

ONE DOCUMENT IN A SUITE TO DESCRIBE CURRENT MANUAL PROCESSES

This particular document describes how to remove one Reseller Partner from all interconnected internal systems. I wrote it as part of a large suite to describe a vast number of manual processes the company had developed. The audience is the internal decision makers so they can better understand and underwrite an enterprise-level update of these critical manual processes.

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How do I off-board a reseller partner from Partner Portal?

This document is intended for Channel Account Manager (CAM) to fulfill a Partner's request to exit the resellers program.

The Prerequisites listed below include critical information for this task.

Goal	To successfully remove a reseller partner (partner) from all necessary internal systems.
Failure Impact	Company continues to pay past partners that are no longer in the Reseller Program.
Frequency	As often as needed.
Who to ask for help	CAM
Stakeholders	<ul style="list-style-type: none">• QuickBooks Solutions Providers• Campaign Manager• Sales Ops• Company Corporate Accounting & Reporting (CAR)• Partner Portal administrators
Who is this for	CAM
Prerequisites	<ul style="list-style-type: none">• CAM must be managing the exiting partner• The partner must be currently in the Reseller's Program
How long will this take	30-days from when the notice is issued.
Diagrammed process link	See swimlane process here .
Last Updated	APR, 2020

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Objective

This document provides step-by-step information that further details the “How do I off-board a Reseller Partner from Partner Portal?” swimlane graphic steps.

Step 1 Company | Partner - partner requests to leave RESELLER'S PROGRAM

By 1st business day: Is the Partner request to leave the RESELLER'S PROGRAM a voluntary request?

- 1A. No. The partner requested to leave the RESELLER'S PROGRAM; skip to [Step 3](#)
 - 1B. Yes. The partner was asked to leave the RESELLER'S PROGRAM, continue to the next step.
-

Step 2 Company | CAM - requests to remove a partner from RESELLER'S PROGRAM

1st business day:

Is legal action required?

- 2A. Yes. **Legal action** is taken with supporting documentation completed, filed and on-hand for further actions; skip to [Step 5](#).
- 2B. No. Send a **30-day end-of-date notice** to RESELLER; skip to [Step 4](#).



NOTE: The associated CAM sends a 30-day notice if a partner doesn't meet the revenue minimum.

Step 3 Company | Partner - formally announces resignation

1st business day:

When partner wants to resign from the RESELLER'S PROGRAM, they **formally announce their intention to resign** with at least a 30-days advance notice by telling their CAM by either:

- sending an email
- talking to them



NOTE: Thomas Y123 oversees this step.

Step 4 Company | CAM - tell Sales Ops about the reseller partner off-board

Same business day:

The **CAM lets the Sales Op know** that one of their reseller partners gave notice they want to leave the RESELLER'S PROGRAM.



NOTE: Gary Txyz is the Sales Ops contact person and is responsible for SFDC and Siebel setup.

Step 5 Company | Sales Ops - updates QuickBase

Same business day:

- 5A. Sales Ops updates **Status & Reason for Removal** (with Offboard Date) on Partner Profile.
 - 5B. Marks 'Opted Out' in the QuickBase records.
 - 5C. Removes the reseller partner from Distribution Group which grants privileges to access their profile information.
 - 5D. Removes access to active landing pages.
-

Step 6 Company | Sales Ops - cancel license in SFDC

Same business day:

Cancel the reseller's license in the SFDC customer account asset page.

NOTE: Set \$0 SKU to **suspended**; reset the partner's row from active to suspended status.

Products and Services			
Search: Enter product name, product number, license, status ...			
	Status	Product Name	Configu
<input type="radio"/>	Active	Intuit QuickBooks Enterprise Solutions Accountant	Fulfillme Version:
<input type="radio"/>	Active	Intuit QuickBooks Accountant	Users: 1 Method:
<input type="radio"/>	Active	Intuit QuickBooks Enterprise Solutions Accountant	Fulfillme 10; Versi
<input checked="" type="radio"/>	Active	Intuit Reseller Premier Membership	--
<input type="radio"/>	Active	Intuit QuickBooks Point of Sale	Edition: I Downloa

Step 7 Company | CAR - money on the table?

Same business day:

8A. If there are *not* any open commissions or open orders for this Partner, then you have completed off-boarding the partner from all applicable internal systems then *you are done*.

8B. If there are open commissions or open orders for this reseller, then continue to the next step.

Step 8 Company | Company CAR - pay out and close

Within 30 calendar days of notice:

Company CAR **pays and closes** all *open* and *pending* partner payouts.

Step 9 Company | Company CAR - verify last payments were made

Within 30 calendar days of notice:

Company CAR **verifies** all *open* and *pending* partner payouts are paid.

Step 10 Company | CAM - which partner?

- 10A. If you are *not* using the beta-version partner portal, then you have completed off-boarding the partner from all applicable internal systems then *you are [done](#)*.
 - 10B. If you **are using the beta-version partner portal**, then continue to the next step.
-

Step 11 Company | CAR - trigger Partner Portal administrator to delete partner

Within 30 calendar days of notice:

- 11A. CAR tells Partner Portal administrator the partner's last payment is verified as paid.
 - 11B. Partner Portal administrator:
 - a. Log onto Partner Dash Portal (<https://app.partnerstack.com>) with an administrator account.
 - b. In the left column, click **Partners**.
 - c. Select **Partners** tab.
 - d. Check the **partner account** you need to remove from the program.
 - e. Choose **Actions**.
 - f. Select **Delete Partner**.
- Next screen appears.



NOTE: Partner Portal archives the partner's profile and history; they do *not* delete the partner information from their database.

	Name	Group	Team	Manager	Tier	Accounts	Orders	Deals	Revenue	Last Active
<input checked="" type="checkbox"/>	Demo Account demo_partnerstack@mailinator.com	US QSP Partners	Partner's Company Name	Stephanie Antoine	Member	0	7	\$0	\$0	Apr 29th
<input type="checkbox"/>	Tamara Clontz clontzclan@gmail.com	US QSP Partners	--	Steve Hall	Advanced	39	8	\$0	\$117,969	Apr 30th

Figure: finding the right partner in Partner Portal

Step 12 Company | Partner Portal - administrator deactivates partner*Within 30 calendar days of notice:*

Partner Portal administrator:

- 12A. Click **Actions**.
- 12B. Select **Deactivate Partner Links**.
- 12C. If Reseller Partner has links that must be activated so they can no longer be used by clients.
- 12D. **Click Delete.**

Figure: Administrator 'Deactivate Partner Links' option and deletes a partner with a 'Delete' option

A confirmation notice appears.

Within 30 calendar days of notice:

Step 13 Company | Partner Portal - administrator confirms delete

Click **Confirm Delete**, to remove the Reseller Partner from the program.

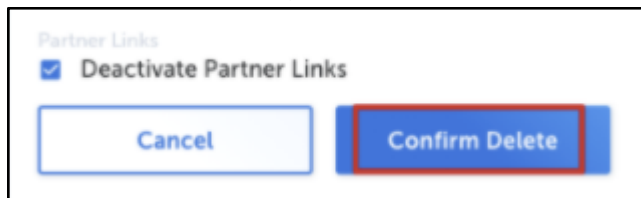


Figure: 'Confirm Delete' button

Done!



Appendix

Related Links

[Partner Portal Manual Processes Library](#)

[Swim Lanes](#)

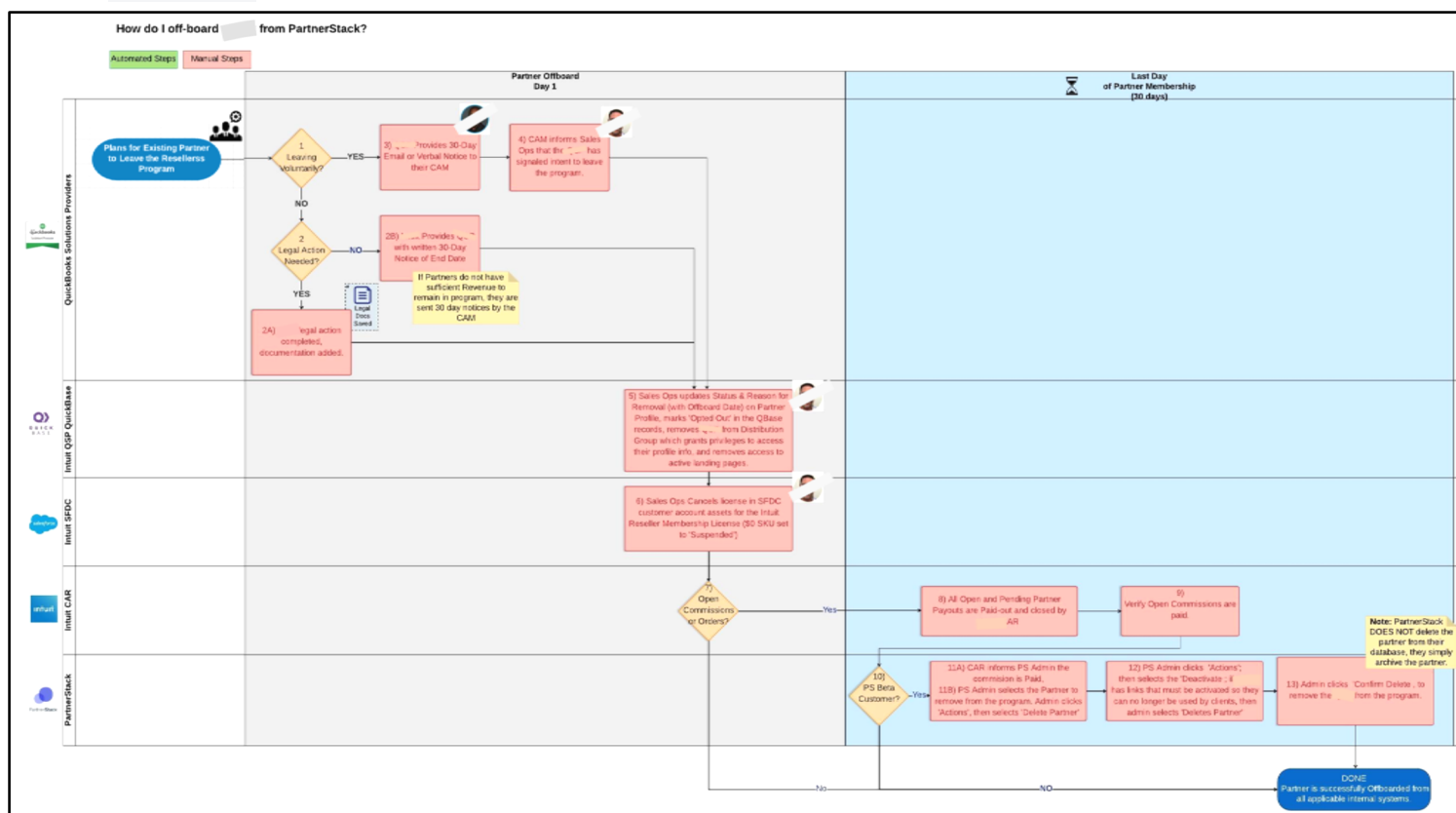


Figure: screen shot of the off-boarding swimlane Lucid chart—see live link in prerequisite's table