



AI

Hi Ethan,
Sophia Adams has viewed
74% of your content.

Sophia Adams

PRESENT
SHARE
SHARE WITH TEAM(S)

Your Top Performing Content

1 PRESENTATION
2 PDF FILE
3 PDF FILE

Deals Activity

Share Content with your Team(s)

- Marketing Team
- Sales Team

SHARE NOW
SCHEDULE

MANUAL & REFERENCE GUIDE

ABOUT SALESDRIVE[®]

Salesdrive equips B2B sales teams with valuable content, tools and insights to convert leads into customers.

Salesdrive **centralizes all your sales material in one intuitive platform**. Marketers efficiently update, distribute, and analyse content, while sellers save time on customization and searching, enabling them to focus on closing deals.





The platform **tracks when and for how long prospects view your content**, allowing sellers to improve follow-up strategies. Combine this with an **up-to-date library** of future-proof sales content and dealmaking naturally speeds up.

Which content is used the most? What separates top sellers from the rest? Where do buyers pay attention to? Salesdrive **real-time dashboards provide sales and content analytics**, revealing which reps and what content generate the most revenue.

Salesdrive is **managed in the cloud**. Your devices can **connect online just as well as offline** if there is no internet connection available. Furthermore, it offers a new and interactive experience for you and your audiences. Tailor made for each opportunity, from pitch talks to sales moments to larger conference speeches.

This user guide has been created for the key users who have access to all content, can adapt presentations and/or apps and can share content with respective teams.

TABLE OF CONTENTS

04 Getting started with Salesdrive	43 Insights
09 Administrate your Audience	47 Team 
12 Working with Slides 	51 Files and Folders in Library
22 Working with Chapters 	53 Files and Folders in Content screen
25 Creating an App 	56 Notification Center
26 Presenting Content	57 Using the help-function in the App
30 Sharing Content	57 Account
36 Buyer Portal	58 Update or Access the App
39 Tracking Content	59 Custom features <i>(available on request)</i>
40 Content in Funnel Stages	65 Contact details
42 Train mode	



Admin Access Only

This section is intended for users with full access to the platform.

GETTING STARTED WITH SALESDRIVE

STEPS

- How to Login
- Using Salesdrive on- and offline
- Road mode
- Homescreen
- Smart Search
- Log out

We want you to feel informed and empowered during your Salesdrive experience. Below we have outlined in detail what each of your first steps will involve.

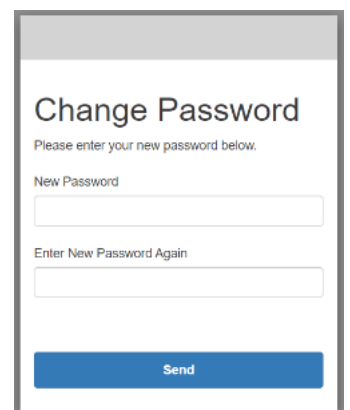
HOW TO LOGIN

SSO

- ▶ You receive a URL link
- ▶ When clicking login, you will be redirected to your own corporate login page.
- ▶ Fill in your credentials in this corporate login page.
- ▶ After having successfully submitted your credentials, the Homescreen appears.

NON-SSO

- ▶ You receive an email with a temporary password.
- ▶ Go to the URL you received and login with your temporary password.
- ▶ After you logged in you will be required to change your password.
- ▶ After changing the password you will be redirected to the app



The screenshot shows a 'Change Password' form with the following elements:

- Change Password** (Section Header)
- Please enter your new password below. (Instruction)
- New Password (Text input field)
- Enter New Password Again (Text input field)
- Send (Blue button)

USING SALESDRIVE ON- AND OFFLINE

- ▶ You can work in both Online and OFFline modes, but in OFFline mode you will have limited options.
- ▶ When in OFFline mode you will be prompted with a pop-up saying “No Internet Connection”, You can only Present a presentation in OFFline mode, all other functionalities will be disabled



*For OFFline presentations you need to make sure your app is **completely synced** beforehand.*

ROAD MODE

- ▶ Road mode can be turned on when Salesdrive is completely synced
 - You’ll notice when the cloud icon turns green.
- ▶ Turn it on by clicking the toggle button at the bottom of the screen. A message pops up that says that road mode is on.



Road mode will stay ‘on’ as long as you don’t turn it off. Even after closing and opening the app.

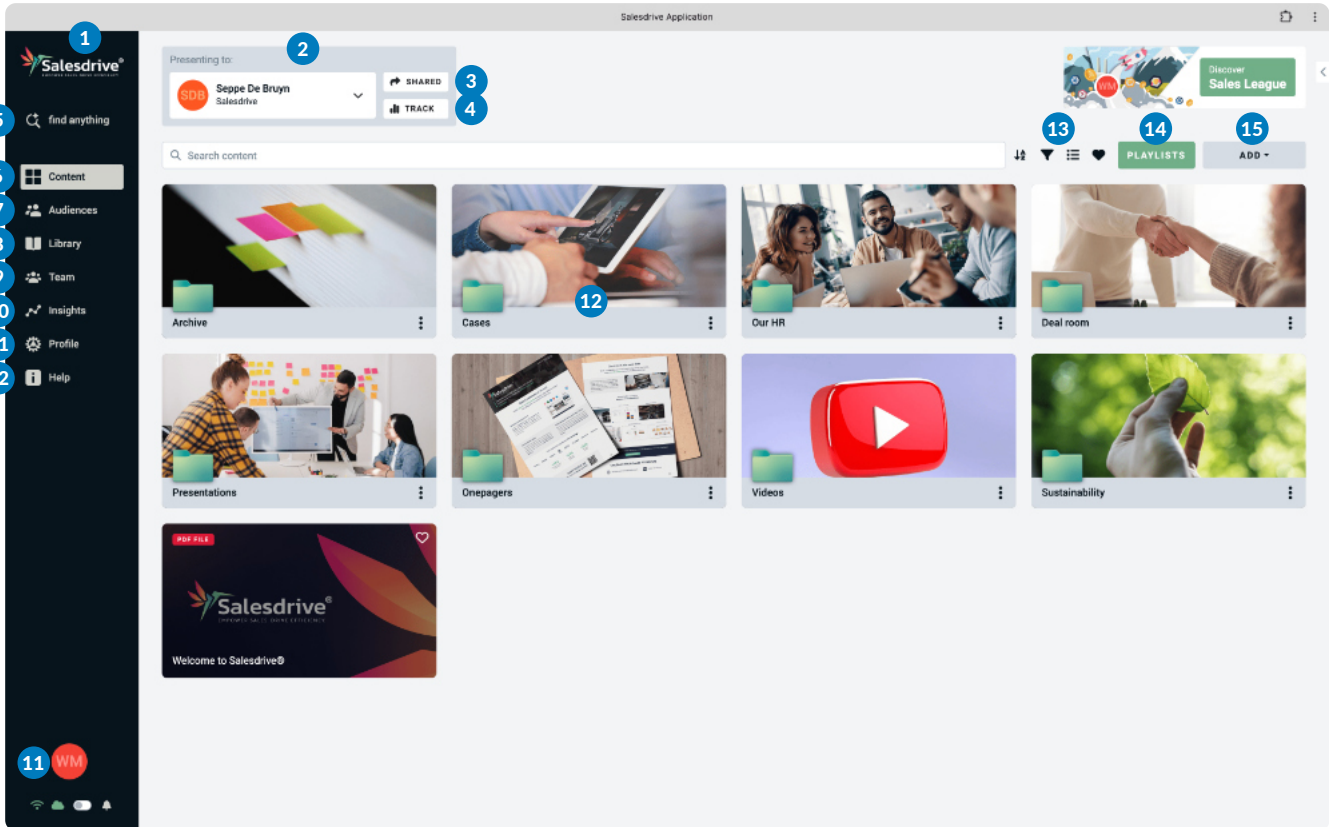
Turn it off by clicking on the toggle button again.

A new pop-up message appears in the top right corner of the screen.

CONTENT SCREEN

- ▶ As soon as you log in you will see the Content screen (home screen).
- ▶ Below you can find the explanation on parts of the Content screen indicated on the next page.
 - 1) On the left, you'll find the main menu featuring the following items: **Find anything (Smart Search), Content, Audiences, Library, Team, Insights, Profile, and Help.**
 - 2) At the top, you'll see your **selected audience**.
If you're logging in for the first time, the message "Select your audience" will be visible.
 - 3) **Shared** shows all the content you have shared with the currently selected Audience.
You can indicate if you want to get notified by email if the Audience visited his/her portal and you can stop sharing content with the selected Audience. Furthermore you can have a look at the portal of your client / audience.
 - 4) **Track** provides analytics data for the selected audience in chronological order. Additionally, you can see which presentation and specific slides they viewed, along with the time spent on each.
 - 5) **Smart Search** allows you to instantly search across the entire platform, from content and files to teams and audiences. It's the fastest way to find what you need, no matter where it lives in the platform.
 - 6) **Content** shows all the content. When you log in you will come to this screen.
 - 7) **Audiences** provides an overview of all your audiences. Here, you can create new audiences, edit their details, or delete them as needed.
 - 8) **Library** lets you create folders where you can upload files like jpeg, png, pdf, xls, word documents etc.
 - 9) **Team** gives you information on all the users and teams using Salesdrive.
 - 10) **Insights** gives you information about the usage of Salesdrive in your team(s).
 - 11) **Profile** lets you see the details of your profile. You can change the settings here and logout of the app.
 - 12) **Help** gives you information about important and useful topics you need to know to navigate through the app.
 - 13) **Sort, filter, and customize how you view your content**—by order, funnel stage, layout, or favorites.
 - 14) **Playlist button** lets you create and manage custom content playlists to present or share in a specific order.
 - 15) **ADD button** allows you to add content.

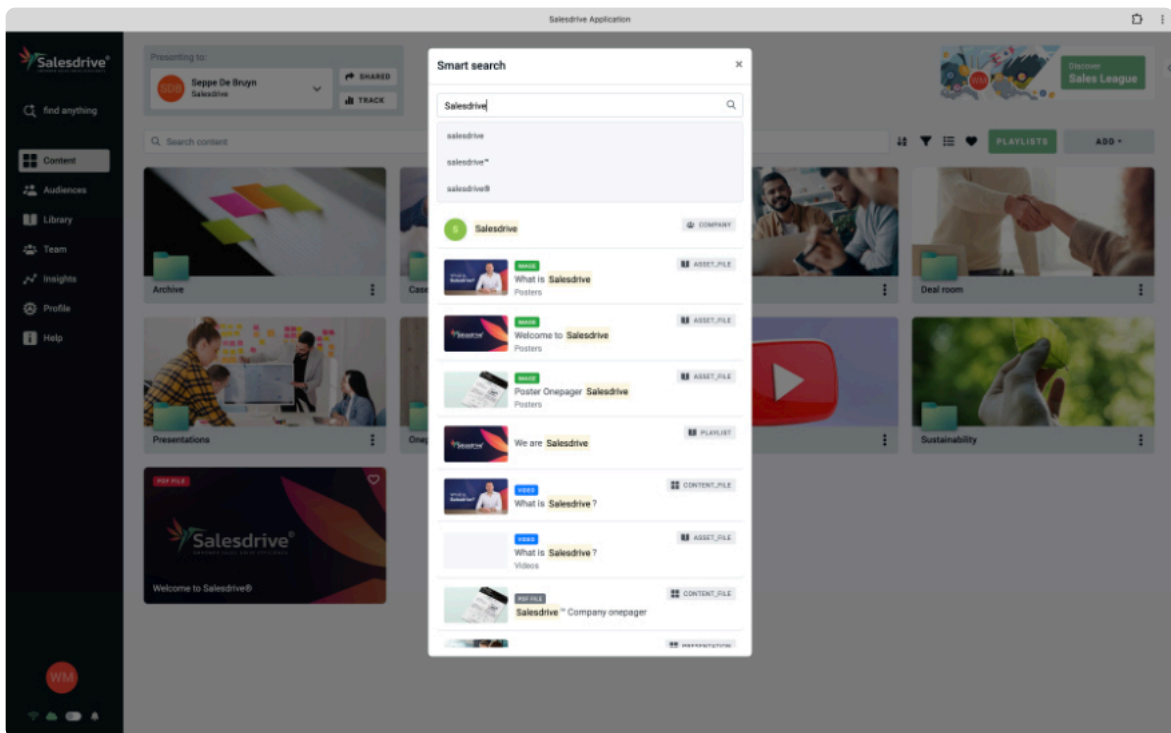
Image of Homescreen on next page



SMART SEARCH

With Smart Search, you can instantly search across the entire Salesdrive platform, from content and files to users and audiences. It's the fastest way to find what you need, no matter where it lives in the platform.

- ▶ In the left-hand sidebar, click on **Find anything** to open the Smart Search window.
- ▶ You can search for content (presentations, apps, files), files stored in the library, app data, audiences & companies, users & teams, etc.
- ▶ Clicking on any result will take you directly to that item, no extra steps needed.



LOG OUT

- ▶ You can click the **Log out** button in your profile to log out very easily from Salesdrive.
- ▶ When clicking on **Log out** you will be prompted with a pop-up asking you if you are sure you want to log out. This is done to make sure you do not click on log out by mistake.



When closing the application, all changes you have made to a slide or presentation that are not yet saved will be lost. Please make sure to save the presentation you are working in before closing the application.

ADMINISTRATE YOUR AUDIENCE

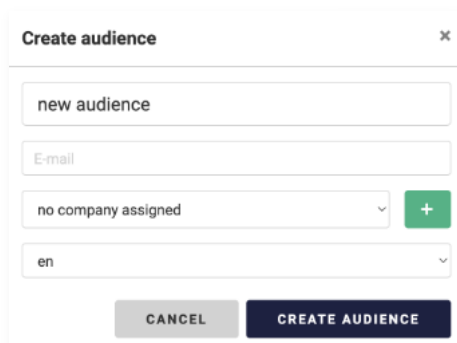
- Add an Audience
- Import Audiences via Excel
- Edit an Audience
- Search an Audience
- Select multiple Audiences & companies
- Delete an Audience

ADD AN AUDIENCE

There are **2 ways** to add a new audience to Salesdrive:

1) Via the Audience banner

- ▶ Click on the Audience banner (*your active audience*) in the top-left corner of your screen. A dropdown menu will appear showing your list of audiences.
- ▶ Click the **NEW AUDIENCE** button.
- ▶ A pop-up window will appear.
- ▶ Fill in the Name and Email address.
- ▶ Select an existing Company or add a new one by clicking the green '+' icon.
- ▶ Select the preferred Language for the audience.



Create audience [x]

new audience

E-mail

no company assigned [v] [+]

en [v]

[CANCEL] [CREATE AUDIENCE]

2) Via the Audience banner

- ▶ Click on **Audiences** in the main sidebar menu (left side of your screen).
- ▶ This view shows your complete audience list and provides the same **NEW AUDIENCE** button.
- ▶ Follow the steps described in Method 1 to create the profile.
Note: This screen also offers the option to import audiences in bulk via Excel (explained in the next section).

IMPORT AUDIENCES VIA EXCEL

- ▶ Click on **Audiences** in the main sidebar menu (left side of your screen).
- ▶ Click the **IMPORT AUDIENCES** button.
- ▶ Before uploading, click **DOWNLOAD XLS TEMPLATE** to ensure your Excel file is formatted correctly.
- ▶ Fill in the template with your contact details and save the file.
- ▶ Upload your completed Excel file by clicking the upload area or dragging the file into the pop-up.
- ▶ Salesdrive will automatically populate your list.



EDIT AN AUDIENCE

- ▶ Click on **Audiences** in the main sidebar menu (left side of your screen).
- ▶ Click on the specific audience you want to edit.
- ▶ Edit any specific details you want about the audience and automatically all your changes will be saved.

SEARCH AN AUDIENCE

- ▶ Click on the search field in the top left corner on the home screen and fill out the audience name or company name you are looking for.
- ▶ The searched name appears at the top.
- ▶ The list is automatically sorted alphabetically.

SELECT MULTIPLE AUDIENCES & COMPANIES

- ▶ Click on  to be able to select multiple audiences at once.
- ▶ Click on  to be able to select all audiences in one company.
- ▶ Selection buttons appear in front of the audience & company names to be able to select multiple audiences at once.
- ▶ You can share content with all these audiences at the same time.

DELETE AN AUDIENCE

- ▶ Click on the specific audience you want to delete.
- ▶ Go into the audience information by clicking on the **Audience** tab in the top menu.
- ▶ Click the **DELETE** button to delete the audience.
- ▶ There is also the option to click on the three dots next to the audience name on the Homescreen. Here you have the option to delete the audience as well.



Please note this can't be undone.

WORKING WITH SLIDES



Admin Access Only

This section is intended for users with full access to the platform.

INFO

Salesdrive makes a difference between **Library** slides and **Template** slides. Library slides are slides with predetermined content & images. You cannot edit these slides. If you want to make any adjustments you can create slides based on template slides.

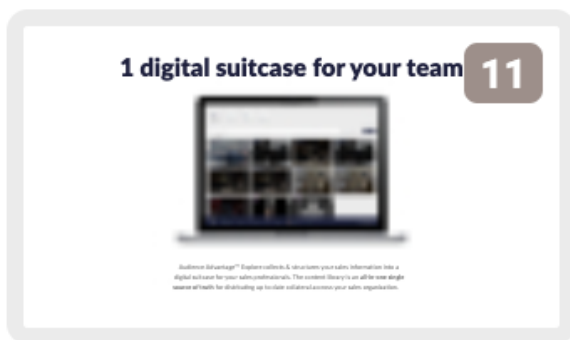
LIBRARY SLIDES

Imported slides or library slides are **marked with an arrow** in the presentation editor (see image below). These slides are **not editable**. The content and images are prefixed. Imported slides **reduce the download time of the app**. This option also makes translations easy and automated.

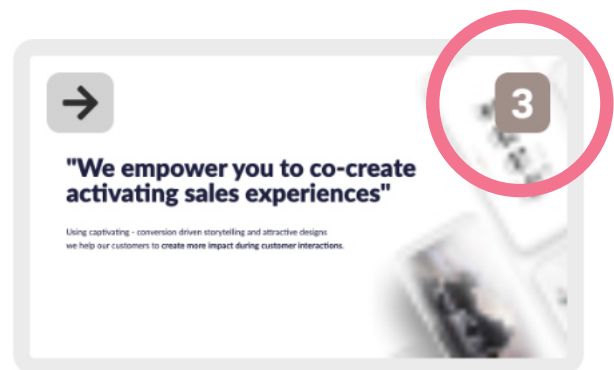
Library slides are very useful because when you modify a library slide in the slide library, it will be automatically modified in all presentations where this slide appears. It also gives the possibility to have the slides managed at a higher level, for example by key accounts.

TEMPLATE SLIDES

Template slides are not marked with an arrow in the presentation editor (as you can see below). These slides are based on templates and are **fully editable**. You can edit both text and images on these slides.

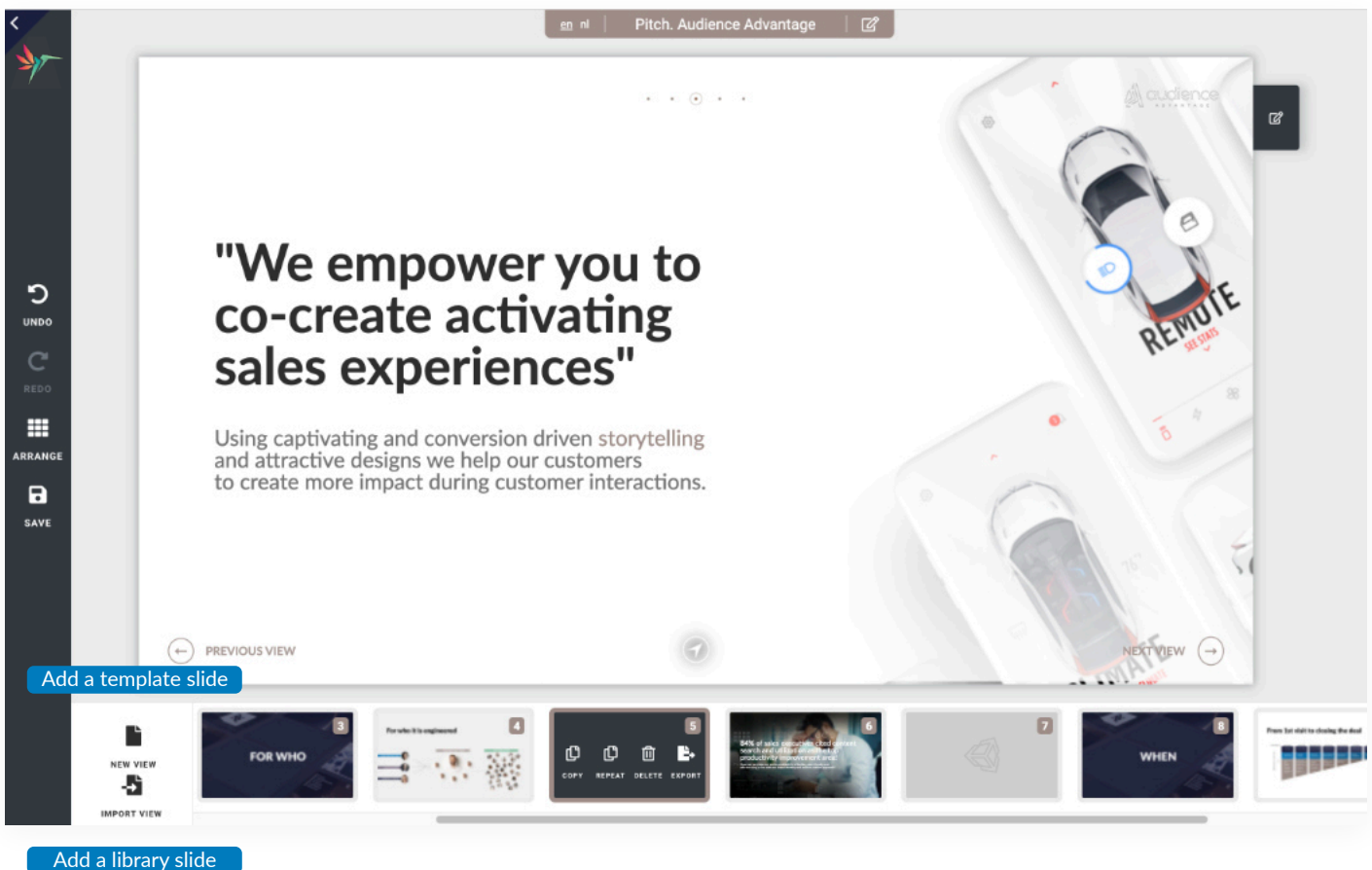


This is a template slide with adjustable content & images.
You can edit these slides



The arrow marks a Library slide with no adjustable content & images.
You cannot edit these slides.

- Adding Template slides
- Adding Library Slides
- Editing Template slides
- Editing Library Slides
- Exporting Library slides
- Editing Text in a Template Slide
- Editing Images in a Template Slide
- Copy a slide
- Repeat slides
- Delete slides
- Search slides and templates
- Create links on text and images



Editor mode

ADDING A TEMPLATE SLIDE

- ▶ In your Homescreen you will see a **ADD** button to your right. Once you click on it and select **Presentation**, you will be redirected to the editor mode and you will see a blank slide. Nonetheless, the easiest way of adapting a presentation is to click on an existing presentation and then click on copy after which you can start editing this version.
- ▶ The bottom left corner of the screen has a **NEW VIEW** button.
- ▶ When you click on the **NEW VIEW** button you can see all the Template slides in the middle, you can select any of the template slides and they will be added to your presentation. You can add them one by one.
- ▶ At the bottom of the screen you can see all the Template slides you just added are shown in sequence numbered 1,2,3 and so on.
- ▶ Once a template has been added, you can start editing the slide with text, images, ...

ADDING A LIBRARY SLIDE

- ▶ In your Homescreen you will see a **ADD** button to your right. Once you click on it and select **Presentation**, you will be redirected to the editor mode and you will see a blank slide. Nonetheless, the easiest way of adapting a presentation is to click on an existing presentation and then click on copy after which you can start editing this version.
- ▶ The bottom left corner of the screen has an **IMPORT VIEW** button.
- ▶ When you click on the **IMPORT VIEW** button you can see all the Library slides, you can select any of the Library slides and they will be added to your presentation. You can add them one by one.
- ▶ You can see at the bottom of the screen all the Template slides you just added are shown.



As mentioned above, library slides can not be edited and will be prefilled with images and text.







When adding a new slide, this new slide will automatically be inserted exactly after the selected slide. For example, when you click the '+' icon if slide number 2 is selected, the slide you'll create will be ranked as slide number 3.


You can drag and drop the slides to any position you want if you want to change the sequence. Release the slide when you see a dotted line in between two other slides.

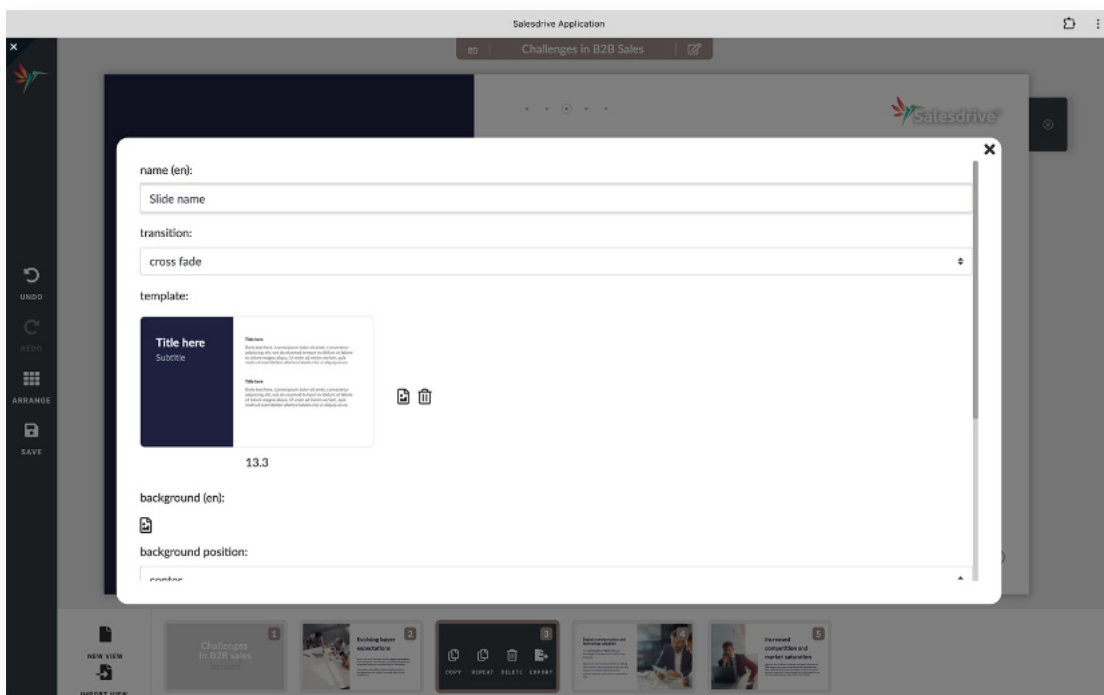
Be careful to also include this in the chapters, in order to keep the menu and the structure of the presentation correct.

EDITING A TEMPLATE SLIDE



- ▶ Once you are in the editor mode, you can add either a Template slide or a Library slide.
- ▶ As soon as you add a Template slide, you will see the  button in the top right corner of the slide.
- ▶ Click on the  button in the top right corner of your slide and you will see all the editing options as shown in the screenshot below.
- ▶ **Name:** You can change the name of the slide by clicking on the name field. **The name of the slide will be used within the menu structure for that presentation, if this is implemented.**
- ▶ **Transition:** You can select a transition of your choice for the particular slide.
- ▶ **Template:** By clicking on the  icon. You can change the existing template to another template if you want. You can delete a template by clicking on the trash icon.

 *Keep in mind, if you change a template after having it stuffed, a part of the content can be gone, as most of the time this template has a different set-up.*

- ▶ **Background:** You can select a background by clicking on the  icon. You can delete the selected background by clicking on the trash icon.
- ▶ **Background position:** You can select a background position from the options in the dropdown. The background image will be positioned as selected, if possible.
- ▶ **Notes:** You can add your personal notes for every individual slides you are editing. These notes will be shown within the **train mode** of a presentation.

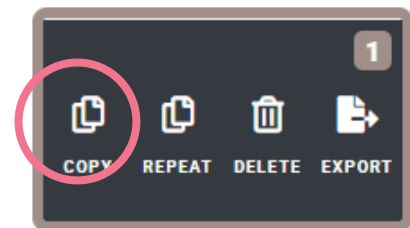


EDITING A LIBRARY SLIDE

- ▶ Once you are in the editor mode, you can add either a **Template slide** or a **Library slide**.
- ▶ As soon as you add a Library slide, you will see the  button in the top right corner of the slide.
- ▶ Click on the  button in the top right corner of your slide and you will see all the editing options.

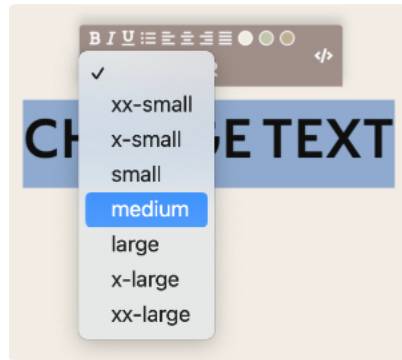
EXPORTING A LIBRARY SLIDE

- ▶ Once you are in the editor mode, you can select any of the template slides and choose for the option 'Export'.
- ▶ A **copy** of this slide is now added to the slide library.
- ▶ The slide can be used in other presentations now by going into the library and select the specific slide. This slide will then be added to the presentation as a library slide.



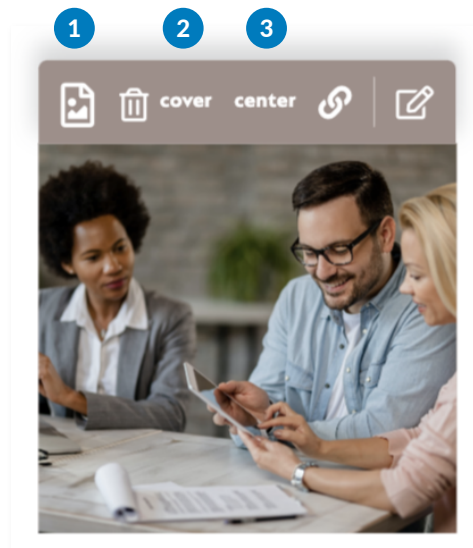
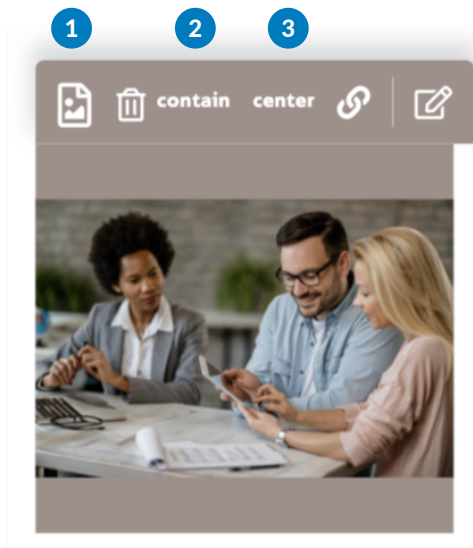
EDITING TEXT IN A TEMPLATE SLIDE

- ▶ When editing a Template slide and clicking on the text within it, you'll find various options for editing the text: You can make text **bold**, *italic*, or underline it. You can create bullet lists, change text alignment, and adjust text color. Additionally, you have the option to directly modify the text using HTML by clicking on the `</>` icons.



EDITING IMAGES IN A TEMPLATE SLIDE

- ▶ When you are editing a Template slide and you click on the image field inside a slide, you will observe the options shown in the screenshot below numbered 1, 2 and 3.
 - This represents the **image file**. Click on the icon and you will have the list of image files appear in the middle. You can select any image you want to be included in the slide.
 - This represents **how the image file will fit** into the image container - contain, auto, cover
 - Cover: This shows the image in full width and height but will be cropped depending on the size of the image container.
 - Contain: This shows the full image.
 - Auto: This will show the image in its original size.
 - This represents the **positioning of the image** within the image container - top, bottom, center, left, right.





COPY A SLIDE

- ▶ This represents **COPY**. When you click on copy, an exact copy of the selected slide will be created and appears next to the original slide.

REPEAT A SLIDE

- ▶ This represents **REPEAT**. When you click on repeat, an exact copy of the selected slide will be created and appears next to the original slide.
- ▶ Any changes made in the original slide will be reflected in the repeated slide.

DELETE A SLIDE

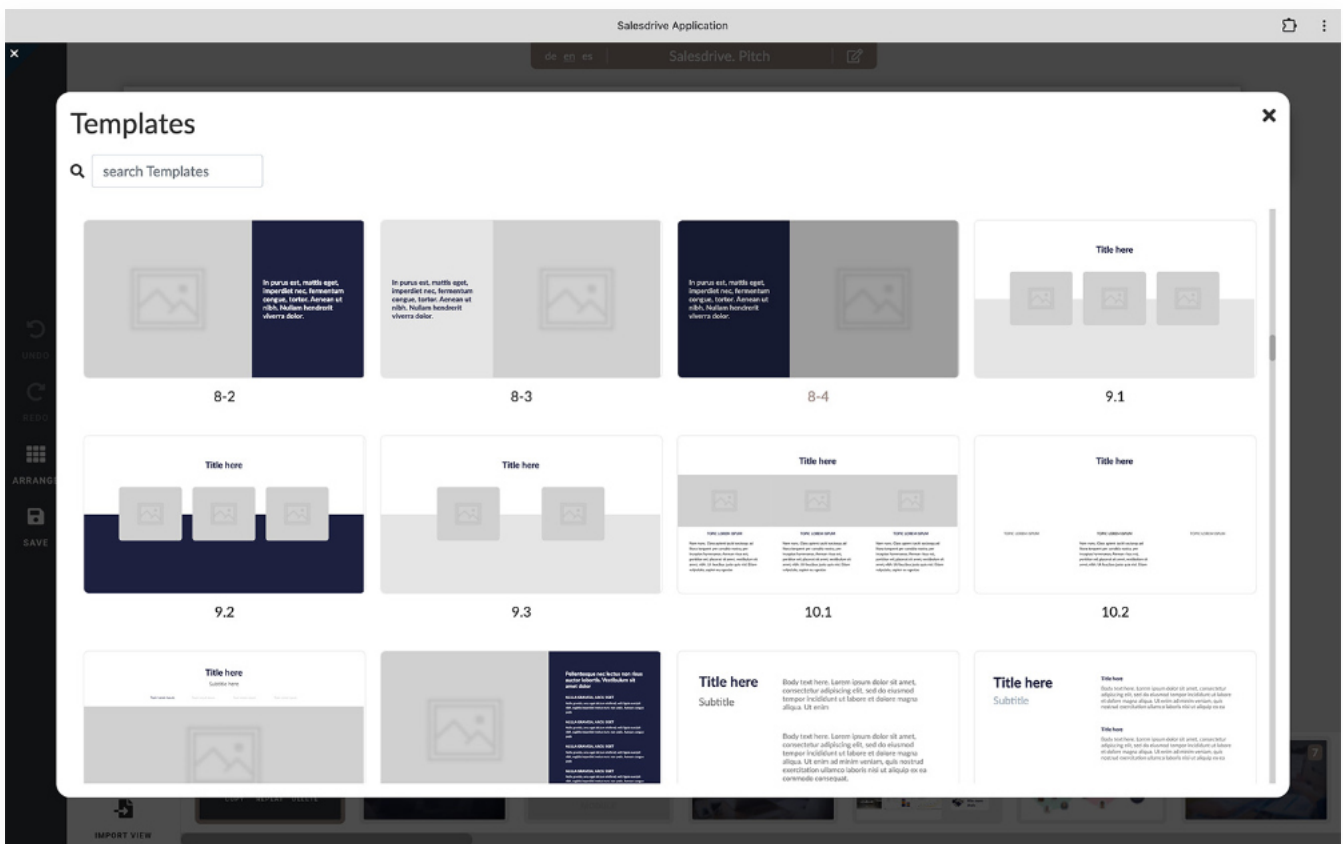
- ▶ This represents **DELETE**. When you click on delete, your selected slide will be deleted.



If you deleted a slide unintentionally or by accident you can still recover this slide by clicking the “undo”-button or close the editor without saving your changes.

SEARCH SLIDES AND TEMPLATES

- ▶ Click on **NEW VIEW** at the bottom left of your screen if you want to search for a template. If you want to search for a specific library slide, click on **IMPORT VIEW** at the bottom left of your screen.
- ▶ A pop-up screen will appear. At the top you will find a search field where you can search for your slide or template by name.
- ▶ Click on the slide or template you want to use.
- ▶ It will appear in your presentation and in the slide overview underneath your screen.



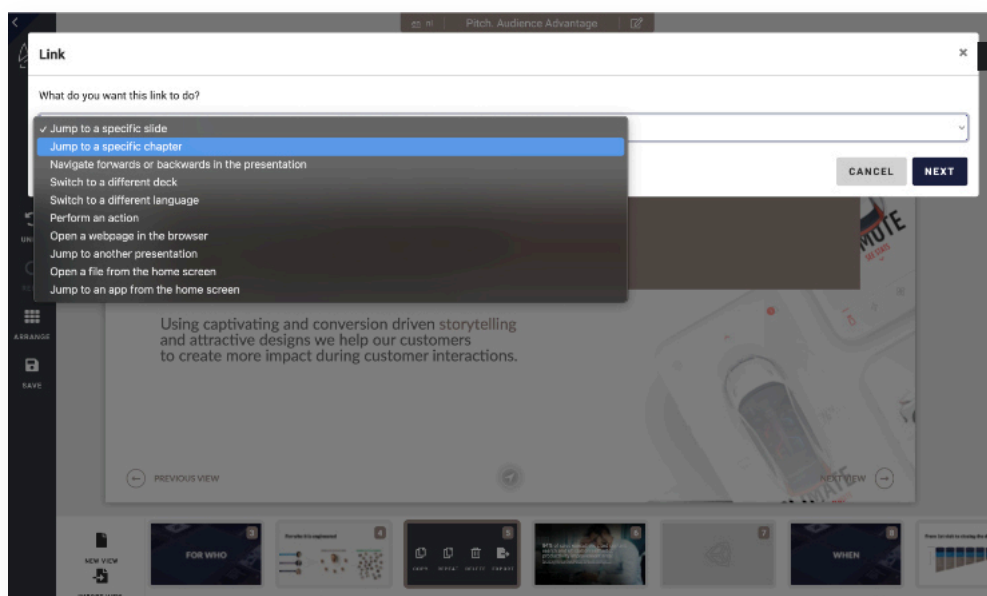
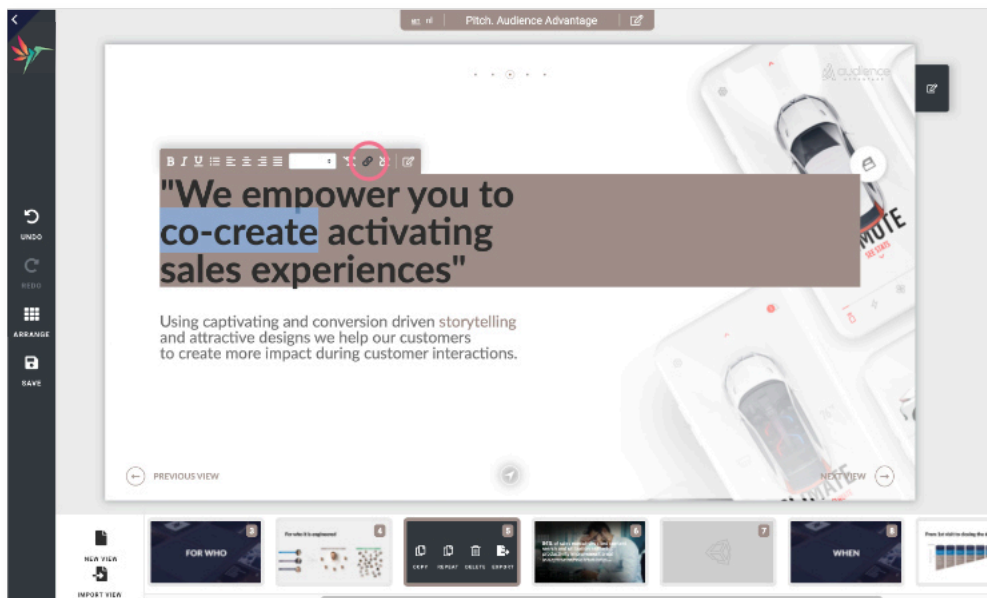
CREATE LINKS ON TEXT AND IMAGES

- ▶ If you want to create a link to a certain slide, chapter, deck, webpage, ... click on a text or image field. Please select a piece of text if you want to create a link on a word or sentence.
- ▶ At the top of the text or image field, the option appears to create a **Link**. (see screenshot below)
- ▶ After clicking on **Link** you get the different options to where you can create a link. Follow the steps in this pop-up.
- ▶ When finishing the steps in the pop-up, the link is created.



You can test the links on text in the editor itself.


If you want to test the link on an image, you need to be presenting the presentation



LINK OPTIONS

- ▶ **Jump to a specific slide**
- ▶ **Navigate forwards or backwards in the presentation:** you can go to the previous slide or the next one but you can also navigate to the beginning or the end of the presentation
- ▶ **Switch to a different deck:** once you have created a deck you can make a link to jump to this deck
- ▶ **Switch to a different language:** If the presentation is translated into multiple languages then you can switch to one of the languages by creating a link.
- ▶ **Perform an action:** depending on your project you will see a list of actions that can be performed
- ▶ **Open a webpage in the browser**
- ▶ **Jump to another presentation:** you can choose the presentation to which you want to jump to.
- ▶ **Open a file from the Homescreen**
- ▶ **Jump to an app from the Homescreen:** you can choose an app (if you have any available) to which you want to jump to from out of your presentation.

TRANSLATE A PRESENTATION

- ▶ In the editor view, click on the  button.
- ▶ When you scroll down you will see a list with the available languages.
- ▶ Choose the language(s) in which you want to translate the presentation.
- ▶ On top of the screen you will see the selected languages. Click on the language in which you want to translate the presentation.



- ▶ Select the text you want to translate and replace it with the correct translation. Do this for every slide.



Admin Access Only

This section is intended for users with full access to the platform.

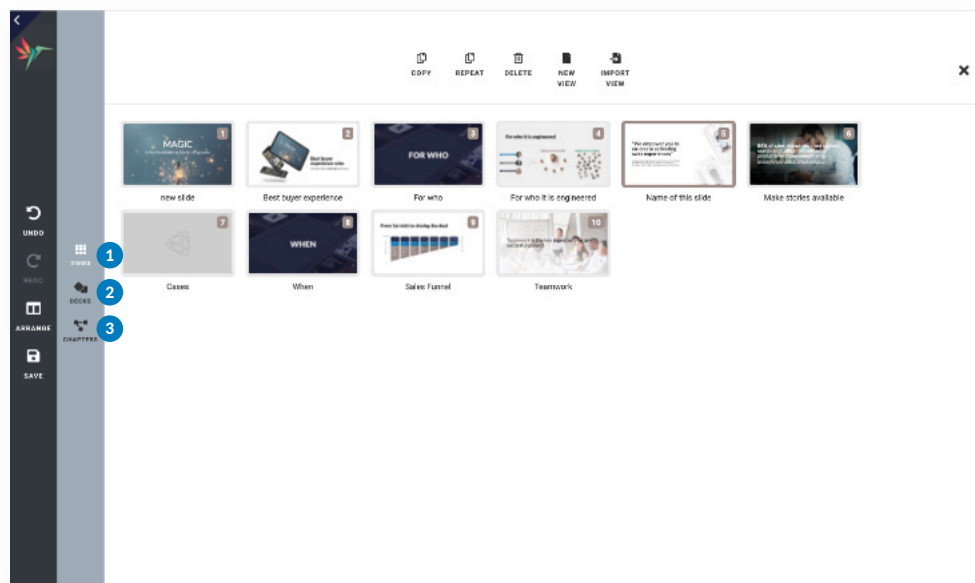
WORKING WITH CHAPTERS

- Creating a new chapter
- Edit chapters
- Delete chapters

Chapters allow you to create a very useful navigation menu inside the presentation. This gives you the opportunity to keep your presentations tidy and structured.

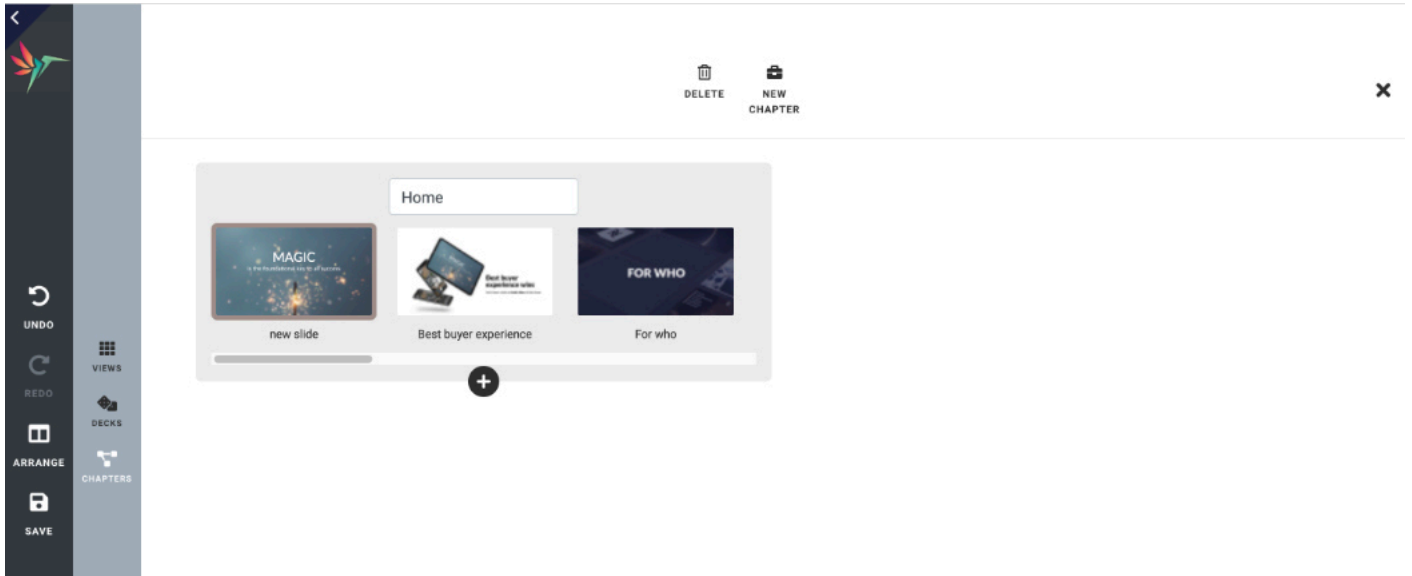
CREATE A NEW CHAPTER

- ▶ When you are in the editor screen, click on the **ARRANGE** button which you will find on the left hand side of the screen.
- ▶ Once you click on it you will be redirected to the screen shown below.

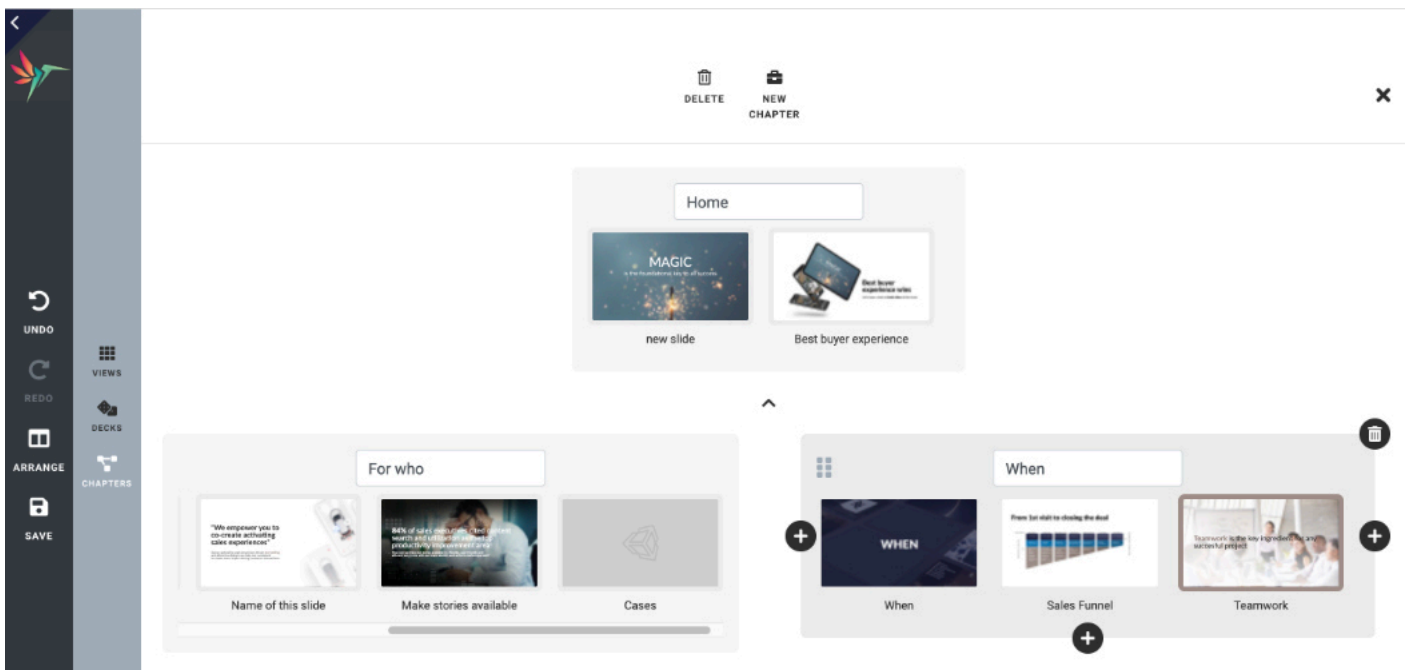


- This button represents the **slide overview**. You can view all the slides you have included in your presentation so far.
- From a presentation you can make a **selection of slides** to create a more concise presentation. From within the 'larger' presentation you can make a link to this selection or '**deck**'.
- This represents the **chapter** button. When you click on it you will see all the slides you have created for your presentation and you can add chapters and drag & drop slides into chapters to create your navigation menu within a presentation.

- ▶ In the beginning all slides will be in the 'Home' chapter. Below this list of slides you will find a + button. You can click on this button to begin adding chapters.



- ▶ You can create your own structure of chapters by clicking on the + buttons.
- ▶ When you click on the space below a chapter name, the + button appears allowing you to add chapters and subchapters.
- ▶ You can add slides in each chapter by dragging and dropping them inside a chapter, just below the chapter name.



RENAME A CHAPTER

- ▶ You can click on the Chapter name field to rename any chapter you prefer.

DELETE A CHAPTER

- ▶ At any point, while creating chapters you can click on the trash icon to delete a chapter.



Be aware that when you delete a chapter, all slides that are still positioned in this chapter will be deleted as well in the chapter overview. You'll see that they will come up in the slide overview still.

Please make sure that these slides are also removed in the slide overview.

CREATING AN APP



Admin Access Only

This section is intended for users with full access to the platform.

CREATE AN APP

- ▶ In your Homescreen you will see a **ADD** button to your right. Click on it and select **App**.
- ▶ A pop-up screen will appear where you can give a name and you will see a list of custom apps.
- ▶ Select the type of app you want to edit.
- ▶ Next you will be able to change the name and add a poster image (this is the image shown in the Content overview of Salesdrive).

All apps relevant for you should already be shown in your **Content** screen.

PRESENTING CONTENT

- Like your content
- Present a presentation
- Navigating through a presentation
- Exiting the presentation viewer
- Create a playlist
- Present a playlist

LIKE YOUR CONTENT

- ▶ In the Content screen which is also your home screen, you are able to like your favorite content
- ▶ On every content piece there is a selectable 'heart' icon
- ▶ Once you selected this, it turns black
- ▶ When you click on the 'heart' filter, next to the search field, only the liked content will show up.
- ▶ Turning this filter off again, all content reappears.

PRESENT A PRESENTATION

- ▶ When you are facing your prospects, select the audience to whom you are going to present
- ▶ In the Content screen which is also your home screen, click on an existing presentation.
- ▶ A pop-up appears where you have to select the option **PRESENT**.
- ▶ You will be redirected to the presentation view where you can start viewing the presentation.
- ▶ To navigate you can use the 'left' and 'right' arrows on your keyboard, swipe left or right on your device, or click the built-in arrows/navigation texts which are located on the bottom right and left side of each slide, or if available you can use the mouse wheel as well.



Want your presentation to *play automatically on repeat*?

On Mac, press **fn + F6**.

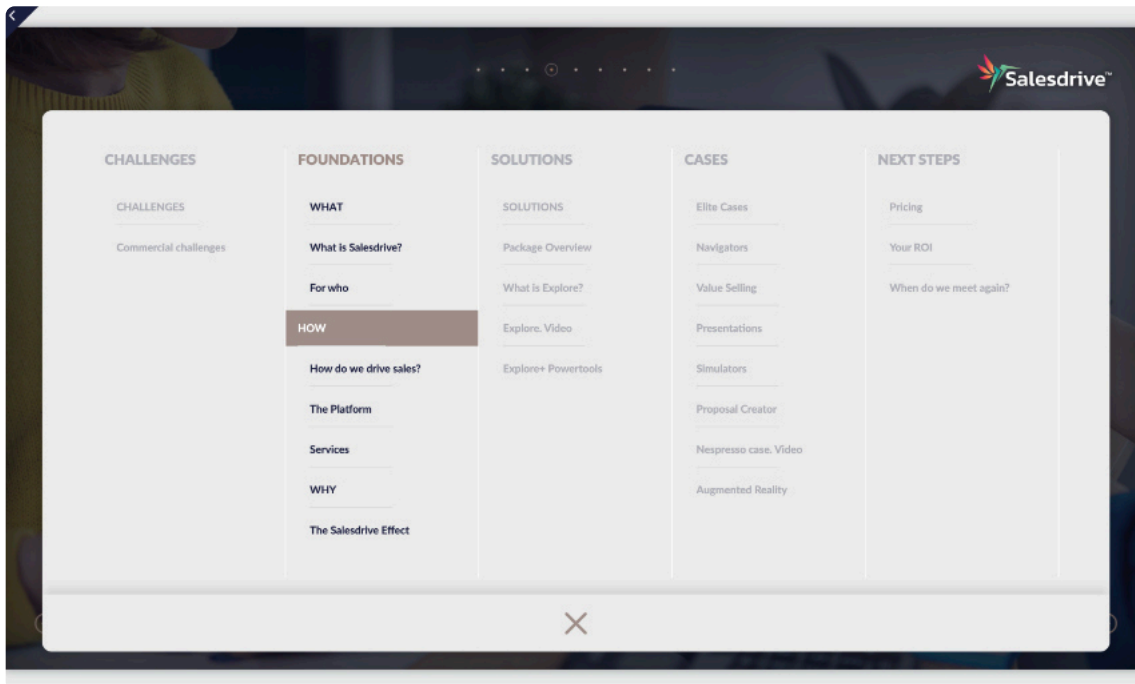
On Windows, press **F6**.

Your presentation will auto-play, switching to the *next slide every 8 seconds*.

- ▶ You can click on the back button on the top left corner of your screen when you want to exit a presentation.

NAVIGATE THROUGH A PRESENTATION

- ▶ When presenting a presentation you can navigate across different slides and chapters.
- ▶ Click on the ☰ button positioned at the bottom of the slide in the centre.



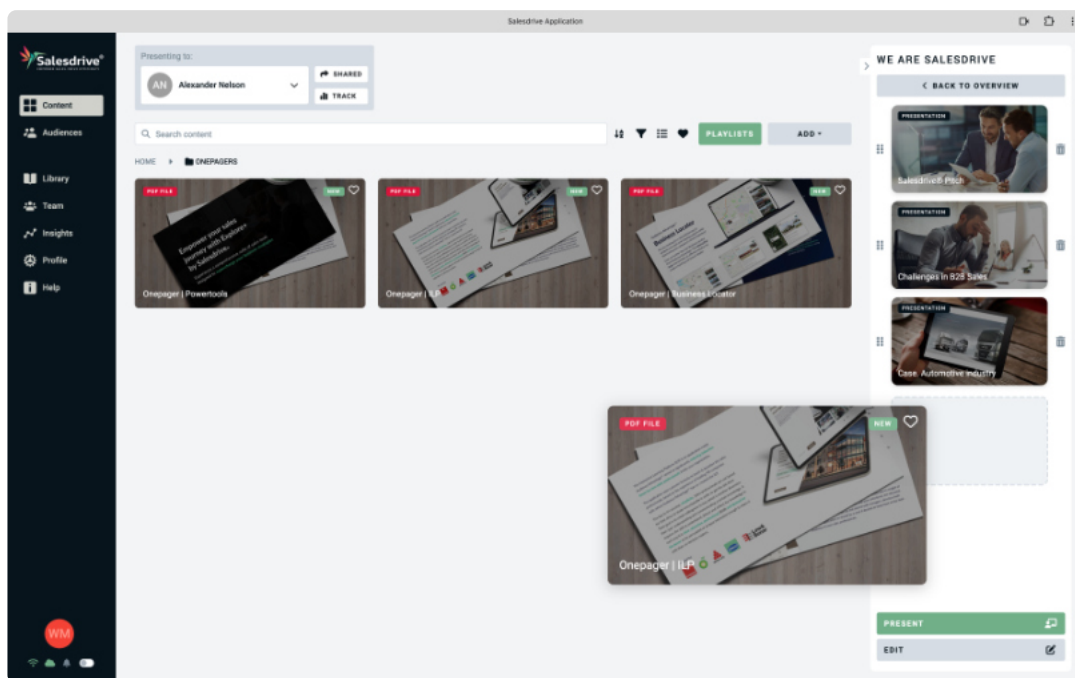
- ▶ Then you can see all the chapters of the presentation numbered 1, 2, 3 and so on.
- ▶ Click on any chapter, you will see the list of slides in that chapter.
- ▶ Select any specific slide if you want to present it.
- ▶ You can also navigate through the presentation by using the arrows on your keyboard or the navigation inside the presentation.

EXITING THE PRESENTATION VIEWER

- ▶ You can click on the **BACK** button on the top left corner of your screen when you want to exit a presentation or you can simply click on Esc on your keyboard.
- ▶ You will now be redirected to the **Content** screen in the app.

CREATE A PLAYLIST

- ▶ Click the green **PLAYLISTS** button at the top of the screen.
- ▶ Click **CREATE PLAYLIST**.
- ▶ In the pop-up window, enter a name for your playlist and choose a poster image.
- ▶ Next, click **CREATE PLAYLIST**.
- ▶ Drag and drop content into your playlist.
- ▶ To rearrange the order of the items, drag them up or down in the list.
- ▶ Once you're finished, you can either start presenting your playlist immediately or return to the playlists overview. Your new playlist will be automatically added there.

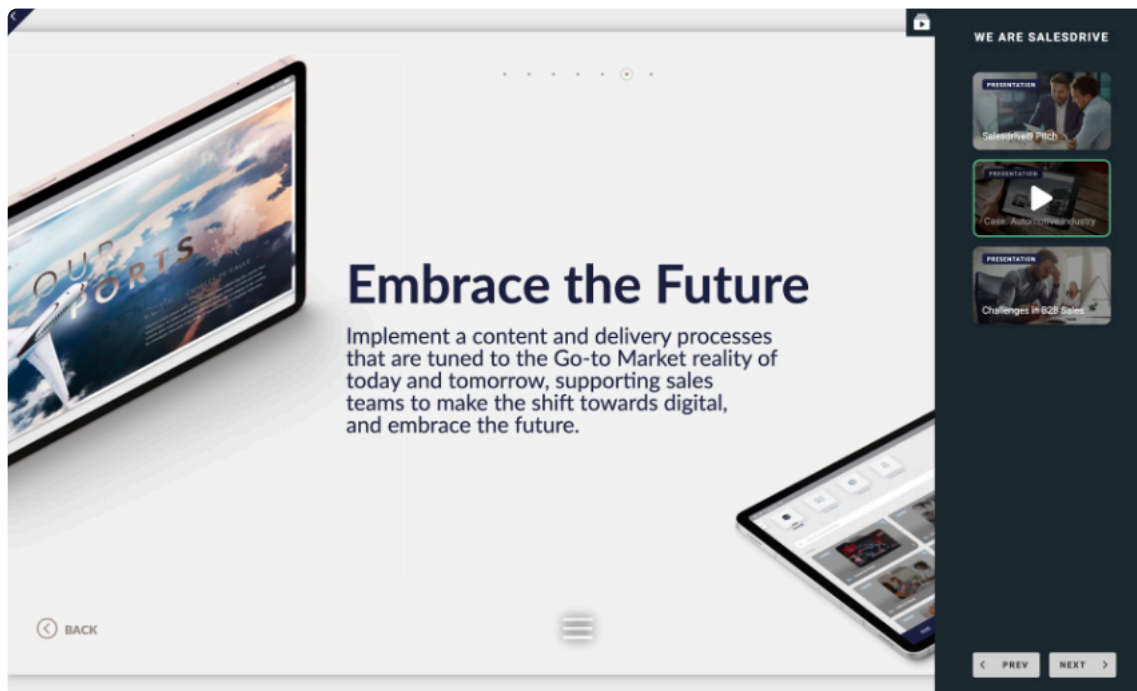


PRESENT A PLAYLIST

- ▶ To present a playlist, click the three dots next to the playlist.
- ▶ In the pop-up menu, select **PRESENT**.

Alternatively: click on the playlist to view its content, then click **PRESENT** at the bottom of the screen.

- ▶ When presenting, you'll see a playlist icon in the upper-right corner. Click it to see a vertical list of your playlist content.
- ▶ Use the navigation buttons at the bottom or click on any item to navigate between content.
- ▶ To stop presenting, click the arrow in the top left corner.

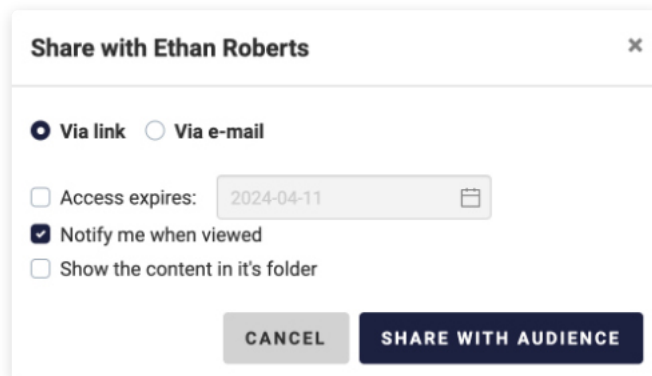


SHARING CONTENT

- Share content via link
- Share content via email
- Share a folder via link
- Share a folder via email
- Overview shared content
- Share content with your sales team(s)


SHARE CONTENT WITH VIA LINK

- ▶ In the Content screen, select the audience you want to share content with.
- ▶ Click the content item you want to share, then choose **SHARE**.
- ▶ Choose how you want to share: click **Via link**
- ▶ Adjust the settings as needed:
 - ▶ **Access expires:** Set an expiry date if you want the link to be temporary.
 - ▶ **Notify me when viewed:** Get an email alert when the content is opened.
 - ▶ **Show content in its folder:** Let the audience see the folder structure, or just the file.
- ▶ Click **SHARE WITH AUDIENCE** to generate the link.
- ▶ Click Copy to copy the link, then paste it into your own email or message.



Share with Ethan Roberts ×

Via link **Via e-mail**

Access expires: 2024-04-11 

Notify me when viewed

Show the content in it's folder

CANCEL **SHARE WITH AUDIENCE**

SHARE CONTENT VIA EMAIL

- ▶ In the Content screen, select the audience you want to share content with.
- ▶ Click the content item, then choose **SHARE**.
- ▶ Choose how you want to share: click **Via email**.
- ▶ Fill in the Subject and Message fields.
- ▶ Adjust the settings if needed:
 - ▶ **Access expires:** Set an optional expiry date for the shared content.
 - ▶ **Notify me when viewed:** Get an email alert when your content is viewed.
 - ▶ **Show content in its folder:** Let the audience see the folder, or just the file.
 - ▶ **Put myself in cc:** Receive a copy of the email you're sending.
- ▶ Click **SHARE WITH AUDIENCE** to send the email.

Share with Ethan Roberts ✕

Via link Via e-mail

Message from Patrick Lauwerys

Dear Ethan Roberts,

Please hit the button to view the shared "Onepager | Portfolio Visualizer" in your favorite browser.

Sincerely, Patrick Lauwerys

Access expires: 2024-04-11 📅

Notify me when viewed

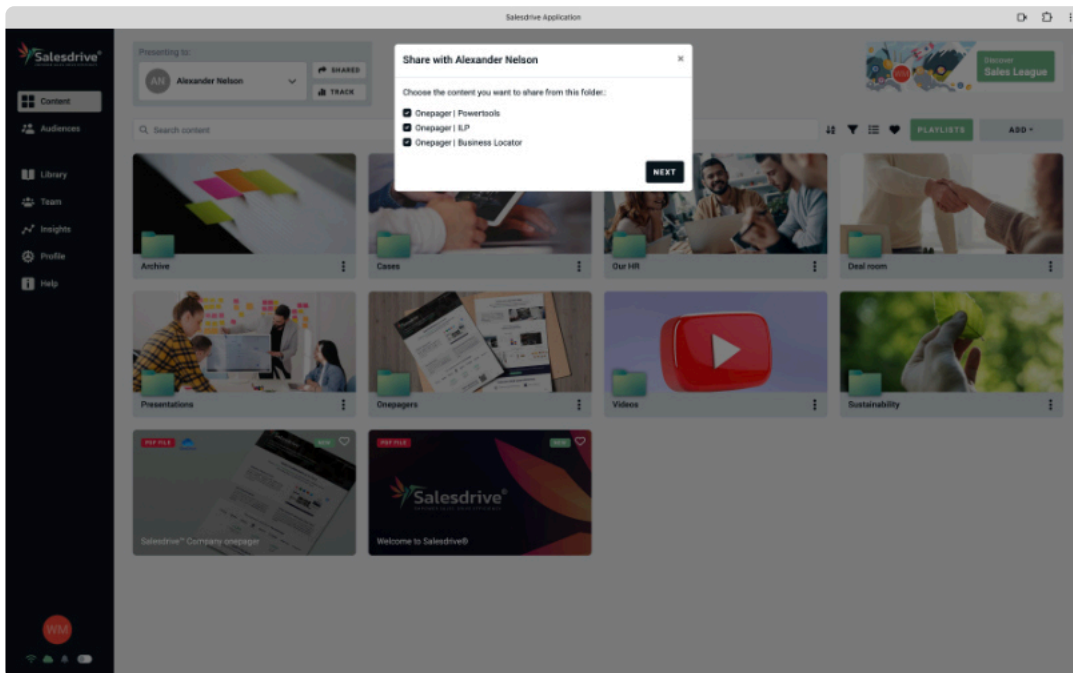
Show the content in it's folder

Put myself in CC

CANCEL **SHARE WITH AUDIENCE**

SHARE A FOLDER VIA LINK

- ▶ In the Content screen, select the audience you want to share a folder with.
- ▶ Click the three dots next to the folder you want to share, then choose **SHARE**.
- ▶ In the pop-up, **select which files from the folder you want to include**, then click **NEXT**.
- ▶ Choose how you want to share: click **Via link**
- ▶ Adjust the settings as needed:
 - ▶ **Access expires:** Choose a date to make the folder available until a specific time.
 - ▶ **Notify me when viewed:** Get an email alert when the content is opened.
 - ▶ **Show content in its folder:** Let the audience see the folder structure, or just the file.
- ▶ Click **SHARE WITH AUDIENCE** to generate the link.
- ▶ Click Copy to copy the link, then paste it into your own email or message.



SHARE A FOLDER VIA EMAIL

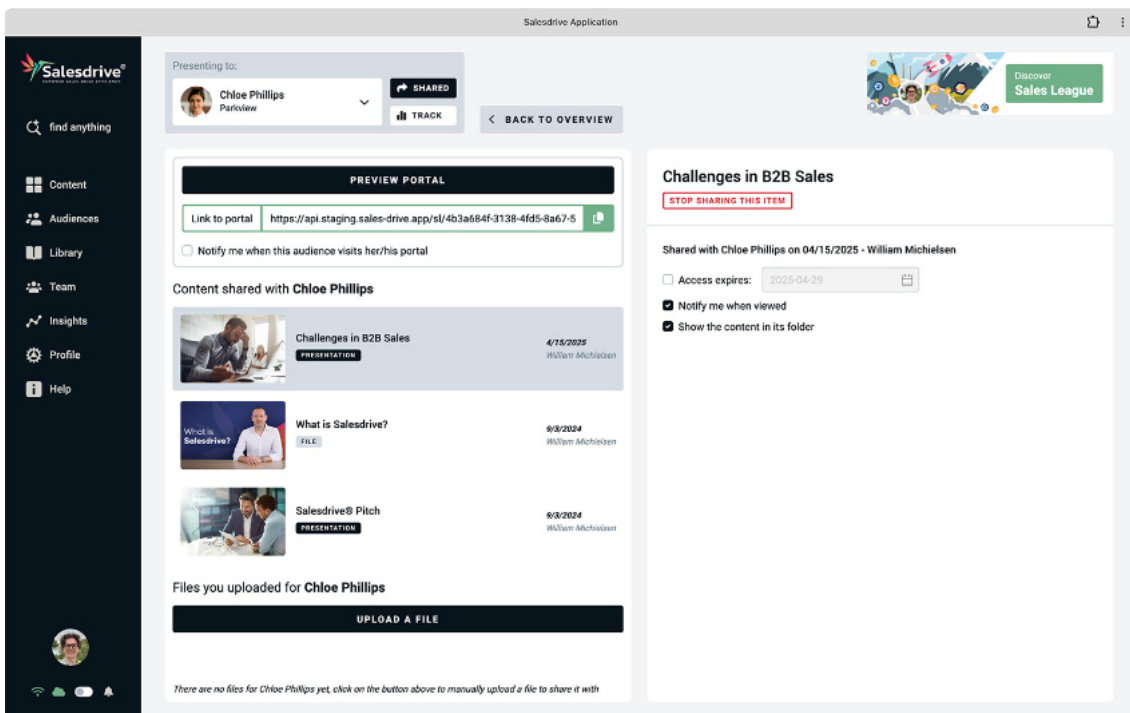
- ▶ In the Content screen, select the audience you want to share a folder with.
- ▶ Click the three dots next to the folder you want to share, then choose **SHARE**.
- ▶ In the pop-up, **select which files from the folder you want to include**, then click NEXT.
- ▶ Choose how you want to share: click **Via email**.
- ▶ Fill in the Subject and Message fields.
- ▶ Adjust the settings if needed:
 - ▶ **Access expires:** Set an optional expiry date for the shared content.
 - ▶ **Notify me when viewed:** Get an email alert when your content is viewed.
 - ▶ **Show content in its folder:** Let the audience see the folder, or just the file.
 - ▶ **Put myself in cc:** Receive a copy of the email you're sending.
- ▶ Click **SHARE WITH AUDIENCE** to send the email.

OVERVIEW SHARED CONTENT

Once you have shared content with an audience, you can manage and track these items in the **SHARED** view.

- ▶ Click the **SHARE** button in the top bar next to your audience name to see all active materials for this contact.
- ▶ The list displays **your own shared items as well as content shared by other sales users** with the same audience, providing a full history of the communication.
- ▶ To add **audience-specific files** (like a custom quote or contract), click the **UPLOAD PRIVATE CONTENT** button. *Private items uploaded here are **exclusive to this specific audience** and will **not appear in your main Content library**.*

Use this overview to **stay aligned with your team** and ensure your prospect has all the necessary information without redundant shares.



The screenshot displays the Salesdrive Application interface for the 'SHARED' view of an audience named 'Chloe Phillips'. The interface is divided into several sections:

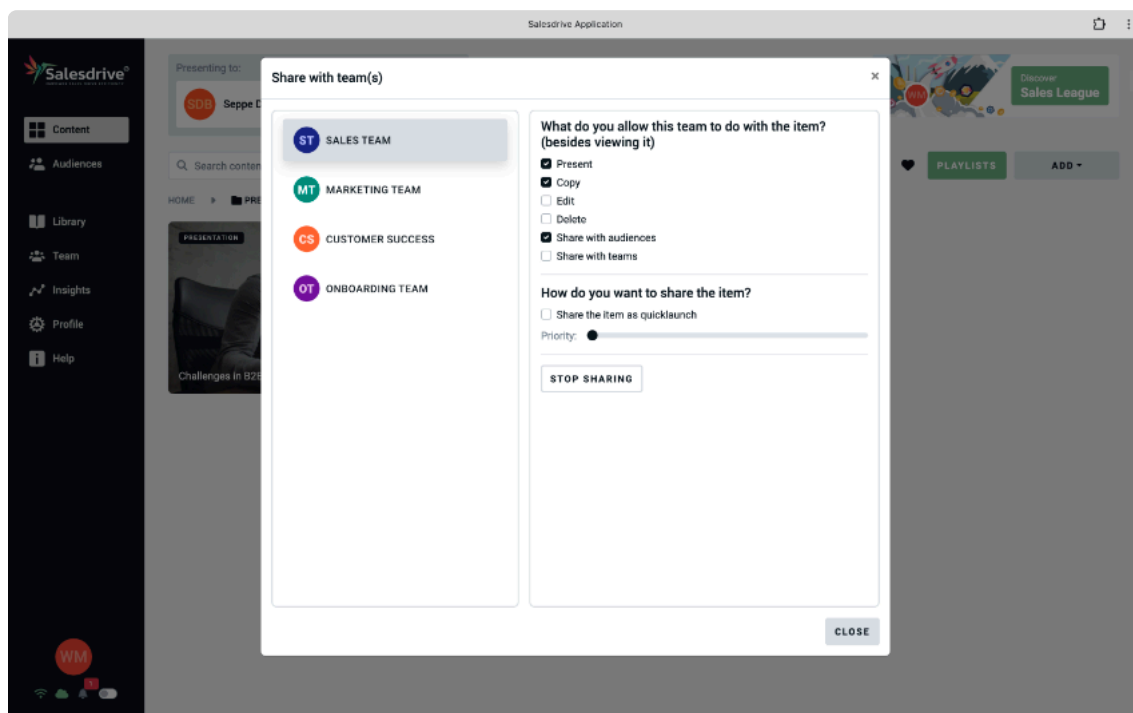
- Header:** Shows 'Presenting to: Chloe Phillips' with a 'SHARE' button and a 'TRACK' button. A 'BACK TO OVERVIEW' link is also present.
- Preview Portal:** A section titled 'PREVIEW PORTAL' containing a 'Link to portal' with the URL <https://api.staging.sales-drive.app/s/4b3a684f-3138-4fd5-8a67-5> and a 'Notify me when this audience visits her/his portal' checkbox.
- Content shared with Chloe Phillips:** A list of shared items:
 - 'Challenges in B2B Sales' (PRESENTATION) dated 4/15/2025 by William Michielssen.
 - 'What is Salesdrive?' (FILE) dated 9/3/2024 by William Michielssen.
 - 'Salesdrive® Pitch' (PRESENTATION) dated 9/3/2024 by William Michielssen.
- Files you uploaded for Chloe Phillips:** A section with an 'UPLOAD A FILE' button and a note: 'There are no files for Chloe Phillips yet, click on the button above to manually upload a file to share it with'.
- Right-hand Panel:** Details for the 'Challenges in B2B Sales' item, including a 'STOP SHARING THIS ITEM' button, sharing information ('Shared with Chloe Phillips on 04/15/2025 - William Michielssen'), and settings for 'Access expires: 2025-04-29', 'Notify me when viewed' (checked), and 'Show the content in its folder' (checked).

SHARE CONTENT WITH A TEAM

Want to collaborate more efficiently within your team? Salesdrive makes it easy to share content with specific teams, so everyone has access to the right materials without the extra emails.

Note: Teams can only be created by key users. If you need a new team, contact your Salesdrive admin.

- ▶ In the Content screen, click the content you want to share.
- ▶ In the pop-up, select **SHARE WITH TEAM(S)**.
- ▶ Choose the team(s) you want to share the content with.
- ▶ Click '**START SHARING**'.
- ▶ Set the level of access permissions for each team.
- ▶ The content will be shared with the selected team, using the access you defined.



Quicklaunch

Check "**Share this item as quicklaunch**" to pin the item at the top of your Content screen. This makes it easy to access without searching – perfect for frequently used presentations or files.

BUYER PORTAL

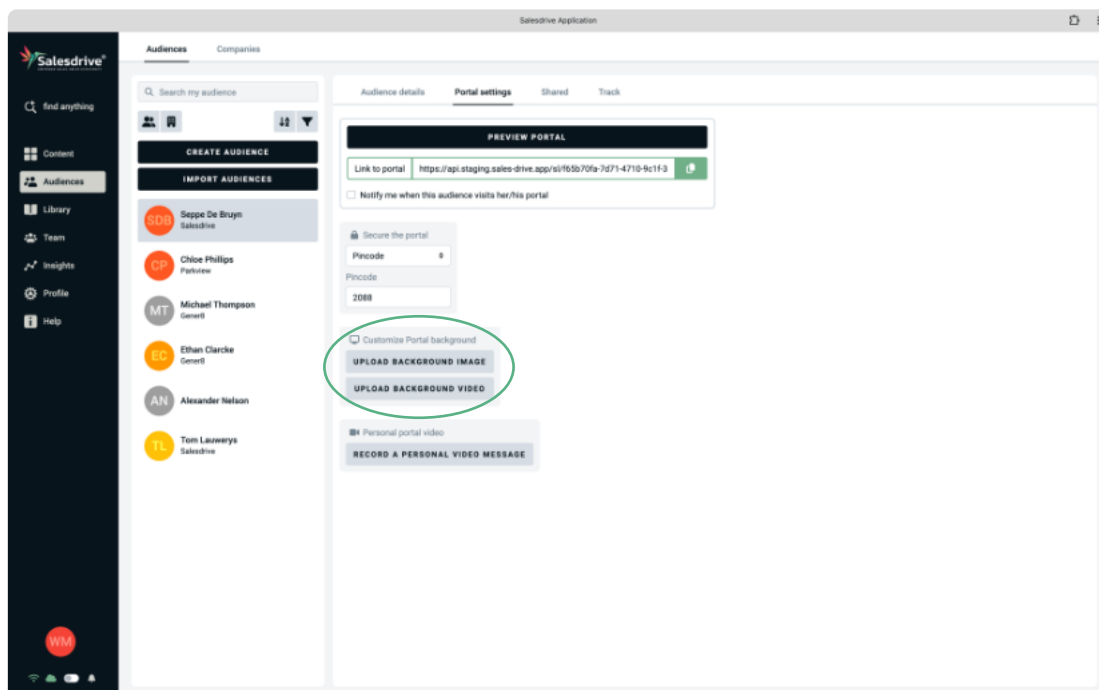
The Buyer Portal is a **personalized space** created for each audience. When you share content such as presentations or files, your audience receives a **unique link** to access their portal. When they open the link in their browser, they will be asked to confirm their name and accept cookies. This step is required for GDPR compliance.

Inside the portal, your audience can view all the content you've shared. Their **activity is tracked**, giving you helpful insights into how they interact with your content. *(You'll learn more about tracking in the next chapter.)*

- Customize the Buyer Portal background
- Securing Buyer Portal access
- Record a personal introduction video
- Preview the Buyer Portal
- Portal User & Content Rating

CUSTOMIZE THE PORTAL BACKGROUND FOR AN AUDIENCE

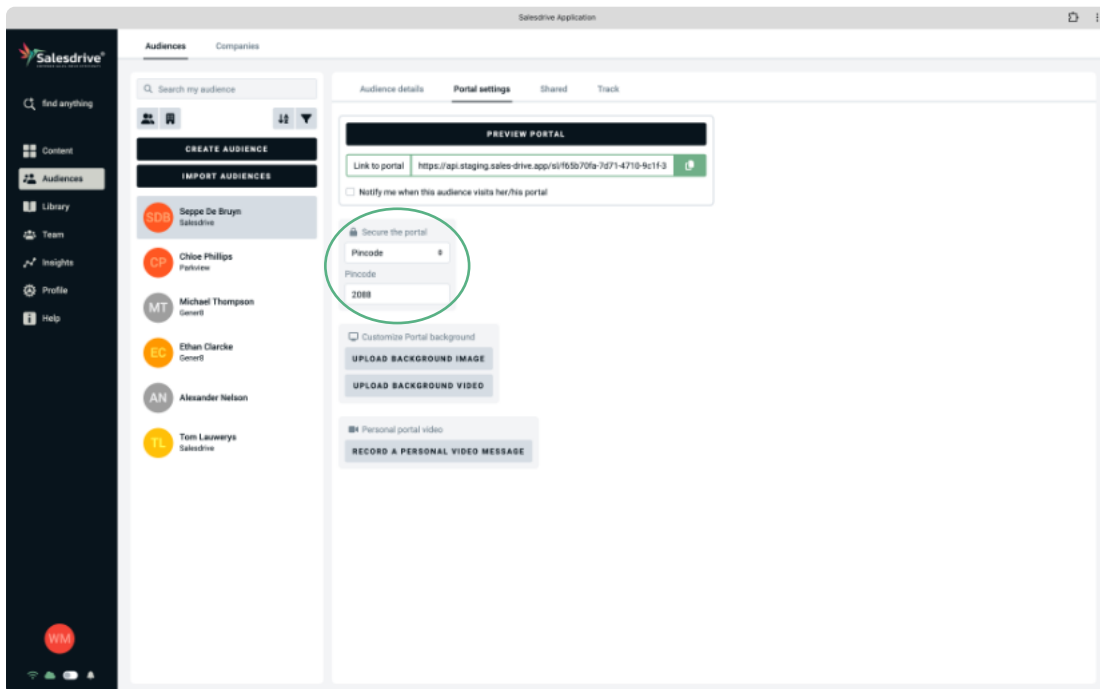
- ▶ Click on **Audiences** in the menu on the left.
- ▶ Select an audience.
- ▶ Go to **Portal Settings**.
- ▶ Under **Customize Portal background**, upload an **image** or **video** to personalize the experience.



SECURING BUYER PORTAL ACCESS

When sharing content with an audience, you can choose how secure their access should be.

- ▶ Click on **Audiences** in the menu on the left.
- ▶ Select an audience.
- ▶ Go to **Portal Settings**.
- ▶ Click the dropdown menu under **Secure the portal** to select one of the **3 available access types**:
 - **Link only**: The audience receives an email with a personal portal link. They can access the portal immediately by clicking **Continue**.
 - **PIN code**: The audience must enter a **4-digit PIN code** before accessing the portal. This code is shared manually by the Salesdrive user.
 - **Temporary access**: The audience must request access by clicking **Send email**. The Salesdrive user receives this request and must approve access before the portal can be viewed.

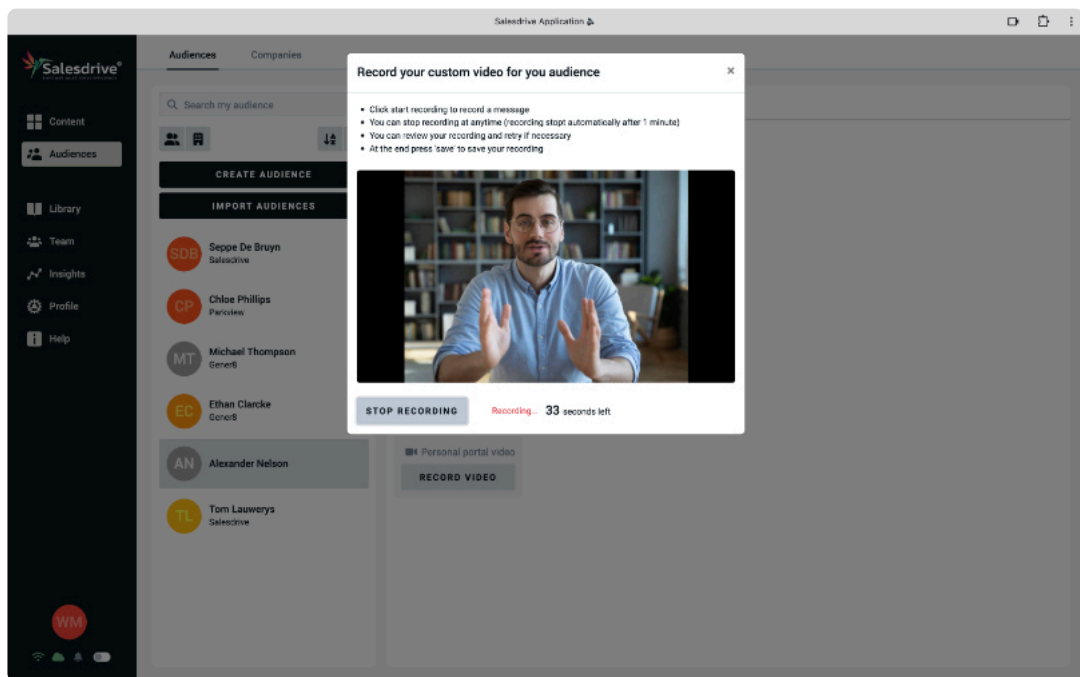


RECORD A PERSONAL INTRODUCTION VIDEO

You can add a short video message that prospects will see when they open their Buyer Portal.

Here's how to record it:

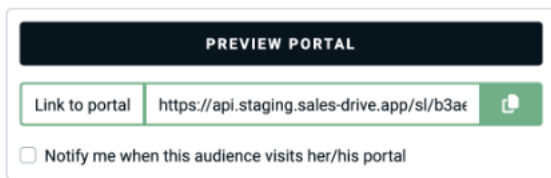
- ▶ Click the **RECORD VIDEO** button in the **Portal Settings**.
- ▶ A pop-up will ask for permission to use your camera and microphone. Click **Allow**.
- ▶ Click **START RECORDING** to begin your message.
- ▶ You can stop anytime, or wait for the automatic stop after one minute.
- ▶ After recording, you can watch the video and decide if you want to keep it or try again.
- ▶ Happy with your message? Click **SAVE VIDEO** to add it to the portal.



PREVIEW THE BUYER PORTAL

Curious what your audience sees? You can preview their Buyer Portal to see exactly what content is visible, how the background looks, and how your message will come across.

- ▶ Click **Audiences** in the menu on the left.
- ▶ Select the audience you want to preview.
- ▶ Go to Portal Settings.
- ▶ Click the **PREVIEW PORTAL** button to see exactly what they'll experience.



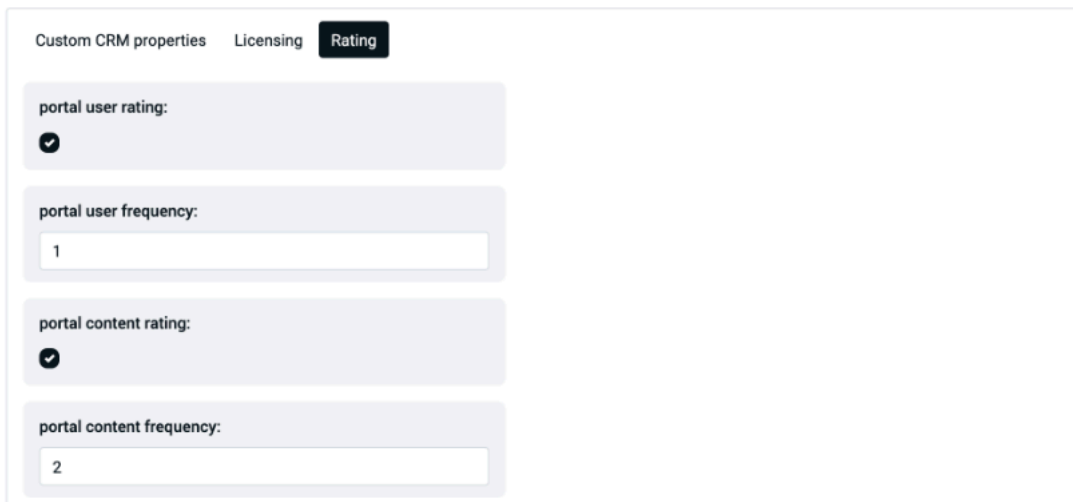
 **Admin Access Only**
This section is intended for users with full access to the platform.

PORTAL USER & CONTENT RATING

Want to gather **real feedback from your audiences**? With Portal Rating, you can let prospects rate both the content they receive and the salesperson they interacted with.

- ▶ Click **Team** in the menu on the left.
- ▶ At the top, click **Teams**.
- ▶ Select the team where you want to enable the Rating feature.
- ▶ Scroll down to **Extra Information** and click **Rating**.
- ▶ Toggle the Rating feature on and set how often you want audiences to be asked for feedback.

EXTRA INFORMATION



TRACKING CONTENT

Want to know how your audience interacts with your content? The **Track** feature gives you **detailed insights** into what was viewed, when, and for how long – helping you follow up at the right time with the right message.

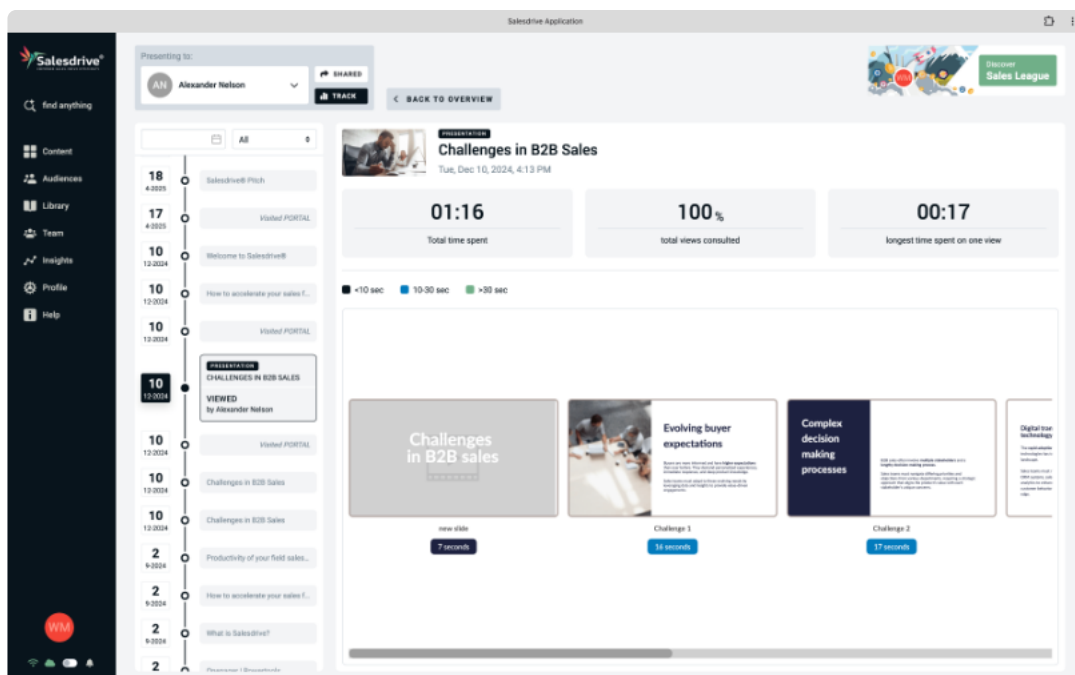
- How to access the Tracking view
- What you can see

HOW TO ACCESS THE TRACKING VIEW

- ▶ In the Content screen, click the **TRACK** button at the top right, next to your audience's name.
- ▶ Or click **Audiences** in the left menu, select an audience, then choose **Track** in the menu on the right.

WHAT YOU CAN SEE

Once you're in the Track view, you'll see a **timeline** on the left **showing all key interactions**, with filters to sort by month or by type (All, Viewed, Presented, or Visited). On the right, you'll find **tracking insights** like total time spent, percentage viewed, longest time on a single slide, and a color-coded breakdown of slide-by-slide engagement – giving you a clear view of who's engaged and where interest is highest.

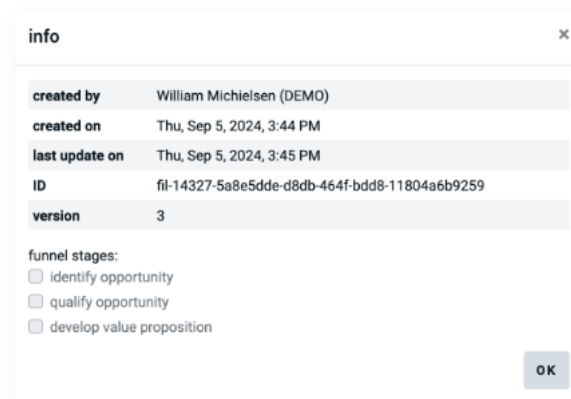



CONTENT IN FUNNEL STAGES

- Add content to a funnel stage(s)
- Assign an Audience to a specific funnel stage

ADD CONTENT TO (A) FUNNEL STAGE(S)

- ▶ Go to the Content screen.
- ▶ Click on the content you want to add to (a) funnel stage(s). And click on the **INFO** button at the bottom of the pop-up screen.
- ▶ At the bottom of this pop-up, you will see the funnel stages. By clicking the tick box you can select or deselect the funnel stage in which this content should be shown.



- ▶ When back on the Content screen, click on the  icon.
- ▶ You can select specific funnel stages by clicking the drop down menu.

INSIGHTS

Salesdrive is more than a content delivery platform. It is a **powerful analytics engine designed to bridge the gap between sales activity and closed deals**. The Insights section provides **real-time visibility** into how your team operates, how your content performs, and, most importantly, how your prospects behave.

By transforming raw data into actionable intelligence, Salesdrive enables you to refine your pitch, prioritize your time, and understand the ROI of every piece of content in your library.

Understanding access levels:

The Insights dashboard is dynamic and **adapts to your specific user role** to ensure you see the data most relevant to your responsibilities:

- ▶ **Sales and Light Users:** Your view is designed for personal performance and daily execution. It acts as a digital coach by highlighting your most active prospects and identifying where your follow-up will be most effective. You see your own metrics, allowing you to focus on your personal pipeline.
- ▶ **Team Admins and Supervisors:** Your view is built for strategy and leadership. You have the ability to toggle between Team View (comparing the performance of different departments or regions) and User View (analyzing the activity of specific team members). You also have access to high-level data like User Ratings to monitor customer satisfaction and guide team coaching.

Universal Dashboard Functionalities

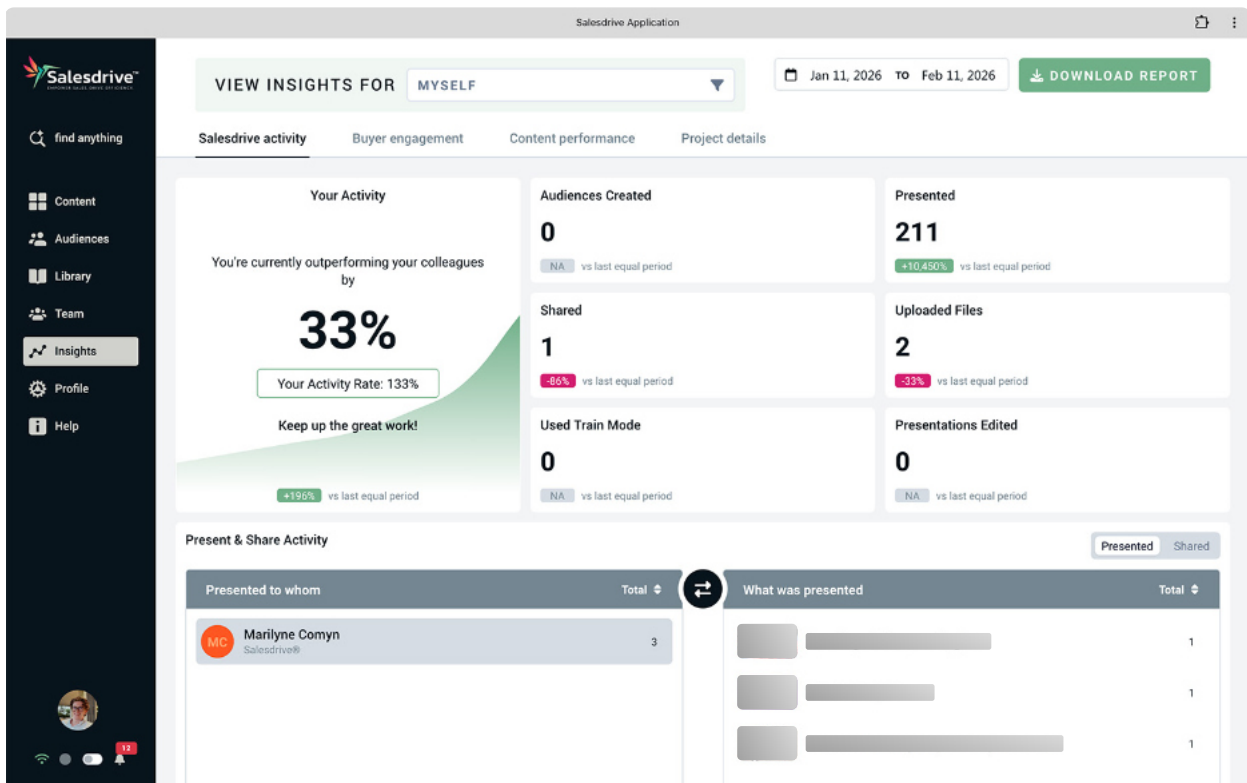
Regardless of your role, every Insights view is equipped with powerful tools to help you manipulate and share data.

- ▶ **Reorder and analyze data** (dynamic tables) is only useful if you can see it from the right perspective.
 - ▶ If you want to see which content is most popular, move the What column to the front.
 - ▶ If you want to see which client is most engaged, move the Audience column to the front. This allows you to customize your analysis in seconds without leaving the screen.
- ▶ **Download Report:** This button allows you to instantly export your current data set into a formatted Excel file. The report will automatically reflect your chosen filters (such as specific teams or users) and your selected time period. This makes it the **perfect tool for preparing team reviews, monthly reports, or strategic deep dives**.

SALESDRIVE ACTIVITY

This section tracks **how active your users or teams are within the platform**. It provides a clear view of how often sales materials are being utilized to drive conversations.

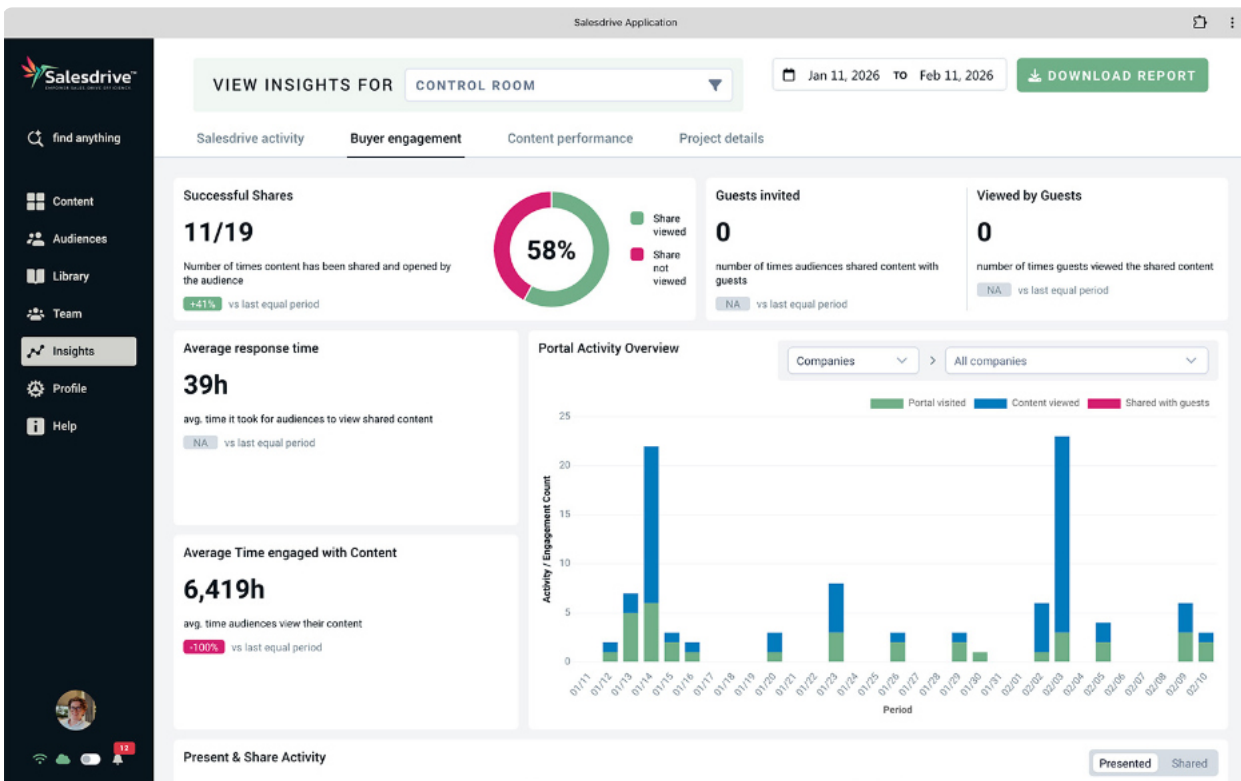
- ▶ **What you learn:** Monitor the frequency of Presentations and Shares. By default, this table is organized to show Who presented, followed by Presented to whom, and finally What was presented.
- ▶ **Key Insights:**
 - ▶ **User Ratings (Admins and Supervisors):** Track how prospects evaluate sales interactions to guide coaching and improve the buyer experience.
 - ▶ **Presenting versus Sharing:** Identify whether users are primarily engaging in live presentations or sending content via shares for later review. This helps you understand the most common ways your team interacts with prospects.



BUYER ENGAGEMENT

Understand exactly **how your prospects behave** after you have shared content. This data reveals where the real interest lies and **tells you exactly when to take action**.

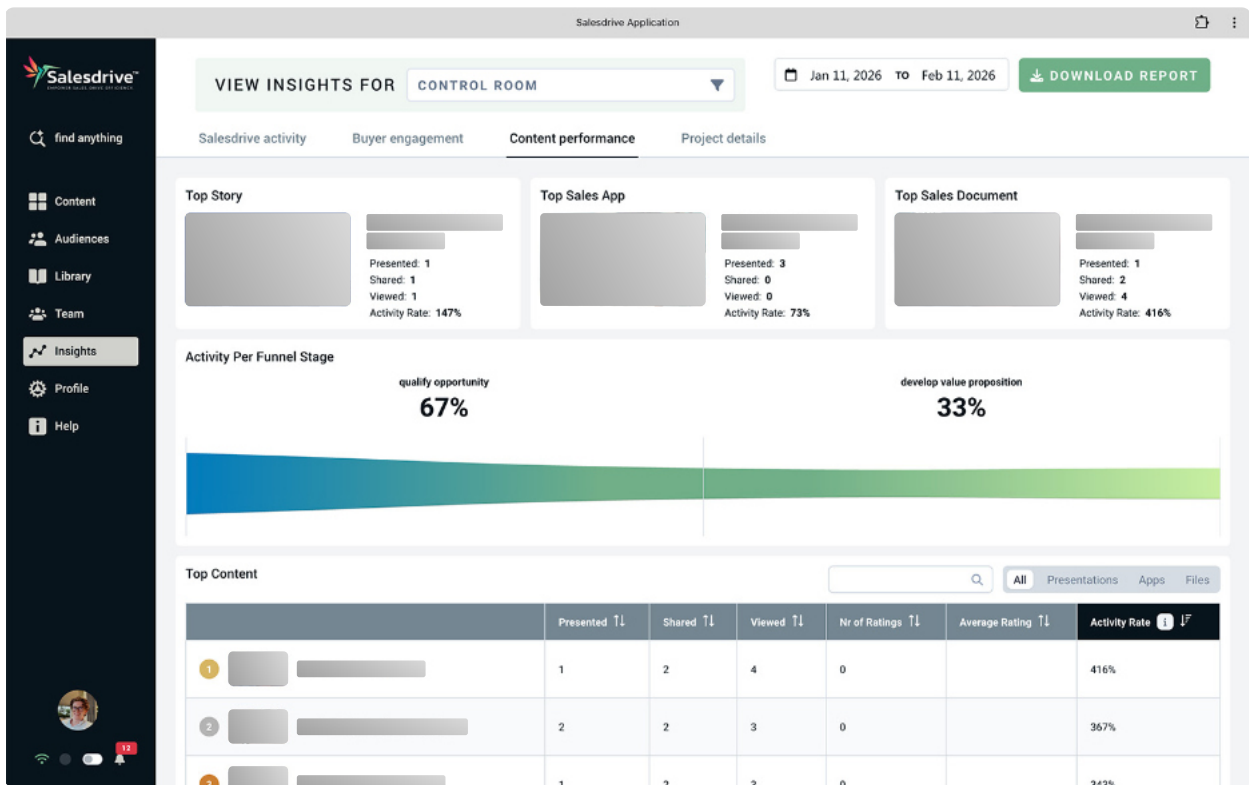
- ▶ **What you learn:** Analyze how prospects interact with your materials. See who is looking and how intensively they are engaging with your story. By default, this table is organized to show Presented to whom, followed by Who presented, and finally What was presented.
- ▶ **Key Insights:**
 - ▶ **Hot and Cold Audiences (Sales & Light Users only):** Identify at a glance which customers are highly engaged (Hot) and ready for a call, and which are currently less active (Cold) and may need a different approach.
 - ▶ **Optimal follow-up time (Sales & Light Users only):** Use activity heatmaps to discover when your prospects are most active. This allows you to time your outreach for the moments they are already thinking about your solution.



CONTENT PERFORMANCE

Discover which sales materials are actually driving results and helping to close deals. This section is essential for **evaluating the effectiveness of your library** and optimizing your content strategy based on real-world usage.

- ▶ **What you learn:** Measure the impact of every specific file, interactive tool, or presentation. By default, this table is organized to show What was presented, followed by Presented to whom, and finally Who presented it.
- ▶ **Key Insights:**
 - ▶ **Activity per Funnel Stage:** This component visualizes your engagement across the sales journey. It allows you to see which specific stage of the sales funnel currently has the most activity, helping you identify where prospects are focusing their attention.
 - ▶ **Top Content:** Located directly below the funnel view, this table highlights your most successful assets. Use this to identify which materials are the most effective at driving engagement.
 - ▶ **Content Ratings:** Check how clients evaluate your sales materials to understand what truly resonates with your target audience and which assets need refinement.



TEAM



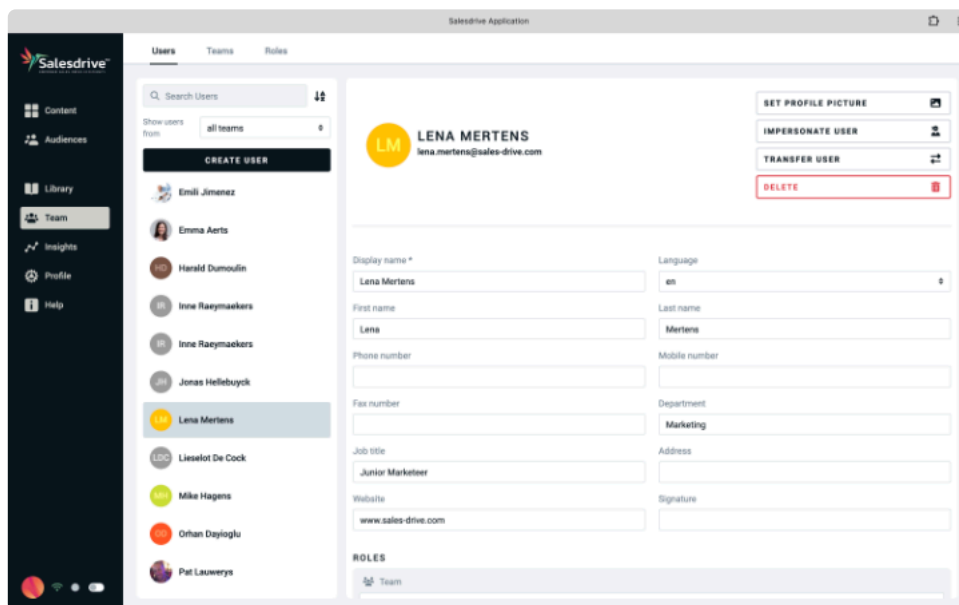
Admin Access Only

This section is intended for users with full access to the platform.

- View and manage users
- Add a new user
- Edit user roles
- Delete a user
- Team languages
- User transfer

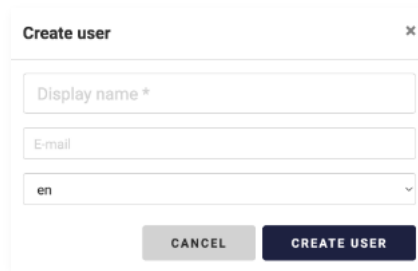
FIND A SPECIFIC USER IN A SPECIFIC TEAM

- ▶ Click **Team** in the menu on the left.
- ▶ In this section, you can view a full list of all Salesdrive users within your company.
- ▶ Use the search bar to quickly find a specific user **or** use the "**Show users from**" dropdown to filter by team.
- ▶ When you click on a user, you'll see detailed information on the right, including:
 - ▶ User information (first and last name, language, number, job title, ...)
 - ▶ User roles (team, role)
 - ▶ Extra information (custom CRM properties, licensing, target tracking)
 - ▶ Account details (creation date, number of created content, number of shares, ...)



ADD A NEW USER

- ▶ On the left side of the screen, under the search field, you will find the **CREATE USER** button.
- ▶ Click this button to add a new user.
- ▶ Add the name of the user and his/her e-mail. As the email address is capital sensitive to login, you must be sure you don't use any capitals.
- ▶ Choose a language.
- ▶ Click the **CREATE USER** button to officially add the new user.



EDIT USER ROLES

- ▶ Go to the user where you want to change the roles.
- ▶ In the middle of your screen you will see a grey box with **Team** and **Roles**.
- ▶ Here you can assign the user to a team and to a particular role.



DELETE A USER

- ▶ Go to the user that you want to delete.
- ▶ On the right side you will see the button **DELETE**.
- ▶ Click on this button. A new pop-up screen will appear.
- ▶ Click on **OK** and this user will be deleted.

TEAM LANGUAGES

- ▶ Select **Teams** at the top of the screen.
- ▶ Click on a specific team.
- ▶ Select the languages available to the users in this team by clicking the tick box(es)
This is only available if you have presentations available in multiple languages.

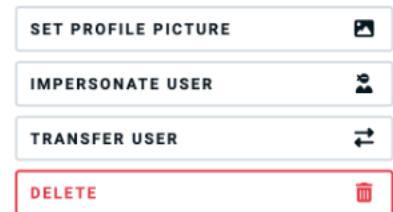
 The languages available to the users in this team

- de
- en
- fr
- nl
- pt

USER TRANSFER

User transfer is created to transfer specific content from one user to another when the first user is going to a different team for example. This way the content from this first user will not disappear and will remain usable and used.

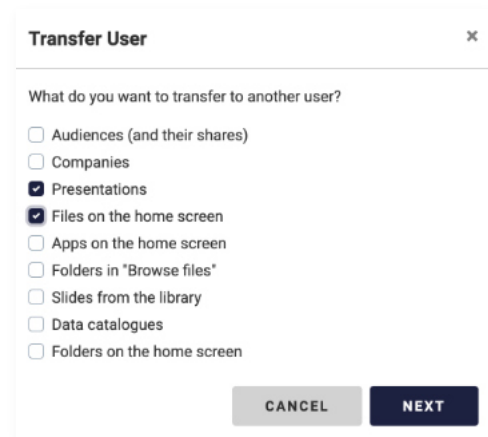
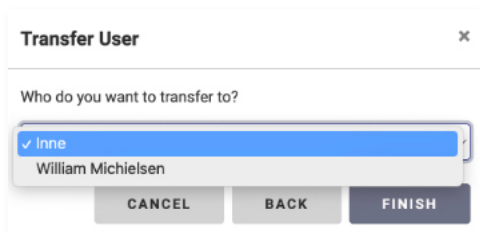
- ▶ Go to **TEAM** in the bottom menu of the app.
- ▶ Select the user you want to transfer information from.
- ▶ Click on the **TRANSFER USER** button.



- ▶ Select content types you want to transfer, for example **Presentations** and **Files on the home screen**.
- ▶ Click on the **NEXT** button.
- ▶ Select the user you want to transfer this selected content to and click on **FINISH**.
- ▶ Once a transfer has been done, the original content will not be available for the user from where the files, content, ... has been transferred from.



This feature can not be undone so make sure you know what you're doing.



FILES AND FOLDERS IN LIBRARY

- Adding new folders and files
- Uploading files
- Show files
- Setting usability of files
- Delete file
- Share file and folders

The **LIBRARY** represents the global library that contains all files and folders used in Salesdrive. You can create your own folders and upload files which can be used for various purposes as explained below.

ADD NEW FOLDERS AND FILES

- ▶ From the bottom menu in the Homescreen, click on the option “**Library**”
- ▶ You will see all the folders listed on the left hand side
- ▶ On the top left you will find a button called “**Create folder**”
- ▶ Click on the “**Create folder**” button, a pop-up will appear
- ▶ Enter a name of your choice and click on the button “**Create folder**”
- ▶ A folder by the name you entered will be created and you can find it in the list of folders on the left

UPLOAD FILES IN YOUR FOLDERS

- ▶ Click on any folder you have created.
- ▶ Click on the button **Add some file(s) to this folder**, you will be redirected to your device folder system to select a file.
- ▶ Select any file of your choice. You can **select up to 10 files**.
- ▶ The file(s) will be uploaded in the folder.
- ▶ The types of files supported are: jpeg, png, pdf, doc, ppt, excel sheets etc.
- ▶ The file you just uploaded will appear in your folder.

SHOW FILES

- ▶ Click on the file in the folder, on the right hand side you will see an option **OPEN**.
- ▶ The file will open on your device.

SETTING USABILITY OF FILES

- ▶ After you select a file in your folder, you will see multiple permission options on the right hand side.
- ▶ **Audience Personal File** - Enable this option if you want to tag a file as being personal only to your audience.
- ▶ **Audience Picture** - Enable this option if you want to use this picture as an audience picture.
- ▶ **Desktop background** - Enable this option if you want to use this picture as a background for your desktop.
- ▶ **File icon** - Enable this option if you want to use this picture as a file icon.
- ▶ **Folder icon** - Enable this option if you want to use this picture as a folder icon.
- ▶ **General Document** - Enable this option if you want to use this file as a general document.
- ▶ **Presentation Content** - Enable this option if you want to use this file as presentation content.
- ▶ **Presentation Poster** - Enable this option if you want to use this picture as a presentation poster. A presentation poster is the image of the presentation that appears on the home screen.
- ▶ **Slide Background** - Enable this option if you want to use this picture as a slide background.
- ▶ **Team picture** - Enable this option if you want to use this picture as a team picture.
- ▶ **User picture** - Enable this option if you want to use this picture as a user picture.
- ▶ The changes will be saved automatically. A pop-up will appear in the top right corner to say that the changes are saved.

DELETE FILES

- ▶ After you select a file in your folder, you will see multiple permission options when you scroll down.
- ▶ Click on the **DELETE** button to delete a particular file.

SHARE FILES AND FOLDER


- ▶ Folder: By clicking on the three dots in the bottom right corner of the folder icon, you go into the details of the folder. Here you can make the folder visible to all teams you want to make it available to .

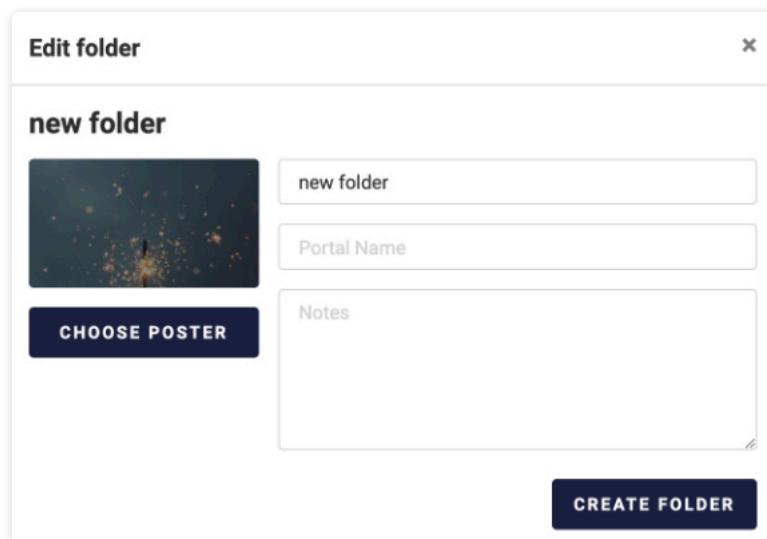
FILES AND FOLDERS IN CONTENT SCREEN

- Add folders to your Homescreen / Content screen
- Add content/files to a folder
- Share the folder with my team(s)
- Check version history of your content

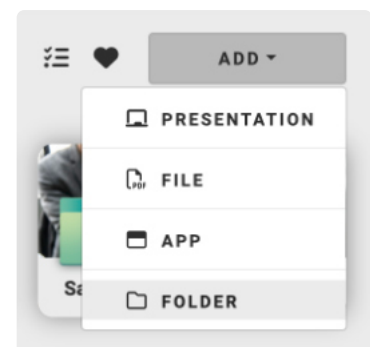
ADDING FOLDERS TO YOUR CONTENT SCREEN

- ▶ Click on the **ADD** button that you see at the top right of your screen.
- ▶ If you click on this button, you see that you can choose between Presentation, File, App and Folder.
- ▶ Click on **FOLDER**.
- ▶ You can now give this folder a name and a portal name, upload a poster image and add notes if you wish.

 *The folder name you choose will be visible to you in Salesdrive, while the portal name will be what your audience sees in the portal.*



The 'Edit folder' dialog box is titled 'new folder'. It features a poster image placeholder with a 'CHOOSE POSTER' button. Below the image is a text input field containing 'new folder', followed by a 'Portal Name' input field and a larger 'Notes' text area. A 'CREATE FOLDER' button is located at the bottom right of the dialog.

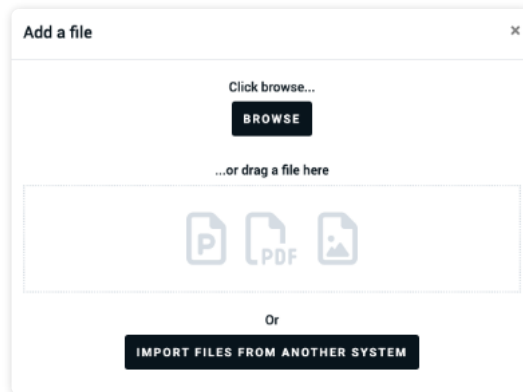


ADD CONTENT TO A FOLDER

- ▶ At the top right of the Content screen, click the **ADD** button.
- ▶ Choose **FILE** from the menu.
- ▶ A pop-up will appear with **3 ways to upload**:
 - ▶ Click **BROWSE** to select a file from your computer.
 - ▶ **Drag and Drop** your file into the upload area.
 - ▶ Click **IMPORT FILES FROM ANOTHER SYSTEM** (e.g. OneDrive).
- ▶ After uploading, give your file a name and choose a poster image.
- ▶ Once saved, you can simply drag it into the folder where you want it to be stored.



Please note that you may not always have the permission to drag and drop a file into a folder, especially if you did not create the file yourself.



SHARE THE FOLDER WITH MY TEAM(S)

- ▶ Click on the three dots of an existing folder.
- ▶ A pop-up appears where you have to select the option **Share with team(s)**.
- ▶ Here you can make the folder visible to all teams you want to make it available to.



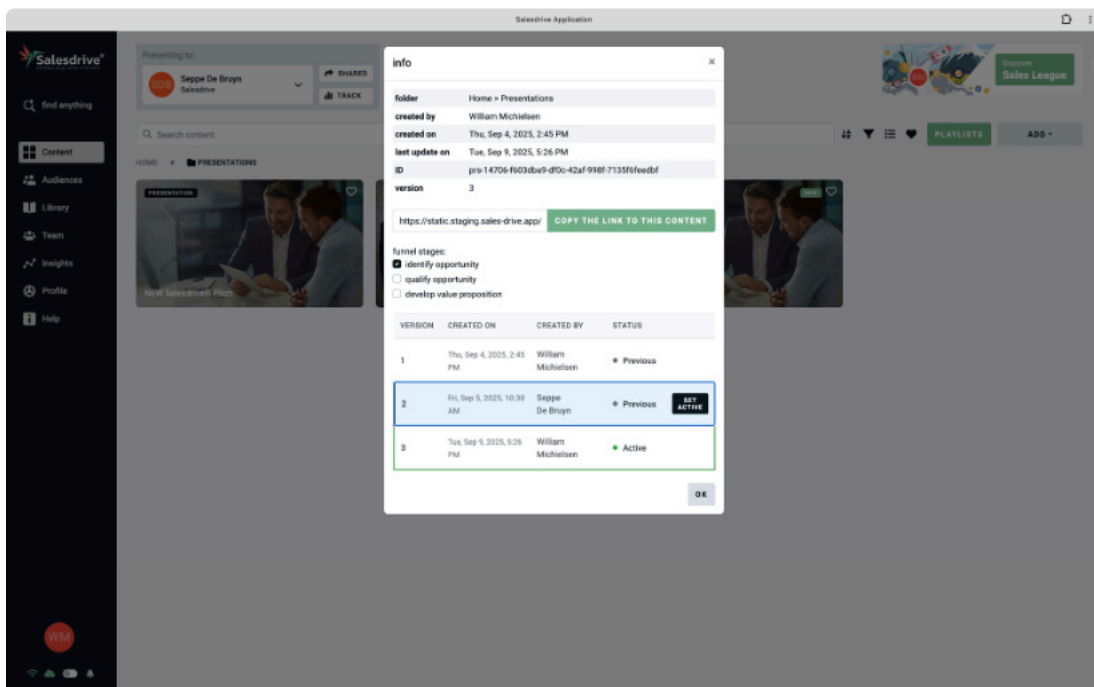
A folder and its files can be shared with all available teams, but please note that all files need to be shared with the specific teams as well in order for the teams to see the files.

Example: if you create a folder with all price information for the accessories, make sure that these files are shared with the teams as well in order for the teams to see this information.

VIEW AND REACTIVATE PREVIOUS CONTENT VERSIONS

Need to review previous edits or go back to an earlier version of your content? With **Version History**, you can view who made updates, when changes were made, and easily reactivate any previous version when needed.

- ▶ Go to your **Content** screen.
- ▶ Click on a piece of content.
- ▶ In the pop-up, click the **INFO** button.
- ▶ A panel will open showing all the details of the content, including: folder location, creator and creation date, latest update, content ID, etc.
- ▶ **Scroll down to the version history to view:**
 - A list of all versions
 - When each version was created
 - Who created them
 - The current status (Active or Inactive)
 - The most recent, Active version is highlighted in green
- ▶ **Want to go roll back to a previous version?**
 - First click on an older version. Then click **SET ACTIVE** to make it the current live version.

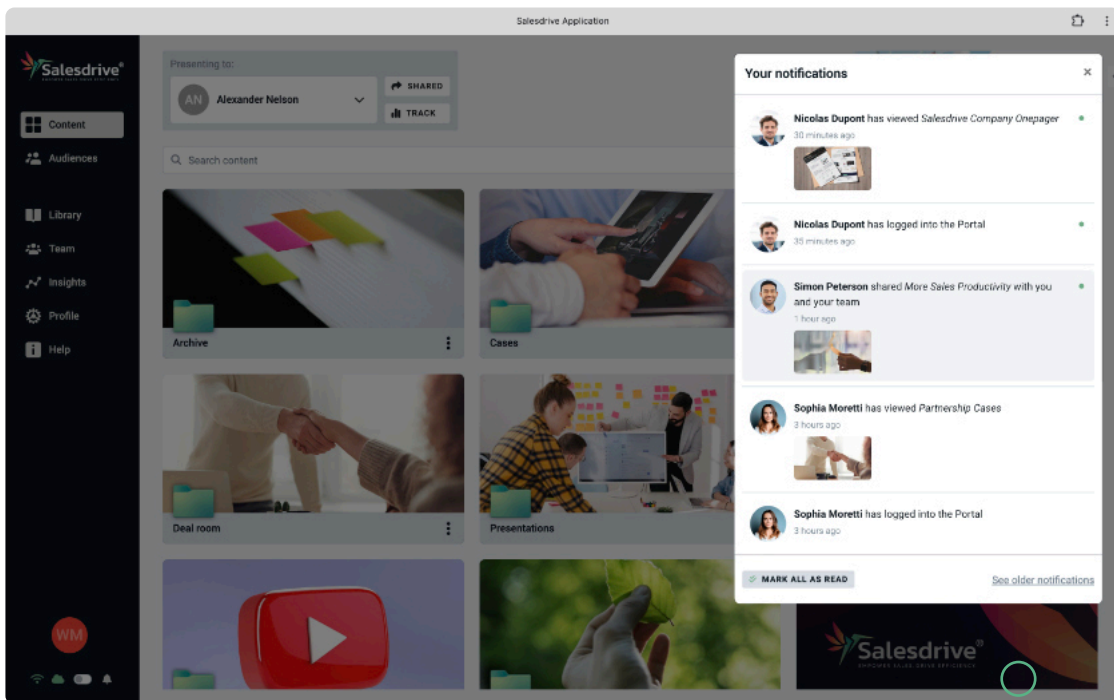


NOTIFICATION CENTER

Salesdrive keeps you in the loop with smart notifications. When something happens—like an audience opening shared content or a teammate sharing something with you – you’ll see it right away.

WHERE TO FIND NOTIFICATIONS

- ▶ Click the **bell icon** at the bottom left of the screen to open your Notification Center and view the latest activity.
 - ▶ New notifications are marked with a green bullet, so you can spot them at a glance.
 - ▶ Done reading? Click **MARK ALL AS READ** to remove the green bullets.
- Note: Your notifications stay visible – only the green bullets disappear.*



TURN OFF NOTIFICATIONS

- ▶ Click **Profile** in the menu on the left.
- ▶ Click the **DISABLE NOTIFICATIONS** button.

USING THE HELP-FUNCTION IN SALESDRIVE

- ▶ Click **Help** in the left-hand menu anytime you need support.
- ▶ A screen will open with everything you need to know.
- ▶ Just pick a topic, and you'll find clear explanations, videos, and guides to get you going.

ACCOUNT

- Update your profile details
- Add contacts/ audiences from your CRM
- Add a company

UPDATE YOUR PROFILE DETAILS

- ▶ Go to **ACCOUNT** in the bottom menu.
- ▶ You'll get an overview of your account details and you can start adapting details like a phone number, job title, ...

ADD CONTACTS / AUDIENCES FROM YOUR CRM

- ▶ Go to account in the bottom menu of Salesdrive and click **CRM** in the top menu.
- ▶ All options that are available to add contacts from show up here.
- ▶ Follow the steps in order for the contacts to be added in the correct way.
- ▶ You'll get an overview of your account details and you can start adapting details like a phone number, job title, ...

ADD A COMPANY

- ▶ Click on **Companies** in the top menu of the Team overview
- ▶ Click on **ADD COMPANY** to create a new company.
- ▶ Fill in the necessary fields for a new company and click on **ADD COMPANY**.

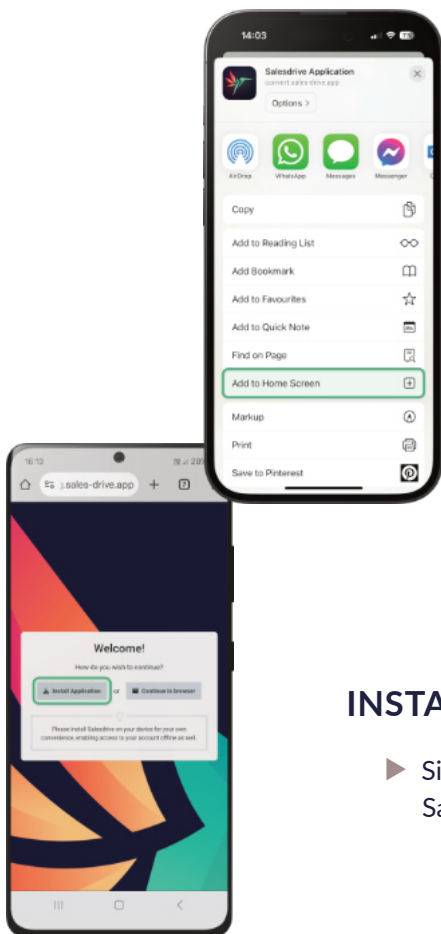
UPDATE OR ACCESS THE APP

- Sync the App to get the latest updates
- Install Salesdrive on iOS
- Install Salesdrive on Adroid

SYNC THE APP TO GET THE LATEST UPDATES

Salesdrive automatically syncs updates when you close and reopen the app. But you can also trigger a manual sync at any time.

- ▶ Click on **Profile** in the left menu.
- ▶ Click the green **START SYNC** button.
- ▶ The app will check for updates and sync all content.
- ▶ Once the sync is complete, the **cloud icon** turns green to confirm everything is up to date.



INSTALL SALESDRIVE ON iOS

- ▶ Open **Safari** and go to your Salesdrive URL.
- ▶ Tap the **Share** icon.
- ▶ Scroll down and tap **Add to Home Screen**.
- ▶ Tap **Add** in the top-right corner.

INSTALL SALESDRIVE ON ANDROID

- ▶ Simply tap the '**Install Application**' button to add Salesdrive to your Home screen.

CUSTOM FEATURES (AVAILABLE ON REQUEST)

- Sales League
- Import files from another system (e.g. OneDrive)
- Import audiences from CRM
- Filter audiences by custom properties
- Outlook Salesdrive add-in

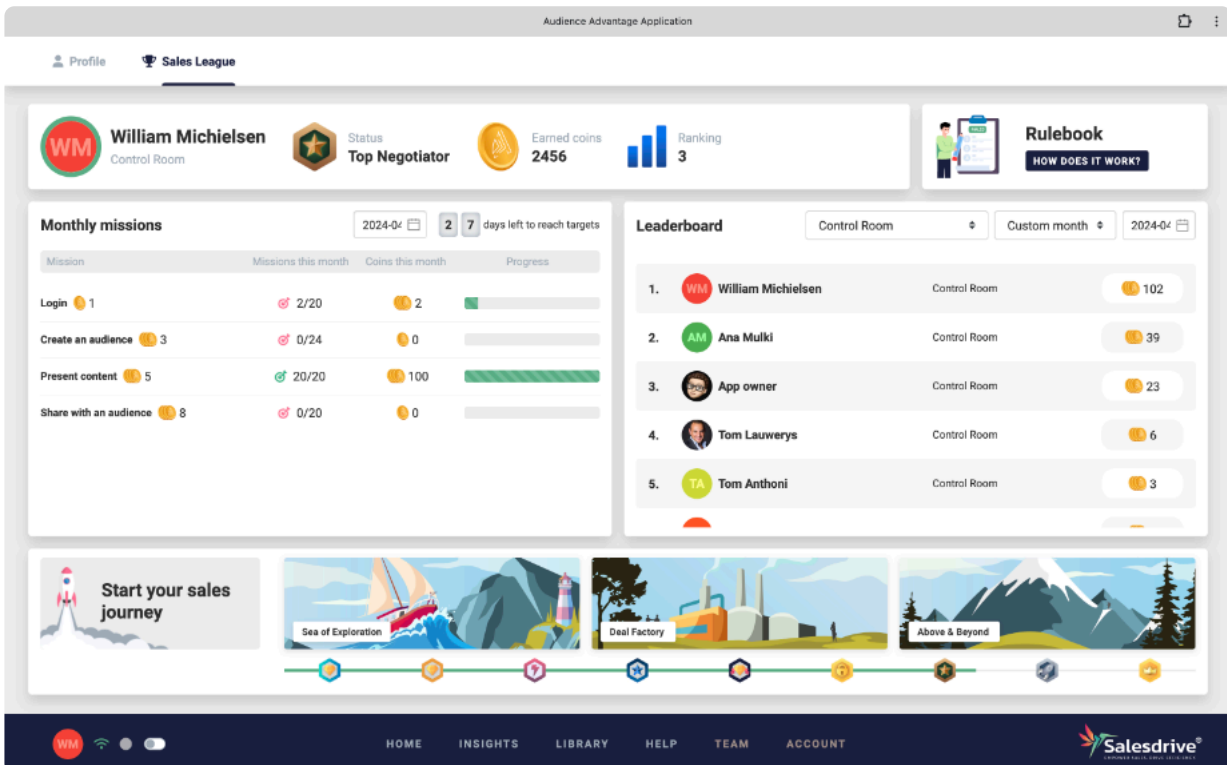
SALES LEAGUE

The “Sales League” shows you the leaderboard of your team as well as your monthly missions. Your own status is also shown here, which will allow you to grow in your usage and get up in the leaderboard.

You are able to compare yourself and your usage with your colleagues. This way you can gamify the usage of Salesdrive and get your numbers up, both in the leaderboard as in your sales numbers and sales talks.

You can also track the journey to reach a new status or level, which always comes with a new badge.

Go to your profile section to view the Sales League dashboard.



Audience Advantage Application

Profile Sales League

William Michielsens
Control Room

Status **Top Negotiator**

Earned coins **2456**

Ranking **3**

Rulebook
HOW DOES IT WORK?

Monthly missions 2024-04 2 7 days left to reach targets

Mission	Missions this month	Coins this month	Progress
Login 1	2/20	2	<div style="width: 10%;"></div>
Create an audience 3	0/24	0	<div style="width: 0%;"></div>
Present content 5	20/20	100	<div style="width: 100%;"></div>
Share with an audience 8	0/20	0	<div style="width: 0%;"></div>

Leaderboard Control Room Custom month 2024-04

1.	William Michielsens	Control Room	102
2.	Ana Mulki	Control Room	39
3.	App owner	Control Room	23
4.	Tom Lauwerys	Control Room	6
5.	Tom Anthoni	Control Room	3

Start your sales journey

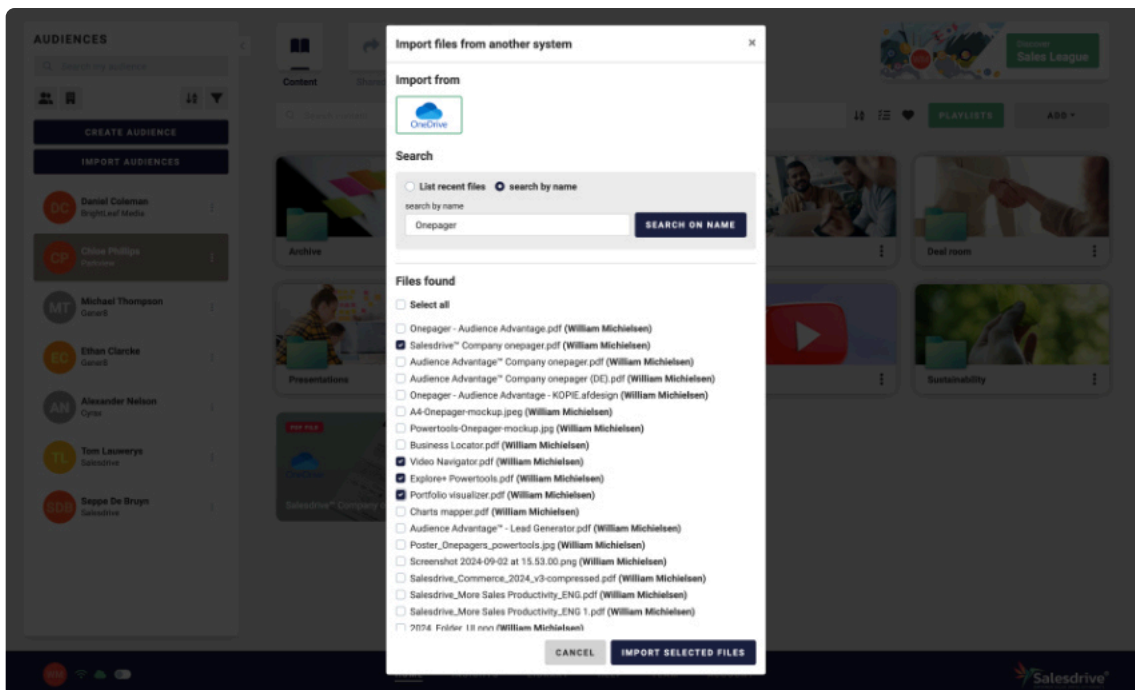
Sea of Exploration Deal Factory Above & Beyond

HOME INSIGHTS LIBRARY HELP TEAM ACCOUNT

Salesdrive[®]

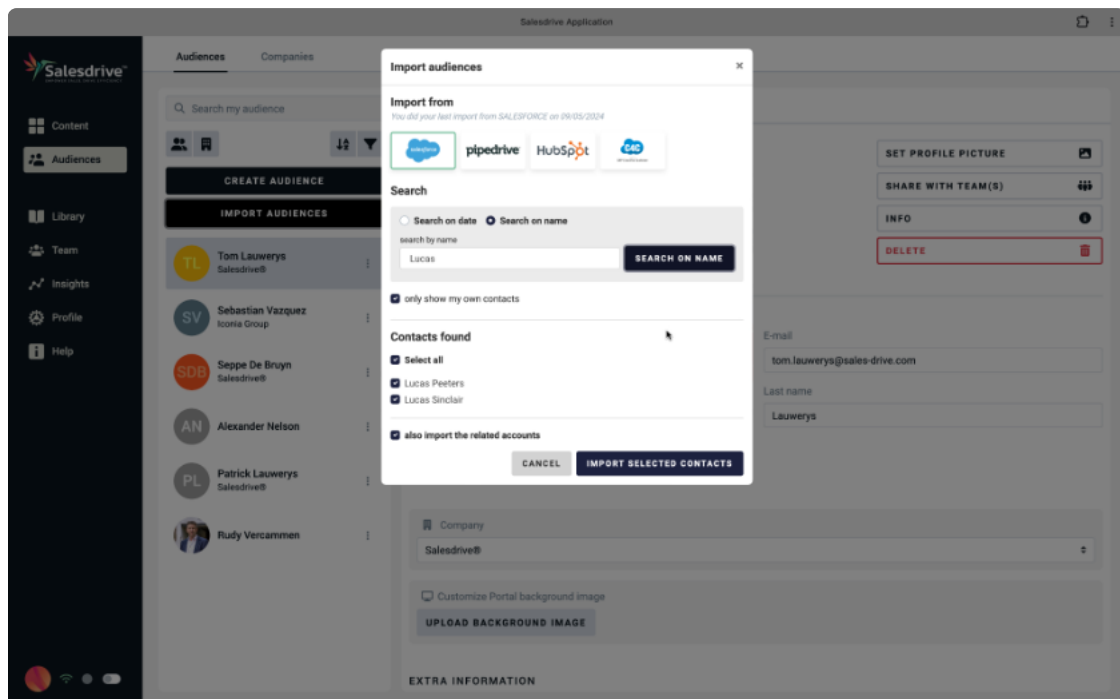
IMPORT FILES FROM ANOTHER SYSTEM

- ▶ Go to the Content view
- ▶ Click the **ADD** button on the top right side of your screen
- ▶ When you click this button, you can choose between Presentation, File, App and Folder.
- ▶ Click on **File**.
- ▶ In the pop-up window, click **IMPORT FILES FROM ANOTHER SYSTEM**.
- ▶ Select the system from which you want to import files.
- ▶ You have the option to choose from a list of **recent files** or you can **search by name**.
- ▶ Check the file(s) you want to import.
- ▶ When you're done, click **IMPORT SELECTED FILES**.
- ▶ The file is now added to your homescreen and can be recognized by the logo of the system from which you imported the file.



IMPORT AUDIENCES FROM CRM

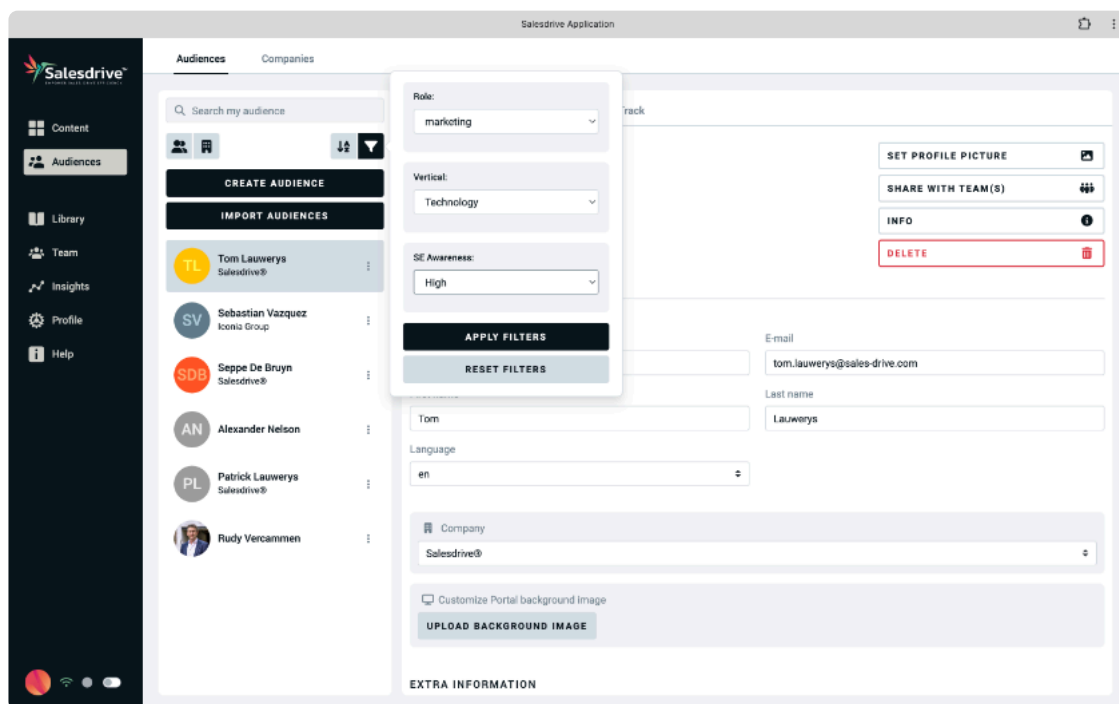
- ▶ Click **IMPORT AUDIENCES** at the top of the audience list to upload contacts from your CRM.
- ▶ Choose the CRM system you want to import from.
- ▶ You can then search for audiences by date or by name.
- ▶ Click **SEARCH BY DATE** or **SEARCH BY NAME**.
- ▶ A list of matching audiences will appear.
- ▶ Select the audiences you want to import from the list.



FILTER AUDIENCES BY CUSTOM PROPERTIES

How to setup Custom Properties

- ▶ Click **Audiences** in the left-hand menu.
- ▶ Select the audience you want to edit.
- ▶ Scroll down to **EXTRA INFORMATION**.
- ▶ There, you can set up and manage custom properties for that audience.

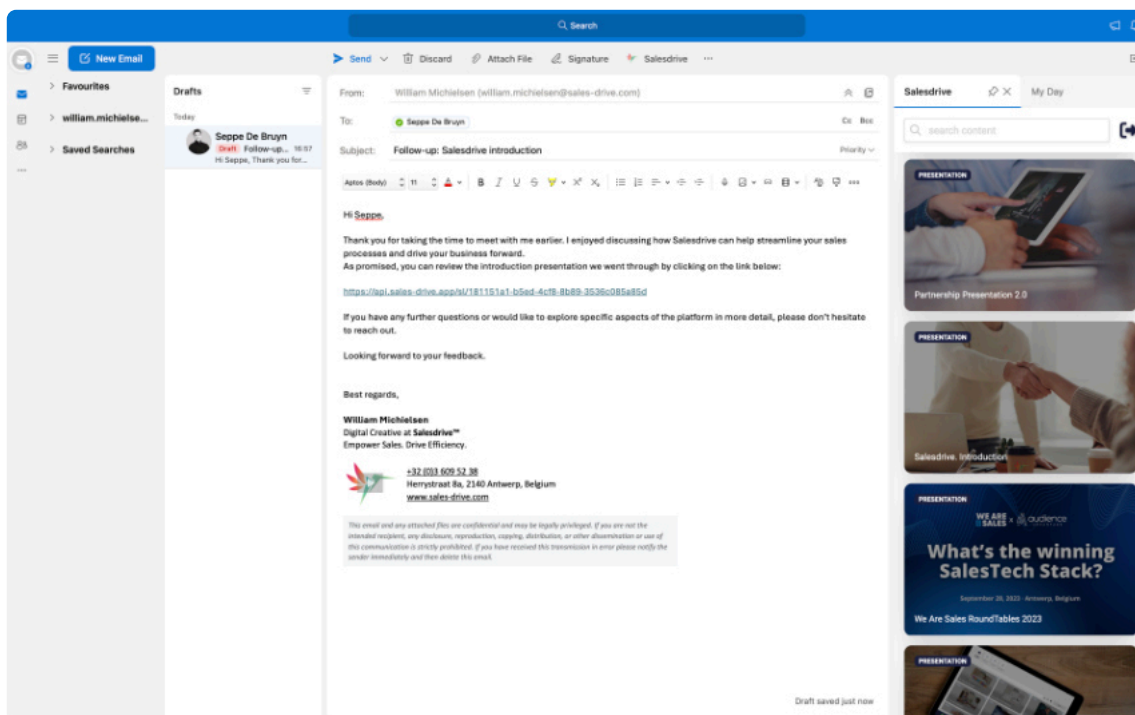


Once you've setup the custom properties for your audiences, you can use them to quickly find the right audience.

- ▶ At the top of the Audience list, click the **filter icon** (funnel symbol).
- ▶ Choose one or more custom properties to filter by.
- ▶ Your audience list will update to match your selected criteria, making it easy to do a more targeted search.

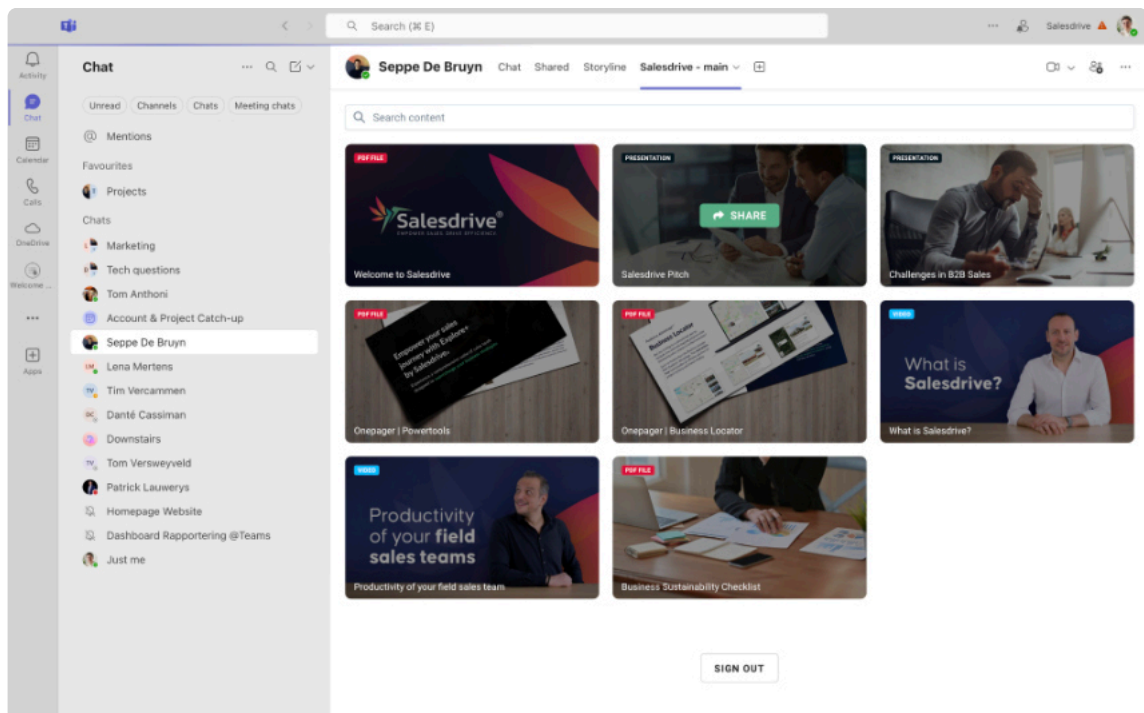
INSTALL AND USE SALESDRIVE IN OUTLOOK

- ▶ Click on the three dots in your Outlook toolbar.
- ▶ Click **Get Add-ins**.
- ▶ Search for **Salesdrive** and add it to your toolbar.
- ▶ Click **Login with Salesdrive** and sign in with your Salesdrive account.
- ▶ Use the search bar to find your content or scroll through your content.
- ▶ Hover over the content you want to share and click the green **SHARE** button.
- ▶ A link will be automatically added to your email message.
- ▶ If the recipient isn't yet in your audience list, Salesdrive will automatically create a new audience.
- ▶ Your email is now ready to send!



INSTALL AND USE SALESDRIVE IN TEAMS

- ▶ In your chat, click the + icon at the top, next to 'Chat', 'Shared' and 'Storyline'.
- ▶ A pop-up will appear – search for “Salesdrive” in the app list.
- ▶ Click the Salesdrive logo and confirm to add the app.
- ▶ Once added, the Salesdrive tab opens automatically.
- ▶ Click **Login with Salesdrive** and sign in with your Salesdrive account.
- ▶ Use the search bar to find your content or scroll through your content.
- ▶ Hover over the content you want to share and click the green **SHARE** button.
- ▶ A link will be pasted directly into your chat message.
- ▶ If the recipient isn't yet in your audience list, Salesdrive will automatically create a new audience.
- ▶ Your message is now ready to send!



CONTACT DETAILS

We have tried to cover every functionality in as much detail as possible in this manual. But we are always there to support you in any possible way.

For any help and support please do not hesitate to contact us.

- ▶ Marilynne Comyn - support@sales-drive.com



For further assistance or inquiries,
please contact Salesdrive at support@sales-drive.com

Copyright © 2024 Salesdrive®. All rights reserved.