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

② Working with the Community:

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Join the Community of Investment Practitioners

START: A deal manager who is familiar with site, but has not yet used it, Intends to set up account/deal. To do so they click "sign up" btn at top right

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 Address	Country

City	CA ▼	Zip Code

Personal ID*

Personal Password*

Re-enter Password*

PLACE/CROP

Insert Photo

From Web Link

From Computer Browse...

Take Photo

NEXT

Pleas Review Your Information

PERSONAL INFORMATION: [Edit]

Name: Juan Davis

Phone Number: 401 996 9013

E-mail: Juandavis@gmail.com

Subject Matter Expertise: Administration

Personal ID: JuanDavis1

Personal Password: [Show]

[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) 🔍	Number of Seats:

Admin: Juan Davis   Edit/Invite Admin

NEXT

SwiftScale

Juan Davis ◀

ORGANIZATION INFORMATION:

Already part of an organization? Sign in here.

Org ID

Principal ID

Principal PW

Starting a new SS

Org ID

Org Address

Org City

Industry(ies)

Admin: Juan Davis

INDUSTRY SPECIFICS

Nationality (UN nation code) 🔍

American - 840

Add Another Nationality

International Industry List Hierarcy - with asscociated codes

Search 🔍

Browse List

Misc. Repair (except computers)
- 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:

Edit

Soogle Inc.
1606 Amphitheatre Parkway
Palo Alto, CA 94302

307 employees
Seats: 75

INDUSTRY SPECIFICS:

Edit

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.

OS.

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REQUEST A FREE TRIAL

First Name: *

Last Name: *

Company Name: *

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

Email Address: *

Phone Number: *

Annual Revenue: * Select One...

Which CRM do you use? *

Select One...

Comments:

Submit

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.

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.

Pleas Review Your Information

PRINCIPAL INFORMATION: Edit

Org Phone Number: 401 575 3256

Org E-mail: juandavis@soogle.com

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

Org ID: JuanDavisSoogle1

Org Password: Show

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 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.