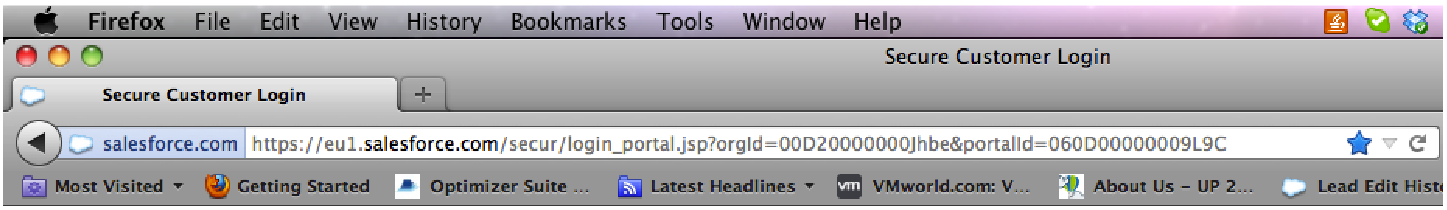
VMTurbo Partner Portal Training Guide

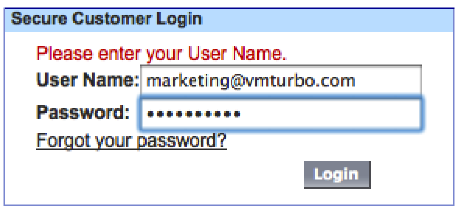
VMTurbo Inc.
400 Columbus Ave.
Valhalla NY 10595
United States of America
Phone: (914) 495-3500
www.vmturbo.com

SUMMARY

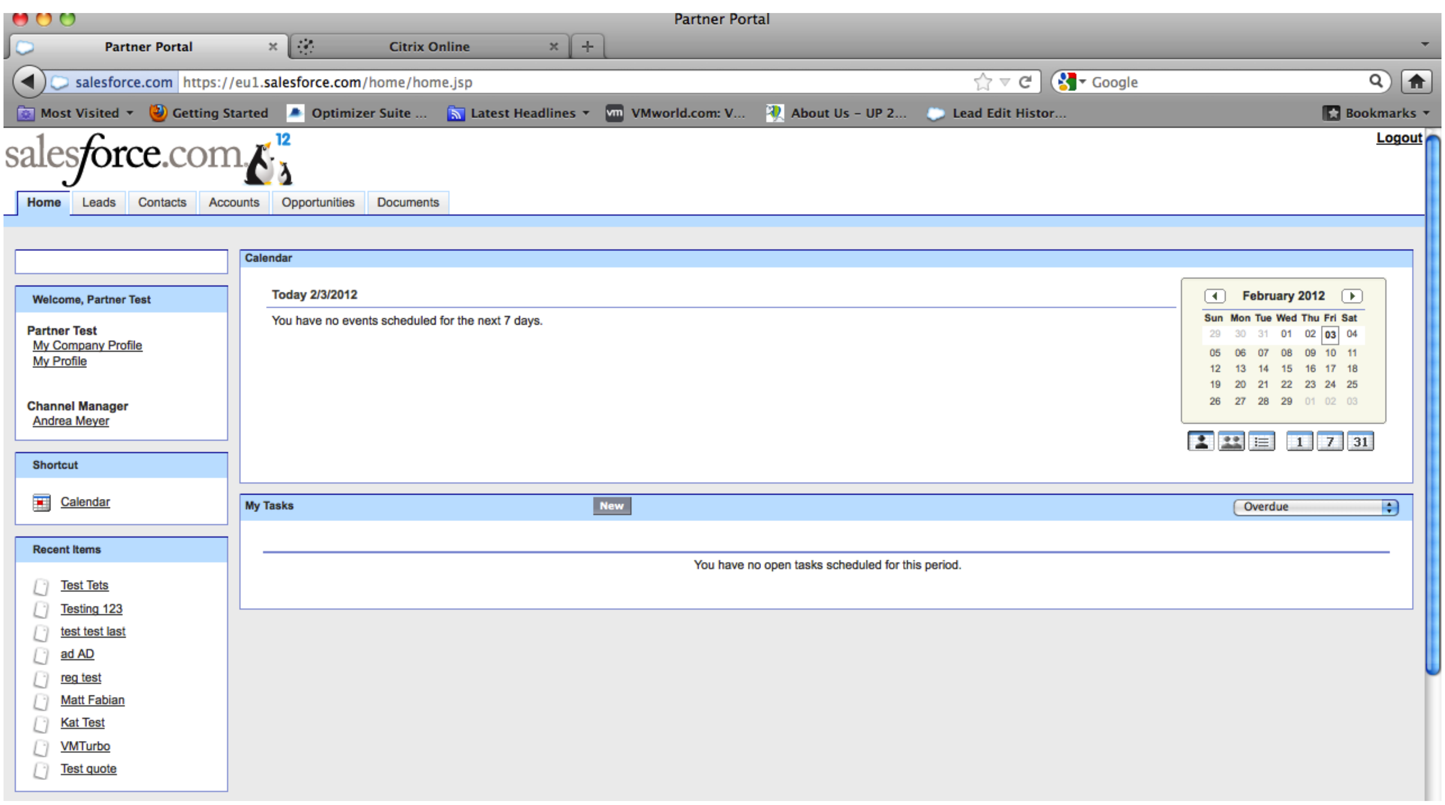
GENERAL SETTINGS

1) Login under:
   https://eu1.salesforce.com/secur/login_portal.jsp?orgId=00D20000000Jhbe&portalId=060D00000009L9C

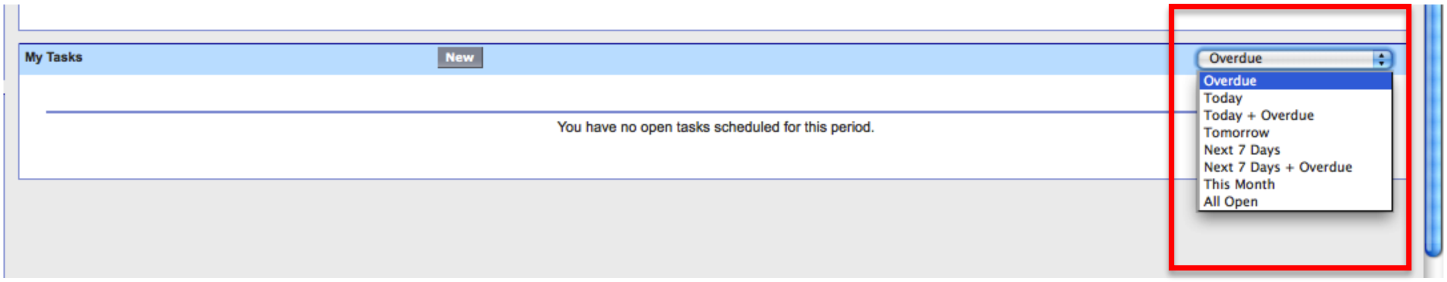




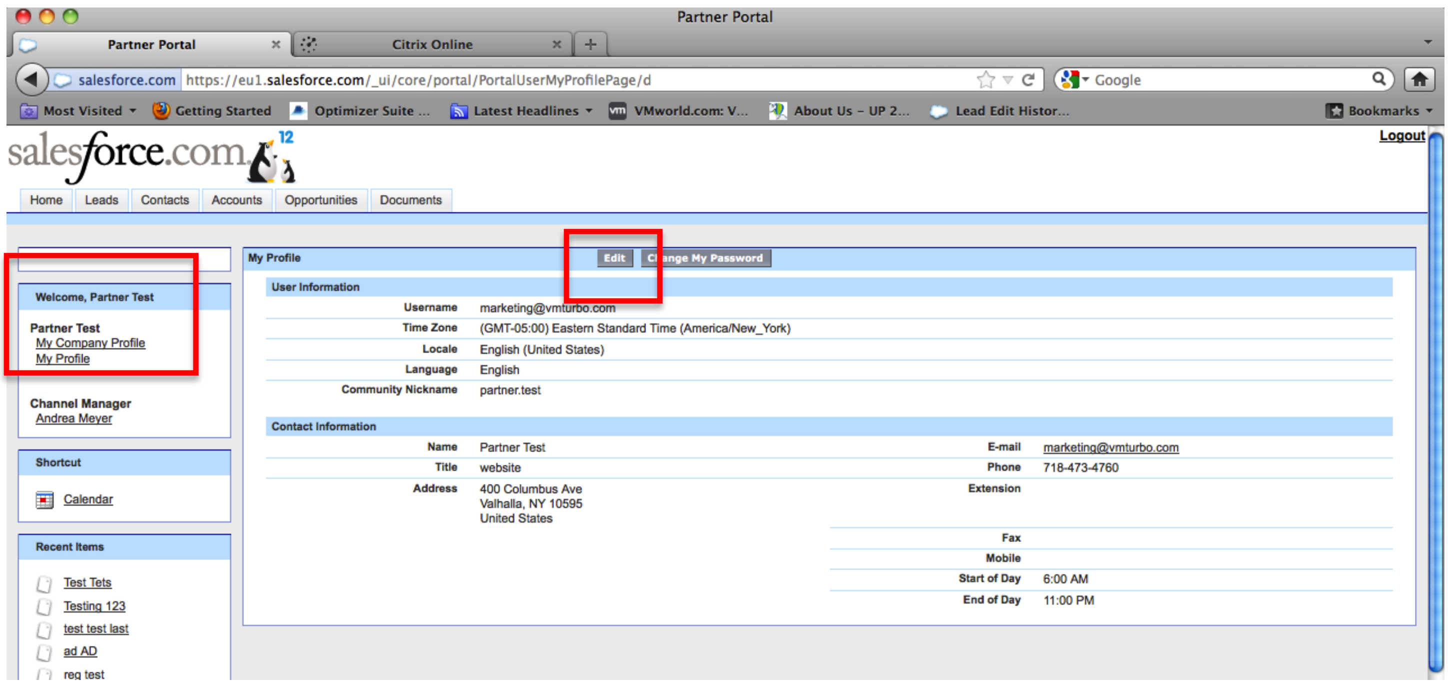
2) On the home screen you will see your calendar, tasks, company & personal profile:



3) Use the task views on the right to select which tasks to show (for example "overdue"):

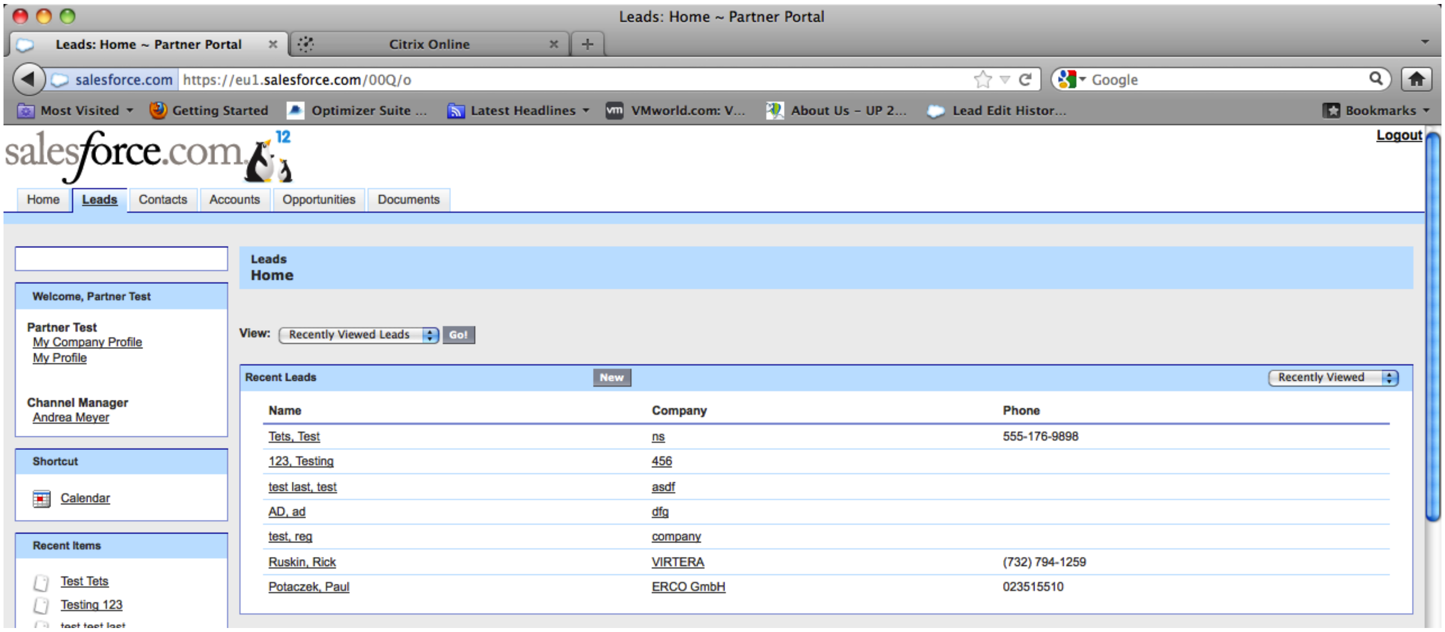


4) To change you company settings, profile settings or password select "My Company Profile" or "My Profile" in the Welcome section to the left and edit the record:

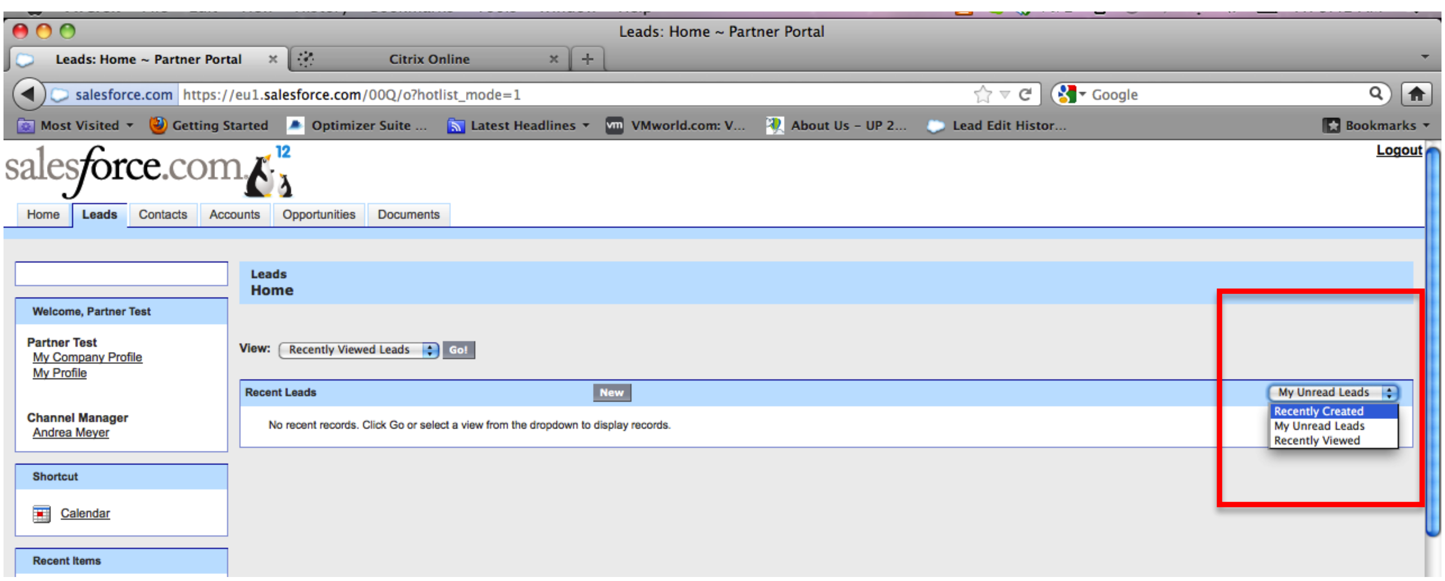


LEAD FOLLOW UP

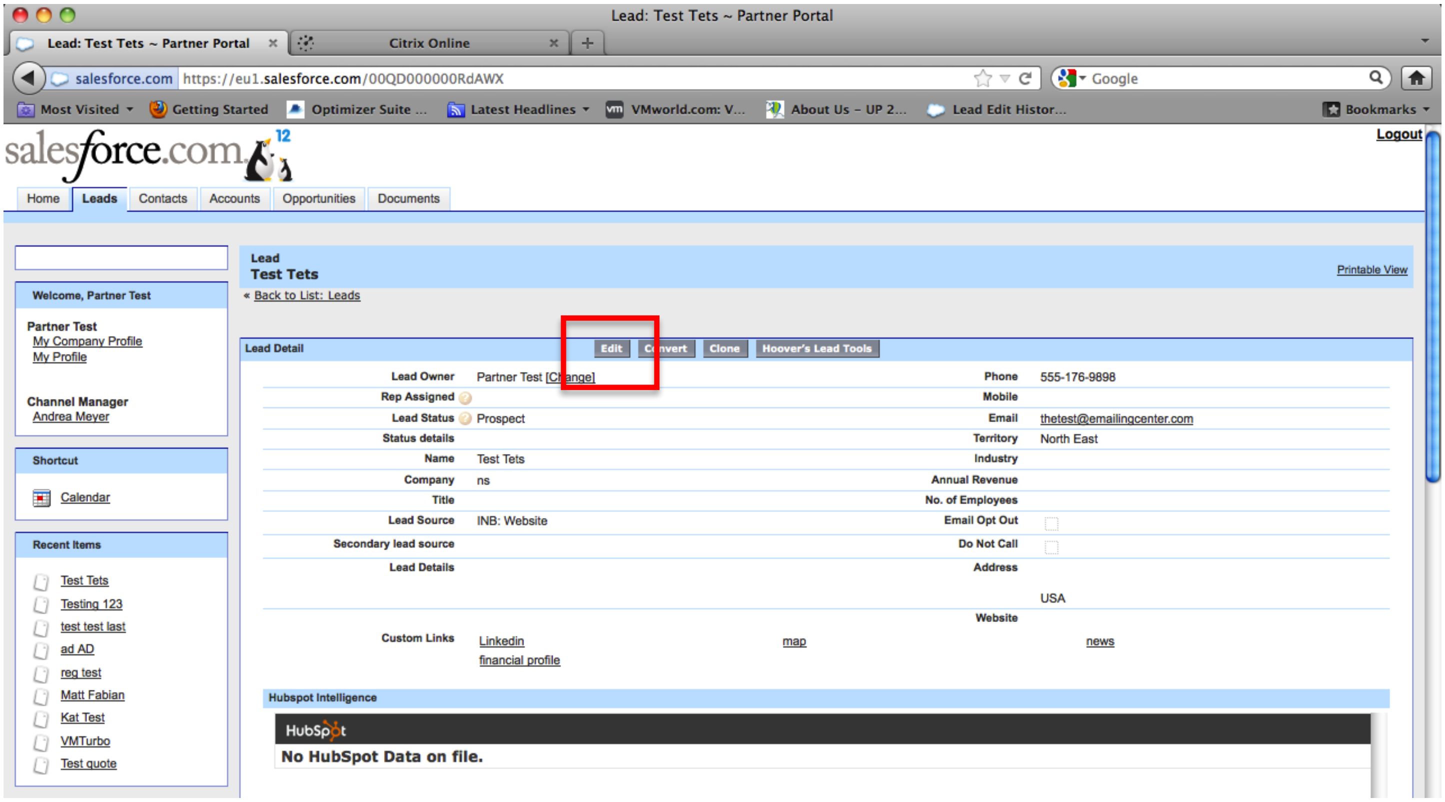
5) Visit the “Leads” Tab to see all Leads that have been assigned to you:



6) Select in the right drop down which leads to display (for example “unread leads”):

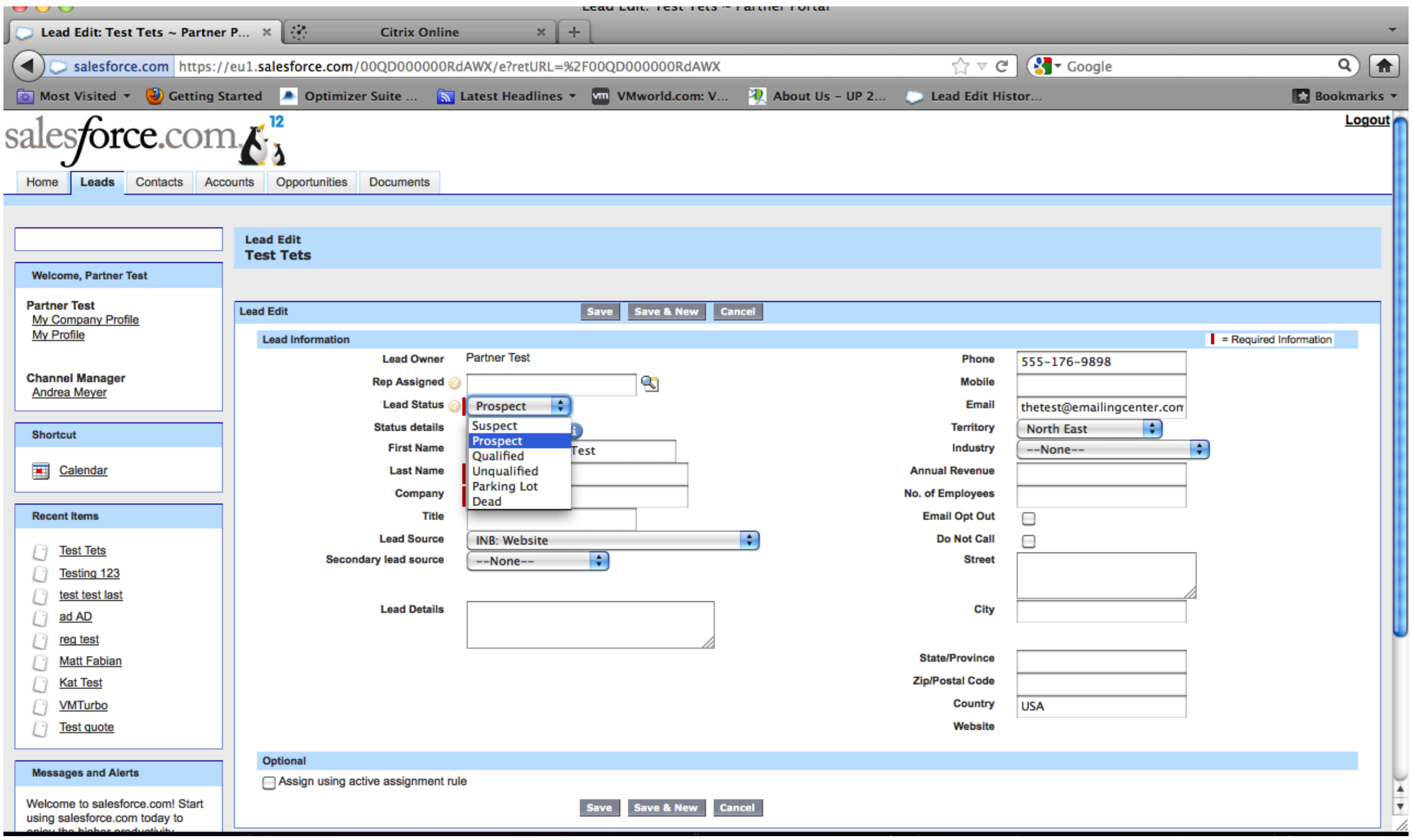


7) Open the lead to see lead details and click edit to update information:

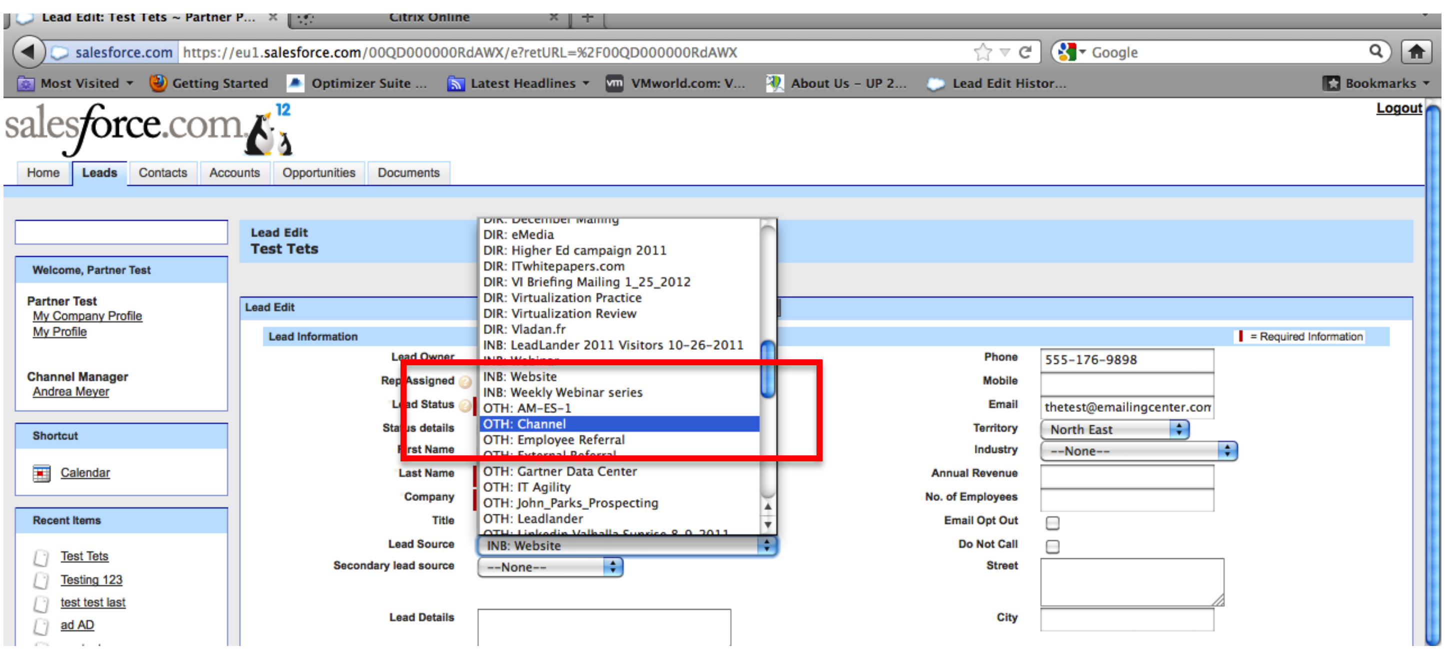


8) Choose the status of the lead:

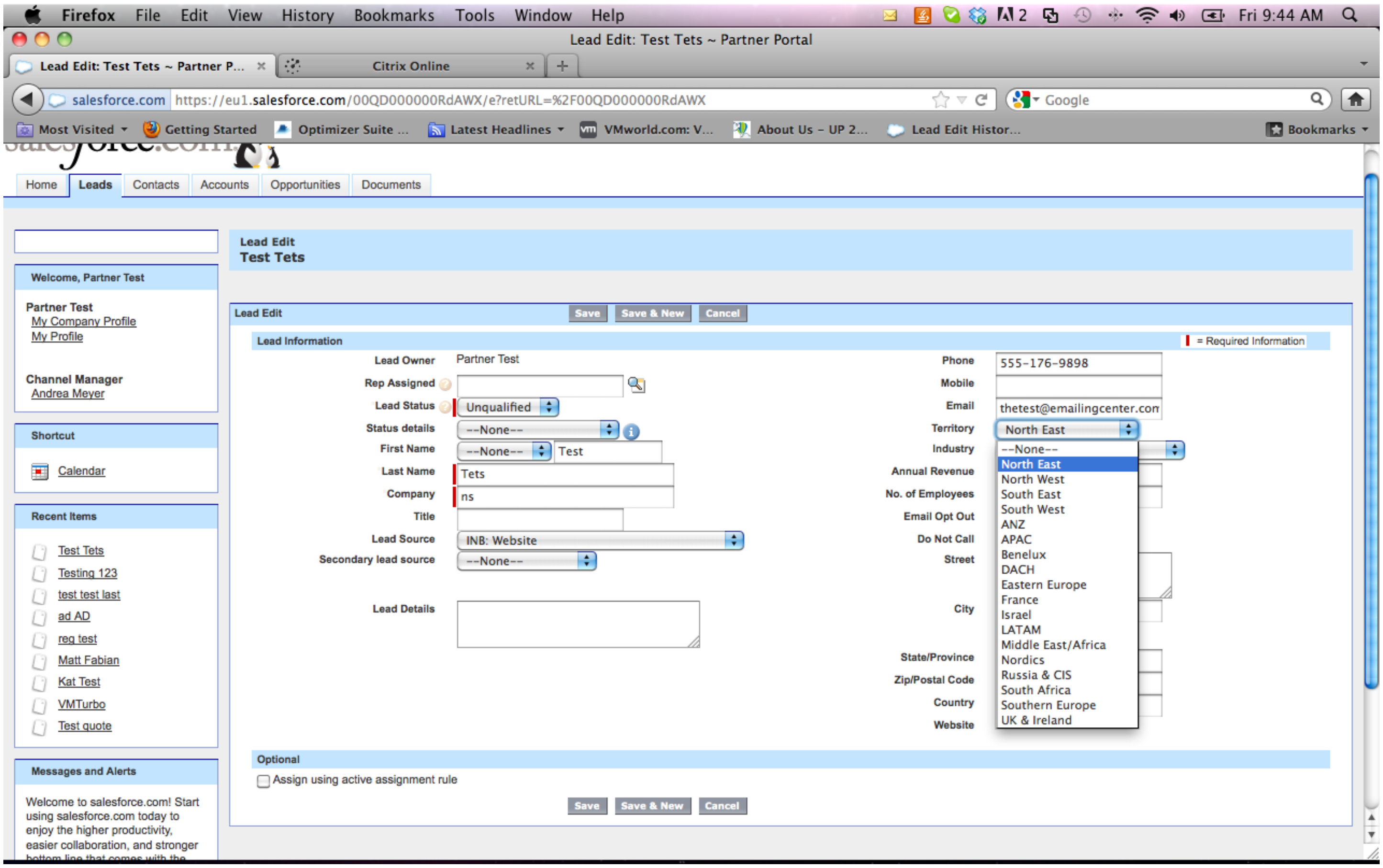
a. **Suspect** = cold leads (i.e: cold call lists, sourcing etc.)
b. **Prospects** = warm/hot leads (Website downloads, Events, Advertising..)
c. **Qualified** = right contact & size (convert to contact !!)
d. **Unqualified** = too small, wrong contact or non-responsive (indicate in status details)
e. **Parking Lot** = already engaged with somebody else at this company (waiting to see where to go from there
f. **Dead** = only if email address, company & phone number are invalid (i.e: bb@cc.com at ABC # 1234 etc.)



9) Lead source: is usually pre-filled when a lead is being transferred. If you are creating a lead / contact yourself please use lead source "OTH: Channel".



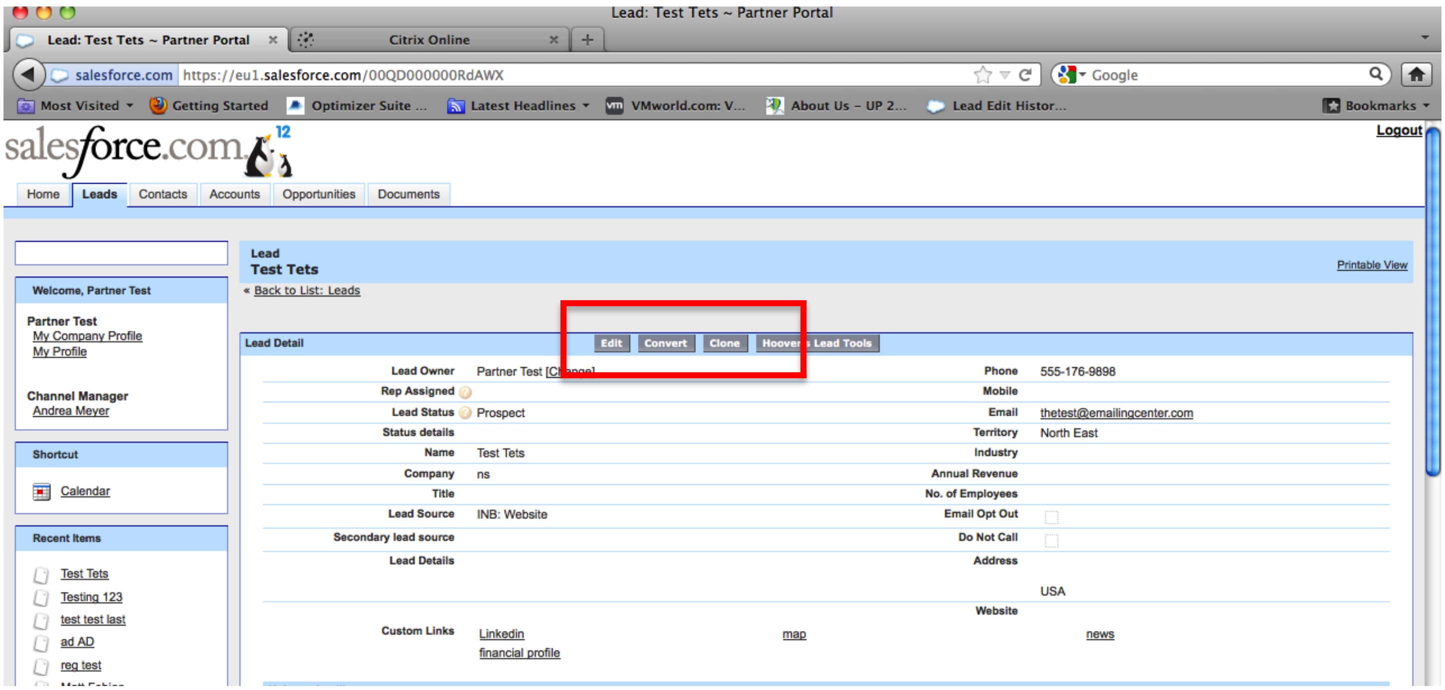
10) Indicate in the territory field which territory it belongs to. The US is split into 4 territories: North East, North West , South East and South West. The territory map with all states is available in the documents section of the partner portal



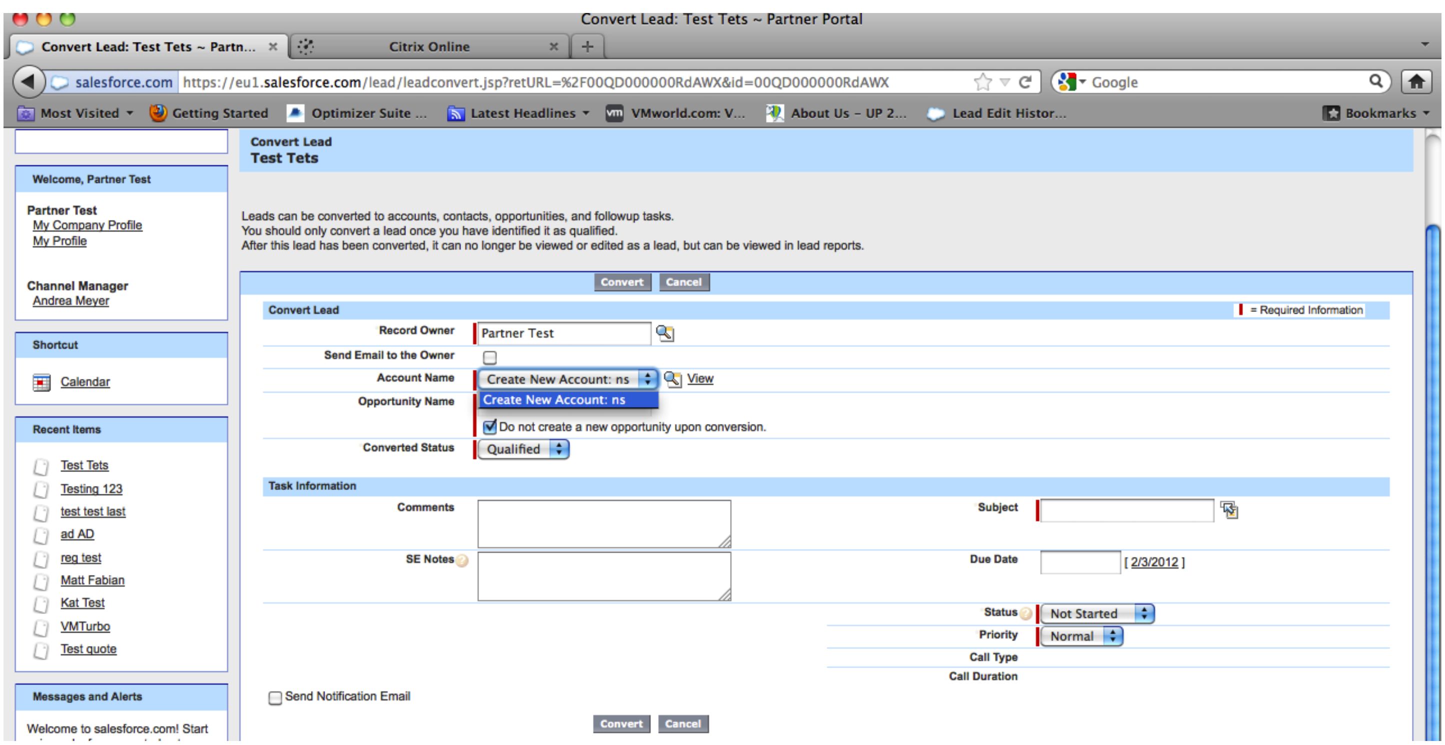
11) Save the record after changes have been made

LEAD CONVERSION

12) To convert a qualified lead to a contact click the “Convert” button on the top of the lead record

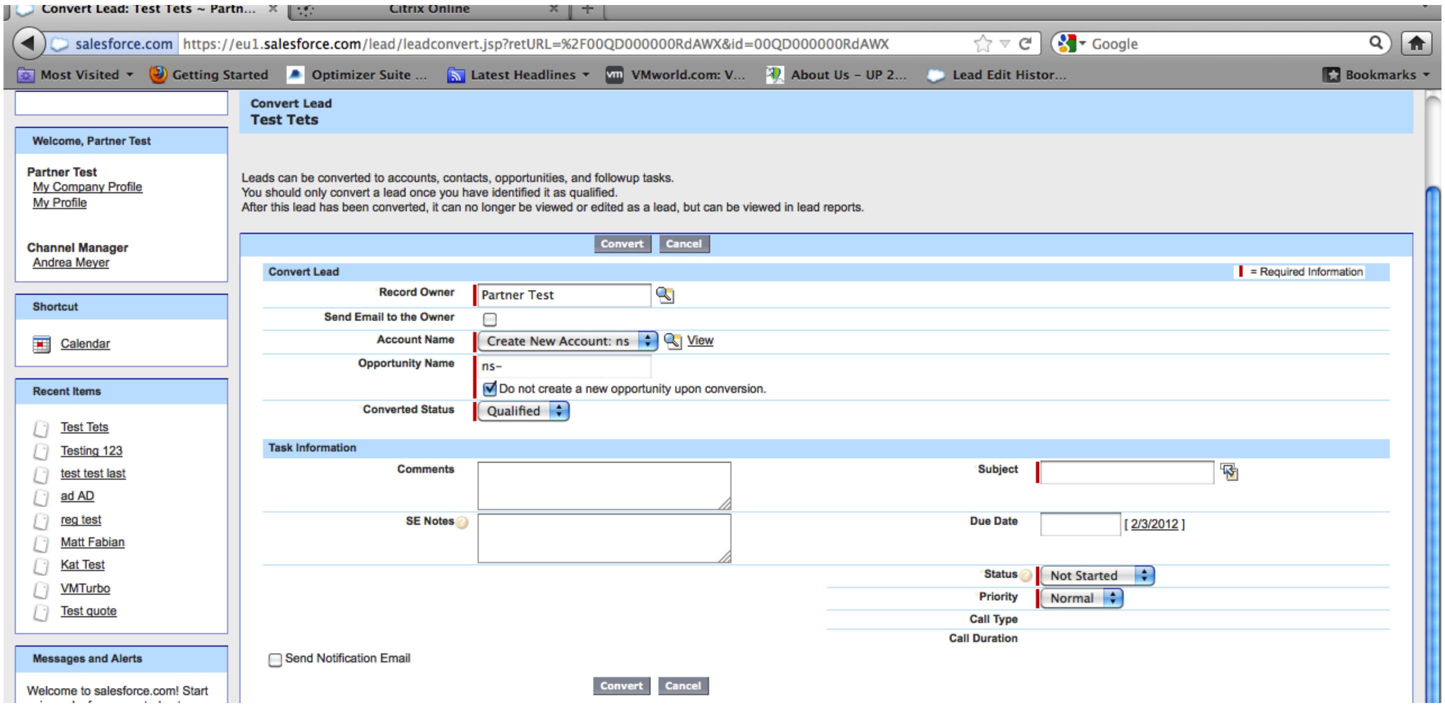


13) Attach the contact to either an existing account or create a new Account

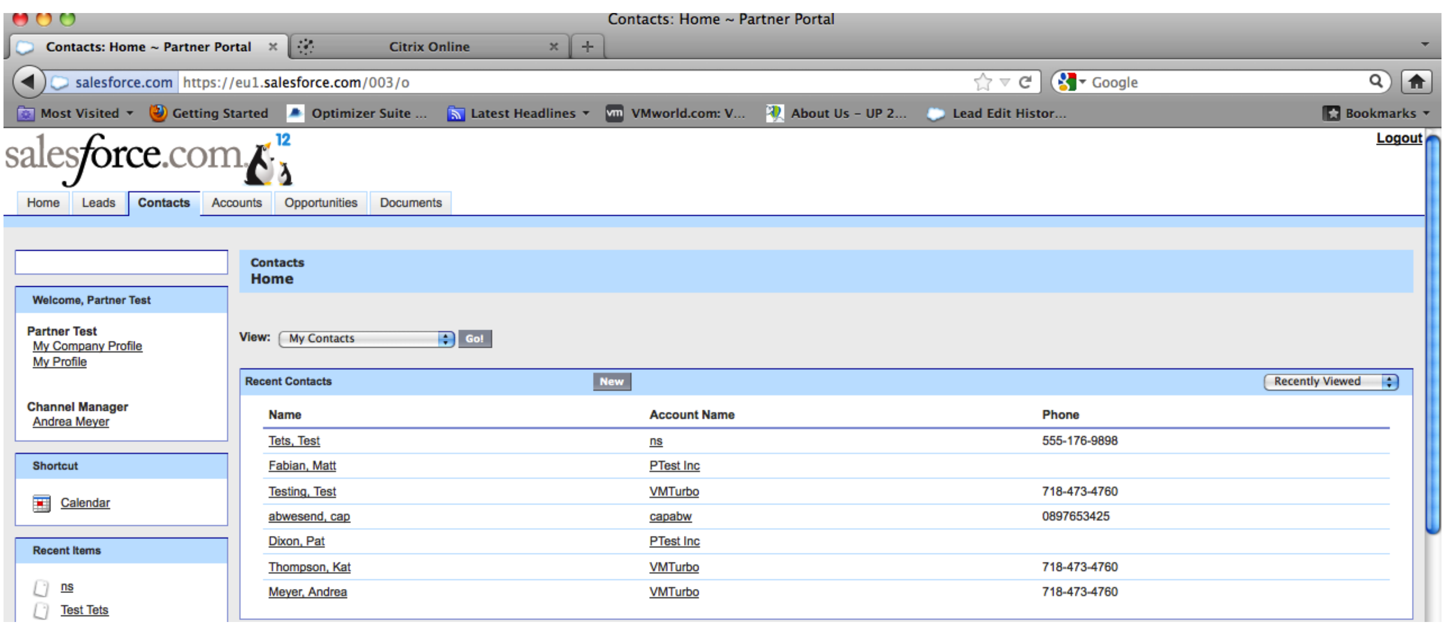


14) Select “Do not create a new opportunity upon conversion” box

15) Set follow up task or demo date in the Task section & click on “Convert”

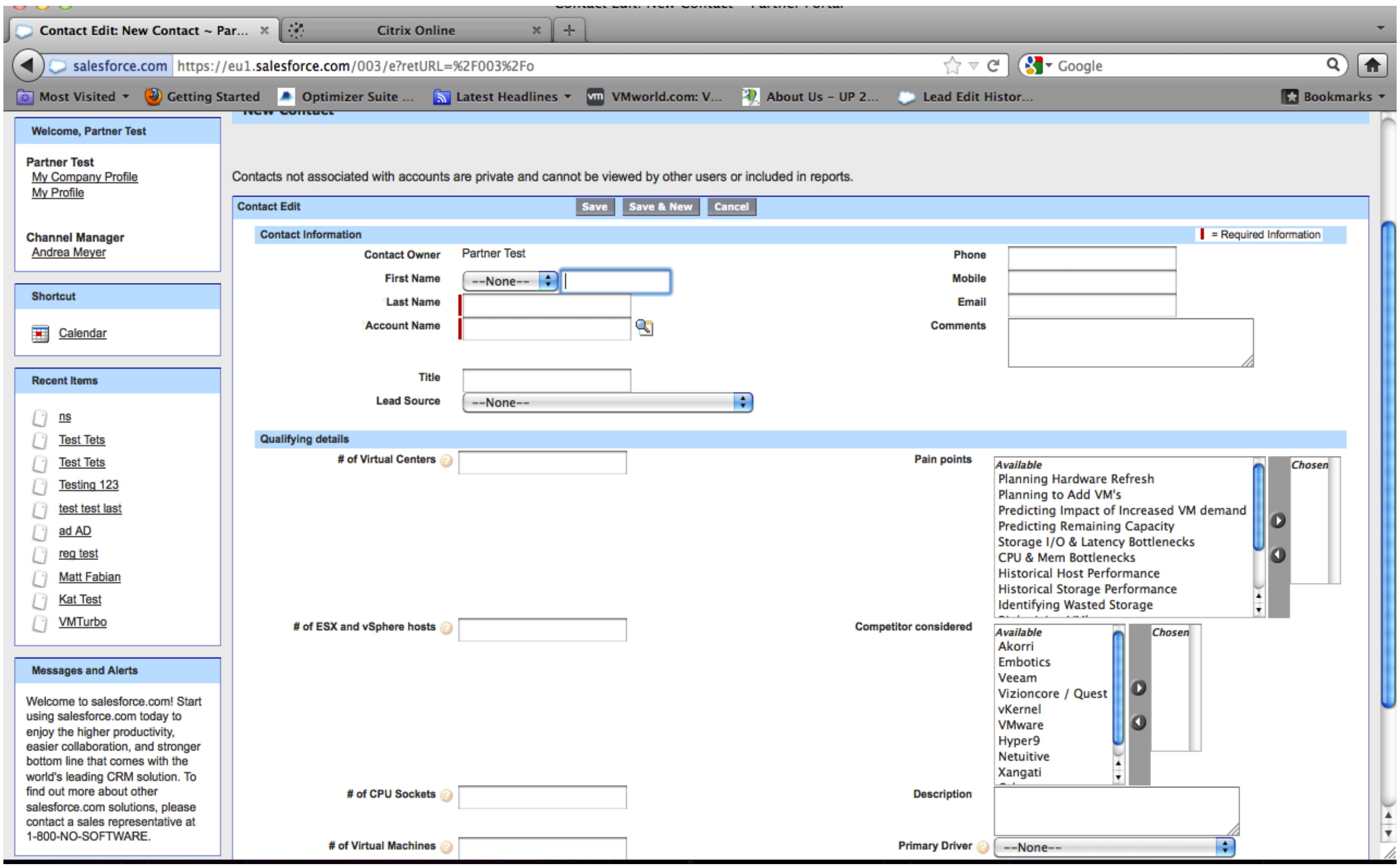


16) The record will now show up in your contact tab in the Partner Portal

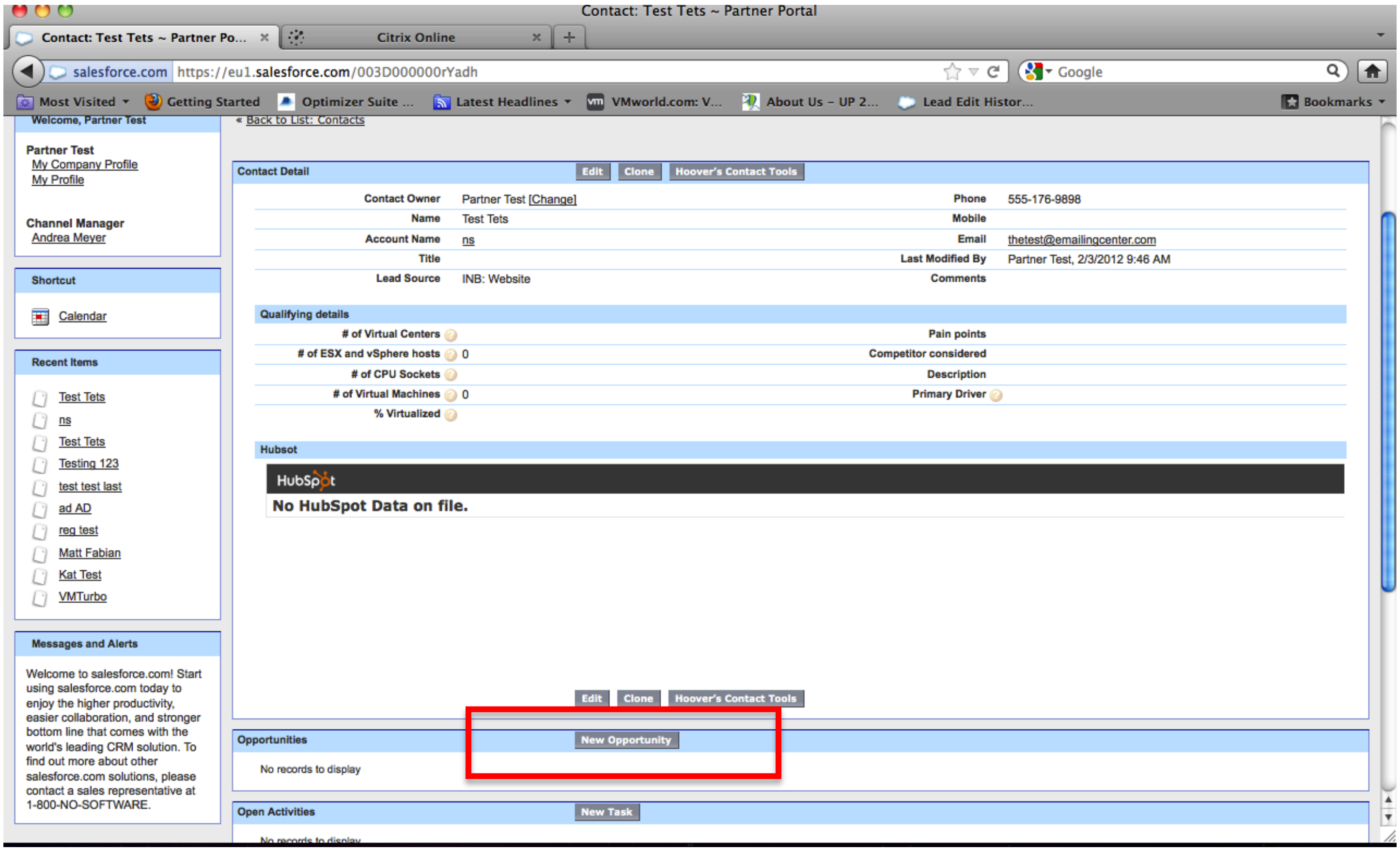


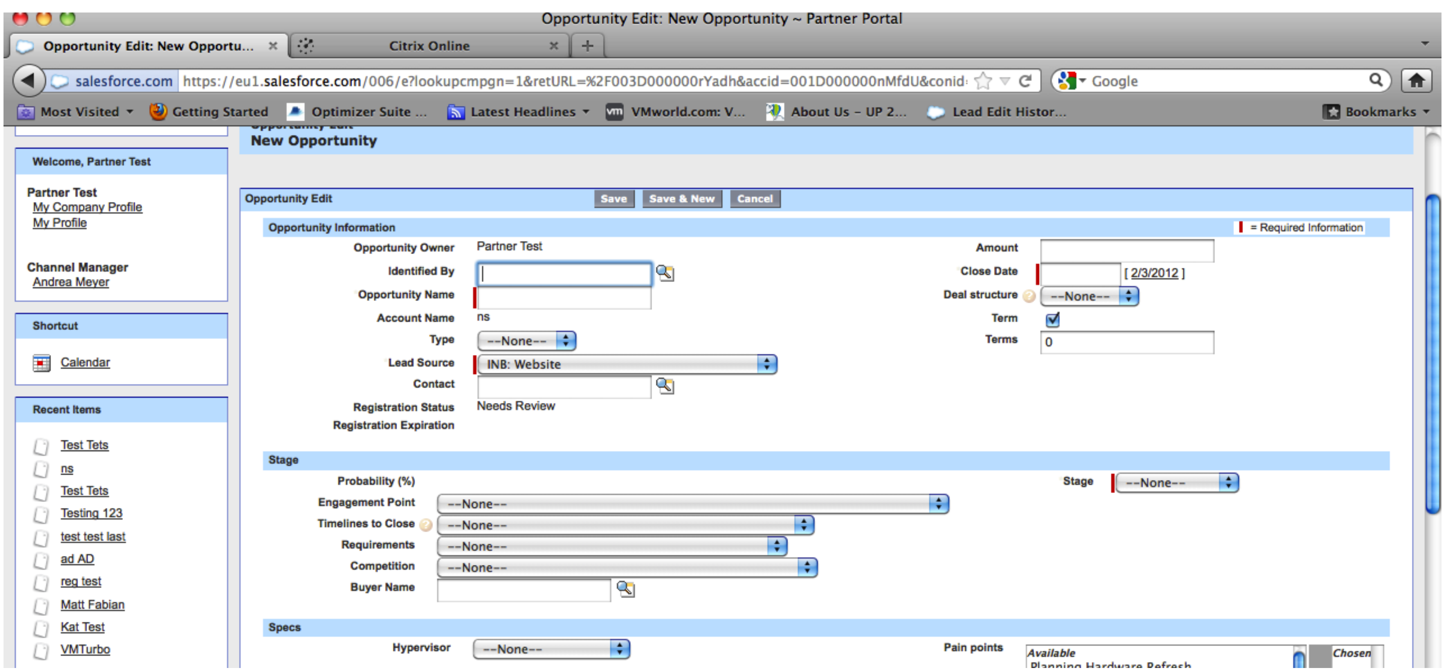
OPPORTUNITY CREATION & REGISTRATION

17) Create an opportunity from either a converted contact (see page 8 and following - “LEAD CONVERSION”), or create a net new contact. To create a new contact click “New” in your Contacts tab and complete as much information as possible. Note: you will have to associate a contact with an existing account. So if the account does not exist yet you will need to create an account first.

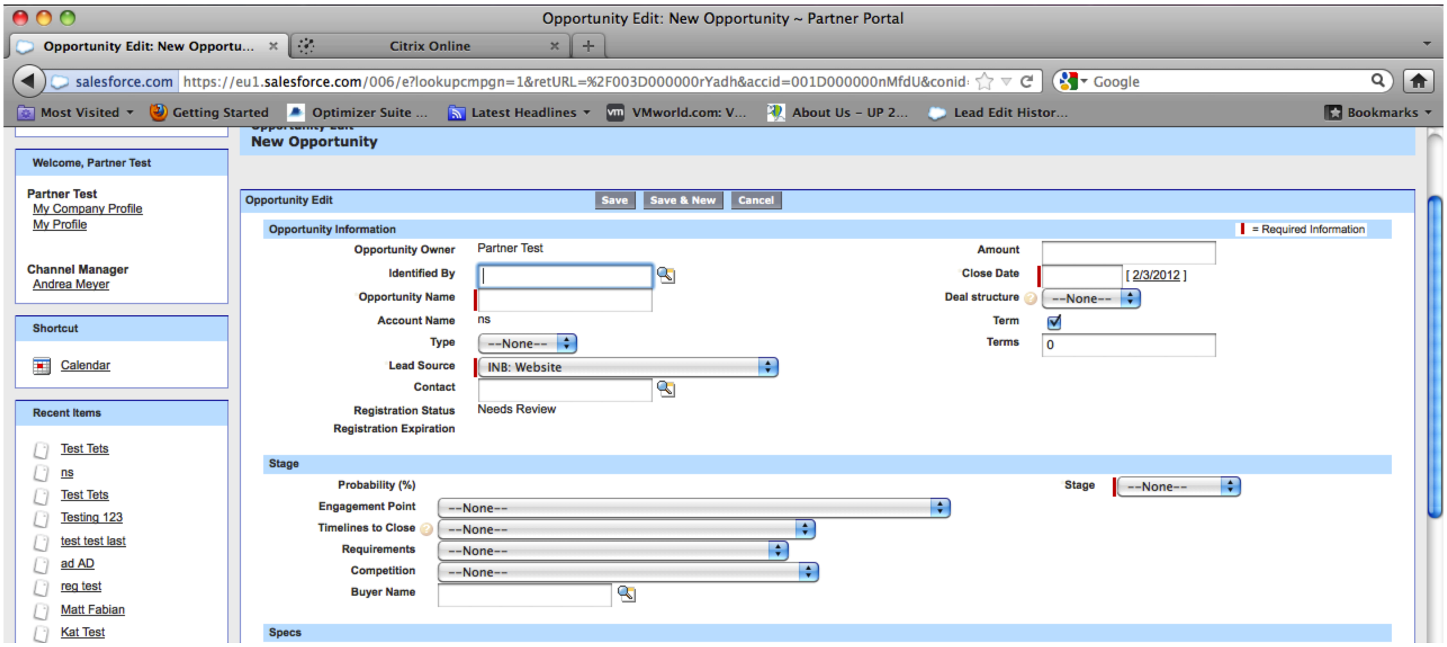


18) Once the Contact is created click on "New Opportunity"

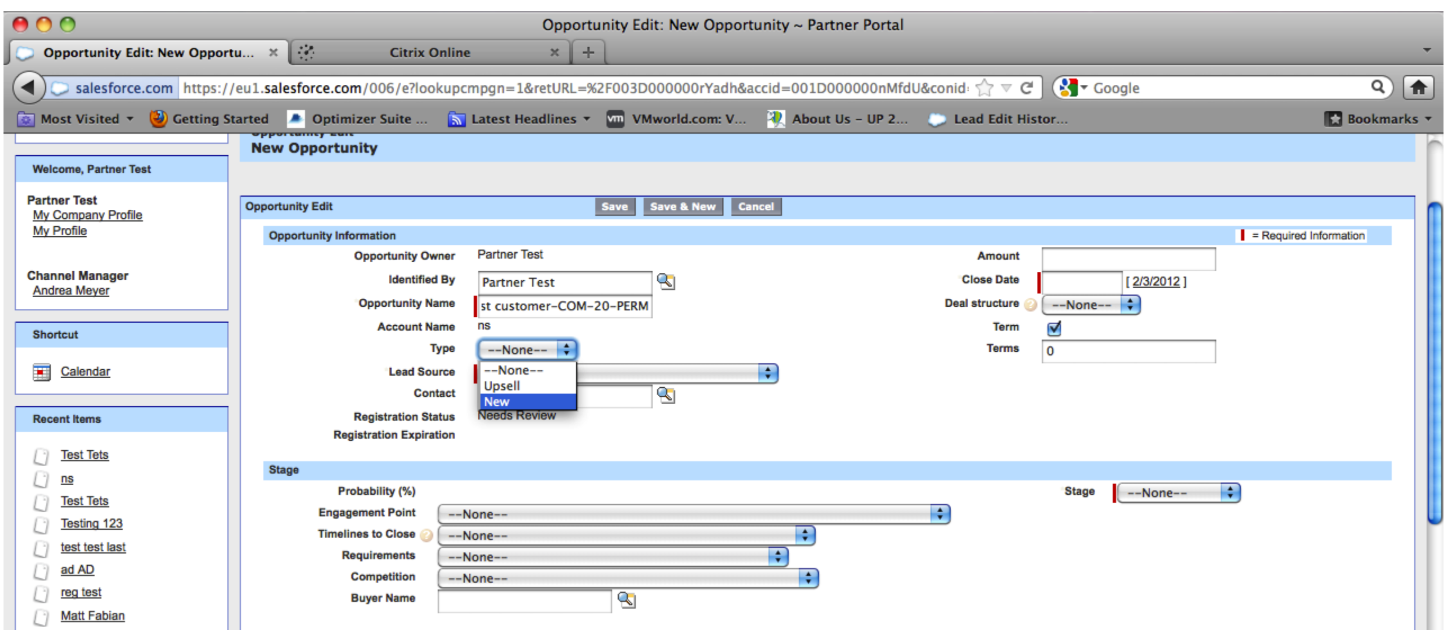




19) Complete all mandatory fields in the Opportunity Information, Stage, Specs & Qualifying details section
20) Opportunity Information to be filled in:
    a. Indicate Identified by (pick yourself)
    b. Opportunity Name consists of: "customer name – product code (EOM or COM)- # of sockets – timeframe (e.g. 3MT or PERM) – example: Bank of America – EOM – 50 – PERM

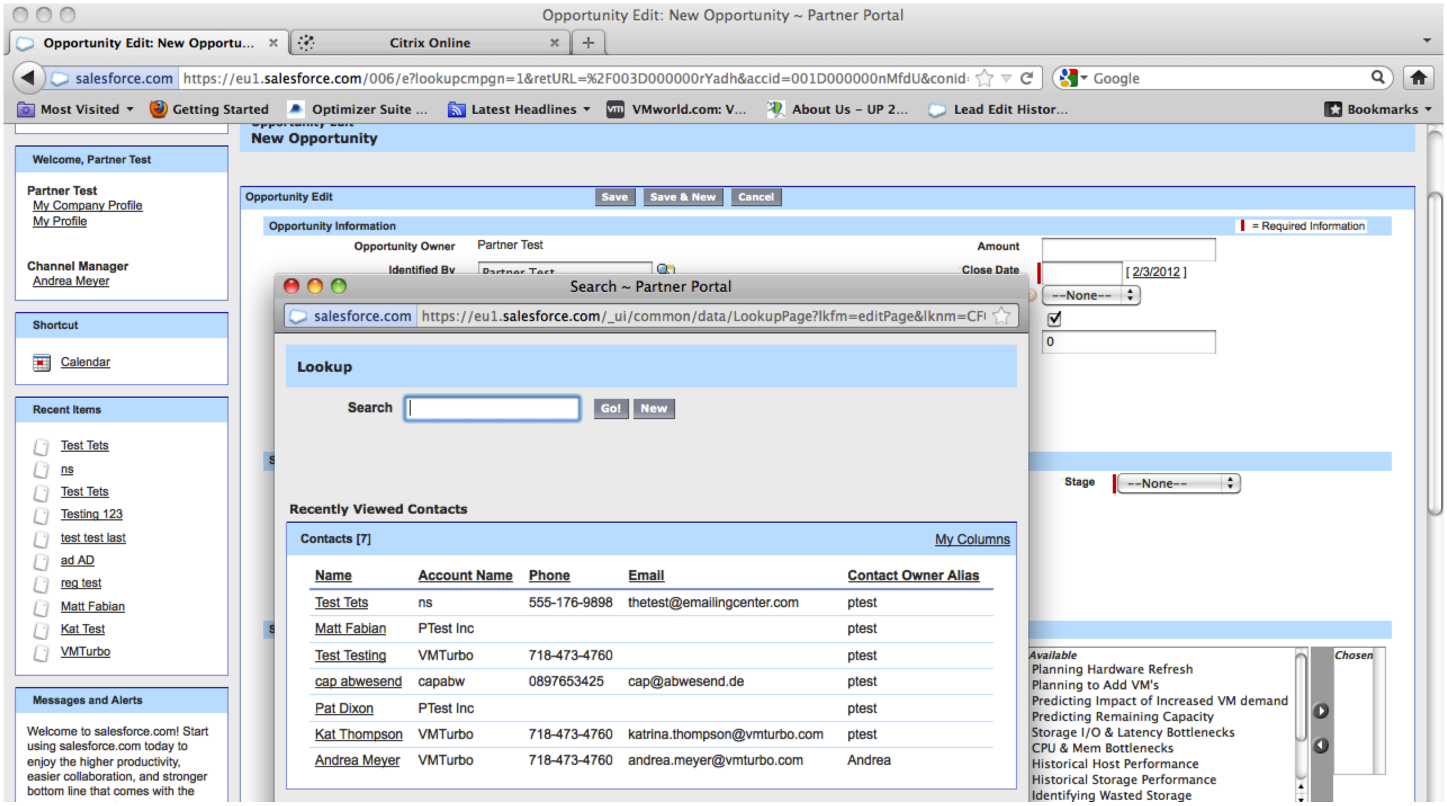


c. Type – whether it's a new business or upsell



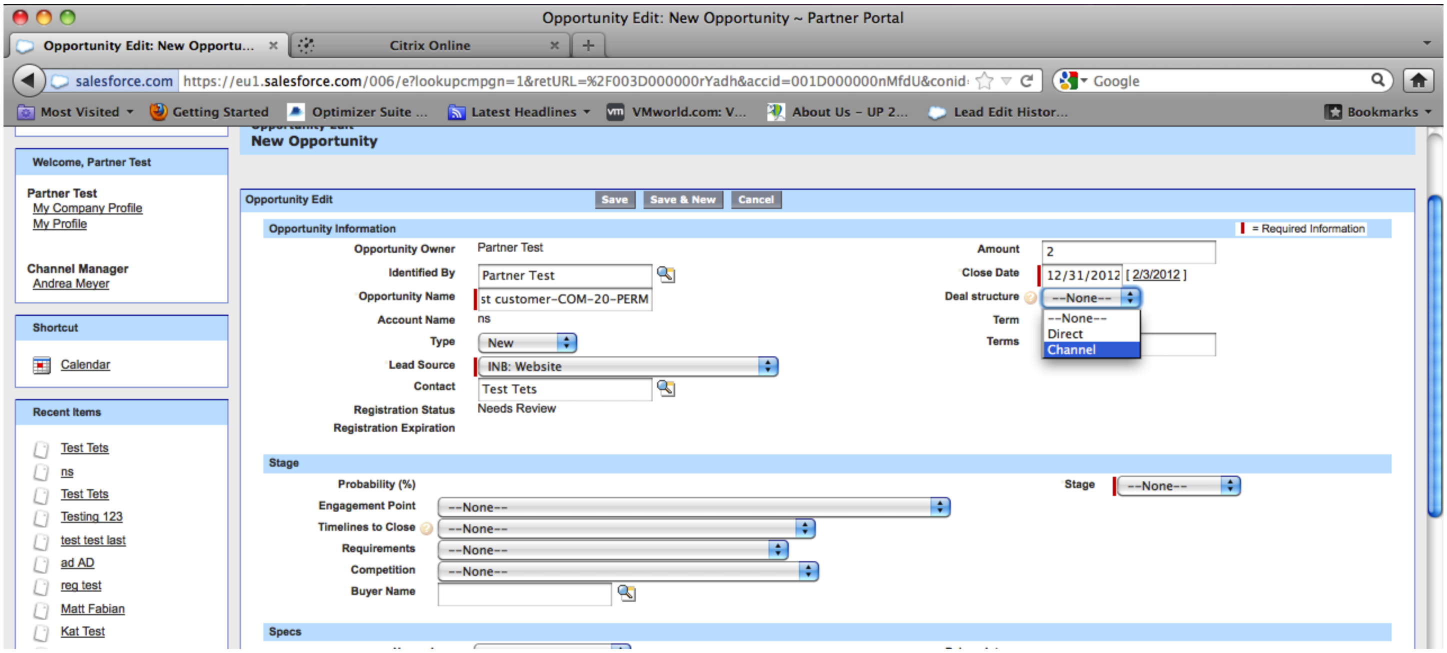
d. Lead source – is automatically transferred from the contact

e. Select the Primary Contact at the customer (Champion) via the Look Up field

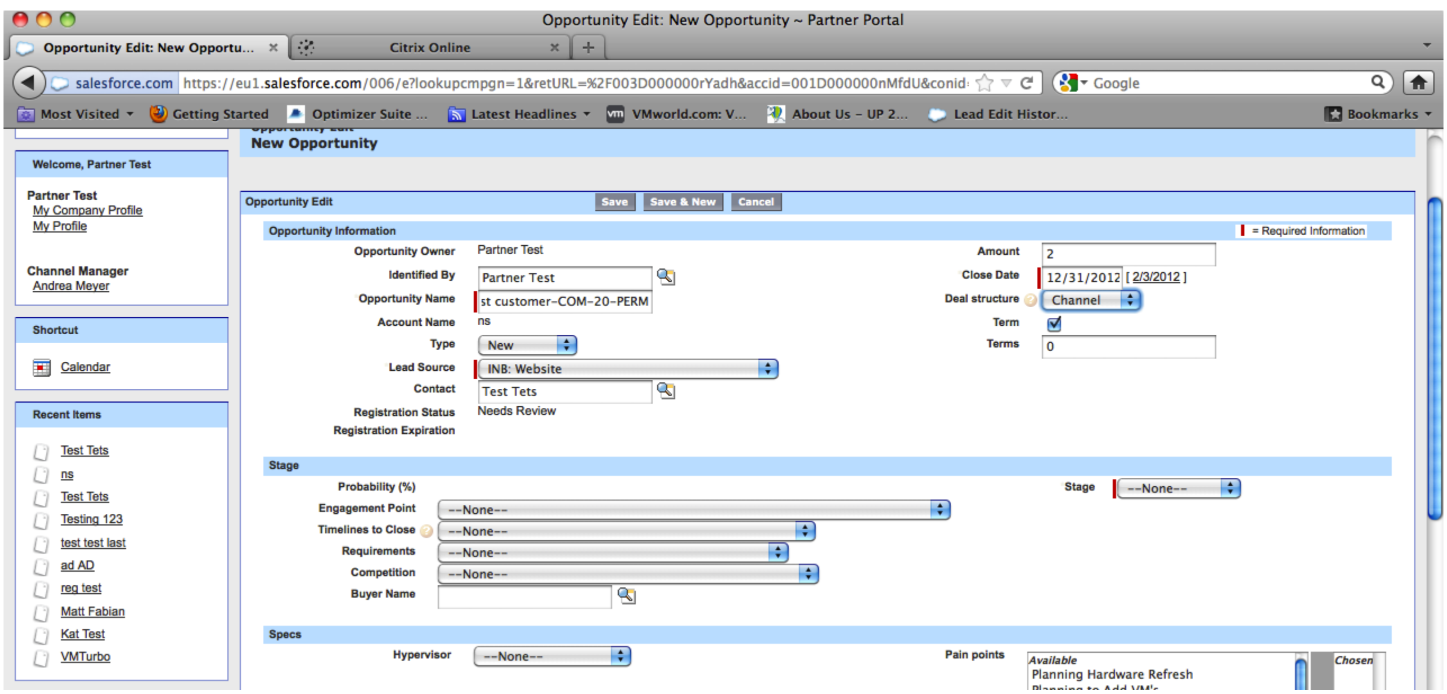


f. Registration status shows that it "needs review"
g. Amount
h. Close date

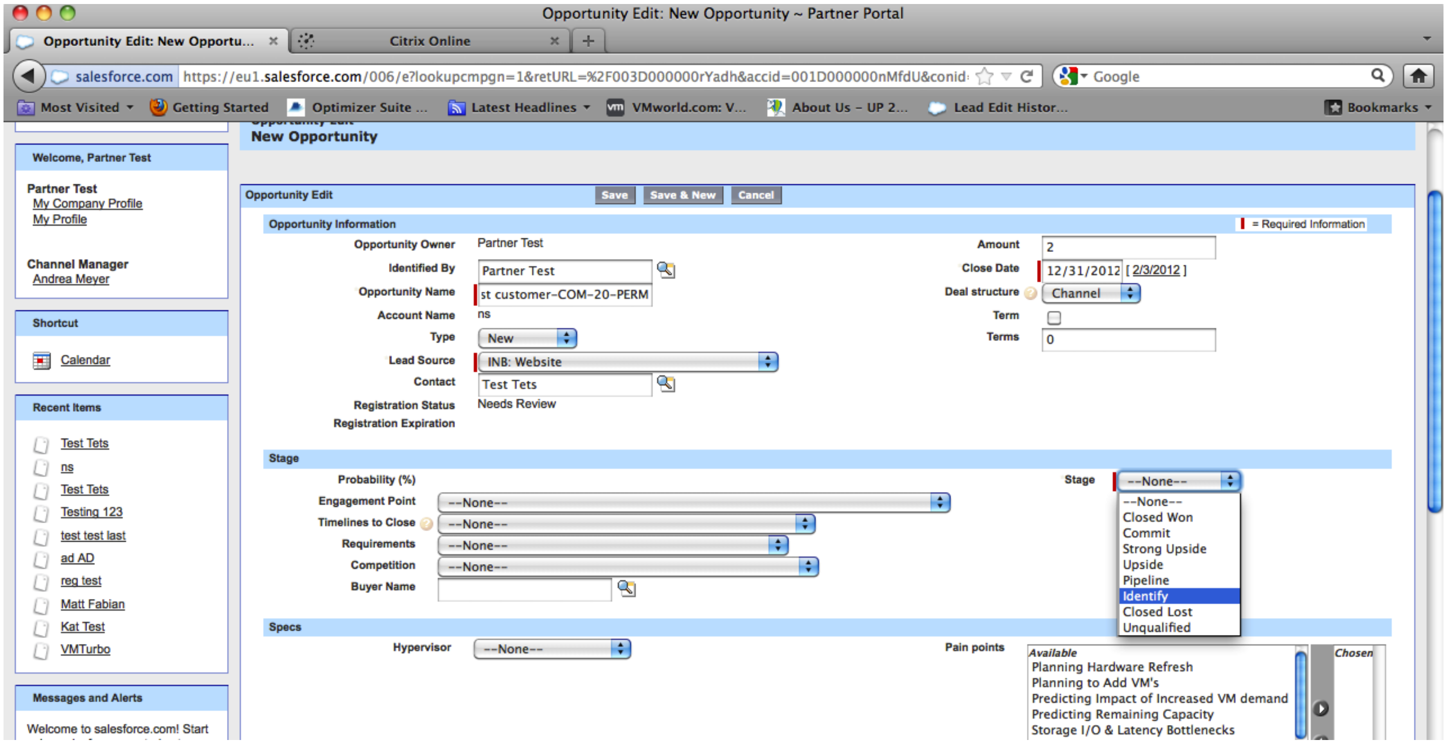
i. Deal structure is always “Channel”



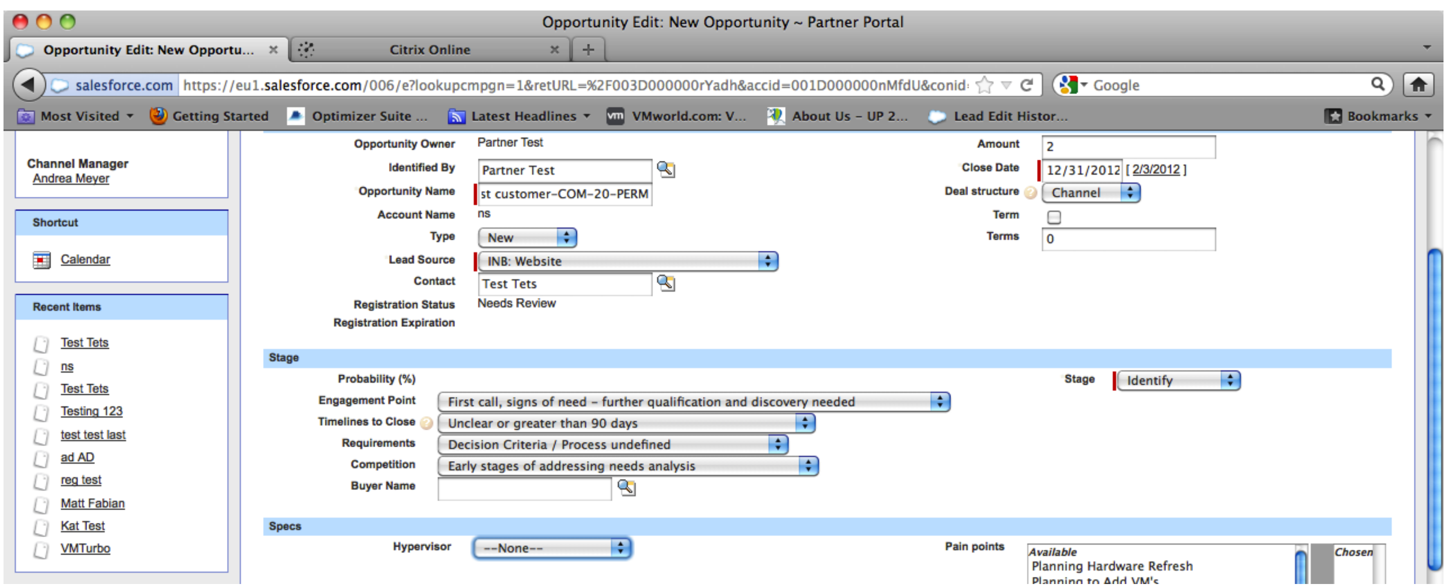
j. If Term license indicate in “Terms” the # of days until the license expires, if permanent license uncheck the box “Term”



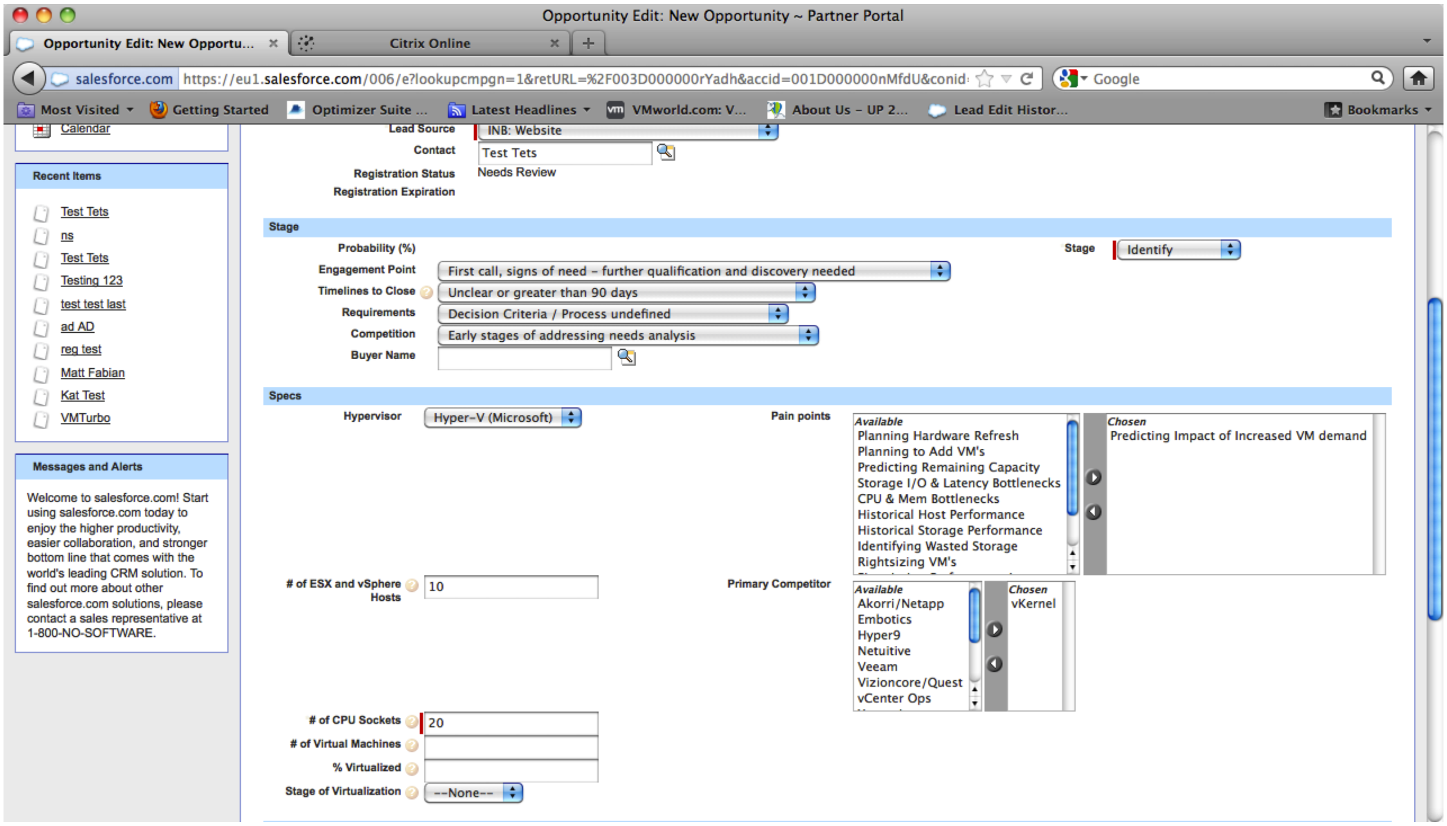
21) Select Opportunity Stage as per the “Opportunity Classification” pdf in the document section



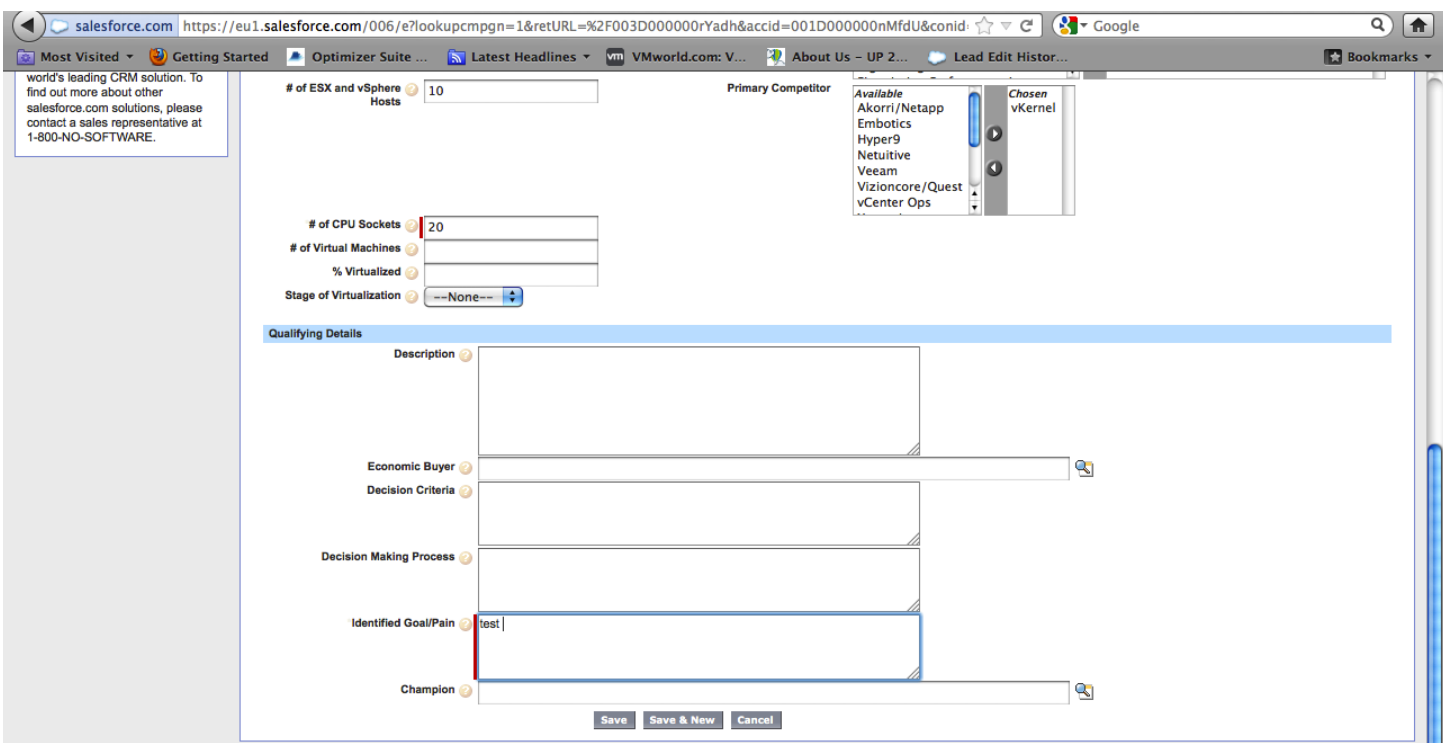
22) Complete “Engagement Point”, “Timeline to Close”, “Requirements” & “Competition”. Note: the record cannot be saved if one of them is not completed.



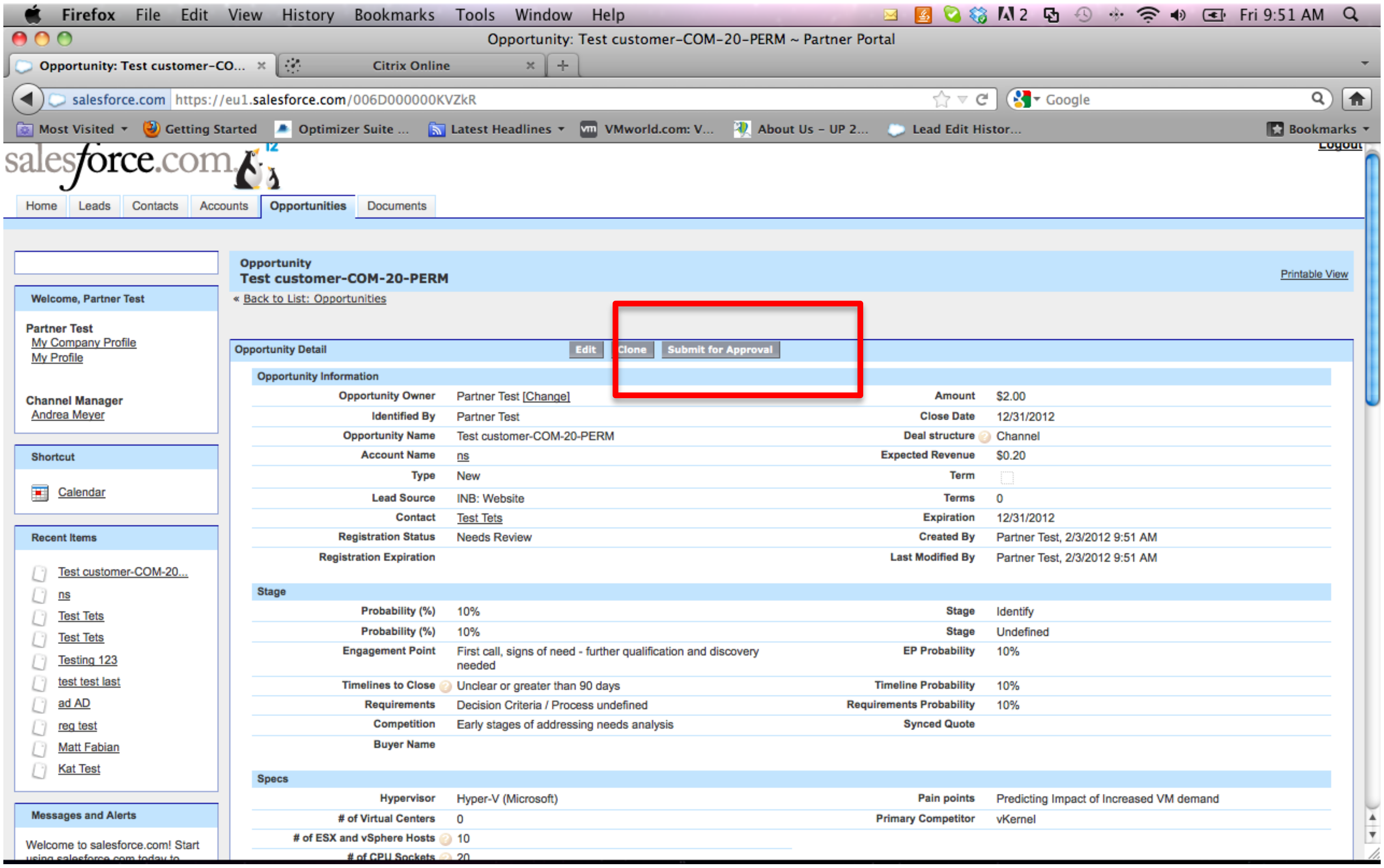
23) In the "Specs" section complete at least the # of CPU Sockets



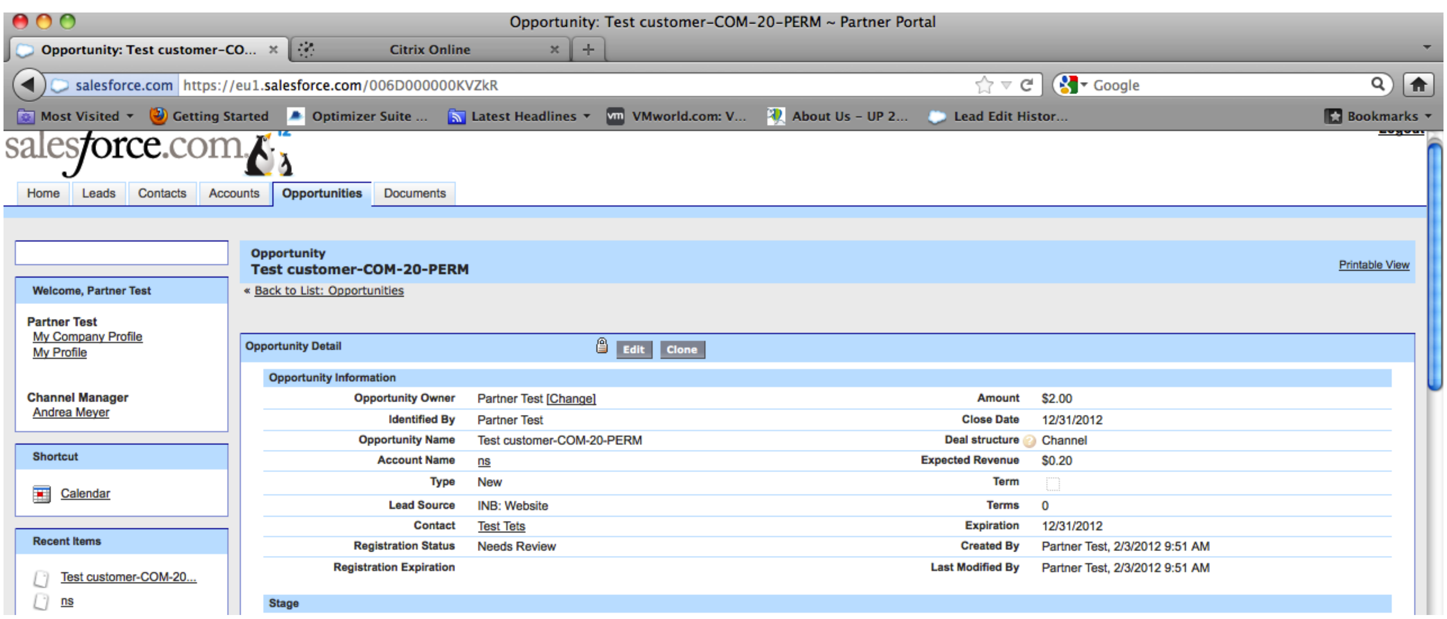
24) Complete the "Identified Goal/Pain" section in the Qualifying details & save the record.



25) Submit for Approval



26) Once the opportunity is submitted for approval it is locked for editing and can only be unlocked by your partner Manager.



27) On the bottom of the opportunity you will see the status of the Approval & once the opportunity has been approved / denied you will receive an email and the opportunity is being updated in the Partner Portal with the expiration date of the registration.