



EVP PRM - Official User Guide

Welcome to the EVP Partner Relationship Manager (PRM), your powerful, comprehensive hub for orchestrating partner ecosystems, guiding onboarding pipelines, and managing ongoing communications.

This document outlines the core features of the platform and best practices for daily operations.



1. The Dashboard (/)

The Dashboard is your control center. It offers a real-time, interactive overview of your complete network of partners.

The screenshot displays the PRM Dashboard interface. On the left, a vertical sidebar lists navigation options: Dashboard (selected), Partners, Deals, Calendar, Analytics, and a share icon. The main content area features a header "PRM Dashboard" with a search bar and a bell icon. Below the header are three large cards: "TOTAL PARTNERS" (1,254), "ACTIVE COLLABORATIONS" (78), and "NEEDS ATTENTION" (12). The "NEXT APPOINTMENTS" section lists four meetings: "Strategic Planning with Acme" at 10:00 AM, "Meeting Moding SInace and Financial Bentouis" at 10:00 AM, "Strategic Planning with Acme" at 12:00 PM, and another "Strategic Planning with Acme" at 8:00 PM. The "LAST INTERACTIONS" section shows five recent emails from Sarah J. about Q4, with the most recent one being 4 hours ago.

APPOINTMENT	TIME
Strategic Planning with Acme	10:00 AM
Meeting Moding SInace and Financial Bentouis	10:00 AM
Strategic Planning with Acme	12:00 PM
'Strategic Planning with Acme	8:00 PM

INTERACTION	TIME
Email to Sarah J. about Q4	1 hr ago
Email to Sarah J. about Q4	1 hr ago
Email to Sarah J. about Q4	2 hr ago
Email to Sarah J. about Q4	3 hr ago
Email to Sarah J. about Q4 & cmeet	4 hr ago

Key Metrics & Modules:

- **Total Partners:** The absolute total number of entered organizations.
- **Active Collaborations:** The count of partners uniquely labeled as "Active".
- **Needs Attention:** The count of partners who have breached their assigned tracking threshold.
- **Next Appointments:** Upcoming deadlines and meetings.
- **Partner Attention Feed:** A dedicated section intelligently notifying you of required follow-ups, highlighting partners who have been dormant beyond their established

"Needs Attention" thresholds.

2. Partner Directory (/directory)

The Directory contains the master list of all organizations. It provides robust filtering, tagging, and immediate visualization of partnership health scores.

The screenshot shows a mobile application interface titled "Partner Directory". At the top, there is a search bar with the placeholder "Search partners..." and three dropdown filters: "Health", "Region", and "Tags". A blue button labeled "+ New Partner" is located in the top right corner. The main area displays a table with six rows of partner data:

Name	Health	Integrations	Tags	Last Interaction
Acme Corp.	●	Cloud Settings	Reseller	Jan 15, 2023
Acme Corp.	●	Cloud Settings	Tech Partner	Jan 16, 2023
Acme Corp.	●	Cloud Settings	Reseller	Jan 13, 2023
AZT5, Inc.	●	Cloud Settings	Tech Partner	Mar 11, 2023
Arament Corp.	●	Cloud Settings	Reseller	May 6, 2023
Acme Corp.	●	Cloud Settings	Tech Partner	May 3, 2023

Key Actions within the Directory:

- **Search & Filter:** Find a specific partner using global search filters based on Integration Status, Tags, Assigned Teams, or specific Products.
 - **Create / Import:**
 - Add a new partner via the highly-detailed **+ New Partner** module.
 - Use the designated **Import (CSV)** button combined with our official schema template to bulk-upload an existing CRM list.
 - **Export Data:** Quickly extract all filtered partnerships into an accessible spreadsheet.
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3. Integration Pipeline (/pipeline)

Track the life cycle of major partner onboarding phases visually over a modern Kanban-style board.

The screenshot shows the PartnerFlow application's Kanban Pipeline feature. At the top, there are navigation links: PartnerFlow, Dashboard, Partners, Devagration, Contact, and a user profile icon. Below the header is a search bar with 'Search' and 'Filters' buttons, and a '+ New board' button.

The main area is titled 'Kanban Pipeline' and displays four columns of cards:

- Not Started**: Contains one card for Acme Corp Partner with a deal value of \$30,000. It has status indicators: Enterprise, Tier 1, and New.
- In Pipeline**: Contains two cards for Acme Corp Partner. The first has a deal value of \$62,000 and the second has \$5,000. Both have status indicators: Enterprise, Tier 1, and New.
- In Development**: Contains three cards for Acme Corp Partner. The first has a deal value of \$30,000, the second \$2,000, and the third \$3,000. All have status indicators: Enterprise, Tier 1, and New.
- Finished**: Contains three cards for Acme Corp Partner. The first has a deal value of \$62,000, the second \$2,000, and the third \$2,000. All have status indicators: Enterprise, Tier 1, and New.

On the left side of the pipeline columns, there is a vertical sidebar with icons for Home, Overview, Pipeline, Partners, Products, and Support. At the bottom of the sidebar is a user profile picture.

Pipeline Mechanics:

- Partners are tracked automatically based on their mapped onboarding stage.
- Progress spans multiple distinct stages: Not Started → In pipeline → In development → Finished.
- Direct visual indicators on cards immediately highlight the core product the partner is integrating.



4. Interactive Log & Reminders (/reminders)

Beyond static storage, the PRM actively manages your engagement calendar.

- **Interaction Logs:** Accessible through each Partner Profile, users can append Calls, Meetings, or Emails. Time-stamping and tracking this activity dictates the "Health" mechanics seen on the Dashboard.
 - **Global Reminders Window:** Centralizes all system-wide internal to-dos, tasks, and future checkpoints allowing you to quickly cross off pending items from a bird's-eye view.
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5. General Settings (/settings)

The Settings dashboard allows users and administrators to conform the software strictly to your company's vernacular and policies.

- **Global Values:** Modify standardized fields like Available Integrations ("Products"), Staff Rosters ("Team"), Industry Classification ("Verticals"), and standard application purposes ("Use Cases").
 - **(Admins Only) The Danger Zone:** Administrators hold explicit access to completely obliterate partner data streams through highly-validated multi-step deletions guaranteeing system integrity by purging related logging schemas simultaneously.
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End of User Guide. For further technical support, please refer to the Admin portal.