

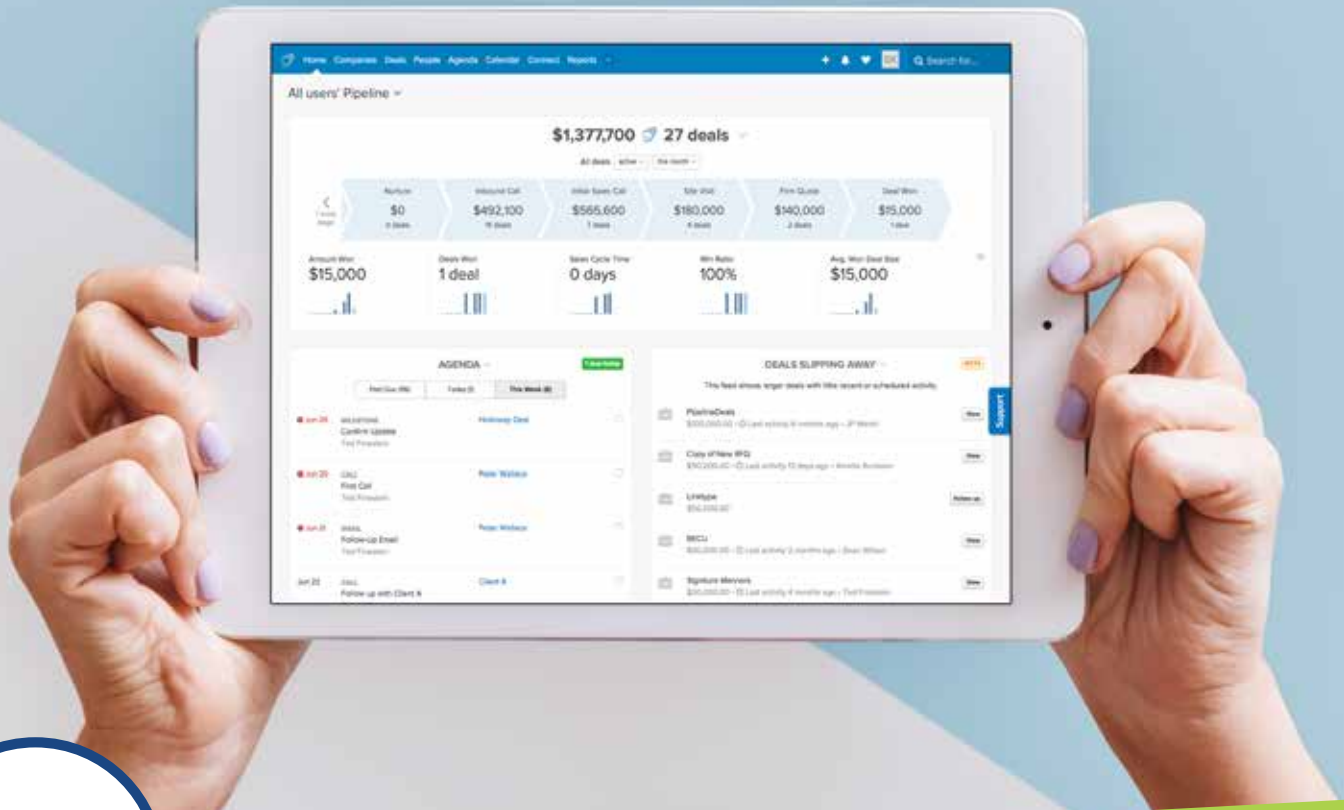


Partner Program Guide

A complete guide to
Pipeline CRM's
Partner Program

Table of Contents

1.	Who is Pipeline CRM?	3
2.	What is the Partner Program?.....	4
3.	How much can I make?	5
4.	How does it work?	6
5.	How do I refer?	7
6.	What is a successful referral?	8
7.	How do I get paid?	9
8.	How do I sign up?.....	11
9.	How do I customize my Partner Dashboard?.....	13
10.	How do I use my account to refer people to Pipeline CRM?.....	15
11.	How do I view my commissions?.....	17
12.	What are the resources to help me refer?.....	19
13.	Questions?.....	20



1

Who is Pipeline CRM?

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

What is the Pipeline CRM Partner Program?

The Partner Program is for anyone that loves Pipeline CRM and is interested in recommending it to their friends and colleagues! Partners are rewarded with 20% lifetime commission on referrals.

Anyone can join and it's free!

2





3

How much can I make?

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

How does it work?

4

After signing up for the Pipeline CRM Partner Program, you get direct access to your affiliate link and can start promoting Pipeline CRM.

Share this link with friends you want to refer to Pipeline CRM, 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.





5

How do I refer?



Each Partner will be given a unique URL that will identify them as the source of the lead. When a lead clicks on the Partner's URL, it takes them to a free 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 Pipeline CRM 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.

6





7

How do I get paid?

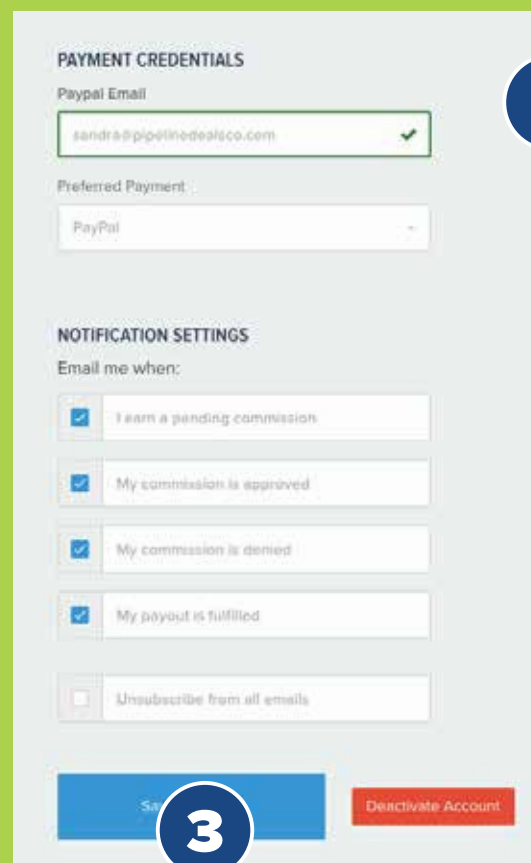
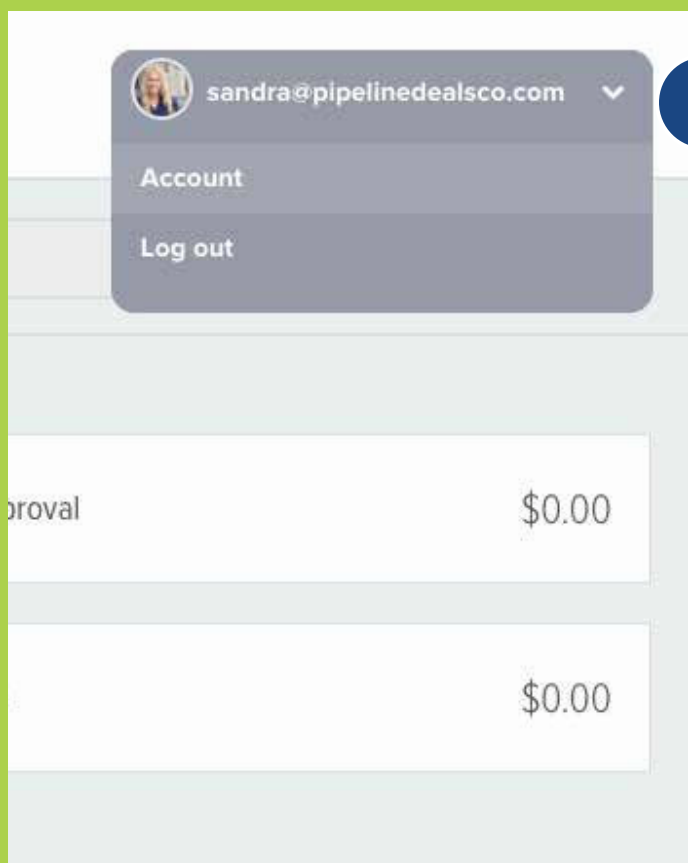
The month after your referral purchases a subscription (using your unique link), we will make a payment directly into your PayPal account. The funds will be added monthly if your referral signed up for a month-to-month subscription. If they signed up for an annual subscription, you will be given the funds all at once. Payment is quick and easy, we use PayPal as our payout method.



How to 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 **Partner Dashboard** and follow these steps:

1. In the top right-hand corner of your main page, click on the drop down 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".





8

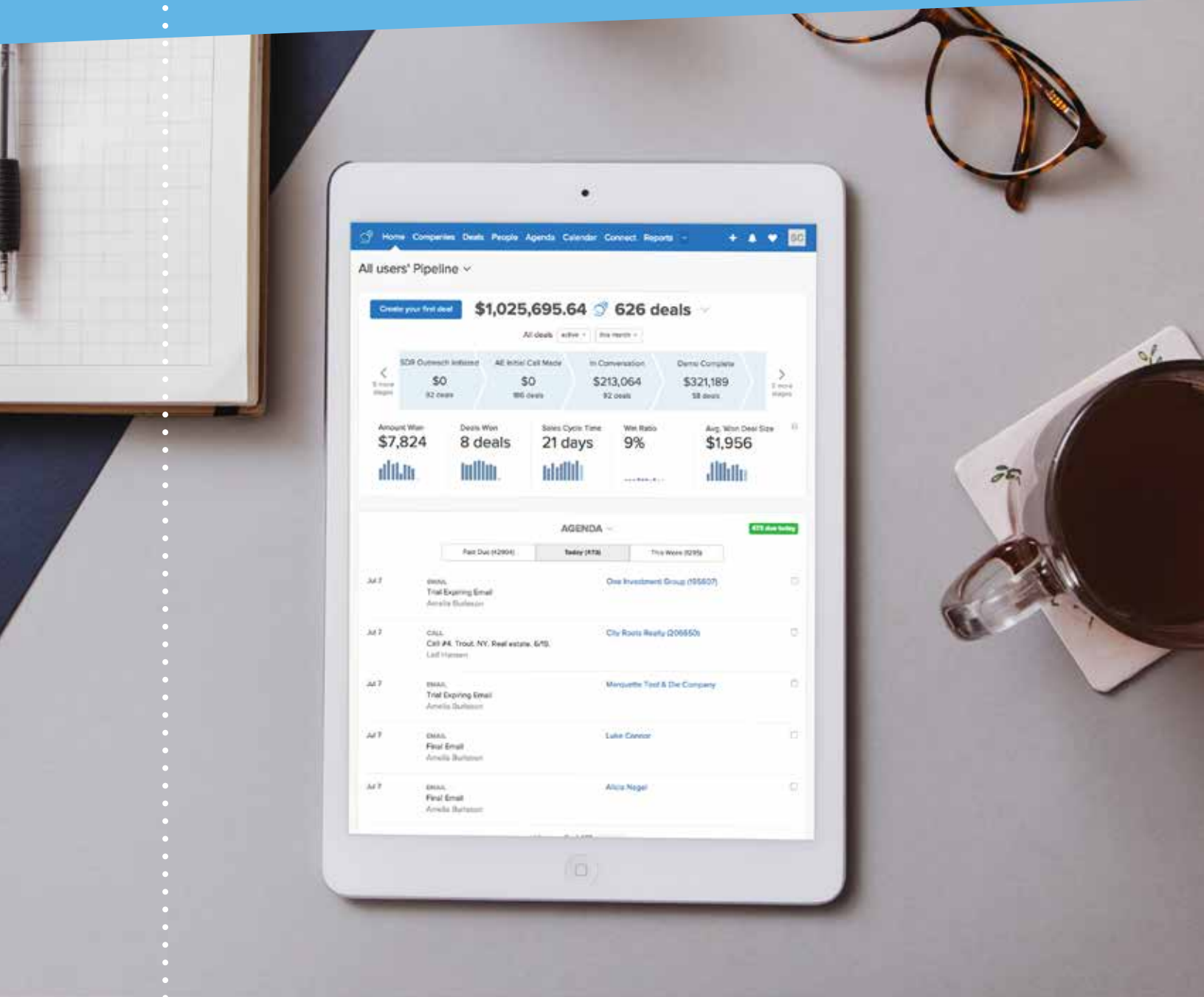
How do I sign up?

Option 1: Anyone can sign up for the Partner Program [here](#).

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

Option 2: If you are a current Pipeline CRM customer, signing up is even easier! Go to **Profile** then select **Partner Program**.

Next, fill out the form and select "Start earning today." You'll immediately be able to start making referrals and earning commissions.





9

How do I customize my Partner Dashboard?

Customize your Partner Dashboard by logging in [here](#). Use the credentials emailed to you when you first signed up to become a Partner.

Customize Your Account

Follow these steps to customize your dashboard:

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 account management page. The interface is divided into several sections:

- Account Overview:** Located at the top right, it shows the user's name (Sandra Kennedy) and options for 'Account' and 'Log out'. A callout '1' points to this area.
- CREDENTIALS:** This section includes fields for 'Email*' (sandra@pipeline-deals.com), 'New Password', 'Confirm New Password', and 'Username'. A callout '2' points to the password fields.
- PERSONAL INFORMATION (OPTIONAL):** This section includes fields for 'First Name' (Sandra), 'Last Name' (Kennedy), 'Company', and 'Street'. A callout '3' points to the name fields.
- PAYMENT CREDENTIALS:** This section includes a 'Paypal Email' field (sandra@pipeline-deals.com) and a 'Preferred Payment' dropdown menu set to 'PayPal'. A callout '4' points to the PayPal email field.
- NOTIFICATION SETTINGS:** This section includes a list of checkboxes for email notifications: 'I want a pending commission', 'My commission is approved', 'My commission is denied', 'My payout is fulfilled', and 'Unsubscribe from all emails'. A callout '5' points to the 'Save Changes' button at the bottom of this section.

At the bottom of the page, there are two buttons: 'Save Changes' (blue) and 'Deactivate Account' (red).



10

How do I refer people to Pipeline CRM?

Referring a friend to sign up for a free trial with Pipeline CRM is easy from your Partner Dashboard. 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 direct referrals to a page where they can sign up for a free trial of Pipeline CRM. This unique link is how we track your earnings, so it is crucial you use it when referring Pipeline CRM.

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.





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

Subject

Message

http://mbsy.co/hMwds"/>



The sharing module is also provided in-app for Pipeline CRM customers. You’ll follow the same steps from the previous page, but instead of logging into your Partner Dashboard, you’ll choose the from within Pipeline CRM. 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 Commissions?

You can use your Partner Dashboard to see if people are clicking on the referral link you shared, as well as track any commissions you've earned.

11



The dashboard shows the following sections:

Earned: Total amount of money you've earned from referring Pipeline CRM using your unique link.

Paid to Date: Total amount of money that has been paid to your PayPal account.

Awaiting Approval: Total amount of money that has been earned and is awaiting approval from the Partner Manager at Pipeline CRM.

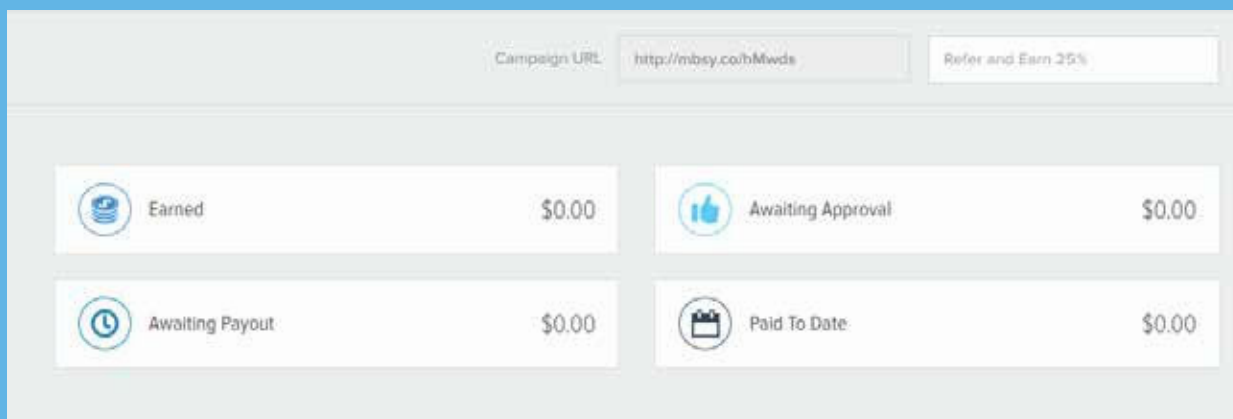
Awaiting Pay-Out: Total amount of money earned. It's been approved but has not yet been paid into your PayPal account.

When one of your referrals signs up for a free trial, the next action you will see is when they convert to a subscription.

When they do, on your Partner 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.



Do you have marketing materials?



We have plenty of marketing materials to help you with your referrals! The best sales and marketing assets to help you are compiled and accessible on the **Parter Program webpage**.



Stay informed by using our **Knowledge Base** and **Blog** to learn about best practices with Pipeline CRM!



Questions?

We're available to help you with any questions you may have regarding your Partner Program.

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

You can also email us: marketing@pipelinecrm.com

