

# PROFILE SIS GUIDANCE

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# LOGGING IN



First, go to [www.profilesis.com](http://www.profilesis.com) and click 'Sign in'.

Log in.

Use a local account to sign in

Use another service to log in.

User name  
name@mycompany.com

Password  
.....

Remember me?

Log in

Forgot your password?

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'.

The screenshot shows the BMC Customers page. At the top, there is a navigation bar with options like Profile, Deals, Customers, Actions, Report, Configuration, System Configuration, and My. Below this, the 'Customers' section has a toolbar with buttons: Add New (highlighted in green), Delete, Save Changes, Export to Excel, Show all, and Import. There are also search filters for Address, History, and Keyword. The main area is a table of customers with columns: Name, Owner, Address, Address, City, Postcode, Country, and Classification. An arrow points from the 'Add New' button to the table.

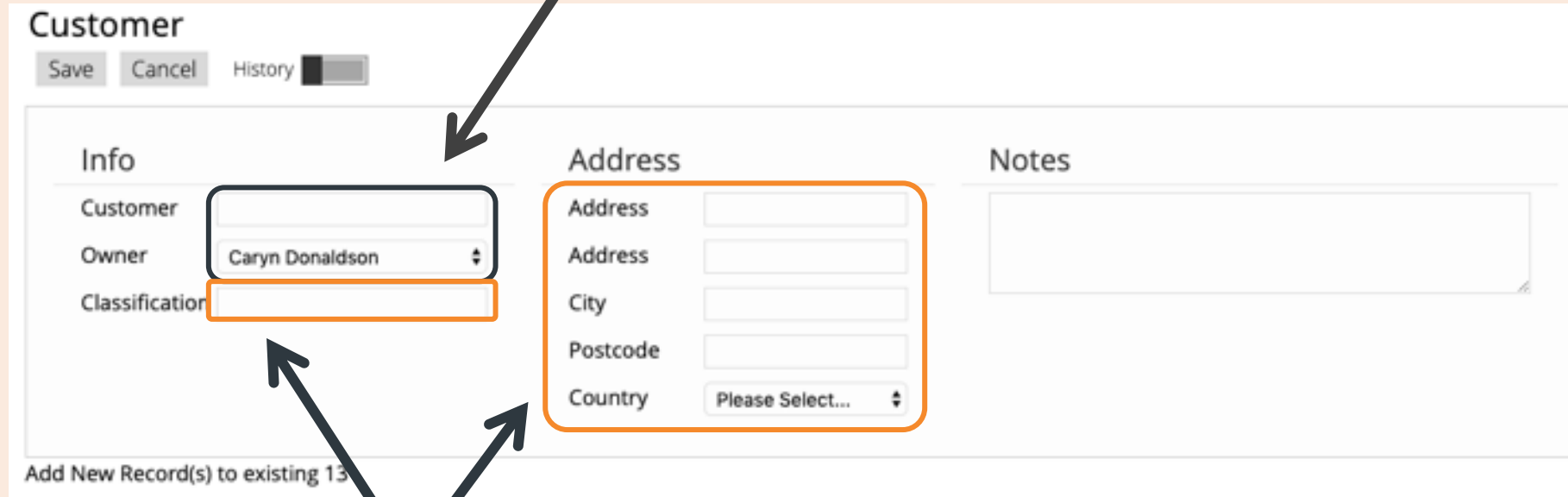
<input type="checkbox"/>	Name	Owner	Address	Address	City	Postcode	Country	Classification
<input type="checkbox"/>	BV Drilling	Caryn Donaldson	Bridge of Don	Offshore Business Park	Aberdeen	AB23 8SS	United Kingdom	Key
<input type="checkbox"/>	Deepwell Solutions	Shaun Robertson	Alens Industrial Estate	12 Belmont Street	Aberdeen	AB11 6HA	United Kingdom	Target
<input type="checkbox"/>	DPS Drilling	John Smith	Springfield	15 E Main Ave.	Vermont	22162-1010	United States	Target
<input type="checkbox"/>	GHRSL	Shaun Robertson	Energy City	Building 4, office 306	Abu Dhabi	74147	United Arab Emirate	Managed
<input type="checkbox"/>	GoldTech	Shaun Robertson	Dyce	4 Eday drive	Aberdeen	AB10 4PX	United Kingdom	Key
<input type="checkbox"/>	Multiclad Systems	Caryn Donaldson	Boknafjorden	Henrik Ibsens gate 14	Stavanger	0255	Norway	Key
<input type="checkbox"/>	Nixonal Parts	James Allen	Mountain View	1224-1332 Observatory	California	94043	United States	Key
<input type="checkbox"/>	Oilwell Netco	John Smith	...	Unit 14 Stoneywood Pa	Aberdeen	AB12 3CD	United Kingdom	New
<input type="checkbox"/>	Old Fairford	Caryn Donaldson	12 Merchant Avenue	Peter House	Inverness	IV23 4DB	United Kingdom	Managed
<input type="checkbox"/>	Plantsbrook Subsea	Shaun Robertson	Portlethen	Badentoy Business Par	Aberdeen	AB34 5GD	United Kingdom	Key

Already existing customers

# 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



Customer

Save Cancel History

Info

Customer

Owner Caryn Donaldson

Classification

Address

Address

City

Postcode

Country Please Select...

Notes

Add New Record(s) to existing 13

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'.

Customer	Deal	Owner	Total Revenue	Total Costs	Total Profit	Sales Cycle(s)
BV Drilling	Op support for F990 vessel 2014/15	Shaun Robertson	132,000	38,500	93,500	Forecast Quoted Won
BV Drilling	Supplier platform front end design	Shaun Robertson	1,254,996	319,996	935,000	Prospect Quoted Won
BV Drilling	Op support for F990 vessel	Shaun Robertson	156,000	31,200	124,800	Won
BV Drilling	Orkney Conceptual Engineering Project	James Allen	1,125,000	450,000	675,000	Won
BV Drilling	Orkney Procurement Management	Shaun Robertson	480,000	78,000	402,000	Prospect
Deepwell Solutions	Consultancy services re Clarkmann program	James Allen	120,000	40,000	80,000	Won
DPS Drilling	Order of 260 10x10 units with customised locking	John Smith	280,000	120,000	160,000	Quoted
DPS Drilling	Test portal	Shaun Robertson	740,000	300,000	440,000	Forecast Prospect Quoted
DPS Drilling	Test	James Allen				

**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'**

Save Cancel History

Info	Attributes
Customer: Belvedere Services	Owner: Caryn Donaldson
Contact: Zac Johnson	Revenue: Consultancy
Description: Design Consultancy VOE (Phase II)	Region: US
Deal Ref.:	Location: Houston
	Source: Business Development

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

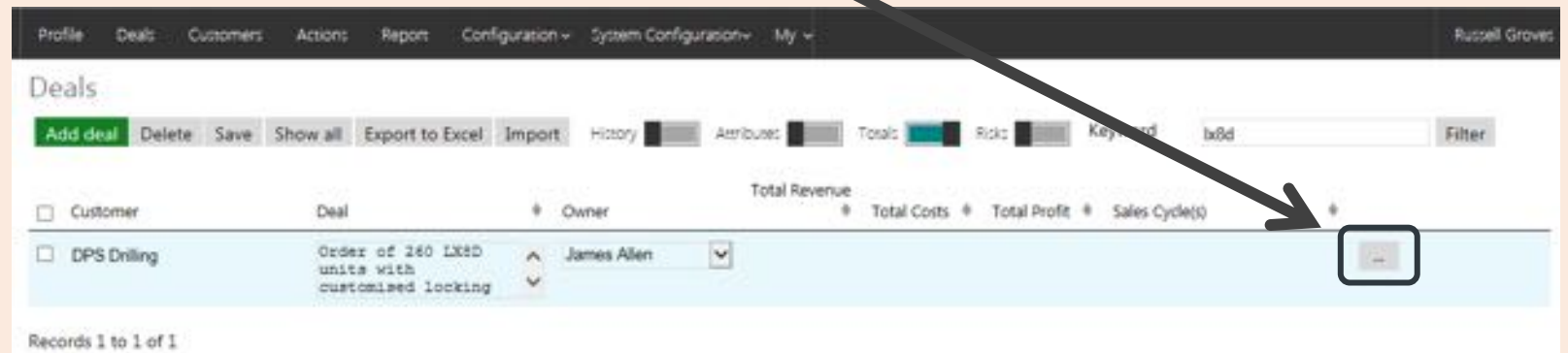
# CREATING A DEAL (3)



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, drill back into the deal.

1. Beneath the heading, you will see the 'Revenues' 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

The screenshot shows the 'Deal Summary' header section in a CRM system. It includes a navigation bar at the top with options like 'Profile', 'Deal', 'Customer', 'Actions', 'Report', 'Configuration', and 'System Configuration'. Below the navigation bar, there are tabs for 'Deal Summary' and 'Deal'. The main content area is divided into several sections: 'Info' with fields for Customer, Contact, and Description; 'Attributes' with dropdowns for Owner, Department, Region, and Revenue Type; 'Sales cycle(s)' with an 'Update wizard' button and a 'Sales Cycle(s)' dropdown; and 'Totals' with a table showing Revenue (112,000), Costs (26,500), and Profit (85,500). At the bottom left, there is a 'Risks Weighting' section showing Revenue (104,400) and Overall Weighting (79.28%).

Revenue phasings

The screenshot shows the 'Revenue Phasings' table in a CRM system. The table has columns for Date, Salescycle, Revenue, Costs, Profit, and Custom-Res. The data is as follows:

Date	Salescycle	Revenue	Costs	Profit	Custom-Res
Nov 2014	Win (100.00 %)	12,000.00	3,500.00	8,500.00	
Dec 2014	Win (100.00 %)	12,000.00	3,500.00	8,500.00	
Jan 2015	Win (100.00 %)	12,000.00	3,500.00	8,500.00	
Feb 2015	Forecast (90.00 %)	12,000.00	3,500.00	8,500.00	
Mar 2015	Forecast (90.00 %)	12,000.00	3,500.00	8,500.00	
Apr 2015	Forecast (90.00 %)	12,000.00	3,500.00	8,500.00	
May 2015	Quoted (90.00 %)	12,000.00	3,500.00	8,500.00	
Jun 2015	Quoted (90.00 %)	12,000.00	3,500.00	8,500.00	
Jul 2015	Quoted (90.00 %)	12,000.00	3,500.00	8,500.00	
Aug 2015	Quoted (90.00 %)	12,000.00	3,500.00	8,500.00	



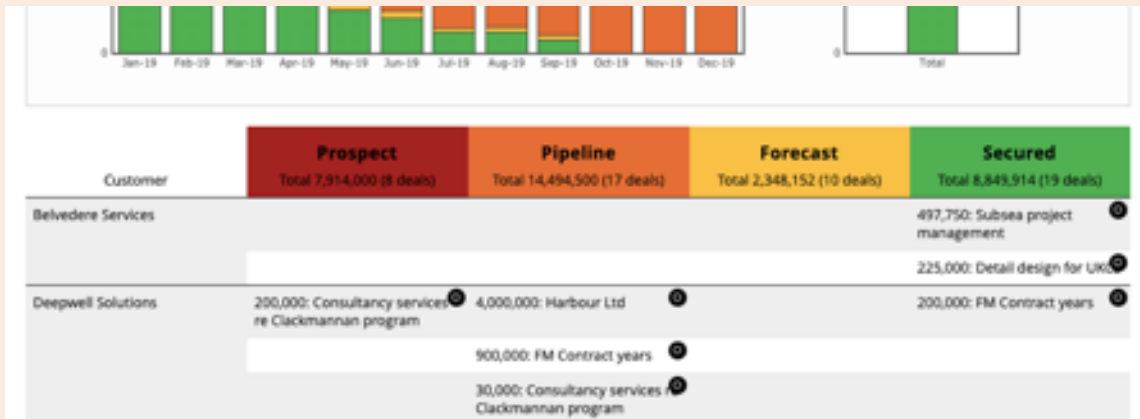
# VIEWING YOUR DEAL



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.

Customer	Display Name	Owner	Total Revenue	Total Costs	Total Profit	Sales cycle(s)
Able Logistics	2 x B16062015 units	Caryn Donaldson				
Able Logistics	4 x B11065017 units	Caryn Donaldson				
Belvedere Services	Detail design for URCS	James Allen	850,300	178,000	671,000	Pipeline
Belvedere Services	Subsea project management	James Allen	497,750	99,875	398,075	Secured
Belvedere Services	Additional subsea assessment works	James Allen	137,563	50,000	87,563	Secured
Belvedere Services	Design Consultancy VOE (Phase II)	Caryn Donaldson				
Belvedere Services	Design Consultancy VOE (Phase III)	Caryn Donaldson				
Deepwell Solutions	Perseus programme 2018/19	Shaun Robertson	12,000,300	3,000,000	9,000,000	Pipeline
Deepwell Solutions	Perseus programme 2018/19	Shaun Robertson	1,200,300	120,000	1,080,300	Secured
Deepwell Solutions	Fit Contract years	Caryn Donaldson	1,112,300	998,000	998,000	Pipeline

## ■ 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](https://ProfileSIS.com) and click 'Sign in'.

Your 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](http://www.profilesis.com/helpdesk).

The screenshot shows the ProfileSIS Helpdesk interface. At the top left is the ProfileSIS logo with the tagline 'VISIBILITY • CONTROL • PERFORMANCE'. At the top right are links for 'Helpdesk' and 'Sign In'. Below the logo is a breadcrumb trail: 'SMA and ProfileSIS customer Helpdesk > Profile help Desk'. A search bar labeled 'Search help:' is present. Below the search bar are two main buttons: 'Submit a ticket' and 'View existing ticket'. The 'Submit a ticket' button has a sub-label 'Submit a new issue to a department'. The 'View existing ticket' button has a sub-label 'View tickets you submitted in the past'. A green horizontal line connects two callout boxes. The left callout box points to the 'Submit a ticket' button and contains the text 'Click here to submit a new ticket, detailing as much information as you can'. The right callout box points to the 'View existing ticket' button and contains the text 'If you have already submitted a ticket, view the latest status here'. Arrows also point from the callout boxes to their respective buttons.