



GETTING STARTED  
GUIDE

DEALPOINT

Everyone On The Same Page

# Welcome

We believe with everything in one place, DealPoint will help you close deals faster and enjoy a higher win rate.

DealPoint is designed to have zero learning curve for Prospects, but Reps do need to know a couple of things to get set up the first time.

Good luck selling!

*The DealPoint Team*

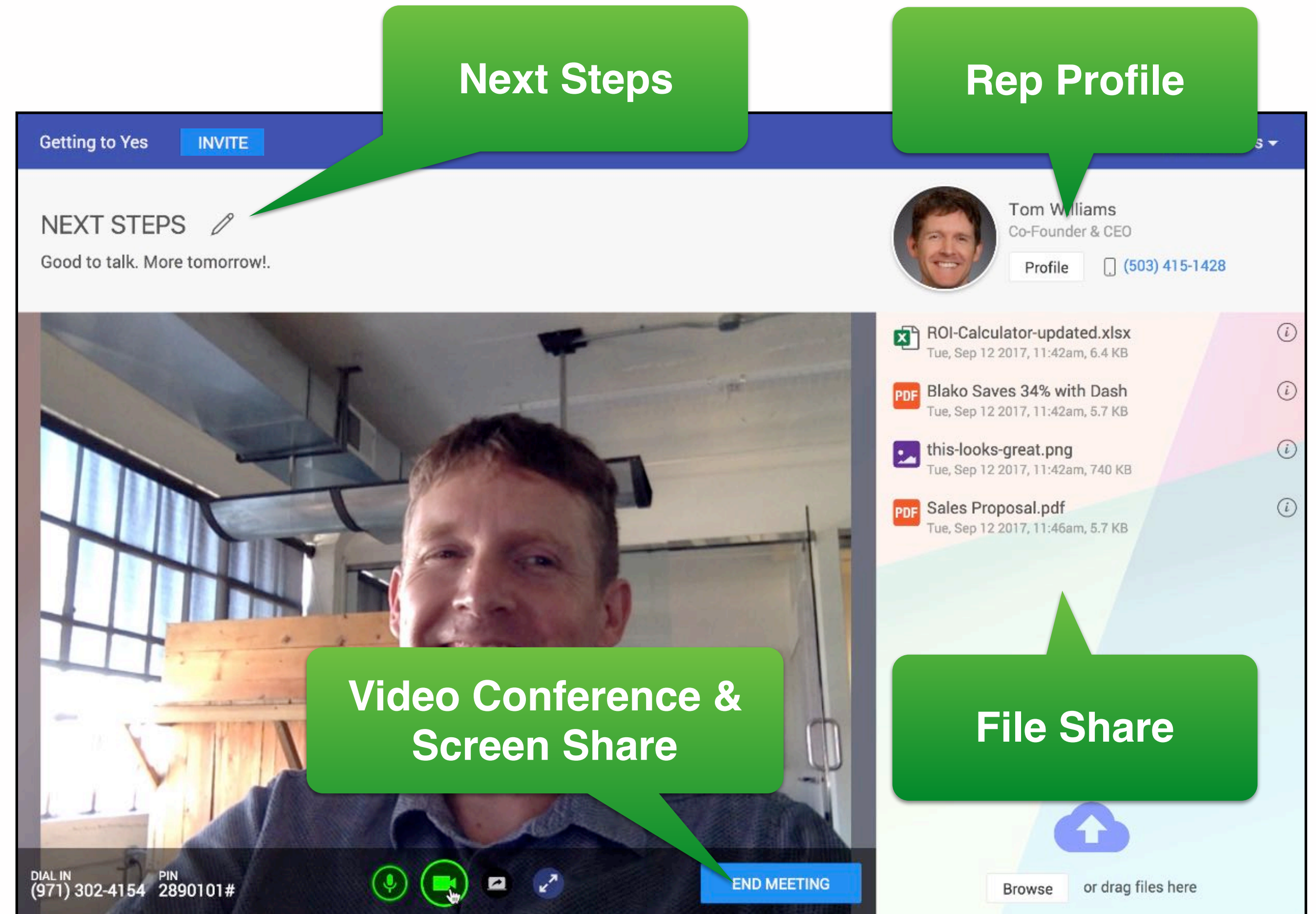
1. Feature Overview
2. Account setup
3. Your first Deal Room
4. Supported browsers
5. Product Roadmap



# FEATURE OVERVIEW: A Deal Room

*Both Rep and Prospect see the same view of the deal, with everything related to each deal in one unique URL per deal that persists for the life of the deal.*

- 100% browser based, no downloads.
- Use computer audio or dial-in. Phone number is the same for everyone, with a unique PIN for each deal room.
- Up to 6 people can join a conference simultaneously.
- Files & next step edits are real-time, so everyone sees updates without refreshing.





# FEATURE OVERVIEW: The Rep Dashboard

Each Rep has their own Dashboard, where they can edit their profile and see their deal rooms.

Organization admins also see organization profile info like Users, Roles and Billing.

Edit your Rep profile

Invite new people

Make a new room

Rooms

Profile

Rooms

+ Create New Deal Room

NAME	ORGANIZATION	REP	PHONE PIN	PASSWORD	CREATED	
A new ROom	Cbright	Tom Williams	6850101	WidthMotelClass	a day ago	...
DealPoint for Investors	Demo Inc.	Tom Williams	7760101	GraphBoardChime	8 days ago	...
DealPoint for Amir Yazdani	Demo Inc.	Tom Williams	0141101	BenchShareLayer	12 days ago	...
The New Deal	Test Org	Pat Wells	8401101	UpperMotelCanal	12 days ago	...
jdfjdf	Demo Inc.	Tom Williams	1230101	ActorInboxBoard	13 days ago	...
Vesta	Demo Inc.	Tom Williams	9641101	EssayBraveDenim	14 days ago	...
Getting to Yes	Demo Inc.	Tom Williams	2890101	TyvekMotorSpear	15 days ago	...
DealPoint 101	Demo Inc.	Tom Cbright	1980101	FruitCrowdDaisy	15 days ago	...
Radar Rocks	Demo Inc.	Tom Williams	0202101	UnityMightCross	15 days ago	...
Domino and DealPoint	Demo Inc.	Tom Williams	7393101	PieceCargoValue	19 days ago	...
Nvoice	Demo Inc.	Tom Williams	8104101	WaferBoardClick	20 days ago	...
Nonfatal	Cbright	Tom Williams	6690101	NoiseLinenFront	20 days ago	...
FoundersPad	Demo Inc.	Tom Williams	8420101	SharePilotMeter	21 days ago	...

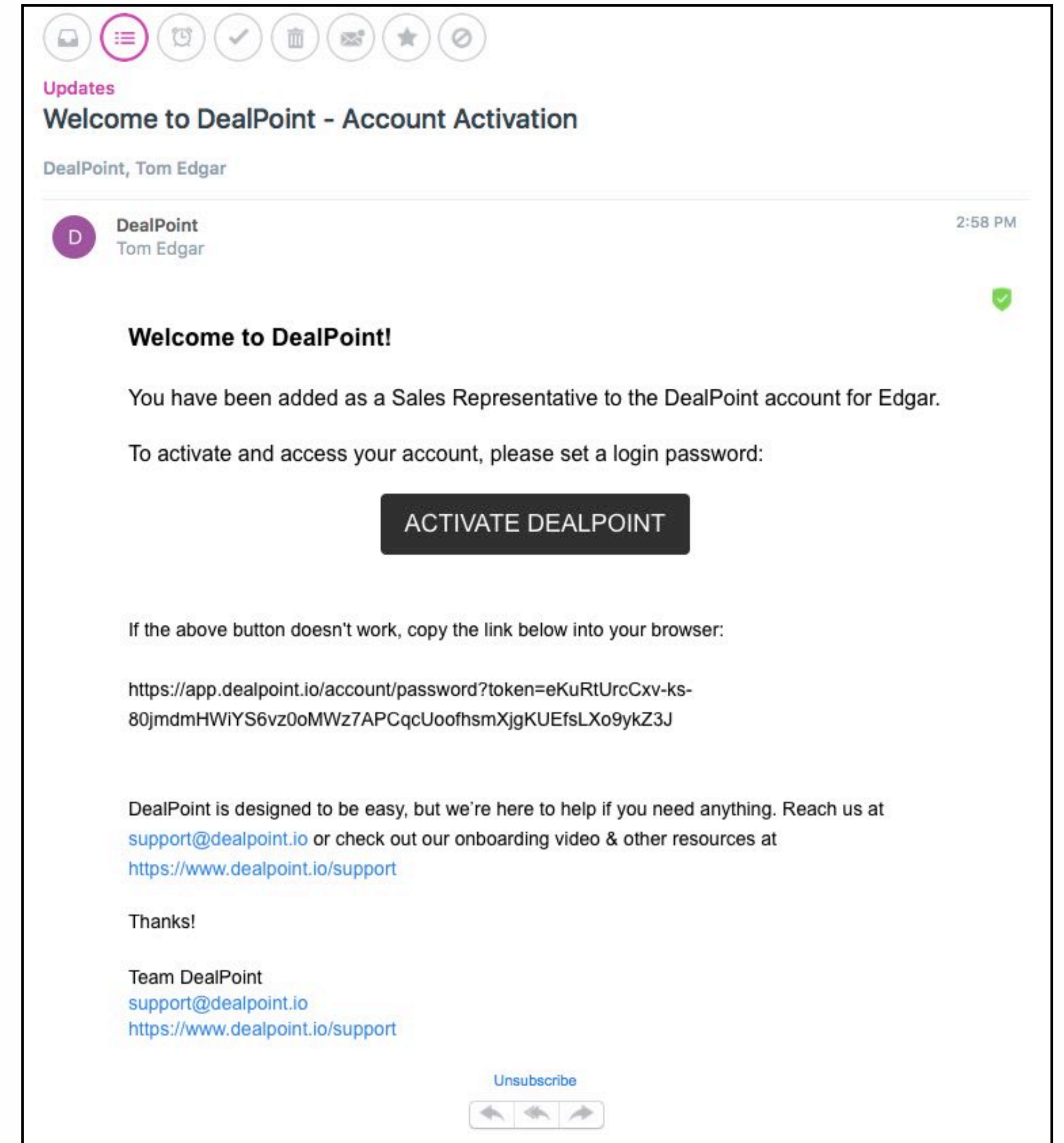
Tom Williams

https://staging.dealpoint.io/admin/rooms

# ACCOUNT SETUP: Activating your account

*Each Rep has their own unique login. You must activate your account from the email link we sent you.*

1. Check your email (including Updates tab) for an email called “Welcome to DealPoint - Account Activation”.
2. Click the link and create a password.
3. The system will log you in and will prompt you to edit your Rep Profile.





# ACCOUNT SETUP: Rep Profile

*Each Rep has their own unique profile.*

To edit your profile, go to the Admin area and click Profile

If you leave a social network link blank, it will not show on your profile.

Edit Profile

Tom Williams ▾

Profile

Rooms

Edit Profile

Name

Tom Williams

Title

Co-Founder & CEO

Email

tom@dealpoint.io

Twitter Handle

DealPoint

LinkedIn Username

tdgwilliams

Primary Phone Number


503.4151428

Short Biography

20+ yrs sales & marketing in corporate, startups & agency.

Save

Tom Williams



Co-Founder & CEO

(503) 415-1428

tom@dealpoint.io

20+ yrs sales & marketing in corporate, startups & agency.

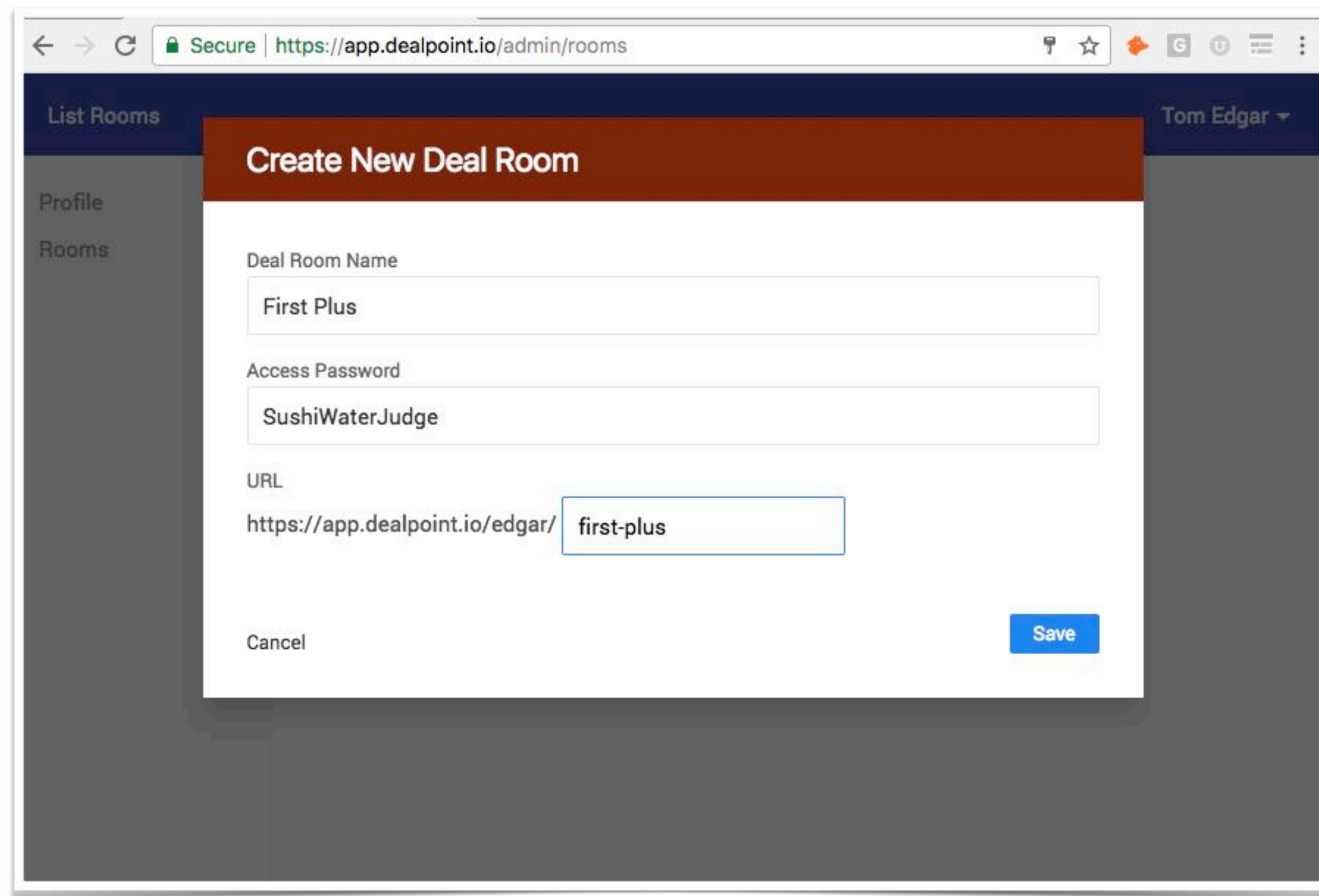
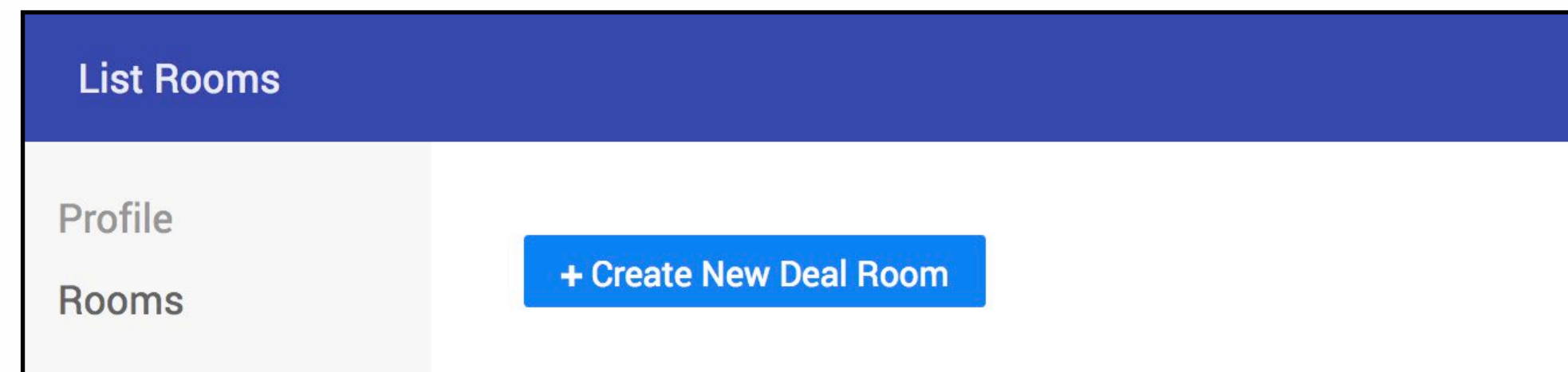
"I've seen first-hand what reps have to undergo to make the sale...with DealPoint, it's easier."

https://staging.dealpoint.io/admin/rooms


# FIRE UP YOUR FIRST ROOM: Create new deal room


1. On the Dashboard, click the Rooms link in left nav
2. Click "Create New Deal Room"
3. Give the room a name.
4. The system will create the passphrase and URL automatically.

*Next you'll want to invite some people...*



# FIRE UP YOUR FIRST ROOM: Inviting people

1. Click the people icon for the room 
2. Input the email and name for each person, **be sure to click ADD each time**.
3. This adds these people to the list of authorized people (or “whitelist”) who can enter the room.
4. To let people know about the room, you can email an invite from this panel or you can copy the room details and send your own email.

NAME	REP	PHONE PIN	PASSWORD	CREATED	
First Plus	Tom Edgar	7312101	SushiWaterJudge	a few seconds ago	 ...
					 Edit Room  Archive  Room Details

Secure | https://app.dealpoint.io/admin/rooms

List Rooms Profile Rooms Tom Edgar

### Invite People

People invited to this room:

Tom Test tomtest@cbright.com NEW

Add Email Name

another-person@cbright.com A. Nother Add

☒ Send invitation to NEW people

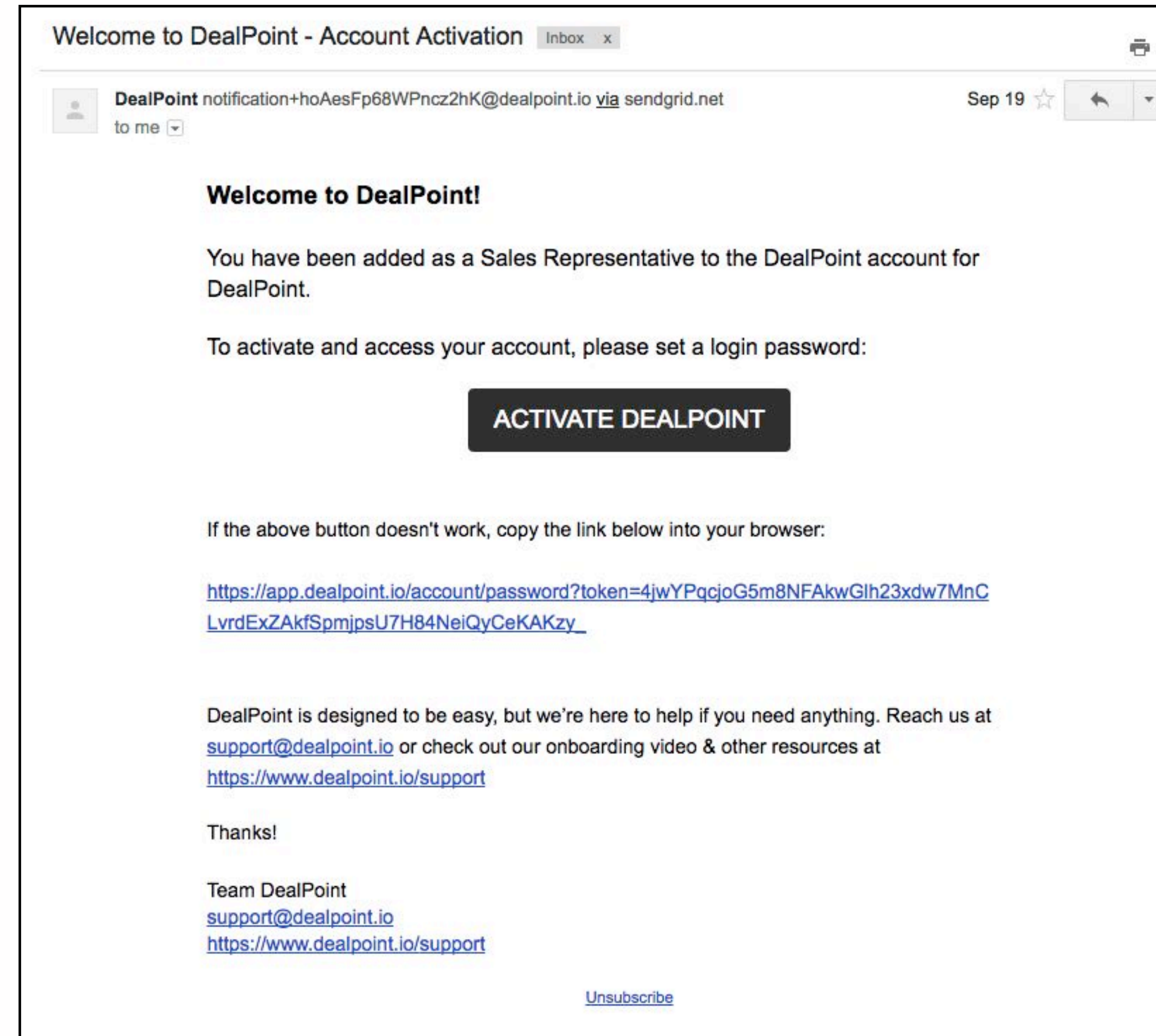
This is the text from the Invite window in DealPoint

Cancel Invite



# FIRE UP YOUR FIRST ROOM: Invite from DealPoint

Here's a system email invite for Prospects. Note that you don't need to include the room URL or password in your introduction, the system does that automatically.



# FIRE UP YOUR FIRST ROOM: Send your own with Room Details

Here's what the Room Details dialog looks like. You'd copy these Room Details into your own email or calendar invite. This is the same view that Prospects see when they click the Invite button inside the Deal Room.

NAME	REP	PHONE PIN	PASSWORD	CREATED	
First Plus	Tom Edgar	7312101	SushiWaterJudge	a few seconds ago	 ...
					<div> Edit Room</div> <div> Archive</div> <div> Room Details</div>

Room Details

Let's use DealPoint to meet.

DealPoint Room Details

Room Link:  
<https://app.dealpoint.io/edgar/first-plus>

Room Password:  
SushiWaterJudge

Dial-In Details

Phone: (503) 966-2323  
PIN: 7312101 #

DealPoint works best in Chrome, Firefox or Edge.

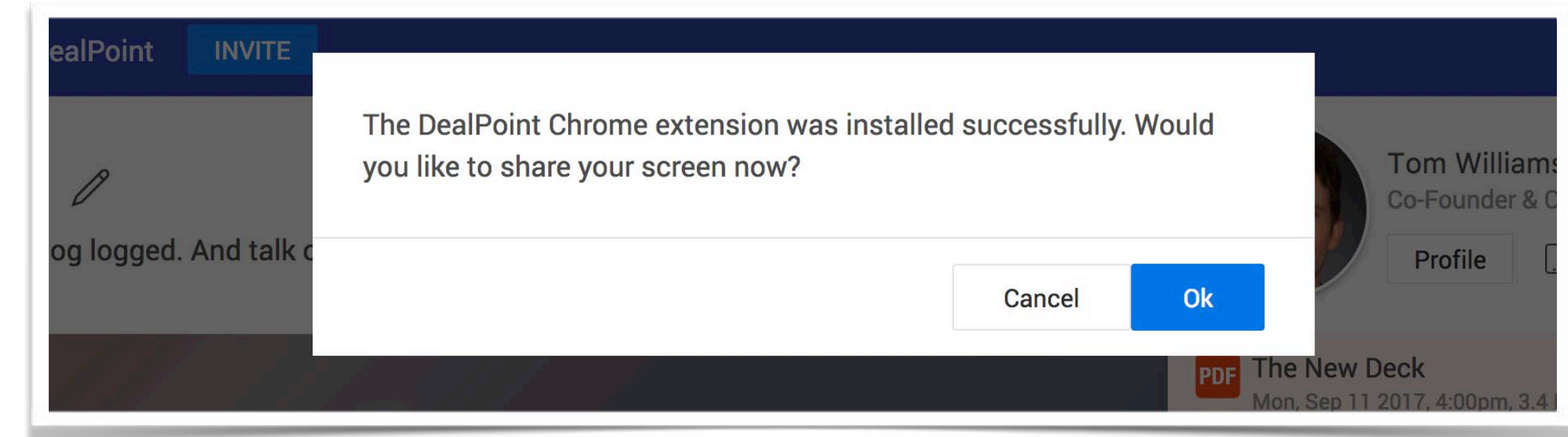
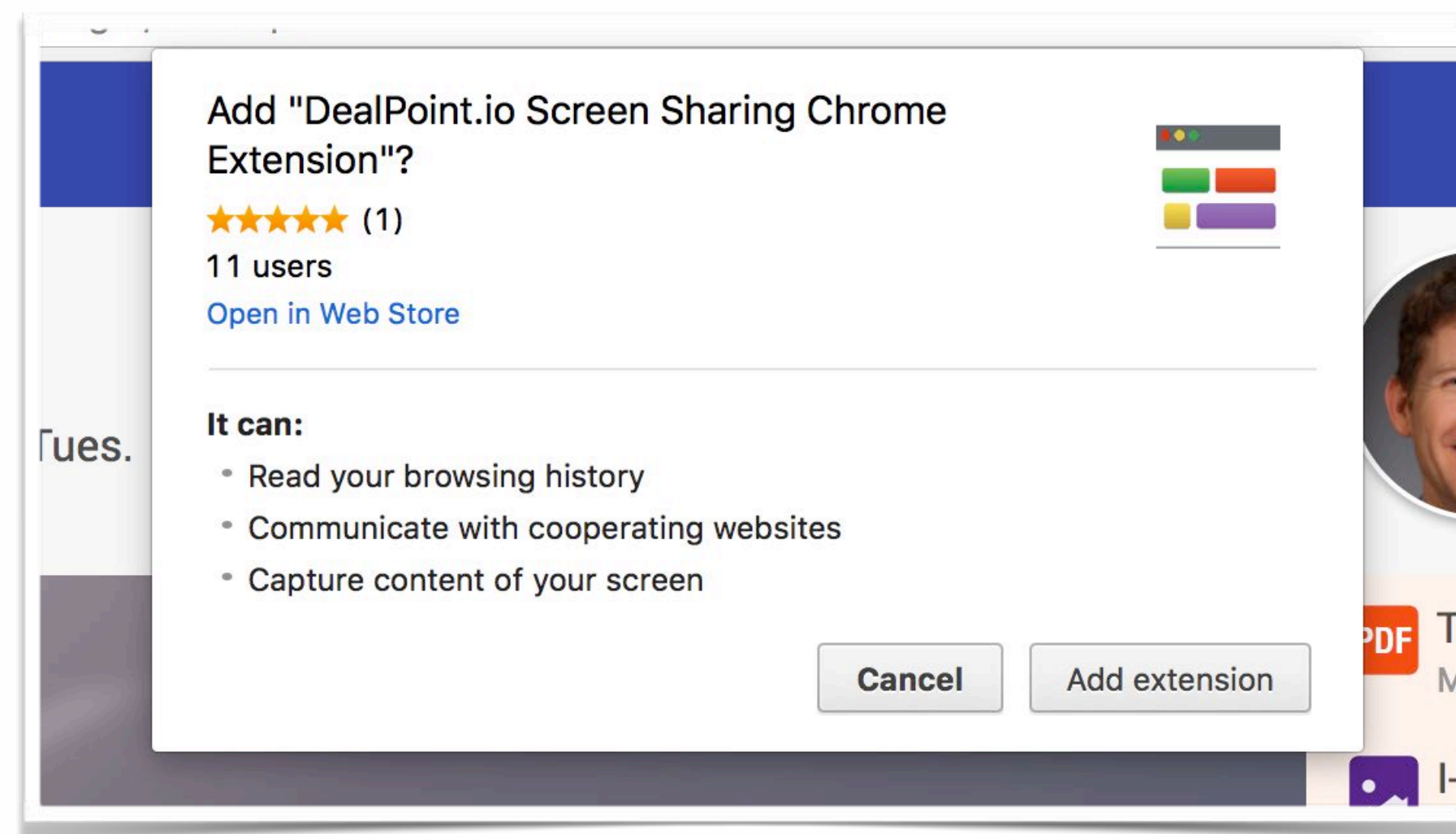
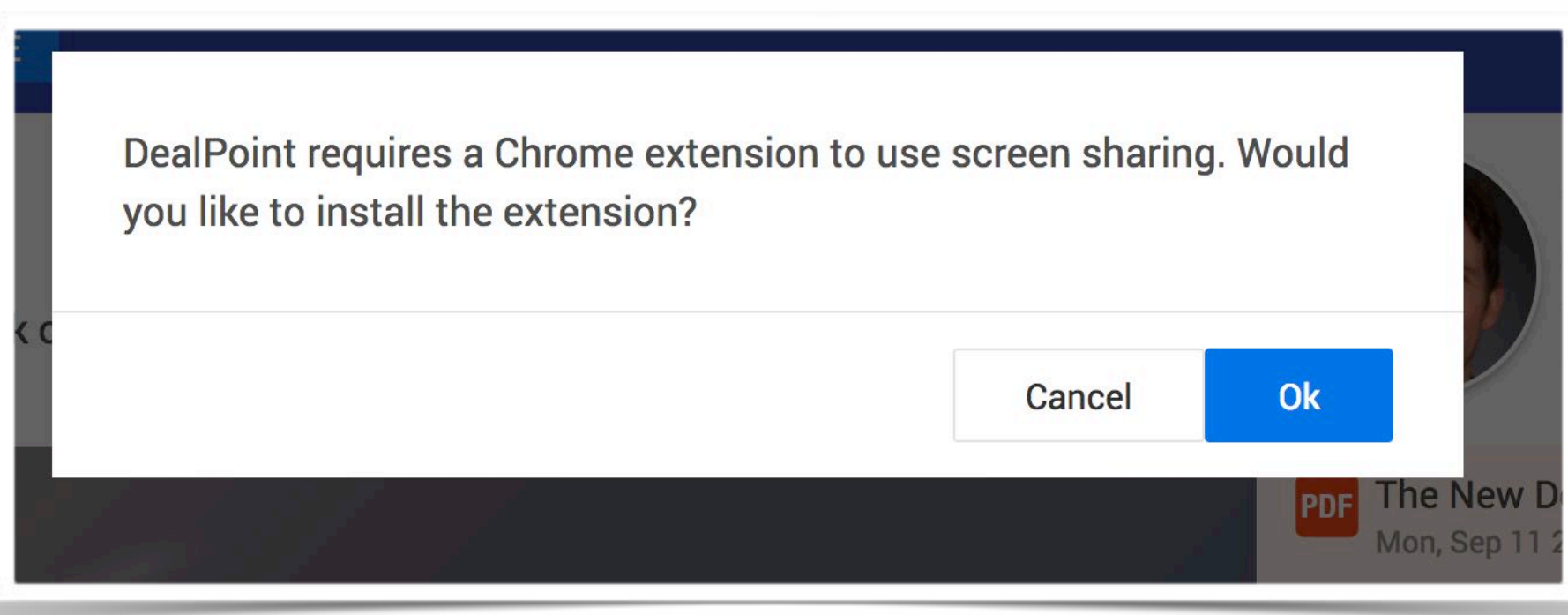
Copy To Clipboard

Invite Some People



# FIRE UP YOUR FIRST ROOM: First Screen Share

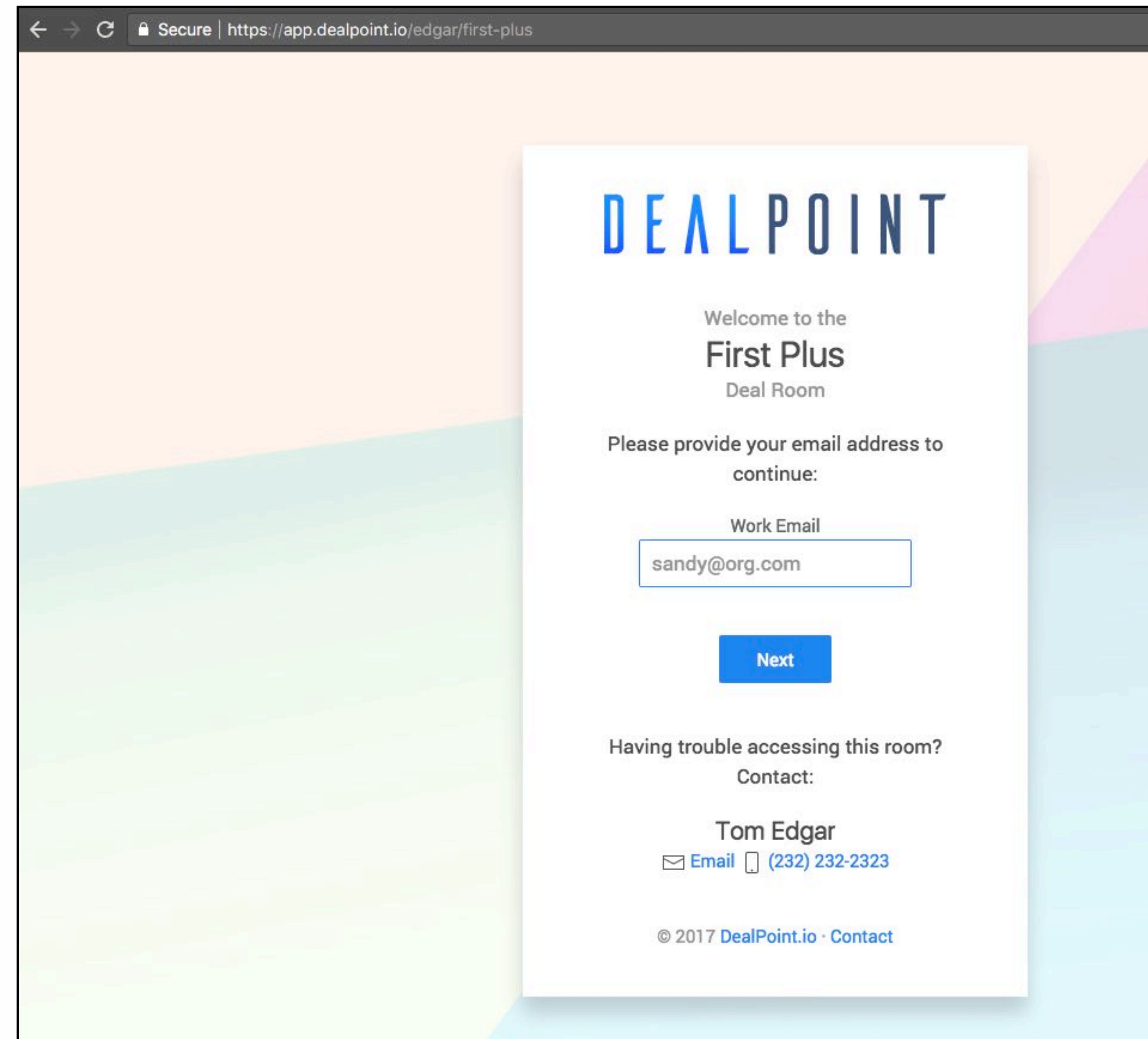
DealPoint has no downloads, but if you want to share your screen, you must use the Chrome browser with our DealPoint Chrome extension. This is a one-click, one-time process, no restart or reload required. Today, only the Rep can be a presenter.



# YOUR FIRST ROOM: The User Experience

## Here's what your customers will see

1. An email from you or the system with the Room and dial-in details.
2. The Room will prompt them for their email to make sure they're allowed in the room (email field is pre-populated if the system sends the invite) .
3. The Room will prompt them for the Room password
4. They'll enter the room, ready for the demo.

A screenshot of a web browser displaying the DealPoint First Plus login interface. The browser's address bar shows a secure connection to https://app.dealpoint.io/edgar/first-plus. The page has a light orange and teal background. A white card in the center contains the DealPoint logo, a welcome message, a prompt for an email address, a pre-filled email field, a 'Next' button, and contact information for Tom Edgar.

← → ↻ Secure | https://app.dealpoint.io/edgar/first-plus

**DEALPOINT**

Welcome to the  
**First Plus**  
Deal Room

Please provide your email address to  
continue:

Work Email

sandy@org.com

Next

Having trouble accessing this room?  
Contact:

Tom Edgar

✉ Email 📞 (232) 232-2323

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# ROADMAP : Make sales easier & less risky for Buyers and Reps

## TODAY

- Screen share
- Video conference
- File share
- Rep profile
- Next steps text editor
- Email notifications
- Org account support

## Q4 2017

- Salesforce integration
- Real-time Chat
- Prospect activity notifications
- Record & bookmark meetings

## Q1 2018

- 2 way email / calendar sync
- Mobile app
- Advanced engagement analytics
- Web push notifications

# BROWSER SUPPORT

## FULLY SUPPORTED

To **share** your screen, you need use Chrome with our extension. Prospects can **view** your screen with any supported browser, **CHROME IS BEST**



## SEMI-SUPPORTED

Safari 11 & Edge will have 100% support soon. Earlier Safari versions will be able to do file share and next steps, but not video or screen share. Users with non-supported browsers will be prompted to dial-in and asked to use a different browser.



## NOT SUPPORTED

We cannot support IE 10 or earlier. Users are prompted to dial in via phone and use a more modern browser.

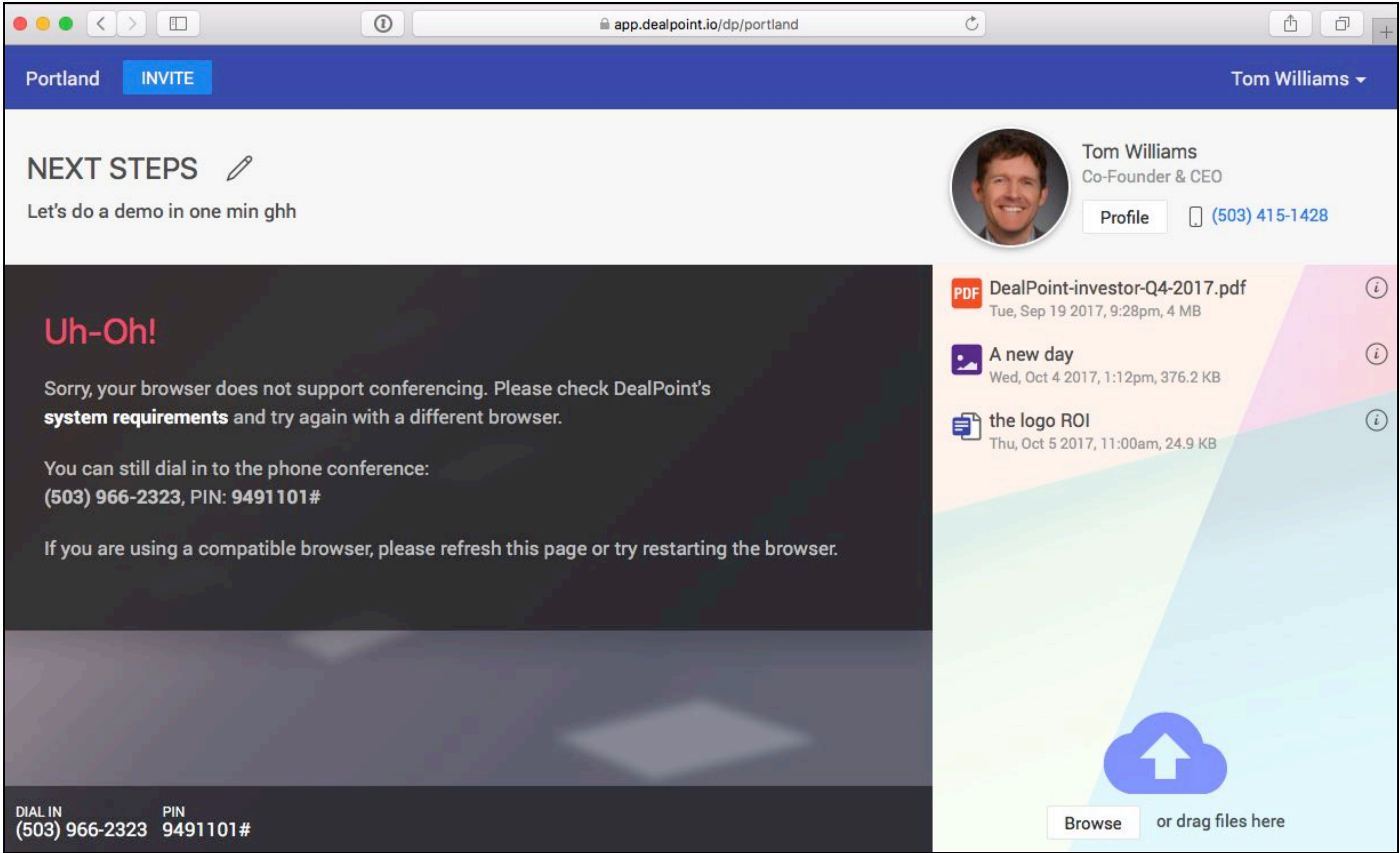
We are working on a downloadable app or plugin for these people.






# BROWSER SUPPORT





*This is what a Safari or Edge user would see. They can still download files and see the phone dial-in number*



# Thank you!

Tom Williams



**Co-Founder & CEO**  
 (503) 415-1428  
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 [@dealpointtweets](https://twitter.com/dealpointtweets)  
 [tdgwilliams](https://www.linkedin.com/in/tdgwilliams)

20+ years sales & marketing in corporate, startups and agency.

"I've seen first-hand what sales people have do to get the sale and it's painful. With DealPoint, it's easier."

If there is anything we can do to help,  
just call ...or invite us to a DealPoint!

DEALPOINT