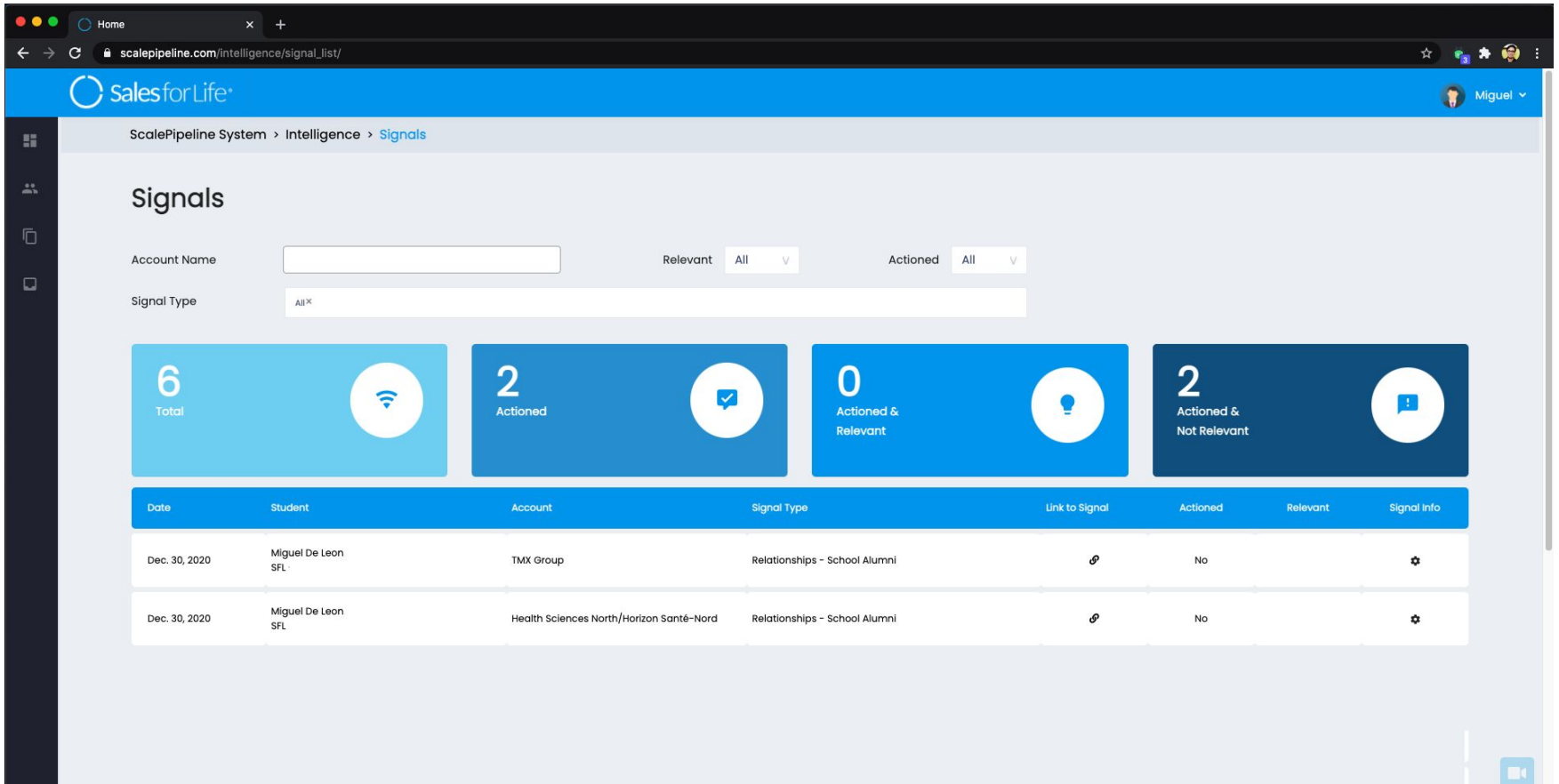
Navigating the App: Intelligence Module – Pipeline Trends Page


The [Pipeline Trends Page](#) contains aggregated data and evidence from the global database of certifications that open doors, grow & retain accounts. You can search by account, by region, by vertical, and more.



Navigating the App: Intelligence Module – Signals Page

The **Signals Page** contains all of the signals that have been assigned to individual users or a team. These are the action items for you to work on after you're certified in The SPEAR Program.





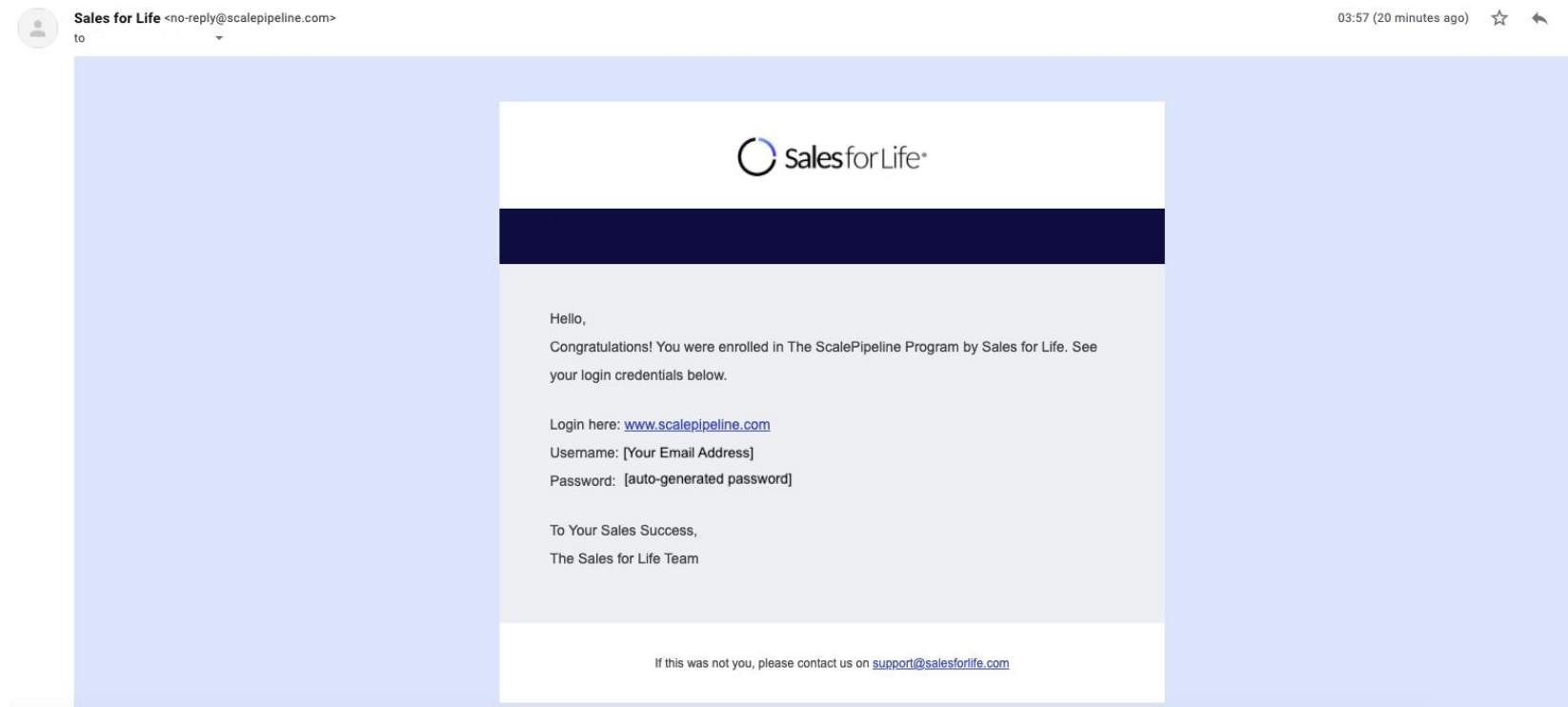
Basic Troubleshooting Guidelines



Basic **Troubleshooting** Guidelines

I did not receive an email notification upon onboarding

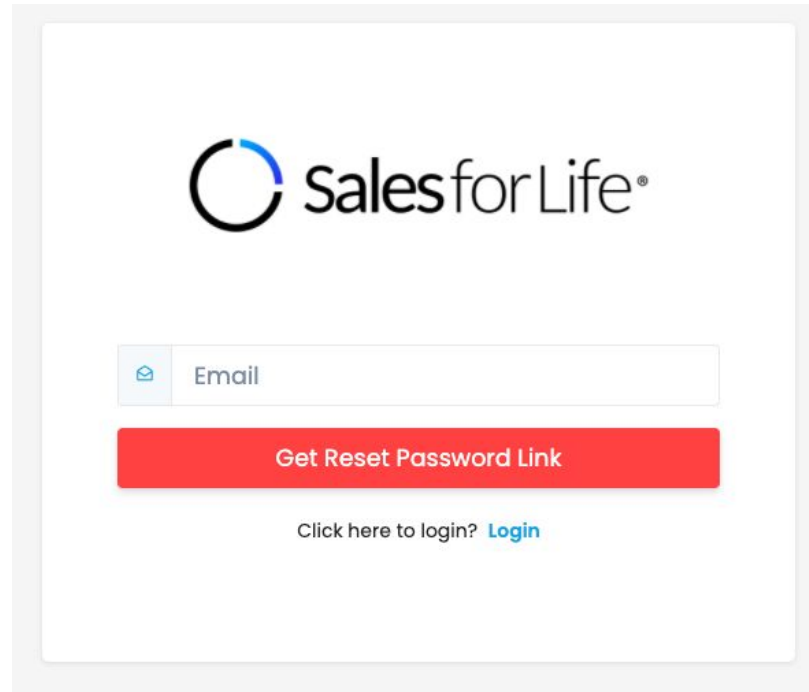
1. Please check your spam or promotions folder.
2. Email Title should be “Sales for Life App Login Credentials”.





Basic **Troubleshooting** Guidelines

I cannot remember / retrieve my password

1. Go to login page, then click “Forgot Your Password?” button.
2. Once redirected to another page, enter your email address, then click “Get Reset Password Link” button.
3. A reset instruction will be sent to the registered email address.
4. Follow the instructions and nominate a new password. After which, a One-Time-PIN will be sent to verify the user authenticity.

A screenshot of the SalesforLife password reset interface. At the top is the SalesforLife logo, consisting of a blue circle icon and the text "SalesforLife®". Below the logo is a text input field with a light blue envelope icon and the placeholder text "Email". Underneath the input field is a prominent red button with the white text "Get Reset Password Link". At the bottom of the form area, there is a link that says "Click here to login? [Login](#)". The entire form is enclosed in a light gray border.

 SalesforLife®

 Email

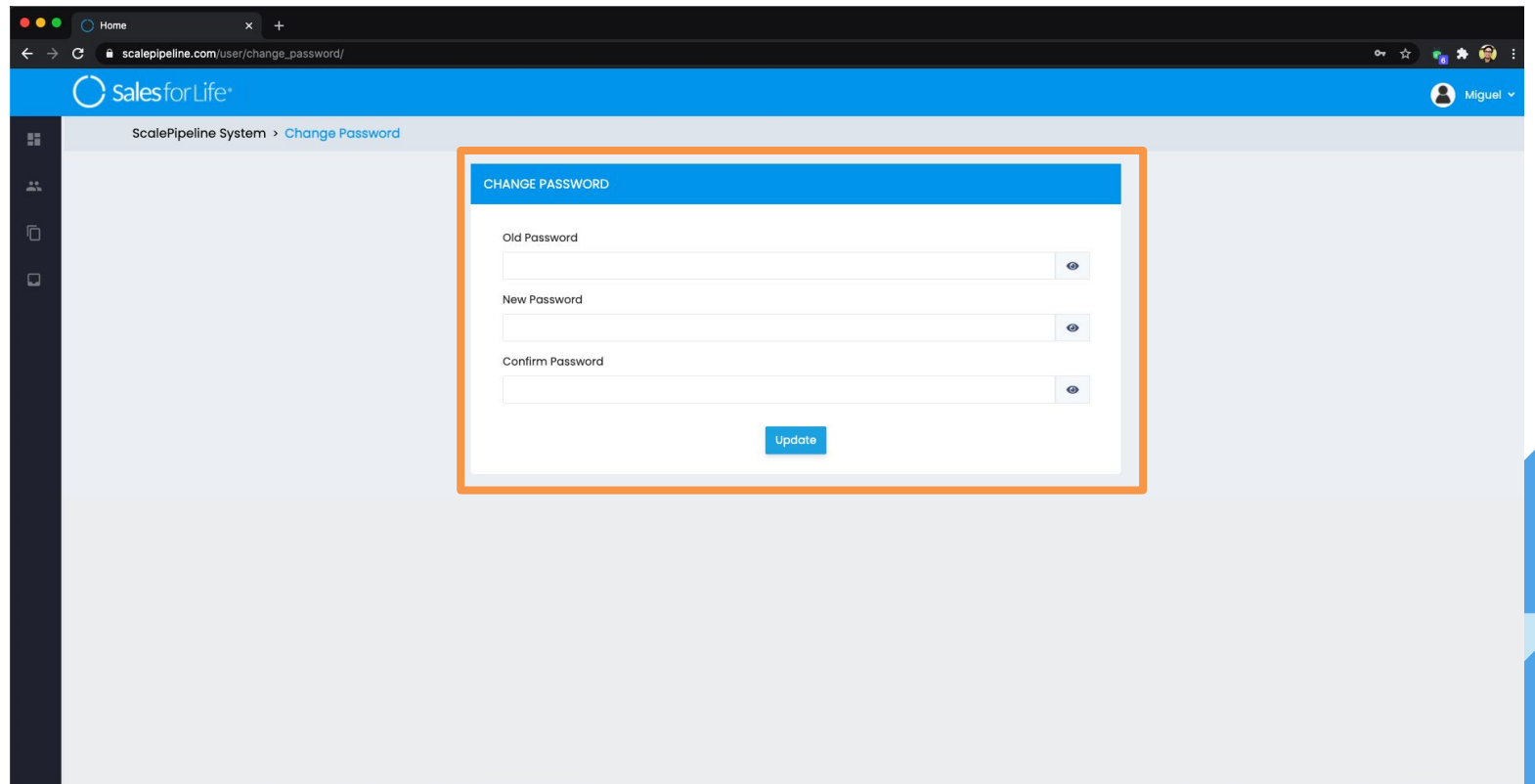
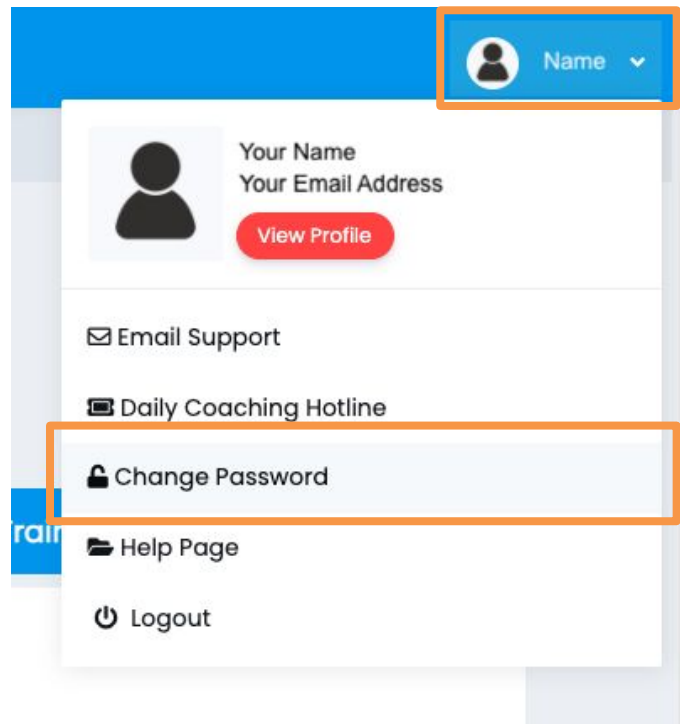
Get Reset Password Link

Click here to login? [Login](#)

Basic **Troubleshooting** Guidelines

I would like to change my password

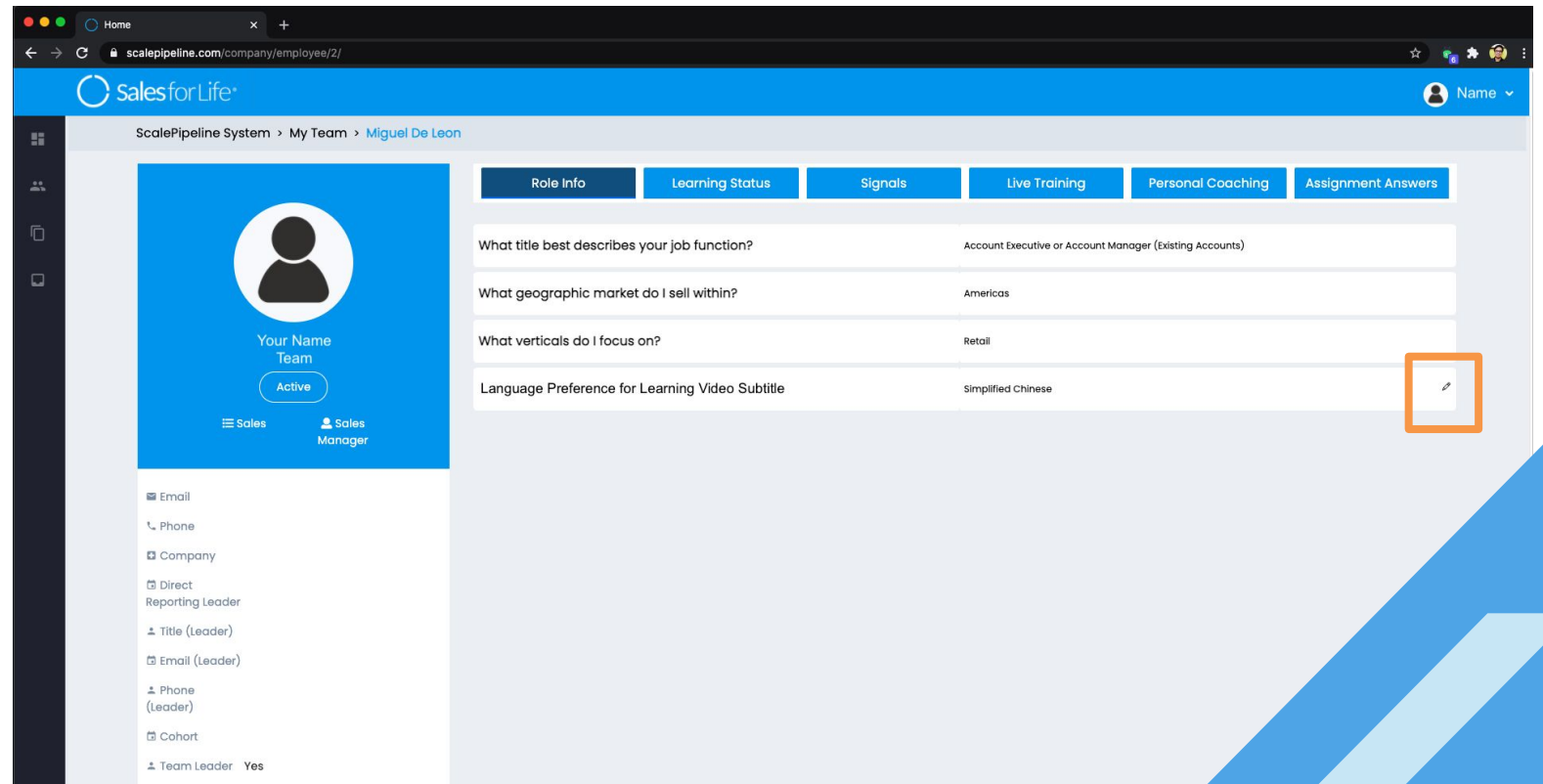
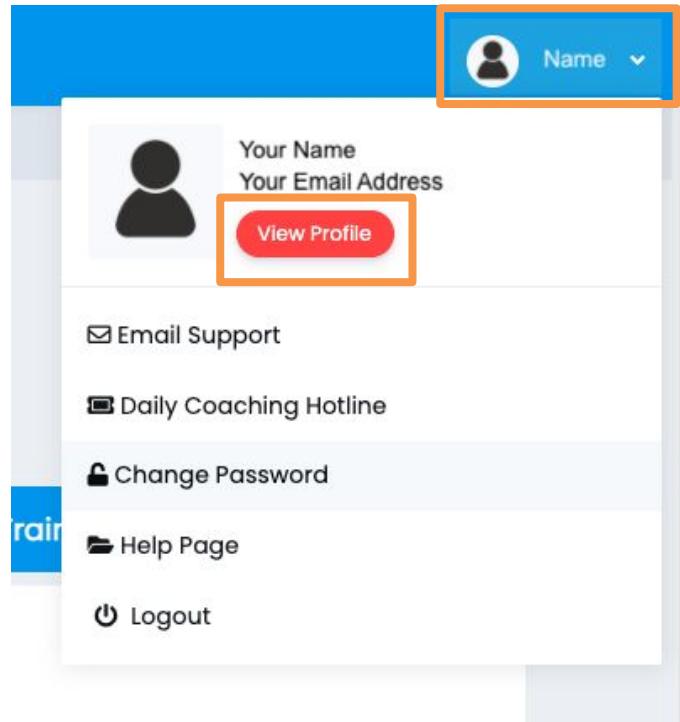
1. Upon login, look for the User Settings dropdown at the top rightmost part of the page.
2. Click “Change Password” tab.
3. Once redirected to another page, enter your old password and new password twice.
4. A One-Time-PIN will be sent to your registered email address for user authentication.



Basic **Troubleshooting** Guidelines

I would like to change my language preference for learning video subtitles

1. Upon login, look for the User Settings dropdown at the top-right most part of the page.
2. Click “View Profile” button.
3. Once redirected to another page, look for and click the pencil icon beside the selected language.
4. Supported subtitle languages are English, Russian, French, German, Italian, Spanish, Brazilian Portuguese, Korean, Japanese, and Simplified Chinese





Need Help or Guidance?

Book time with our team at www.salesforlife.com/coaching
or email us at support@salesforlife.com.

