Log In

Manage Your Deal & Be a Part of a Community of Practice

Learn More...



1 Manage your deal:

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Sign Up to Start an Organization Space



Working with the Community:

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Join the Community of Investment Practitioners

PERSONAL INFORMATION: Following Diagram Entry Fields

Already have a personal account?

Community ID

Personal PW

New to SwiftScale? Please create a personal account. Disclaimer: Information will not be shared with any third party. Starred fields are mandatory

Name*		Personal E-mail*			
Personal Phone Number*		Subject Matter Expertise*			
Personal Addre	ess	Country			
City		CA 🔻 Zip Code			
Personal ID*					
Personal Pass	word*				
Re-enter Passy	word*				
	Insert Photo				
	From Web Link				
PLACE/CROP	From Computer Browse	ə			
	Take Photo				

When a person is invited to SS to join an Org they receive an email containing a link that when clicked will be prompt them to enter their personal info first (same as this screen), and their principal info next (same as Principal info screen). If they have already joined as a person, with intentions of starting a new org, they can enter their personal ID and Password to log in, but will still need to create a principal account for the new org (only the Admin, everyone else is sent confirmation e-mail. Once the account has been created the Admin will sign in using their selected org ID and PW. With each new org membership there is a new ID and PW. This personal account ID info is only for the community and if one is starting a new org.

NEXT

Click sends the new user to the first sign-up screen (personal info). Here the Admin enters their personal info. The only member of a team who can "sign-up" through the site "sign-up" btn is an advisor. Anyone who carries out the initial sign-up is defaulted as the Admin (this can be edited later) all others are invited at some point in the process.

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Pleas Review Your Information

PERSONAL INFORMATION:



Name: Juan Davis Phone Number: 401 996 9013 E-mail: Juandavis@gmail.com

Subject Matter Expertise: Administration

Personal ID: JuanDavis1

Personal Password: Show

Edit

SUBMIT

Once the Initital Admin/Org data has been entered the admin will be prompted to review the information, and agree to SS terms, They will then recieve an e-mail telling them to confirm/log in to their account.



ORGANIZATION INFORMATION:

Already part of an organization? Sign in here.

Org ID

Principal ID for this ^ org

Principal PW

Starting a new SS organization? Sign up here.

Org ID	Size	•
Org Address	Org Country	•
Org City	CA 🔻 Zip Code	
Industry(ies)	Q Number of Seats:	
Admin: Juan Davis Edit/Invite Admin	n	

NEXT

The Admin fills out Initial company information. They define the org for SS. For another member (an admin or the opposite deal team (an invited party) an org may already exist, here they would click the "sign in" btn to bypass this step.



ORGANIZATION INFORMATION:

Already part of an organization? Sign in here.

Org ID						
Principal ID	INDUSTRY SPECIFICS					
Principal PW	Nationality (UN nation code)					
Starting a new SS	American - 840					
Org ID	Add Another Nationality					
Org Address	International Industry List Hierarcy - with asscociated codes					
Org City	Search Q					
Industry(ies)	Browse List					
Admin: Juan Davis	Misc. Repair (except computers)					
Aumin. Juan Davis	3267 Audio Equipment and T.V. Repair					
	3133 Electrical and Electronic Equipment Repair Except Audio and T.V.					
	3215 Furniture Repair/ Reupholstery 4566 Other Equipment Repair					
	Trade, Retail-Selling Goods to Individuals and Households					
	3038 Catalogue or Mail Order					
	Electrical and Electronic Equipment Repair Except Audio and T.V. ISIC: 3133					
	Size of Business (Revenue)					
	Add Another Industry					
	DONE					

NEXT

Admin sets the industry specifics. This is in a modal window (probably will need to be a little larger...)

Pleas Review Your Information

ORGANIZATION INFORMATION:

Soogle Inc. 1606 Amphitheatre Parkway Palo Alto, CA 94302 307 employees Seats: 75

INDUSTRY SPECIFICS:

Industry: Electronic and Electrical Equipment Repair Nationality: American - 804 ISIC: 3133 Size (Revenue): 100 B

SUBMIT

Next form @Zuora

Once the Initital Admin/Org data has been entered the admin will be prompted to review the information, and agree to SS terms, They will then recieve an e-mail telling them to confirm/log in to their account.



Edit

Edit

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Last Name: * Company Billing is associated with org size/number of seats so will come after the org setup, this screen, along with org setup, will be bypassed for anyone joining SS through invitation Phone Number: * Annual Revenue: * Select One Which CRM do you use? * Select One * Comments:		
Company Billing is associated with org size/number of seats so will come after the org setup, will be bypassed for anyone joining SS through invitation Phone Number: Annual Revenue: Select One Which CRM do you use? Select One		
Phone Number: * Annual Revenue: * Select One Which CRM do you use? * Select One Comments:	Company Billing is a of seats so this screen, bypassed fo invitation	ssociated with org size/number will come after the org setup, , along with org setup, will be or anyone joining SS through
Annual Revenue: * Select One Which CRM do you use? * Select One \$ Comments:		
Which CRM do you use? * Select One \$		* Select One
	Which CRM do yo เ Select One	

After completing the org profile/identifying their principal info, the Admin is linked out to Zuora to and prompted to assess the number/division of seats/any other billing info required by the site.

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PRINCIPAL INFORMATION

Org ID

Password

Re-enter Password

Org E-mail

Org Phone

Subject Matter Expertise (selct another)

1. IT development

They also enter their principal information. They could have more than one principal account. For each organization a member can hold one principal account. The admin retains their principal information within the context of their org. Even if they assume a number of roles within that org, any information that has been tied to them lower in the hierarchy (is if they assumed some role in specific deal within their org) is forwarded to them through their principal account tied to that organization. A person may have two principal accounts if they are asked to join another org.

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Pleas Review Your Information



PRINCIPAL INFORMATION:

Org Phone Number: 401 575 3256

Org E-mail: juandavis@soogle.com

Show

Industry Expertise: Electronic and Equipment Repair Tech. and Process Development

Org ID: JuanDavisSoogle1

Org Password:

Devin: Might consider having the number of seats allotted post somewhere when you are generating a team (any team) so it can be easily editable, and if you need to add one, you can through SS, and you get billed through the other site. I assume teams will want to add new seats throughout the deal or investment process...

Tim: I agree, and it will probably add a further complication. A team lead may not have authority to buy more seats, so they will need to specify the seats they need and then a workflow will need to route that spec as a request for more seats to the Org Admin to approve. Might also need to get routed to a Deal Mgr if budget is attached to Deals.

More complicated than warranted in this phase, but it most likely going to grow to that.

I have read and agree the Terms and Conditions of SwiftScale

SUBMIT

Once the Initial Admin/Org data has been entered the admin will be prompted to review the information, and agree to SS terms, They will then recieve an e-mail telling them to confirm/log in to their account.