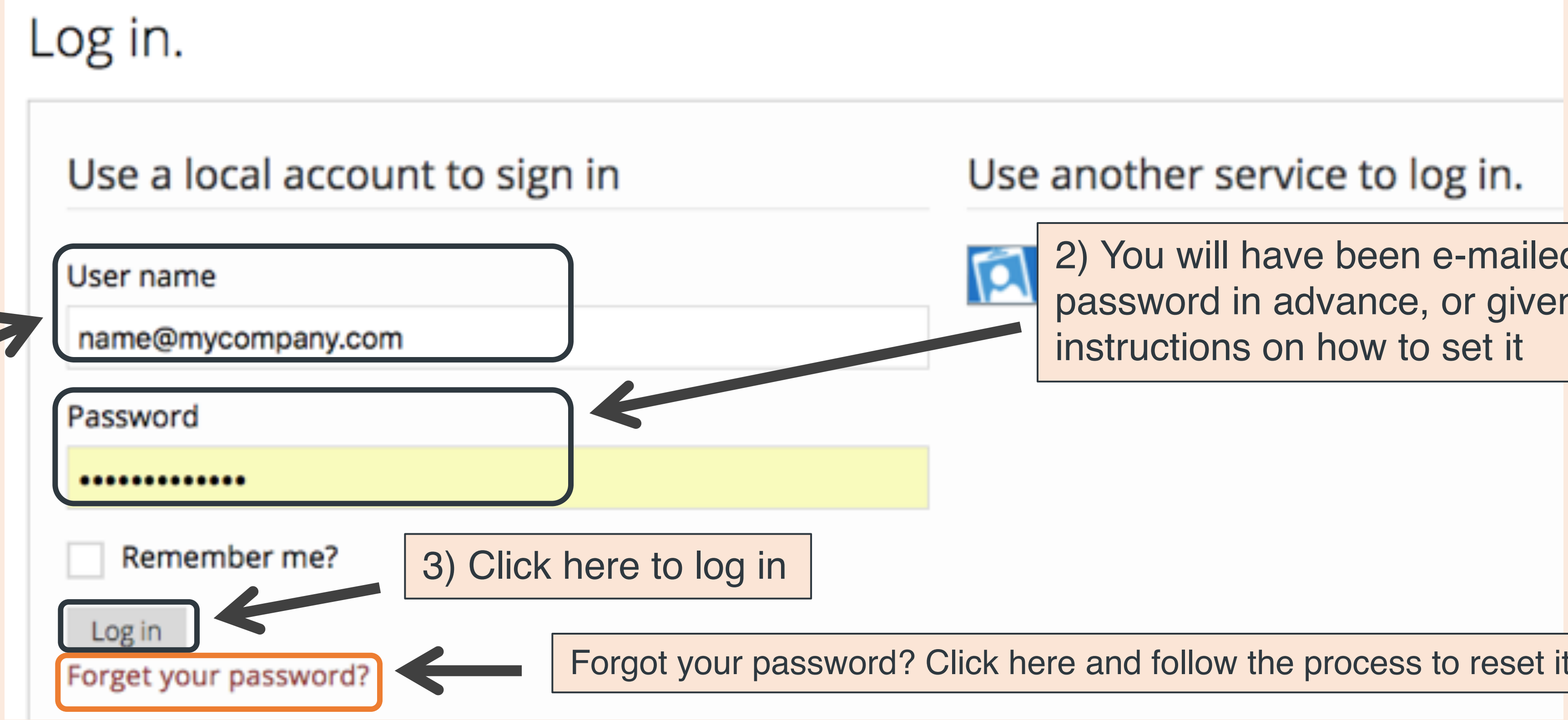
PROFILESIS GUIDANCE

BMC

LOGGING IN

First, go to www.profilesis.com and click 'Sign in'.



1) Your username is normally your company e-mail address

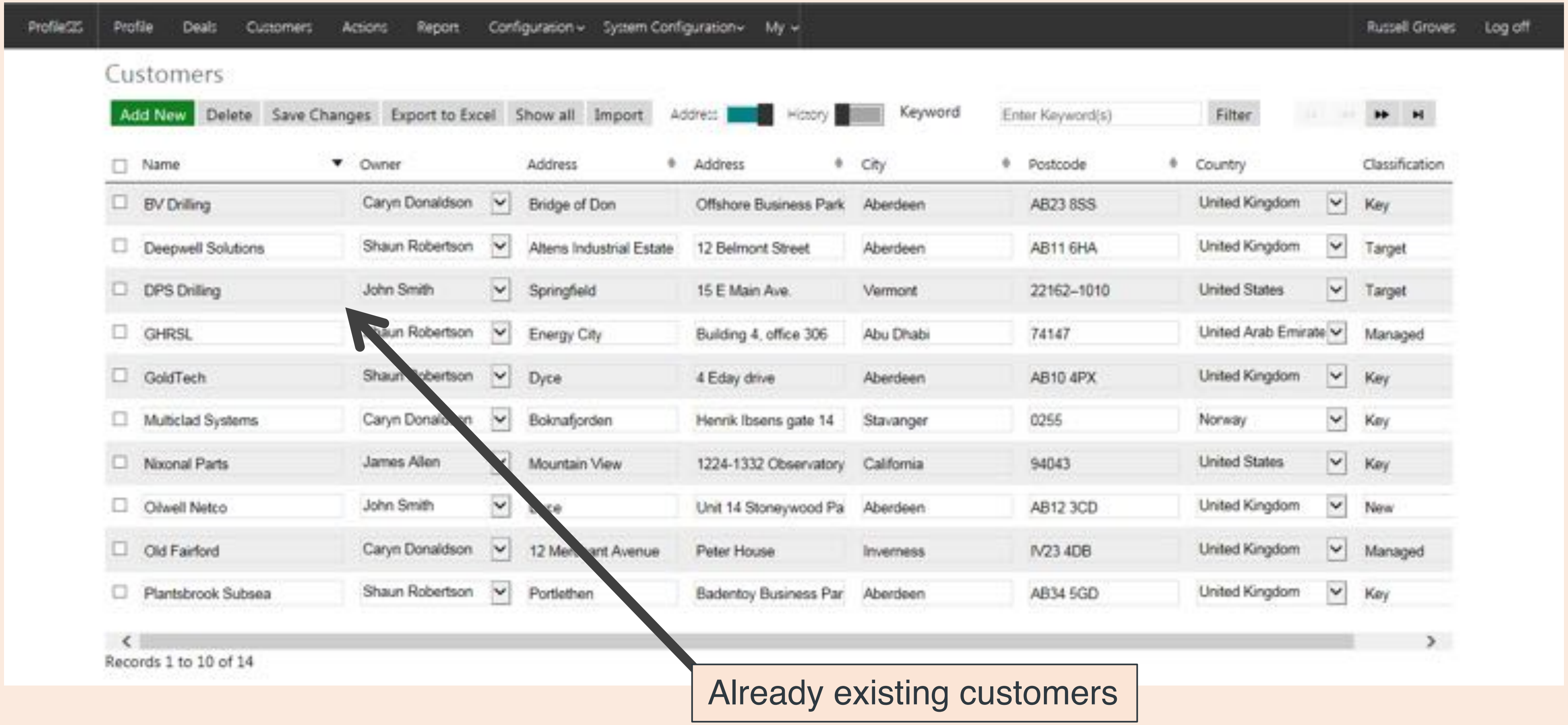
2) You will have been e-mailed your password in advance, or given instructions on how to set it

3) Click here to log in

Forgot your password? Click here and follow the process to reset it

CREATING A CUSTOMER

To create a new customer, go to the ‘Customers’ page and click **‘Add New’.**

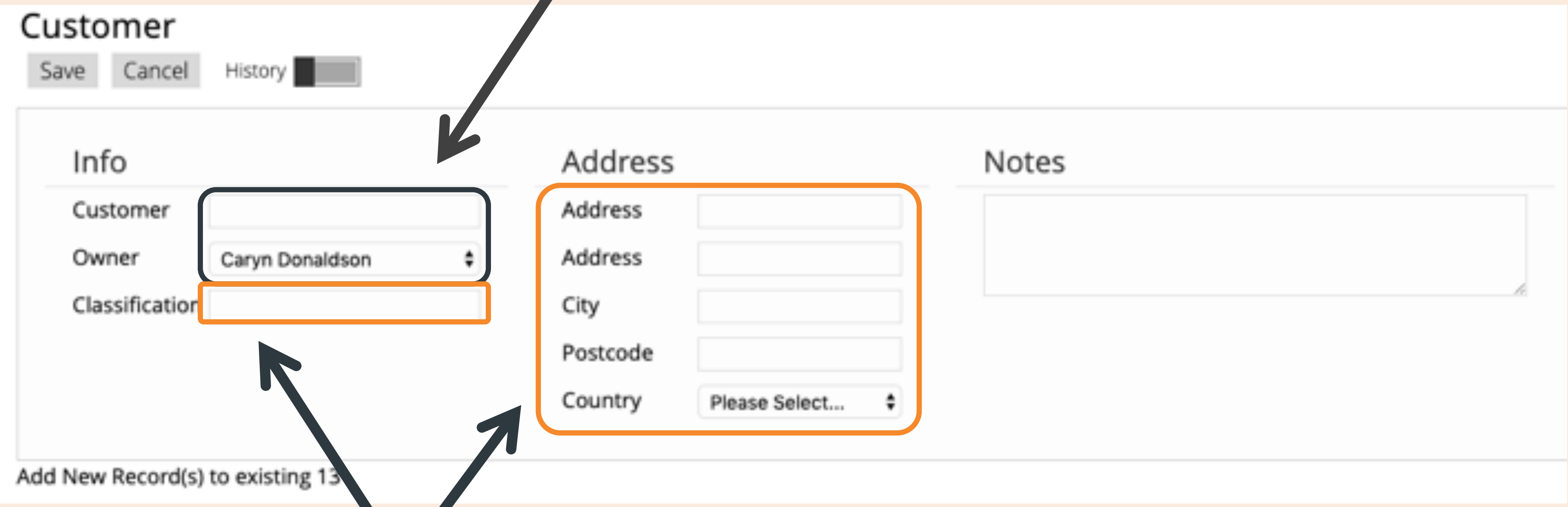


CREATING A CUSTOMER (2)

Click save.

You will be taken back to the customer list with a filter applied to show that this customer has successfully been created.

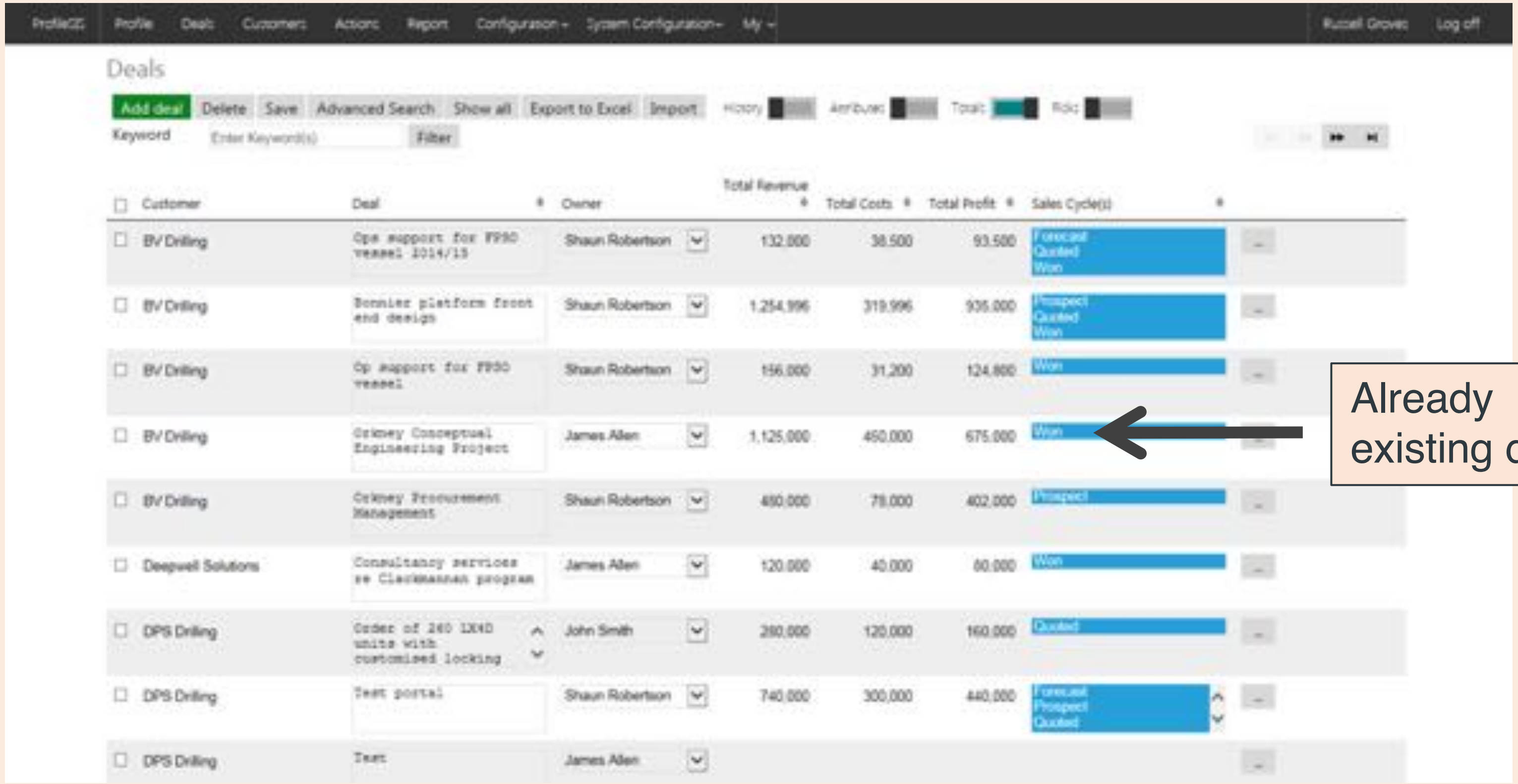
Enter the customer name and select the internal account holder



You may also add a classification and address details. These are optional

CREATING A DEAL

To create a new deal, the customer must already have been created. Go to the ‘Deals’ page and click **‘Add Deal’.**



Already existing deals

Tip: Alternatively, go to the customers tab, drill into the customer for which you wish to create a deal. Under the ‘Customer deals’ section, click ‘Add Deal’.

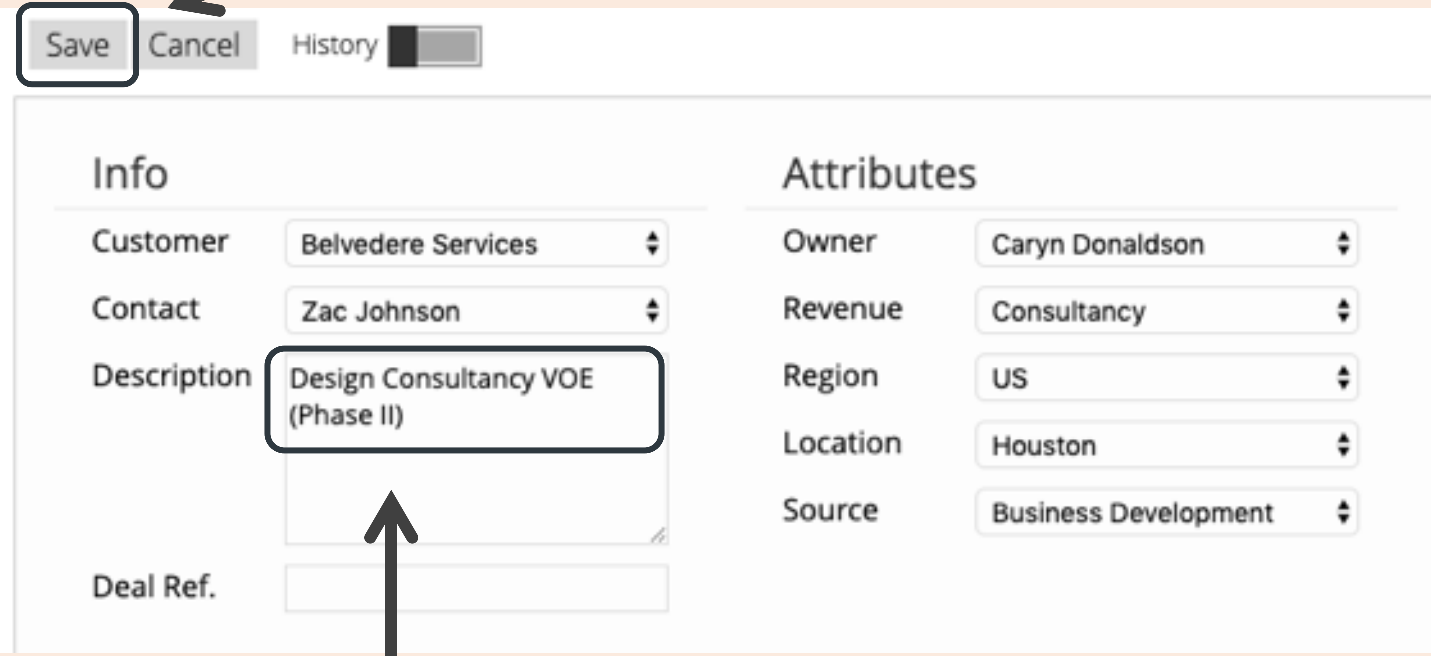
CREATING A DEAL (2)

Populate the fields:

- Customer, description, owner and revenue type are mandatory.
- Any other attributes that have been created for your company are also mandatory.
- Contact, department and region are optional. To select a contact, the customer contact must already have been created.

Note: It's so important for all attributes to be completed to get an accurate vision of your opportunity bank, especially where targets have been applied.

Once you have completed the fields, **Click 'Save'**

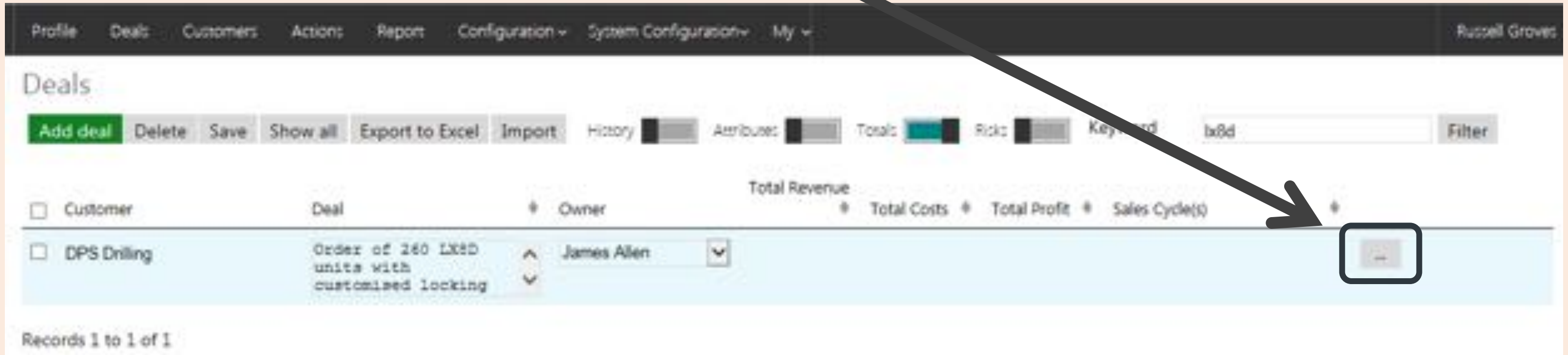


Your description should be a headline which describes the opportunity in a clear and succinct way

CREATING A DEAL (3)

You will be taken back to the deals list with a filter applied to show that this deal has successfully been created.

If you already know the value of the potential deal, <u>drill back into the deal.</u>



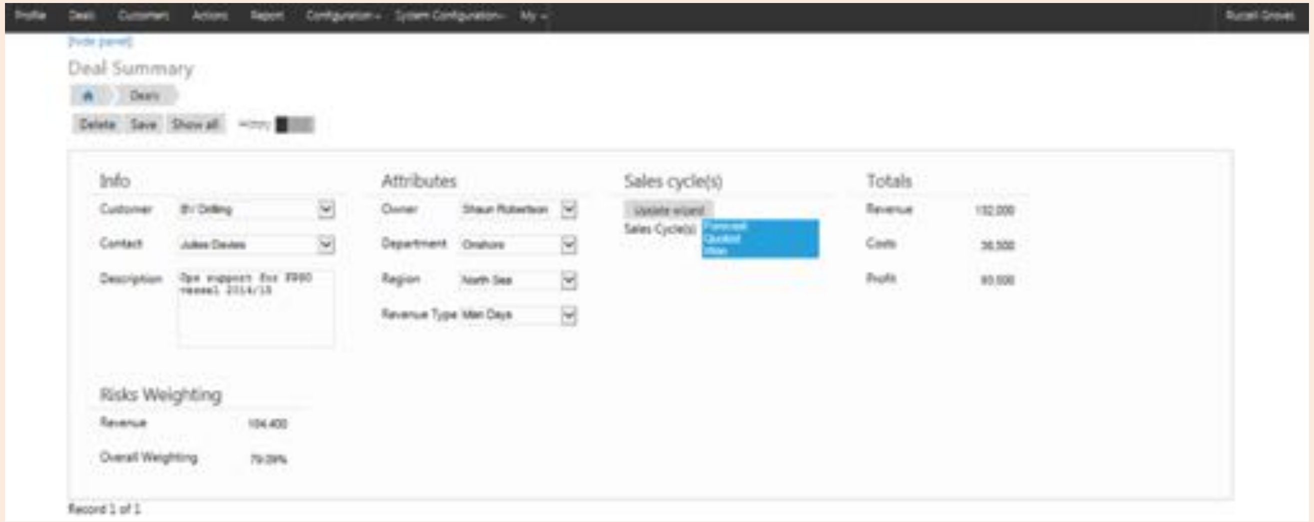
1. Beneath the heading, you will see the '<u>Revenues'</u> tab. Under this tab, click 'Add New'.
2. Click on the date box and select any date from the calendar in the month where the revenue should be included.
3. Select a sales cycle from the drop down list.
4. Enter a revenue and cost value (cost is optional).
5. Save.

Note: You can enter revenue phasings for more than one month and can complete a maximum of 10 per page.

CREATING A DEAL (4)

Revenue phases will be shown beneath the deal header section:

Deal header section



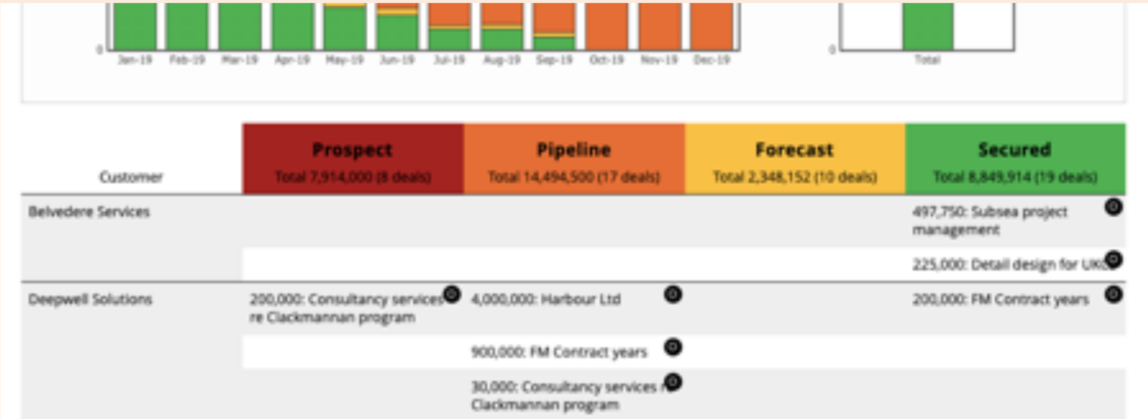
Revenue phasings

VIEWING YOUR DEAL

That's it! You now should have created a customer, a deal and associated revenue to your opportunity. Here's two ways you can view your deal…

Via the deals table

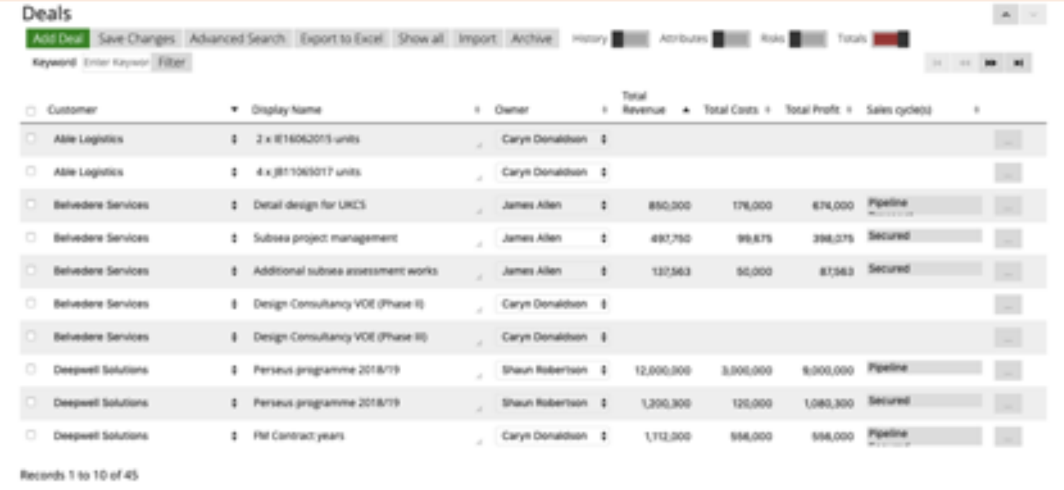
- ➢ Click 'Profile' on the top menu to see your graph. Scroll to the table below and look for your customer.
- ➢ Follow along the sales cycle and locate your deal.
- ➢ To drill into any opportunity, click the small dark circle.



Note: This table will reflect figures that you can see in the interactive ProfileSIS graph above it. If the deal stretches beyond the financial period in the graph above, the figure may appear lower on this table.

Via the 'Deals' menu

- ➢ Click 'Deals' in the top menu.
- ➢ Scroll down and look for your deal or search for it by 'Filtering'.
- ➢ To drill into the deal, click the small box to on the right side.



FAQs

I'm having trouble logging in

First, make sure you are logging in to the right page.
If the system times you out during a period of inactivity, you may see a Microsoft login page which is different from the ProfileSIS login page.
Ensure you are logging in at the correct page. Go to Profilesis.com and click 'Sign in'.
You user name is your email address and your password is either one you were given or one you set yourself. You can also reset your password from here.

Secondly, Please make sure you are entering your password correctly. Passwords are case sensitive and include a selection of upper and lower case as well as special characters. If you are using a copy and paste function, please make sure there are no blank spaces at either side of your password.

ProfileSIS is not displaying correctly

ProfileSIS is supported and tested on Google Chrome, Microsoft Internet Explorer and Mozilla Firefox browsers.
Some versions of other browsers do not always display the Profile graph or other features.
Chrome, Internet Explorer and Firefox which are available to install for free on all PCs, Apple Mac and almost all mobile devices such as tablets and smartphones.

I can only see one or limited record(s) on a page

When you drill into a deal or customer, or apply a filter (i.e. a search) ProfileSIS 'remembers' this. If you navigate away from a page, and then back to it, the previous search is still applied. To display all records, simply click 'show all'.

My changes are not being saved

In order to show additional relevant information, some pages contain multiple sections, each with their own set of options.
You must click save/update in each section that you make a change.

GETTING SUPPORT

If you require any technical support, or need to contact the team for help, visit our **Helpdesk** and a member of our team will be on hand to help: www.profilesis.com/helpdesk.

Click here to submit a new ticket, detailing as much information as you can

If you have already submitted a ticket, view the latest status here