



EVP PRM - Official User Guide

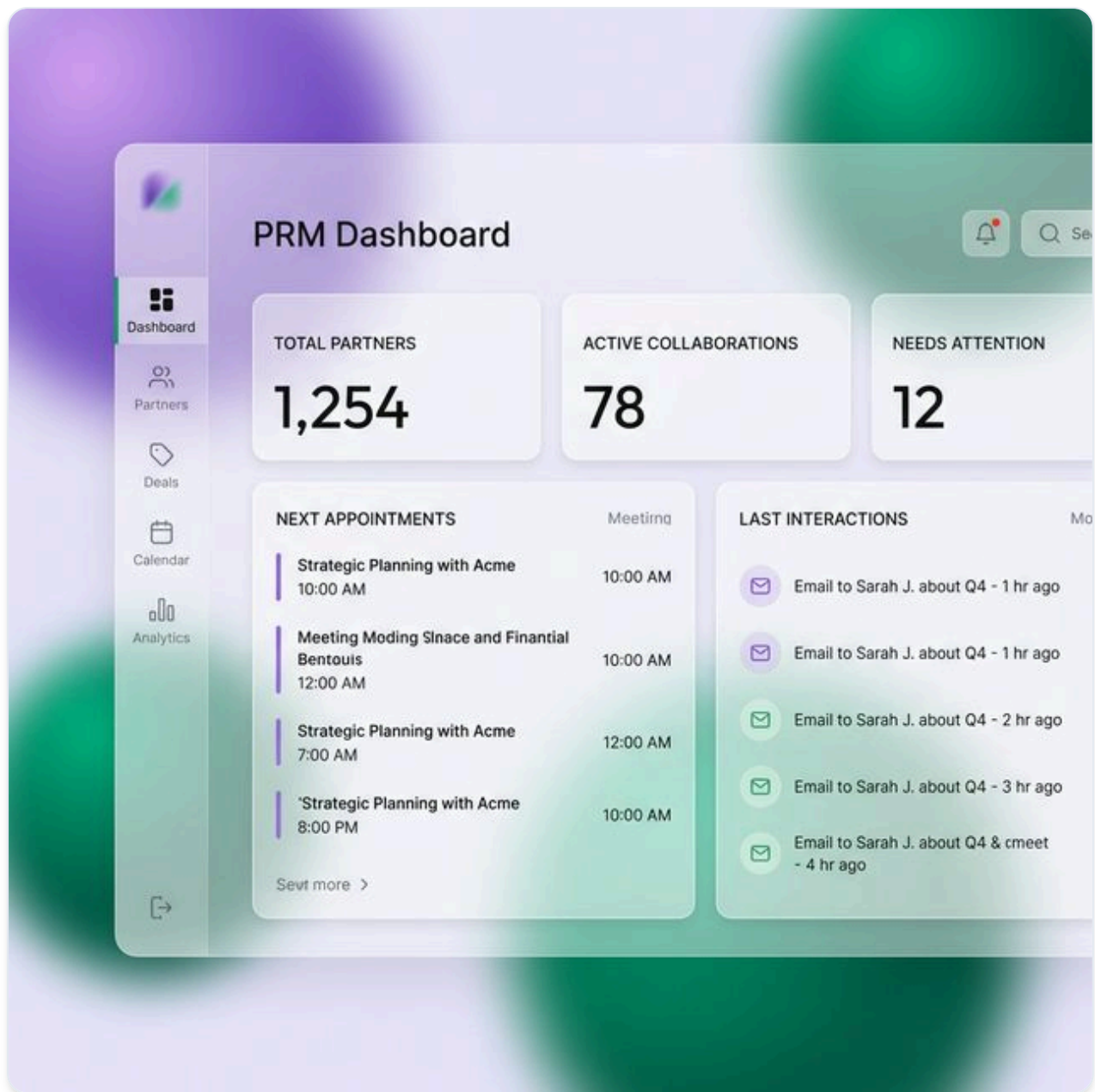
Welcome to the EVP Partner Relationship Manager (PRM), your powerful, comprehensive hub for orchestrating partner ecosystems, guiding onboarding pipelines, and managing ongoing communications.

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.



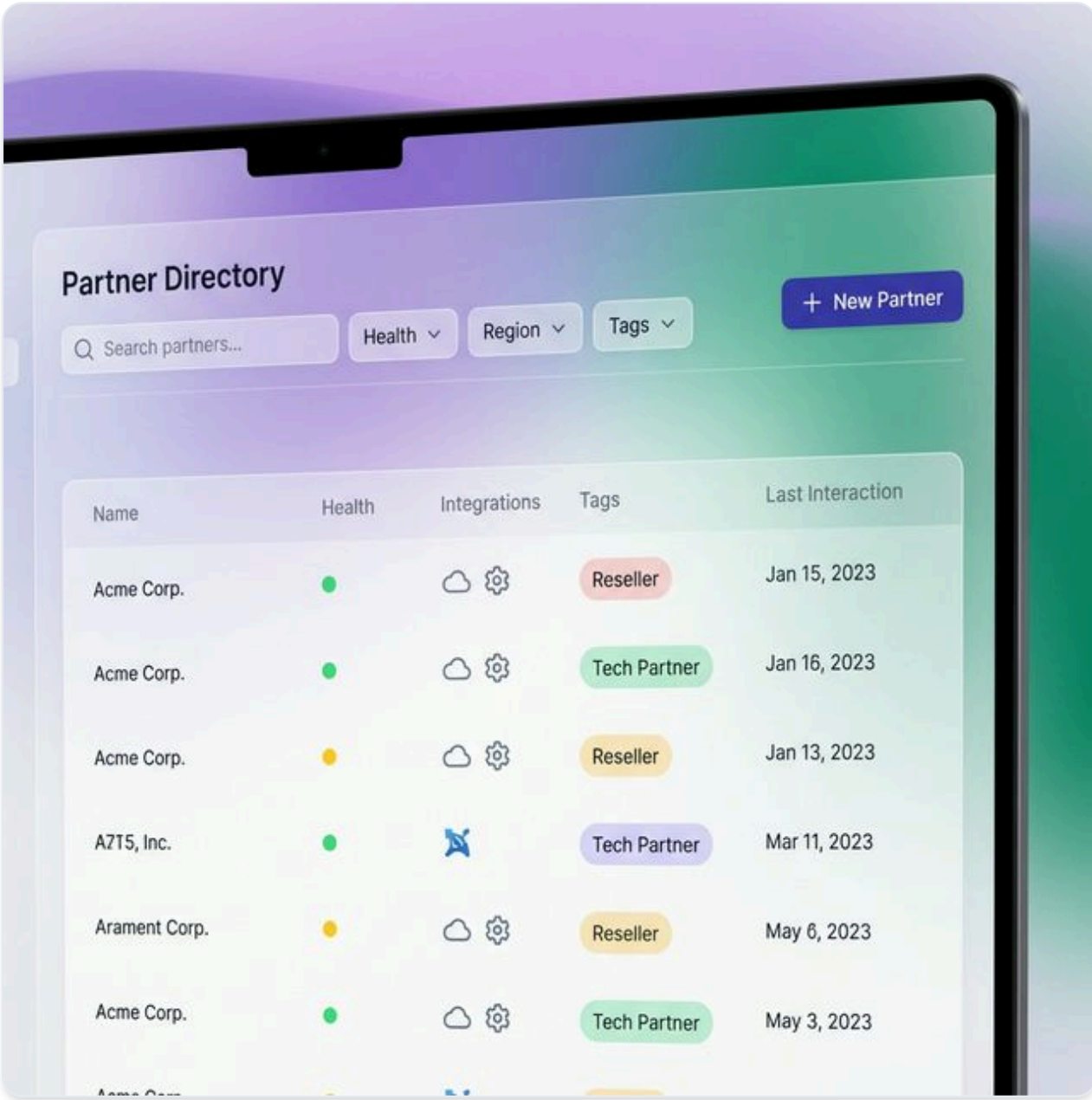
Key Metrics & Modules:

- **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.



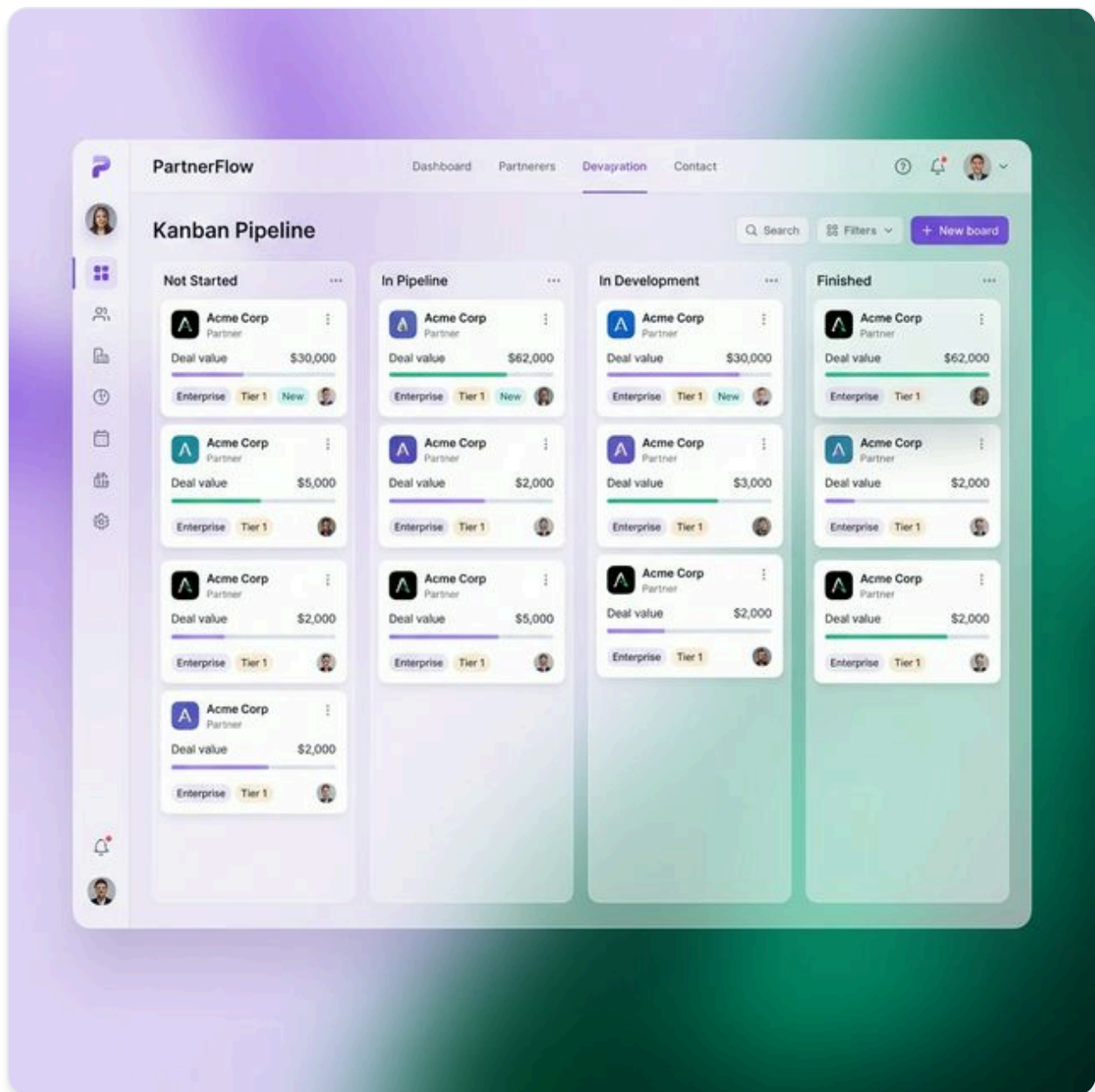
Key Actions within the Directory:

- **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.
-



3. Integration Pipeline (/pipeline)

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



Pipeline Mechanics:

- Partners are tracked automatically based on their mapped onboarding stage.
- Progress spans multiple distinct stages: Not Started \rightarrow In pipeline \rightarrow In development \rightarrow 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.
-



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.
-

End of User Guide. For further technical support, please refer to the Admin portal.