



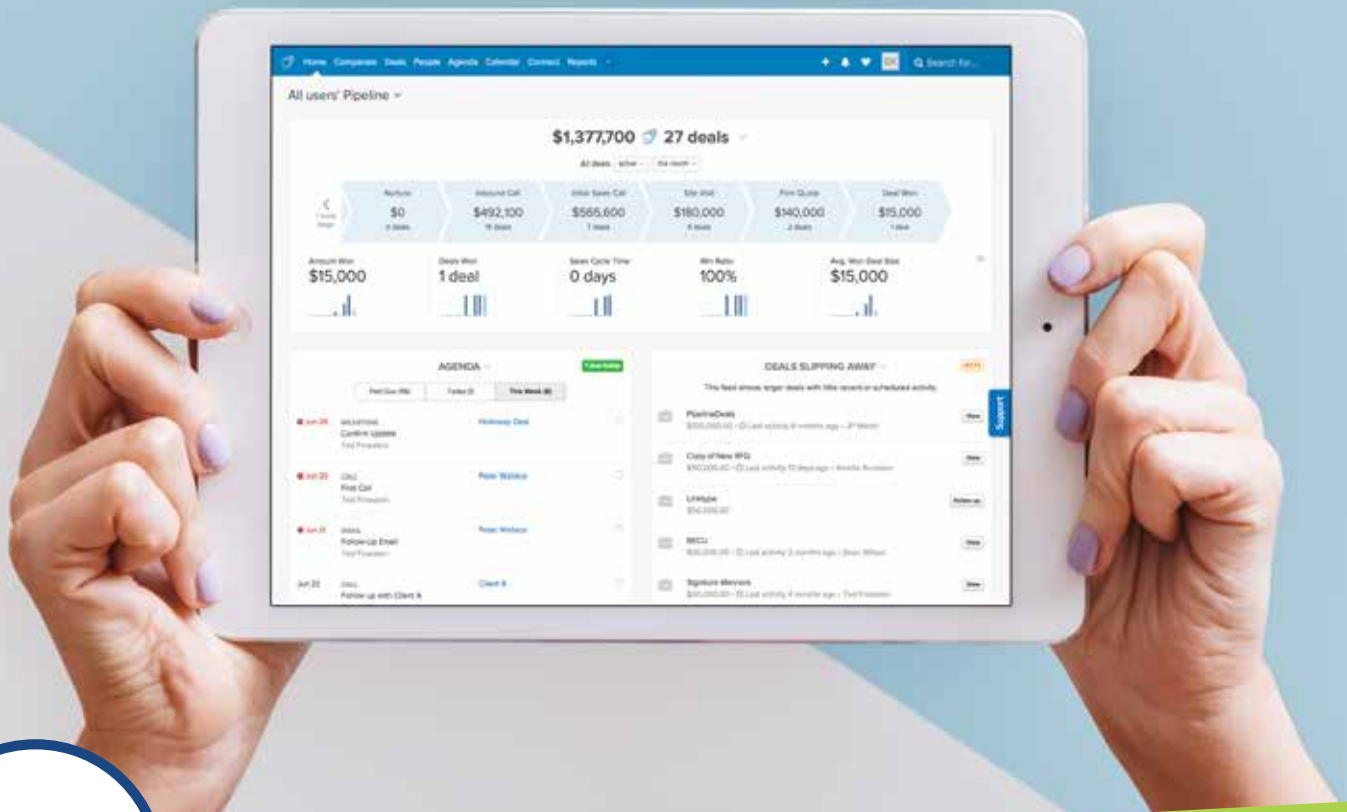
# Referral Partner Program

♥ Success Kit

# Success Kit

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# Who is PipelineCRM?

PipelineCRM is an easy-to-use, cloud-based CRM (customer relationship management) platform. We provide businesses with a way to organize, share, and grow their customer base successfully. Using PipelineCRM, your sales team can confidently close more business, faster.

# What is the PipelineCRM Referral Partner Program?

The PipelineCRM Referral Partner Program is for anyone that loves PipelineCRM and is interested in recommending it to their friends and colleagues. Referral Partners are rewarded with a 20% of revenue for the lifetime of the account.

**Anyone can join and it's free!**

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# How much can I make?

There is no limit on how much money you can make with the program. We happily reward Referral Partners with a 20% commission on the subscription's lifetime revenue for each referral that signs up.

**On average, that's \$9885.37 per referral!**

# How does it work?

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Partners need a valid email address and to be a fan of PipelineCRM to sign up. From there, you'll get access to a free referral account where you can access a specific URL that is unique to you. You'll then share this link with friends you want to refer to PipelineCRM, and it will take them to a page offering a free trial. Once they sign up for a trial and convert to a paid subscriber, we'll send you cash.





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# How do I refer?

Each Referral Partner will be given a unique URL that will identify them as the source of the lead. When a lead clicks on the Referral Partner's URL, it takes them to a free PipelineCRM trial form. Once a lead signs up for a trial, they will be linked to the referral partner on a first come, first served basis. When that lead converts from a trial to a paid subscription, the PipelineCRM referral partner earns a commission!





# What is a successful referral?

A successful referral is someone who has used your unique link to start a trial and later converted to enroll in their own paid subscription.

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## How do I get paid?

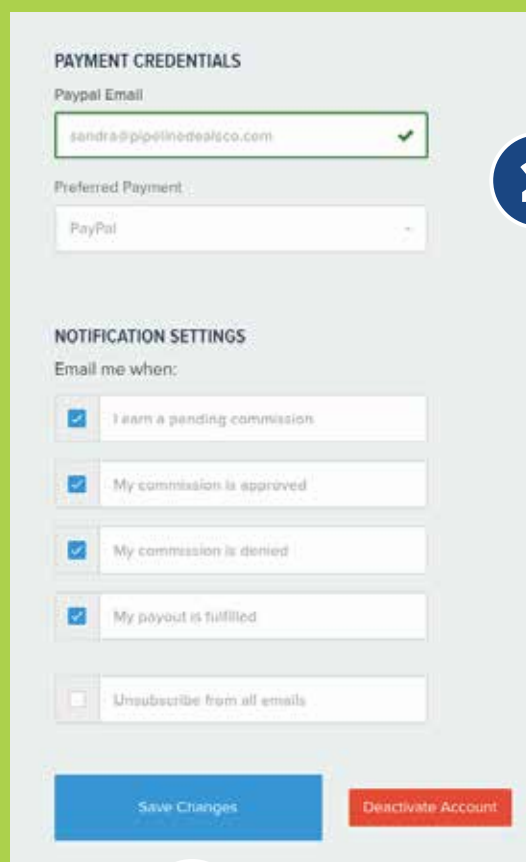
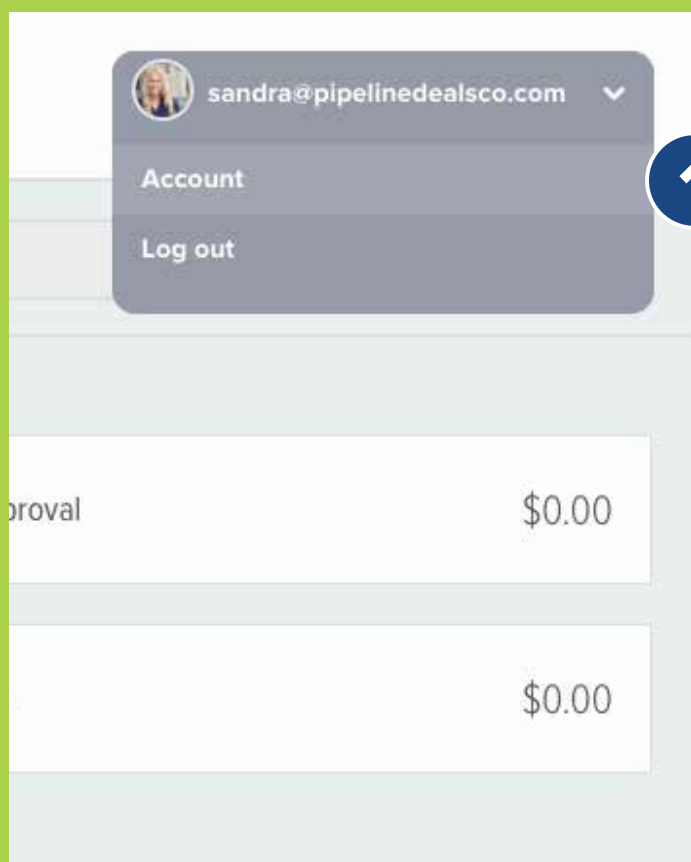
The month after your referral purchases a subscription (using your unique link), we will make a payment directly into your PayPal account. The funds will be added monthly if your referral signed up for a month-to-month subscription. If they signed up for an annual subscription, you will be given the funds all at once. Payment is quick and easy, but we require 2 items for our accounting purposes. First, you need a PayPal account so we can get you paid. Second, you'll need to complete a tax form as we must have this on file in order to process payments. *Follow the instructions on the next page.*



## Step one: Add Your PayPal Email

We use PayPal to reward you with your earned commissions. This is why you'll need to have a PayPal email address to set up in your account. To do this, sign into your referral account here <https://pipelinedeals.getambassador.com/login> and then follow these steps:

1. In the top right-hand corner of your main page, click on the dropdown and choose "Account".
2. Then scroll down on that page and find the section to enter your PayPal email and choose "PayPal" as your preferred payment..
3. Then click "Save Changes".



## Step two: Submit a tax form

We ask that you complete, sign and return one of the following tax forms to [referralpartners@pipelinedealsco.com](mailto:referralpartners@pipelinedealsco.com):

- W9 (US based individual or company)
- W8Ben (foreign individual)
- W8Bene (foreign company)

It's important to complete these two steps promptly so we can pay you any earned commissions as soon as possible.



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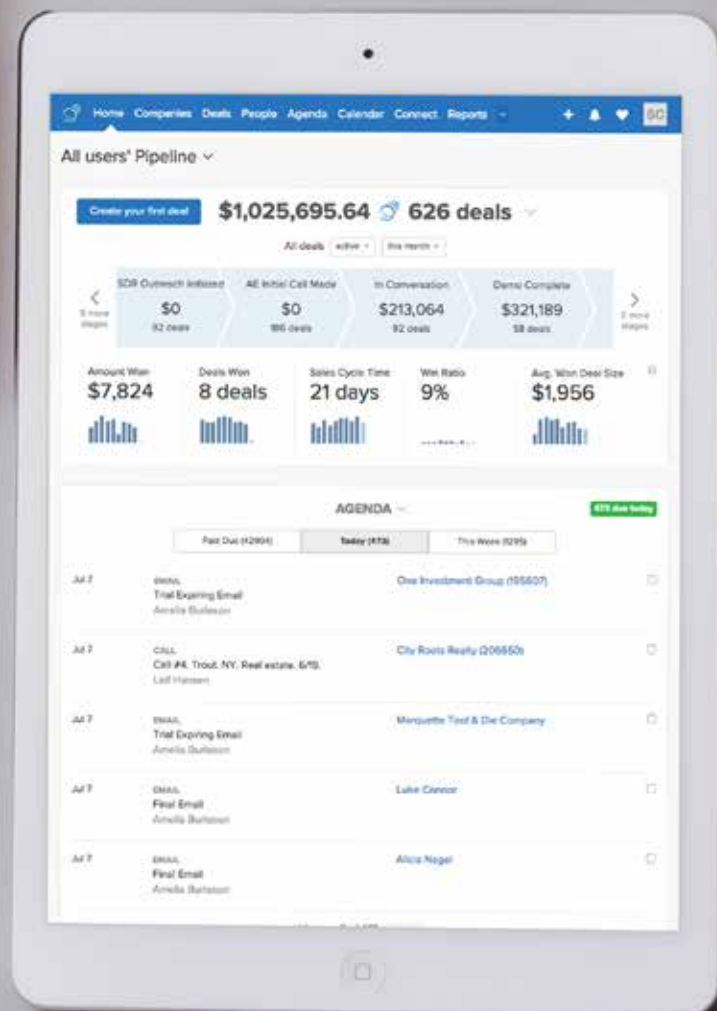
# How do I sign up?

**Option 1:** Anyone can sign up for the Referral Partner Program by using this link: <https://pipelinedeals.getambassador.com>

Fill out the form, agree to the terms and conditions, and choose “Sign me up”. You’ll then be automatically logged into your Referral Partner Account, where you’ll be able to start sharing out your unique link!

**Option 2:** If you are a current PipelineCRM customer, you'll have an even easier way to sign up to be a Referral Partner. Just click the ♥ icon in the top right hand corner of your PipelineCRM home dashboard.

Next, enter your email and select "Let's Do This!" You'll immediately be able to start referring your friends and earning commissions.







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# How do I customize my Referral Partner Account?

Customize your Referral Partner Account by logging in here: <https://pipelinedeals.getambassador.com/login/>. You will use the credentials emailed to you when you first signed up to become a Referral Partner. *See next page for more information.*

# Customize Your Account

The first thing you'll need to do is:

1. Visit your account
2. Change your password
3. Update your personal information
4. Enter your PayPal email and set it as the default preferred payment method
5. Save changes

The screenshot displays the PipelineDeals 'Referral Partner Program' account page. On the left, a user profile for Sandra Kennedy is shown with a circular avatar, a 'Change Avatar' button, and contact details including email, join date, and a memorable URL. The main content area is titled 'Account' and contains three sections: 'CREDENTIALS', 'PERSONAL INFORMATION (OPTIONAL)', and 'PAYMENT CREDENTIALS'. The 'CREDENTIALS' section includes fields for Email (pre-filled with 'sandra@pipelinedealsco.com'), New Password, Username, and Confirm New Password. The 'PERSONAL INFORMATION (OPTIONAL)' section includes fields for First Name (pre-filled with 'Sandra'), Last Name (pre-filled with 'Kennedy'), Company, and Street. The 'PAYMENT CREDENTIALS' section includes a field for PayPal Email (pre-filled with 'sandra@pipelinedealsco.com') and a dropdown for Preferred Payment (set to 'PayPal'). Below this is the 'NOTIFICATION SETTINGS' section with checkboxes for 'Email me when:' and options for 'I earn a pending commission', 'My commission is approved', 'My commission is denied', 'My payout is fulfilled', and 'Unsubscribe from all emails'. At the bottom right, there are 'Save Changes' and 'Deactivate Account' buttons. Numbered callouts are placed over the interface: '1' is over the user profile; '2' is over the 'New Password' field; '3' is over the 'Last Name' field; '4' is over the 'Paypal Email' field; and '5' is over the 'Save Changes' button.

**1**

**2**

**3**

**4**

**5**



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# How do I use my Account to refer people to PipelineCRM?

Referring a friend to sign up for a free trial with PipelineCRM is easy with your Referral Partner account. Once you log into your account, you will see your “Campaign URL” front and center on your Dashboard. This link is unique to you, and will take those being referred to a page where they can sign up for a free trial of PipelineCRM. This unique link is how we track your earnings, so it is crucial you use it when referring PipelineCRM.

## Sharing your Link

The main dashboard has a “Share” widget that is already populated with your unique link in the message section. Enter the recipients you’re emailing, edit the subject and message (but don’t change the link), and select Share. You can also share out using social media platforms such as LinkedIn, Twitter and Facebook.

### Share

Use the share widget to instantly share your referral links.

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**Refer and Earn 25%**  
When Referral Partners refer a friend that becomes a customer of PipelineDeals, they earn 25% of revenue for the first year of that account.

**To**


Add recipients


**Subject**


Check out PipelineDeals!


**Message**

I'm a fan of PipelineDeals. Check them out! <http://mbsy.co/hMwds>









Share

The sharing module is also provided in-app for PipelineCRM customers. You’ll follow the same steps from the previous page, but instead of logging into your Referral Partner Account, you’ll choose the from within PipelineCRM. Next you will enter your email, and choose “Let’s do this.” The same module will appear and you’ll follow the same steps to add email recipients and share.



# How do I View My Commissions?

You can use your Referral Account to see if people are clicking on the referral link you shared, as well as track any commissions you've earned. *See next page for details.*

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## The dashboard shows the following sections:

**Earned:** This is the total amount of money you've earned from successfully referring PipelineCRM using your unique link.

**Paid to Date:** This is the total amount of money that has been paid to your PayPal account.

**Awaiting Approval:** This is the total amount of money that has been earned and is awaiting approval from the Referral Partner Manager at PipelineCRM.

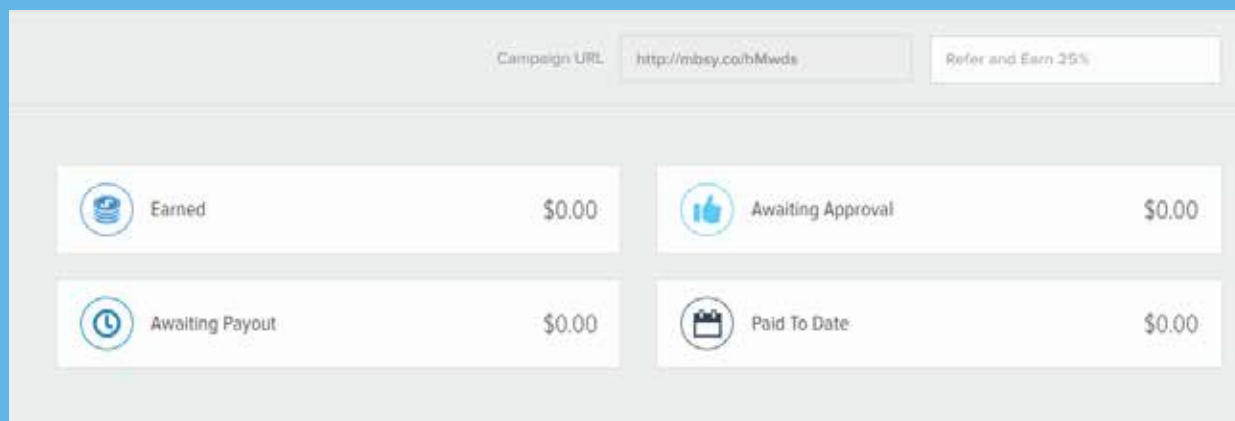
**Awaiting Pay-Out:** This is the total amount of money earned. It's been approved but has not yet been paid into your PayPal account.

When one of your referrals signs up for a free trial, you won't see much else until they actually sign up for a subscription.

When they do, on your Referral Partner account dashboard, you'll see your commissions move from:

Awaiting Approval → Awaiting Pay-Out → Earned.

You don't need to take any action. We will see this, process it on our end, and pay you via your PayPal email account the following month.



# What are the resources to help me refer?

We have plenty of marketing materials to help you with your referrals:



The best sales and marketing assets to help you refer include infographics, case studies and white papers. They are compiled and accessible in our Partner Resource Guide.



Stay informed by using our [Knowledge Base](#) and [Blog](#) to learn about best practices with PipelineCRM.



Read the monthly Referral Partner Newsletter which gives you sneak peeks on new features, and highlights helpful hints, in order to help you earn more referral dollars.

# Questions?

**We're always open to helping you with whatever needs you may have regarding the program.**

Feel free to call our customer support Monday-Friday  
8am to 8pm EST at 1-866-702-7303.

You can also email us: [referralpartners@pipelinecrm.com](mailto:referralpartners@pipelinecrm.com)

