



VMTurbo Partner Portal Training Guide

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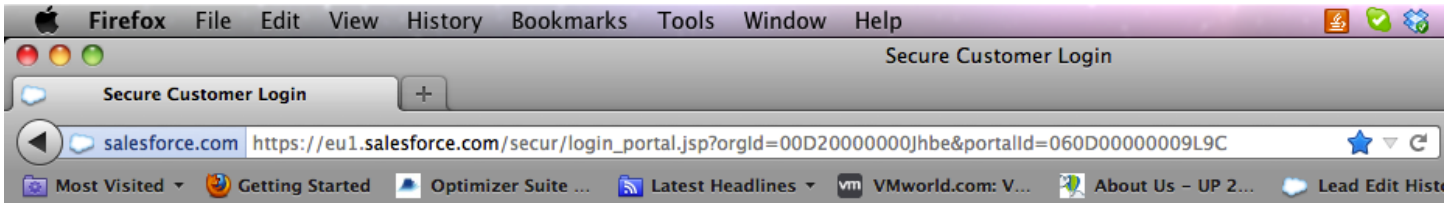
SUMMARY

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GENERAL SETTINGS

1) Login under:

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



Secure Customer Login

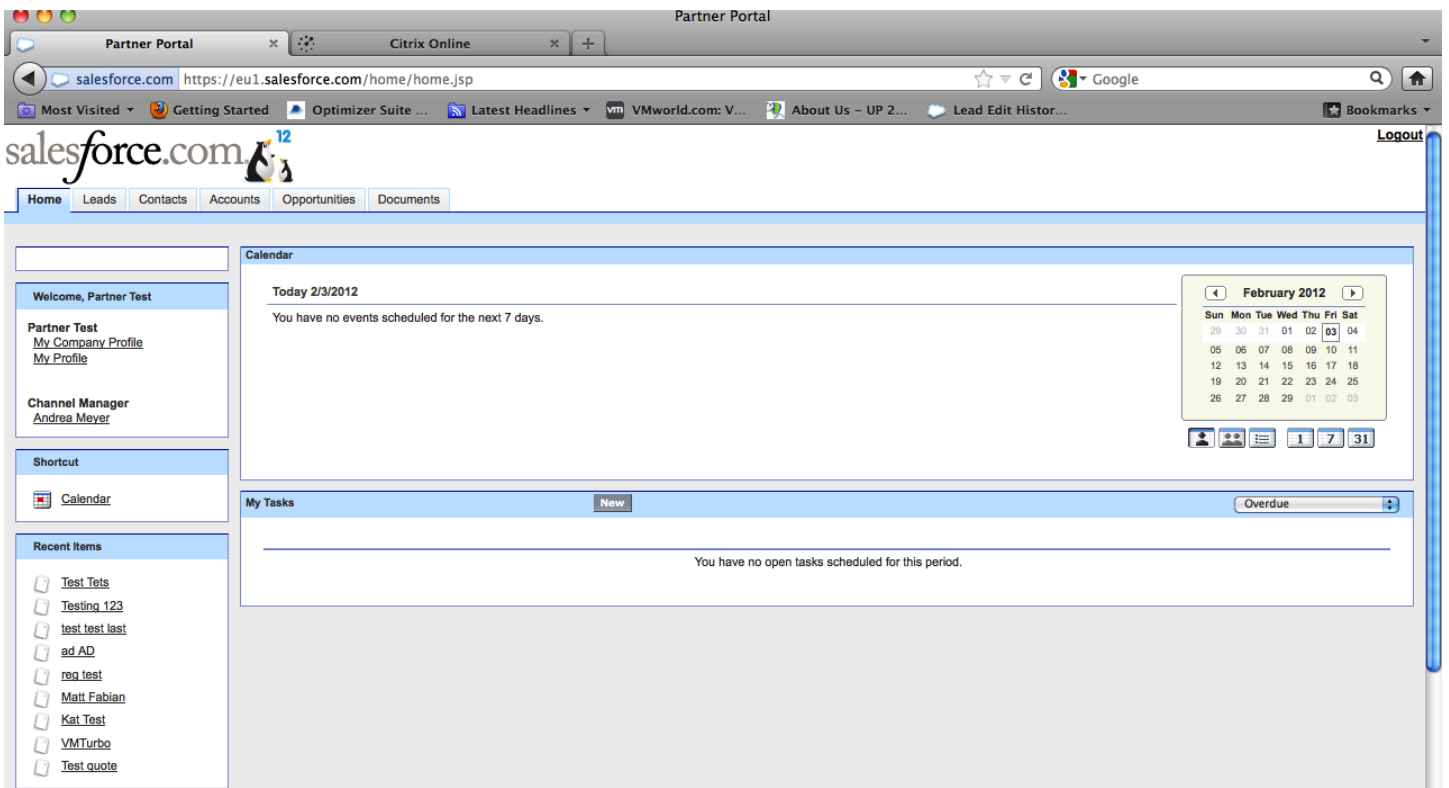
Please enter your User Name.

User Name:

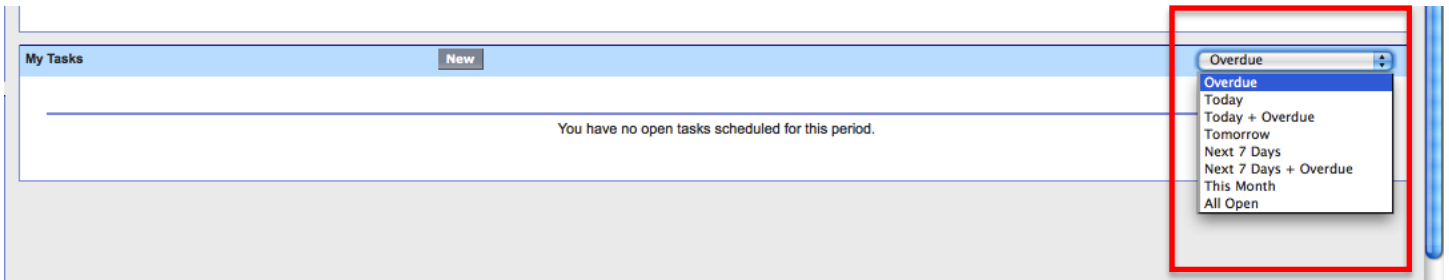
Password:

[Forgot your password?](#)

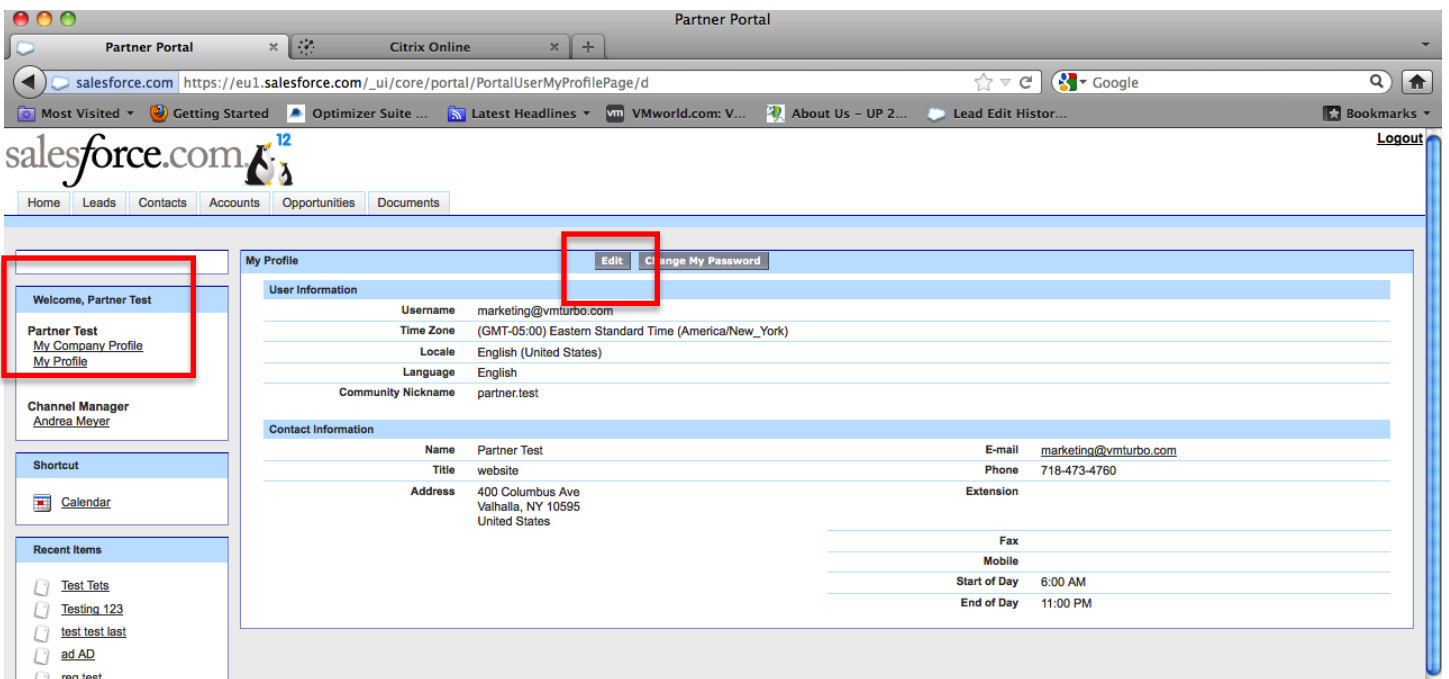
2) On the home screen you will see your calendar, tasks, company & personal profile:



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

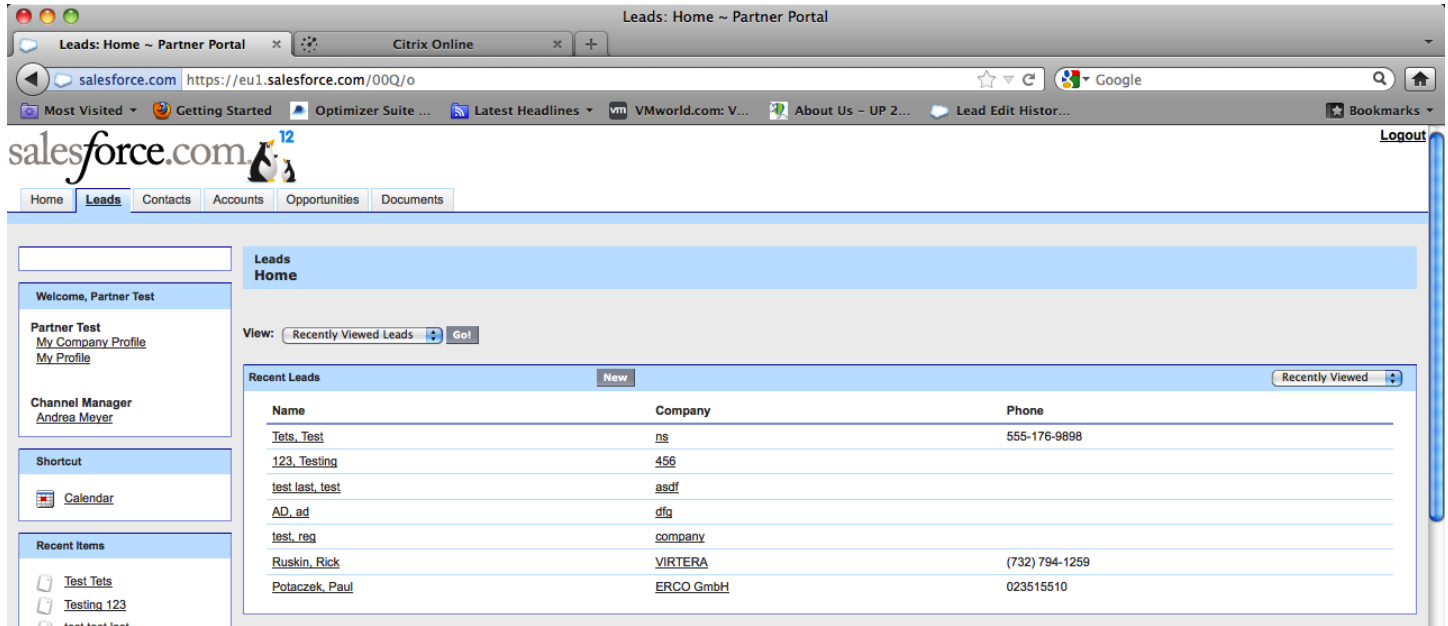


4) To change you company settings, profile settings or password select “My Company Profile” or “My Profile” in the Welcome section to the left and edit the record:



LEAD FOLLOW UP

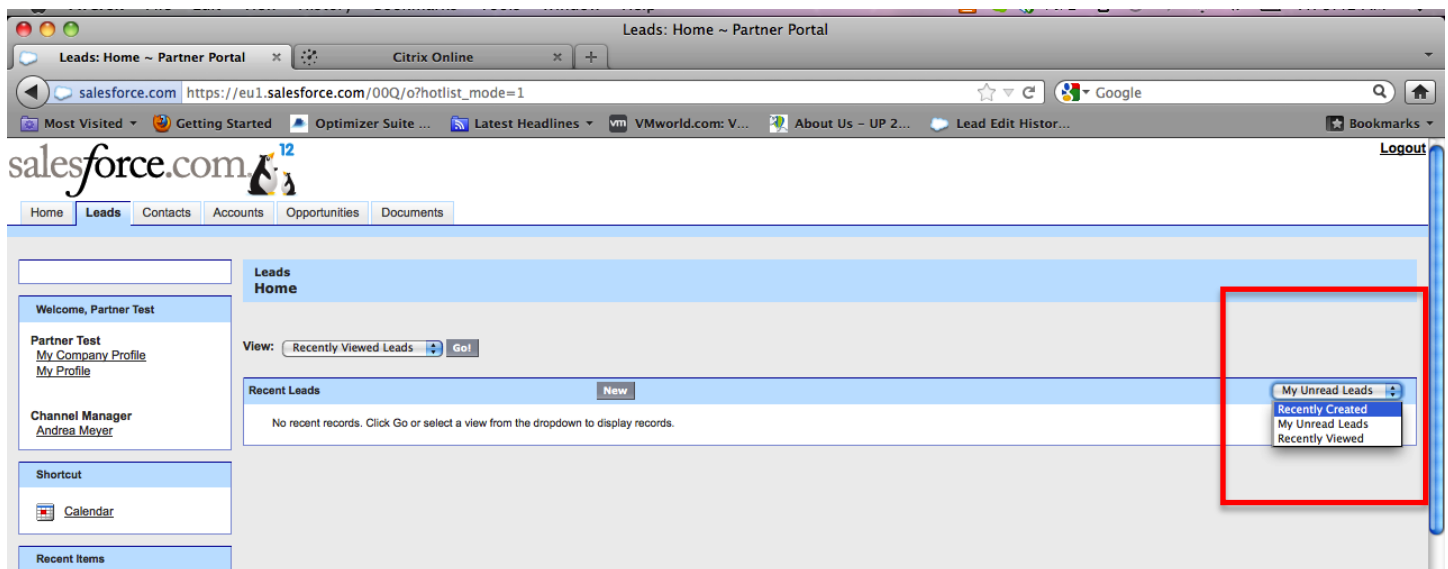
5) Visit the “Leads” Tab to see all Leads that have been assigned to you:



The screenshot shows the Salesforce 'Leads Home' page for a Partner Portal user. The left sidebar contains navigation links: Home, Leads (selected), Contacts, Accounts, Opportunities, and Documents. The main content area is titled 'Leads Home' and includes a 'View:' dropdown set to 'Recently Viewed Leads' and a 'Go!' button. Below this is a table of 'Recent Leads' with columns for Name, Company, and Phone. The table lists several leads, including 'Tets, Test', '123, Testing', 'test last, test', 'AD, ad', 'test, req', 'Ruskin, Rick', and 'Potaczek, Paul'. The right sidebar contains a 'Logout' link.

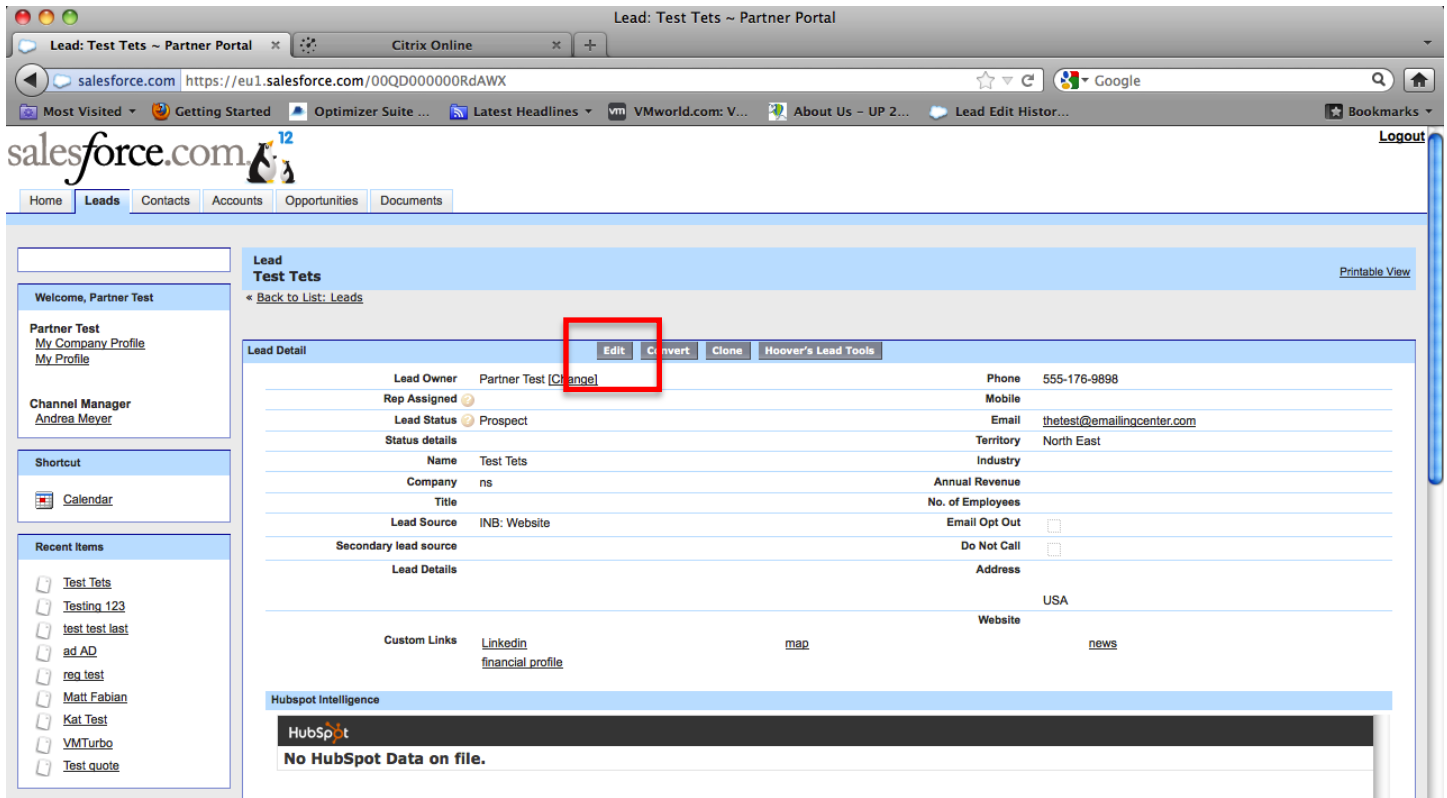
Name	Company	Phone
Tets, Test	ns	555-176-9898
123, Testing	456	
test last, test	asdf	
AD, ad	dfg	
test, req	company	
Ruskin, Rick	VITERA	(732) 794-1259
Potaczek, Paul	ERCO GmbH	023515510

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



The screenshot shows the same Salesforce 'Leads Home' page, but the 'View:' dropdown is now open, displaying a list of options: 'My Unread Leads', 'Recently Created', 'My Unread Leads', and 'Recently Viewed'. The 'My Unread Leads' option is highlighted. The main content area below the dropdown shows a message: 'No recent records. Click Go or select a view from the dropdown to display records.'

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



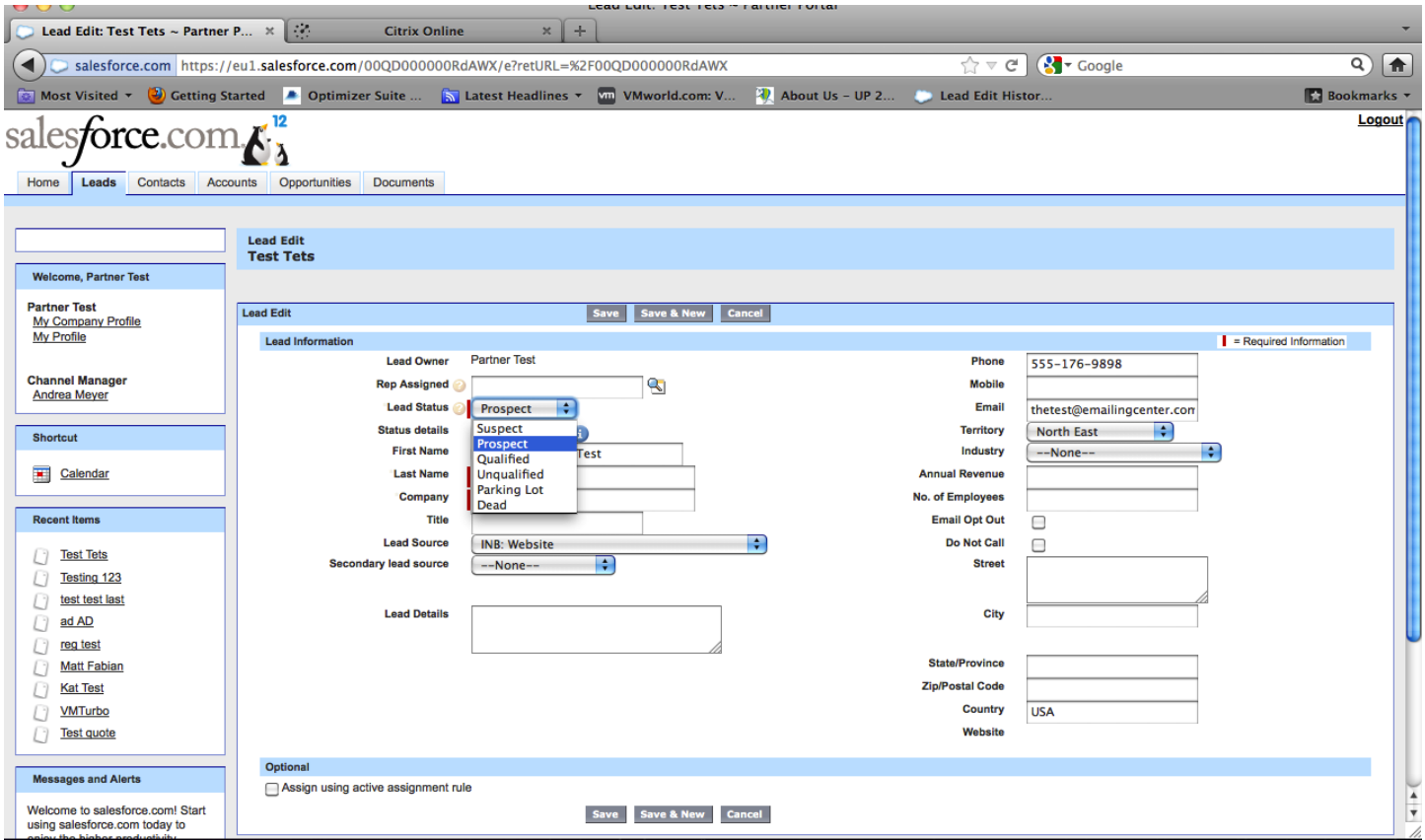
The screenshot shows the Salesforce interface for a lead named 'Test Tets'. The 'Edit' button in the top action bar is highlighted with a red box. The lead details are as follows:

Lead Owner	Partner Test (Change)	Phone	555-176-9898
Rep Assigned		Mobile	
Lead Status	Prospect	Email	thetest@emailingcenter.com
Status details		Territory	North East
Name	Test Tets	Industry	
Company	ns	Annual Revenue	
Title		No. of Employees	
Lead Source	INB: Website	Email Opt Out	<input type="checkbox"/>
Secondary lead source		Do Not Call	<input type="checkbox"/>
Lead Details		Address	
		USA	
Custom Links	LinkedIn financial profile	map	news

Hubspot Intelligence section shows: No HubSpot Data on file.

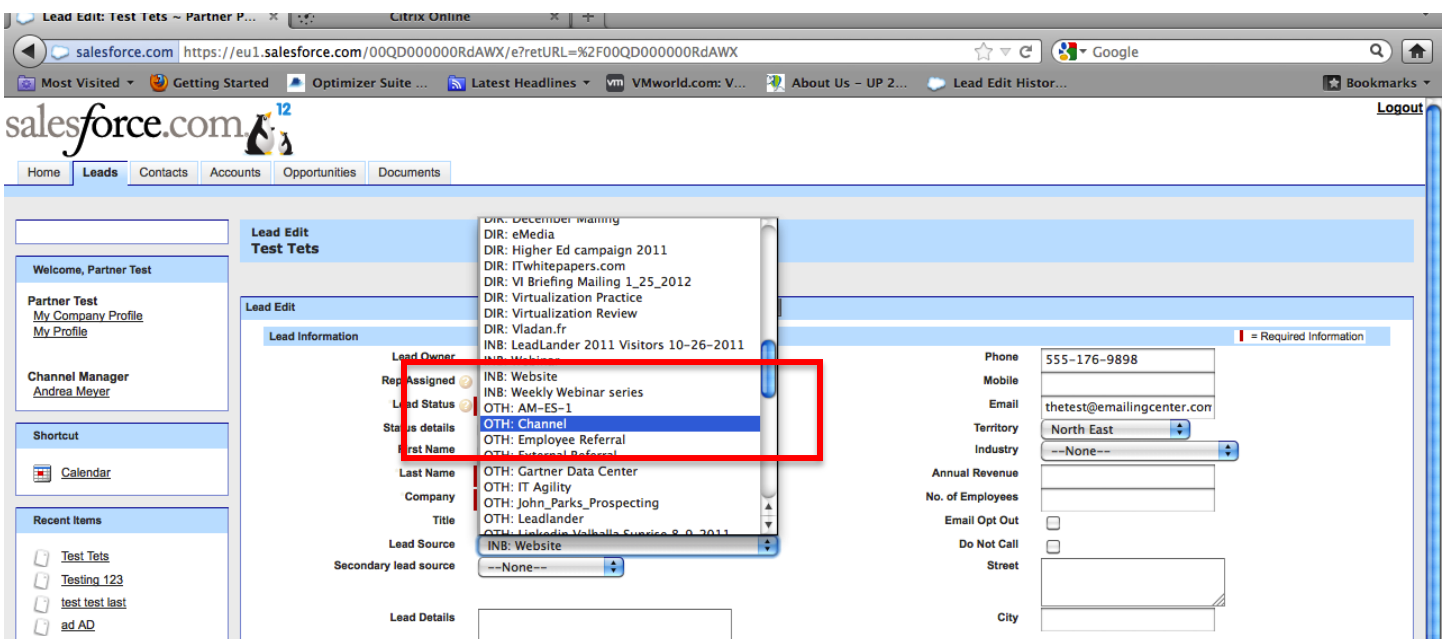
8) Choose the status of the lead:

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



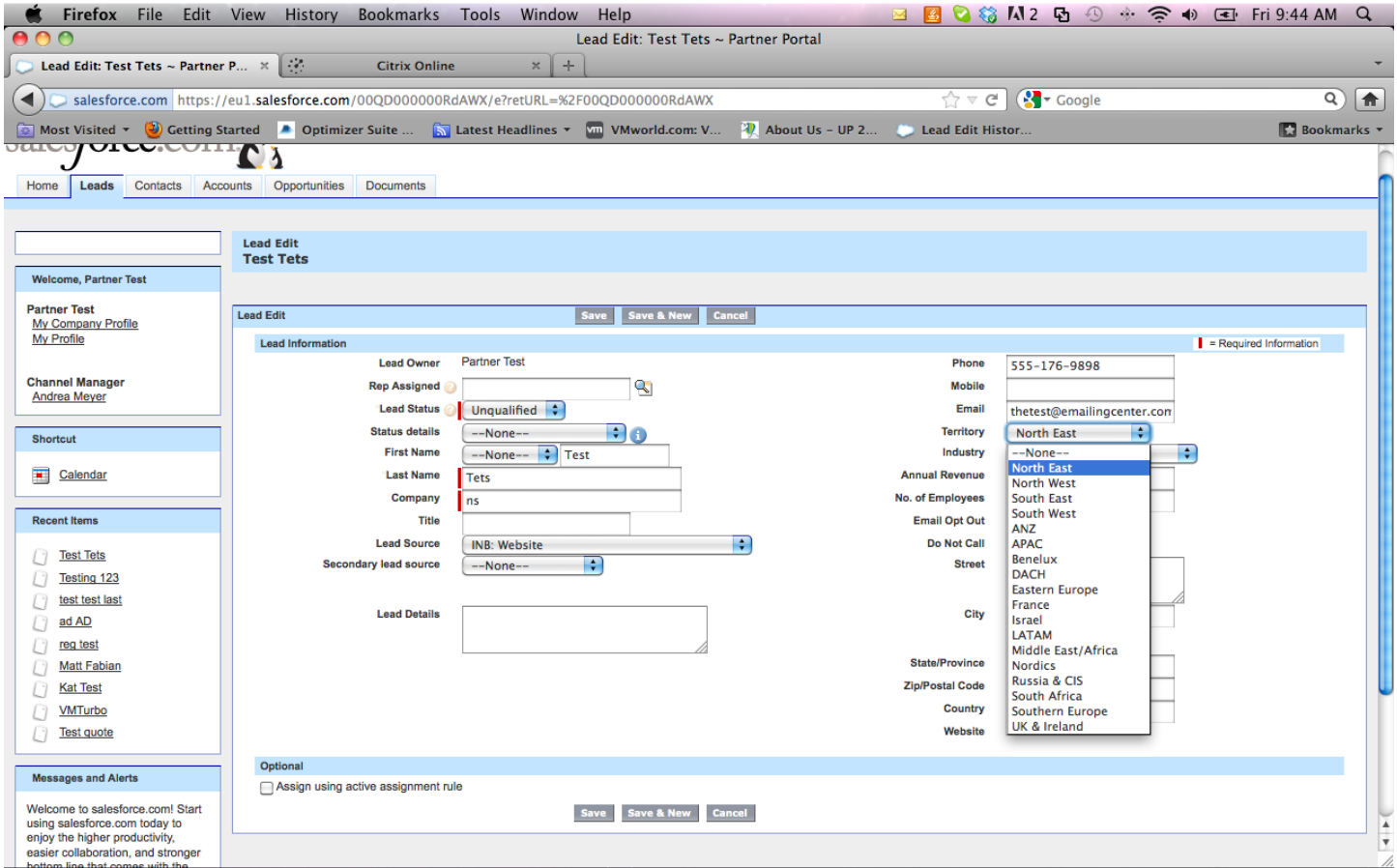
The screenshot shows the Salesforce 'Lead Edit' interface for a lead named 'Test Tets'. The left sidebar contains navigation links like 'Home', 'Leads', 'Contacts', 'Accounts', 'Opportunities', and 'Documents'. Below these are sections for 'Welcome, Partner Test', 'Partner Test' (with links to 'My Company Profile' and 'My Profile'), 'Channel Manager' (Andrea Meyer), 'Shortcut' (Calendar), 'Recent Items' (a list of recent leads and documents), and 'Messages and Alerts'. The main content area is titled 'Lead Edit' and includes a 'Lead Information' section with fields for 'Lead Owner' (Partner Test), 'Rep Assigned', 'Lead Status' (a dropdown menu is open showing options like 'Prospect', 'Suspect', 'Qualified', 'Unqualified', 'Parking Lot', and 'Dead'), 'First Name', 'Last Name', 'Company', 'Title', 'Lead Source' (INB: Website), and 'Secondary lead source' (None). To the right of these fields are fields for 'Phone' (555-176-9898), 'Mobile', 'Email' (thetest@emailingcenter.com), 'Territory' (North East), 'Industry' (None), 'Annual Revenue', 'No. of Employees', 'Email Opt Out', 'Do Not Call', 'Street', 'City', 'State/Province', 'Zip/Postal Code', 'Country' (USA), and 'Website'. At the bottom of the 'Lead Information' section is an 'Optional' section with a checkbox for 'Assign using active assignment rule'. Buttons for 'Save', 'Save & New', and 'Cancel' are located at the top and bottom of the form.

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".



This screenshot shows the same Salesforce 'Lead Edit' interface, but with the 'Lead Source' dropdown menu open. The dropdown list shows various lead sources, including 'DIR: December mailing', 'DIR: eMedia', 'DIR: Higher Ed campaign 2011', 'DIR: ITwhitepapers.com', 'DIR: VI Briefing Mailing 1_25_2012', 'DIR: Virtualization Practice', 'DIR: Virtualization Review', 'DIR: Vladan.fr', 'INB: LeadLander 2011 Visitors 10-26-2011', 'INB: Website', 'INB: Weekly Webinar series', 'OTH: AM-ES-1', 'OTH: Channel' (highlighted with a red box), 'OTH: Employee Referral', 'OTH: External Referral', 'OTH: Gartner Data Center', 'OTH: IT Agility', 'OTH: John_Parks_Propecting', 'OTH: Leadlander', and 'OTH: MediaValka Surice 8.9.2011'. The 'Lead Source' field in the form is currently set to 'INB: Website'. The rest of the interface remains the same as in the previous screenshot.

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



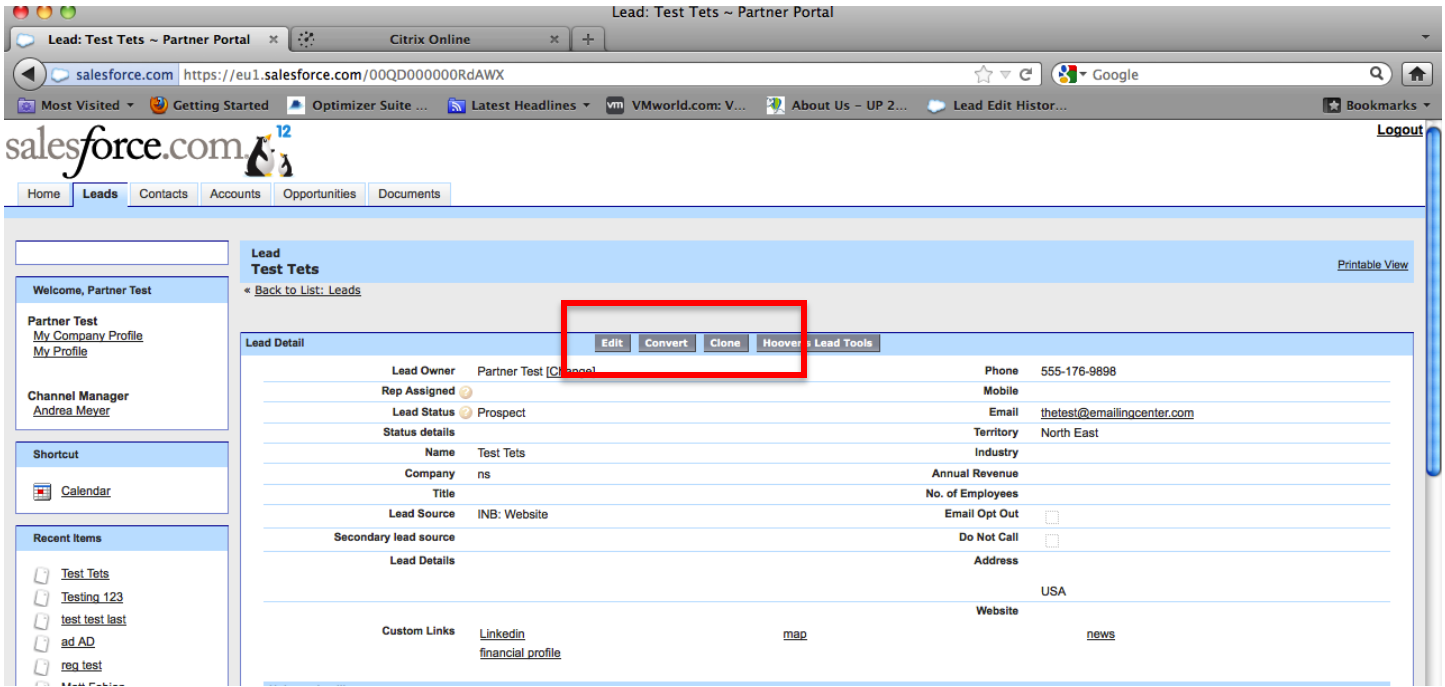
The screenshot shows the Salesforce 'Lead Edit' page for a lead named 'Test Tets'. The interface includes a sidebar with navigation links (Home, Leads, Contacts, Accounts, Opportunities, Documents) and a main content area with 'Lead Information' and 'Lead Details' sections. The 'Territory' dropdown menu is open, showing a list of regions including North East, North West, South East, and South West. The 'Lead Status' is set to 'Unqualified'.

Field	Value
Lead Owner	Partner Test
Rep Assigned	[Searchable]
Lead Status	Unqualified
Status details	--None--
First Name	--None--
Last Name	Tets
Company	ns
Title	
Lead Source	INB: Website
Secondary lead source	--None--
Phone	555-176-9898
Mobile	
Email	thetest@emalingcenter.com
Territory	North East
Industry	--None--
Annual Revenue	
No. of Employees	
Email Opt Out	
Do Not Call	
Street	
City	
State/Province	
Zip/Postal Code	
Country	
Website	

11) Save the record after changes have been made

LEAD CONVERSION

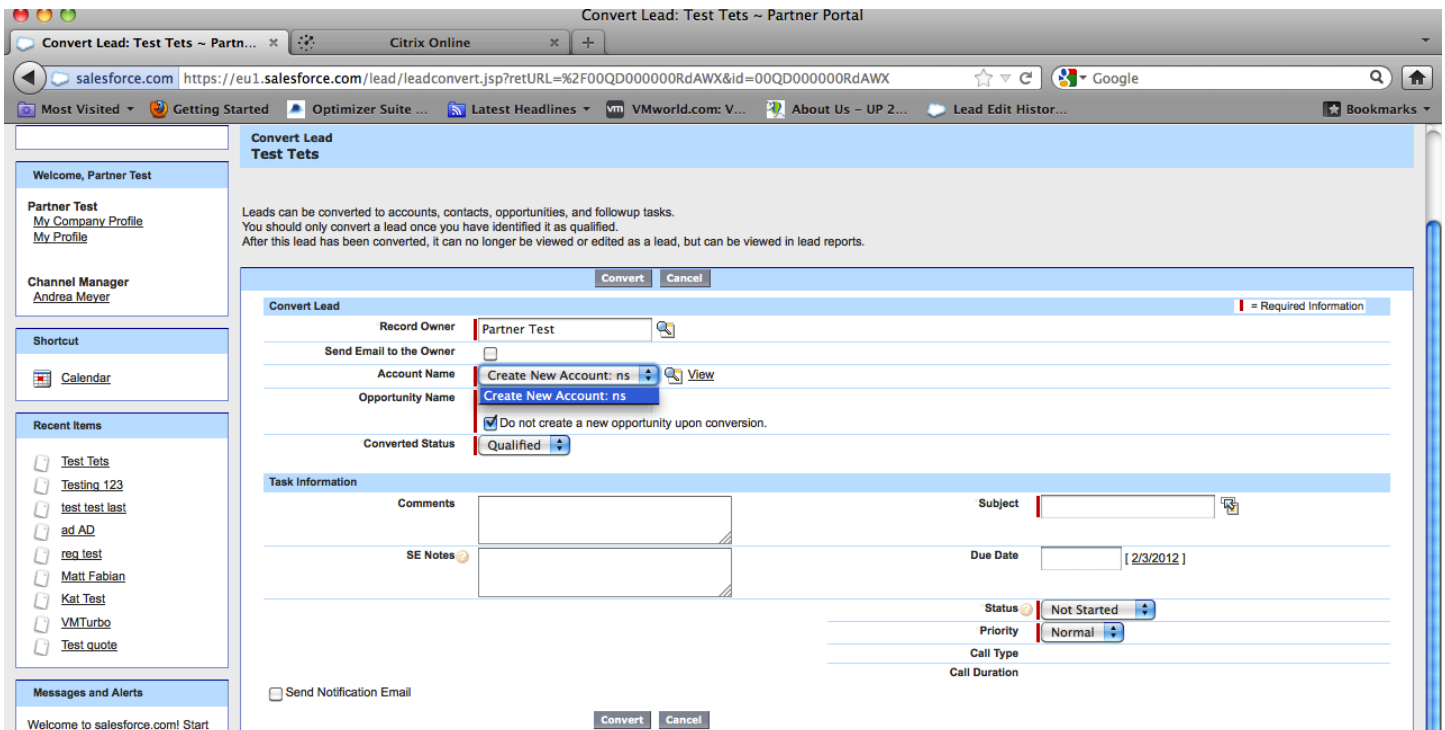
12) To convert a qualified lead to a contact click the “Convert” button on the top of the lead record



The screenshot shows the Salesforce interface for a lead named 'Test Tets'. The 'Convert' button is highlighted in a red box. The lead details include:

- Lead Owner: Partner Test (Contact)
- Rep Assigned: Partner Test (Contact)
- Lead Status: Prospect
- Status details: Name: Test Tets, Company: ns, Title: Lead Source: INB: Website, Secondary lead source: Lead Details
- Phone: 555-176-9898
- Mobile: thetest@emailingcenter.com
- Email: thetest@emailingcenter.com
- Territory: North East
- Industry: Annual Revenue: No. of Employees: Email Opt Out: Do Not Call: Address: USA, Website: news
- Custom Links: LinkedIn, map, financial profile

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

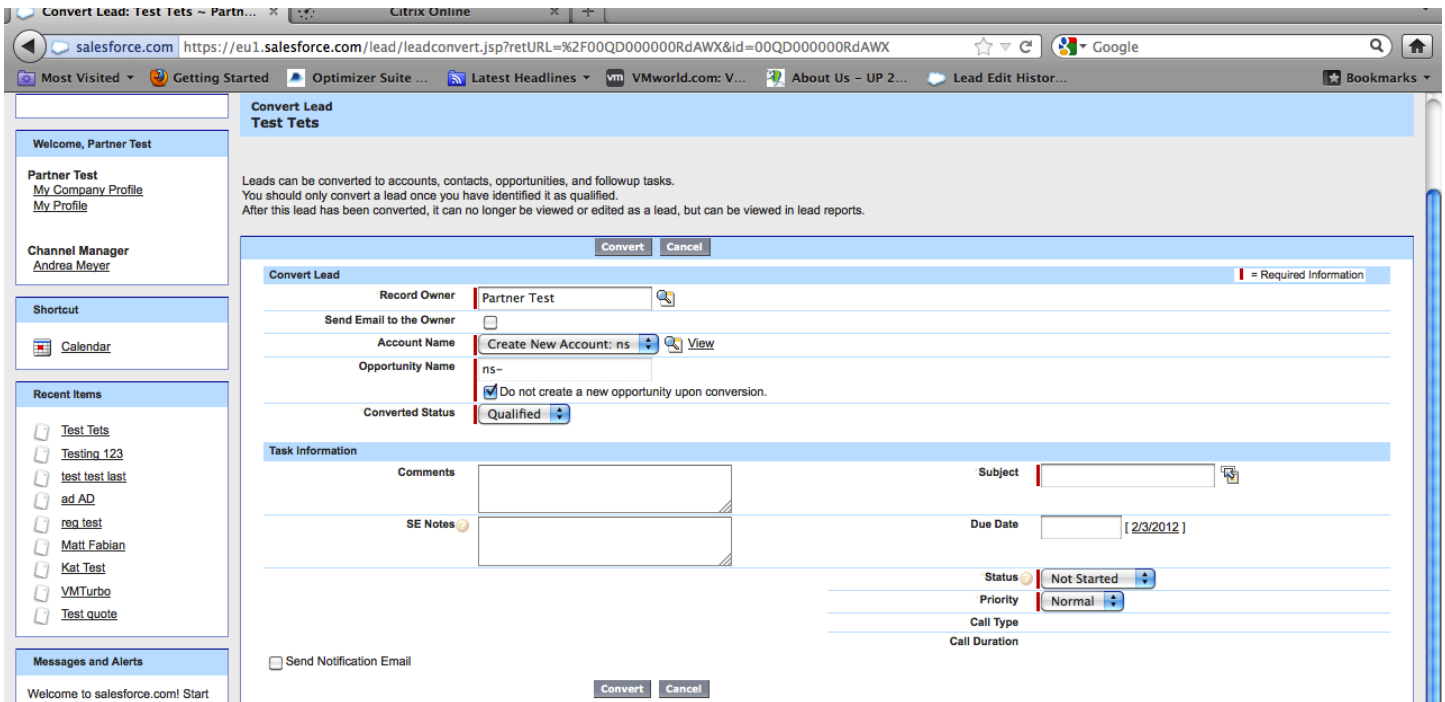


The screenshot shows the 'Convert Lead' dialog in Salesforce. The 'Convert' button is highlighted. The dialog includes the following fields and options:

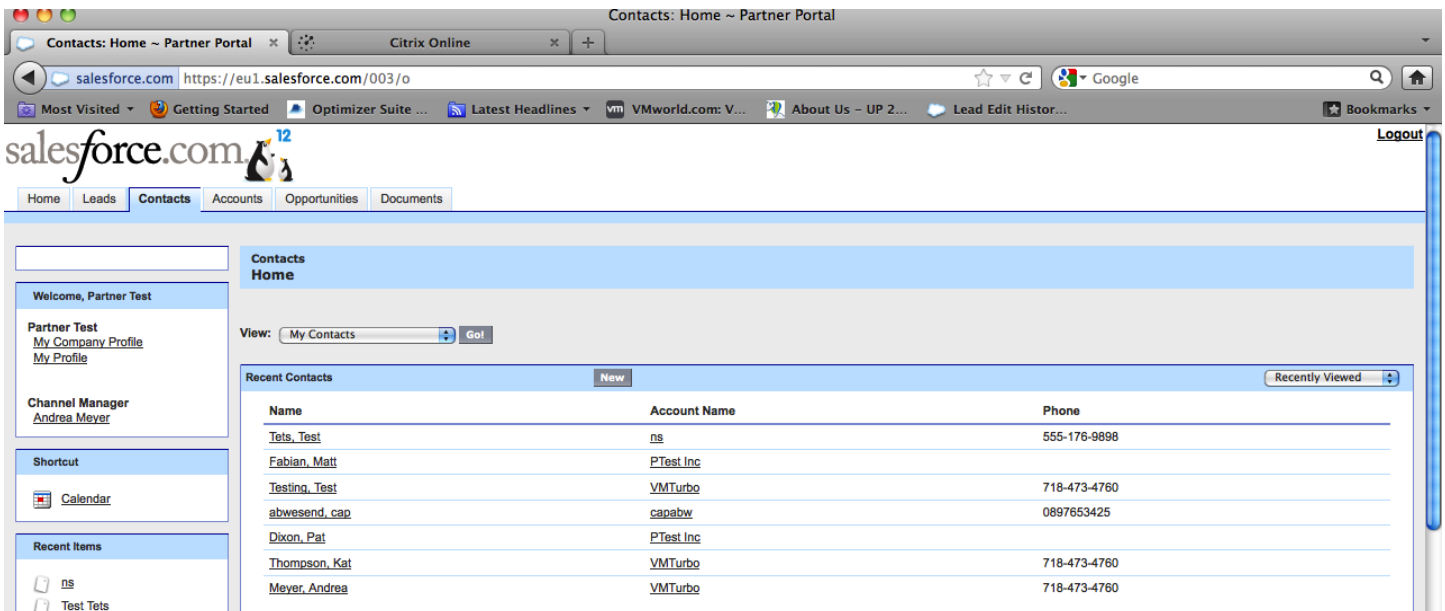
- Record Owner: Partner Test
- Send Email to the Owner: ☐
- Account Name: Create New Account: ns (View)
- Opportunity Name: Create New Account: ns
- Converted Status: Qualified
- Task Information:
 - Comments: [Text Area]
 - SE Notes: [Text Area]
 - Subject: [Text Field]
 - Due Date: [Date Picker] (2/3/2012)
 - Status: Not Started
 - Priority: Normal
 - Call Type: [Dropdown]
 - Call Duration: [Text Field]
- Send Notification Email: ☐

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”



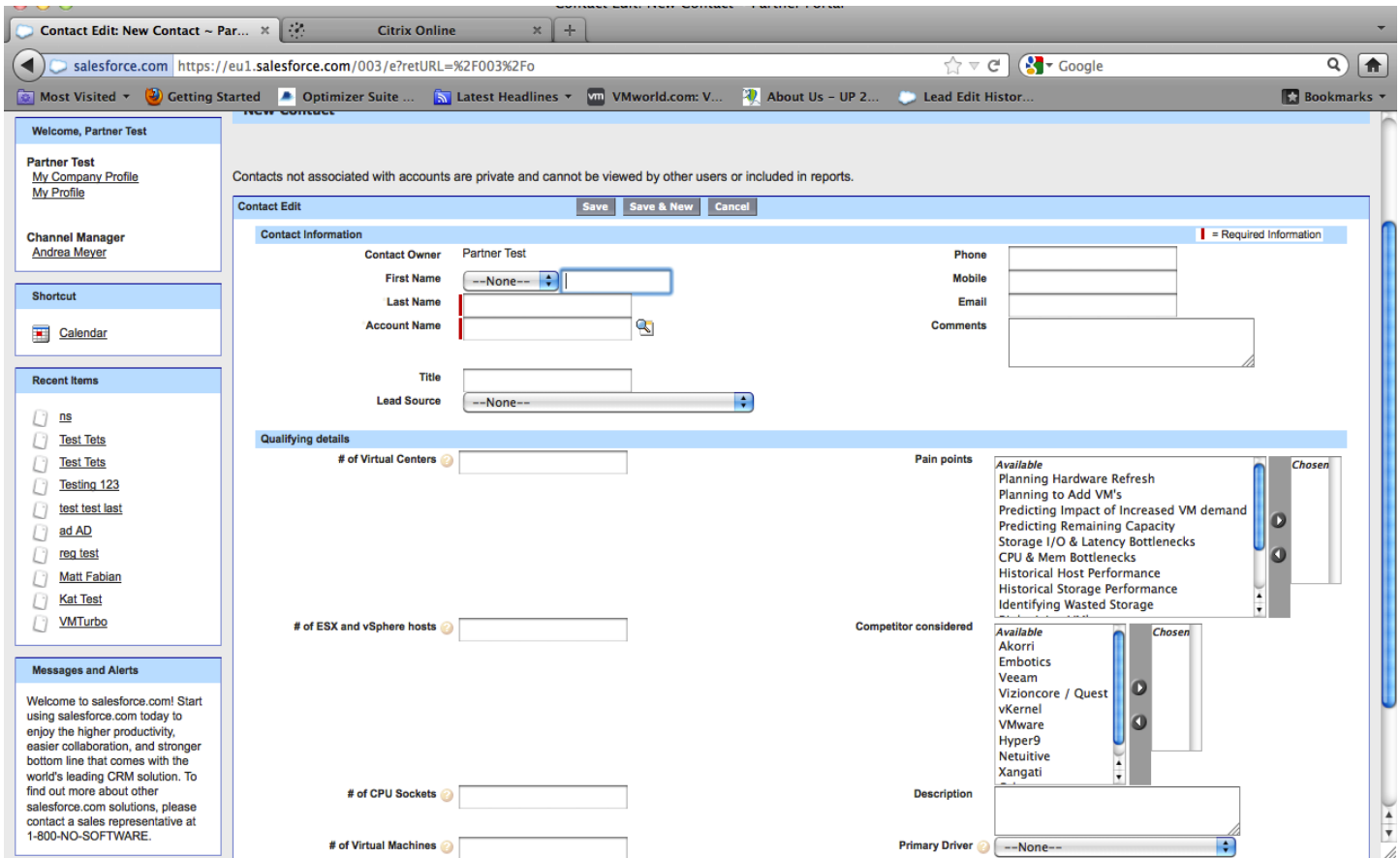
16) The record will now show up in your contact tab in the Partner Portal



Name	Account Name	Phone
Tets, Test	ns	555-176-9898
Fabian, Matt	PTest Inc	
Testing, Test	VMTurbo	718-473-4760
abwesend, cap	capabw	0897653425
Dixon, Pat	PTest Inc	
Thompson, Kat	VMTurbo	718-473-4760
Meyer, Andrea	VMTurbo	718-473-4760

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.



Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit [Save] [Save & New] [Cancel]

Contact Information ! = Required Information

Contact Owner: Partner Test

First Name:

Last Name:

Account Name:

Title:

Lead Source:

Phone:

Mobile:

Email:

Comments:

Qualifying details

of Virtual Centers:

of ESX and vSphere hosts:

of CPU Sockets:

of Virtual Machines:

Pain points

Available:

- Planning Hardware Refresh
- Planning to Add VM's
- Predicting Impact of Increased VM demand
- Predicting Remaining Capacity
- Storage I/O & Latency Bottlenecks
- CPU & Mem Bottlenecks
- Historical Host Performance
- Historical Storage Performance
- Identifying Wasted Storage

Chosen:

Competitor considered

Available:

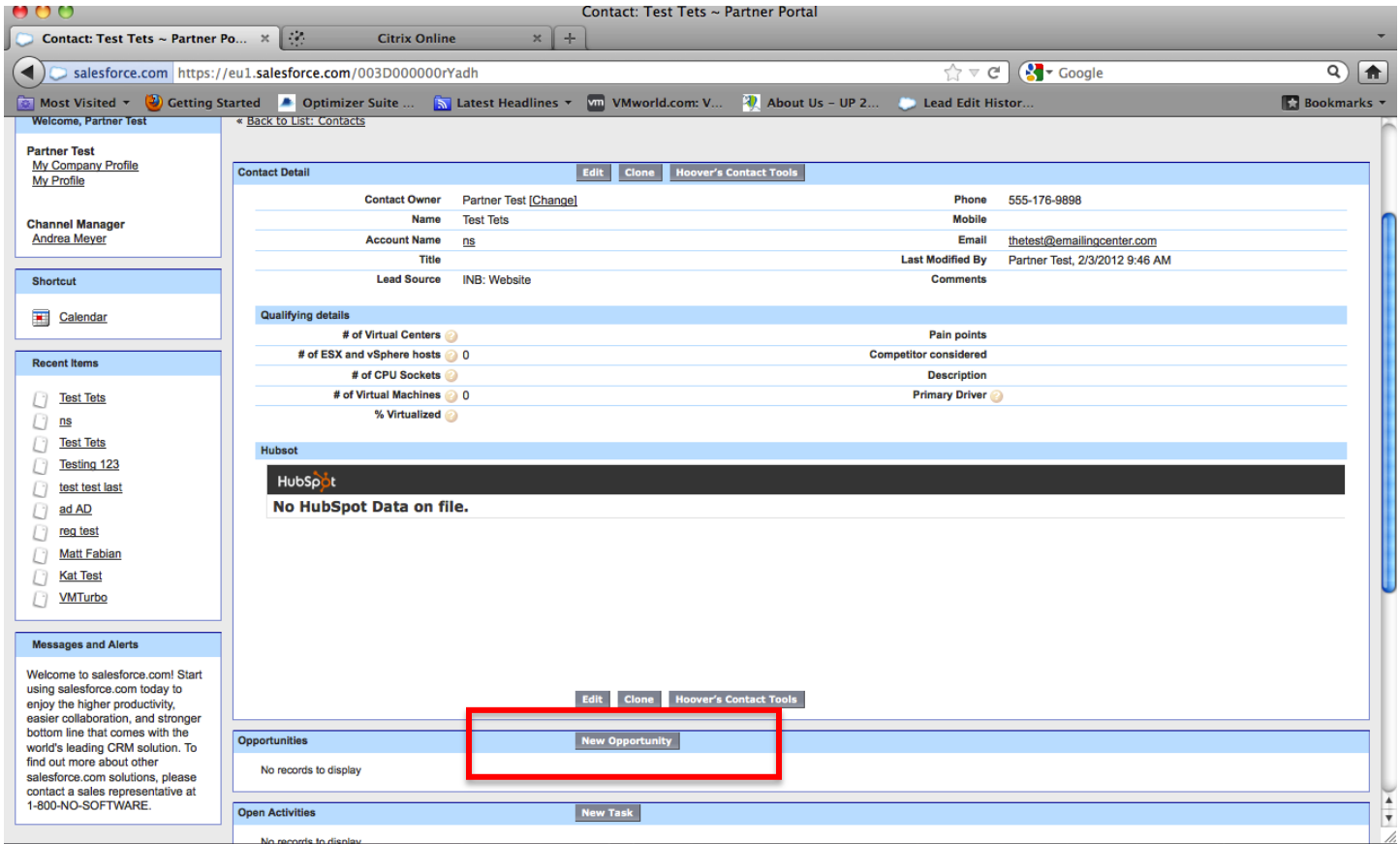
- Akorri
- Embotics
- Veeam
- Vizioncore / Quest
- vKernel
- VMware
- Hyper9
- Netuitive
- Xangati

Chosen:

Description:

Primary Driver:

18) Once the Contact is created click on “New Opportunity”



The screenshot shows the Salesforce 'Contact: Test Tets ~ Partner Portal' page. The contact details are as follows:

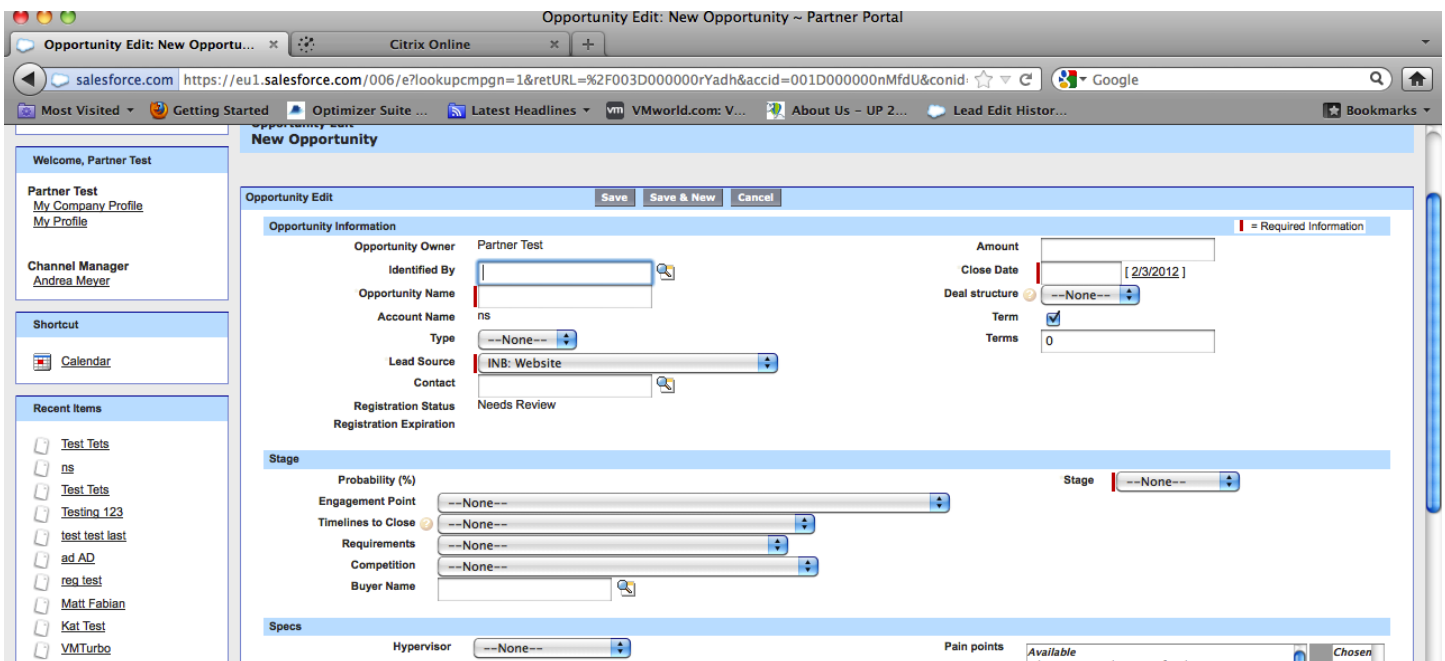
Contact Detail		Edit Clone Hoover's Contact Tools	
Contact Owner	Partner Test [Change]	Phone	555-176-9898
Name	Test Tets	Mobile	
Account Name	ns	Email	thetest@emailingcenter.com
Title		Last Modified By	Partner Test, 2/3/2012 9:46 AM
Lead Source	INB: Website	Comments	

Qualifying details:

# of Virtual Centers		Pain points	
# of ESX and vSphere hosts	0	Competitor considered	
# of CPU Sockets		Description	
# of Virtual Machines	0	Primary Driver	
% Virtualized			

Hubspot: No HubSpot Data on file.

At the bottom, the 'New Opportunity' button is highlighted with a red rectangle.



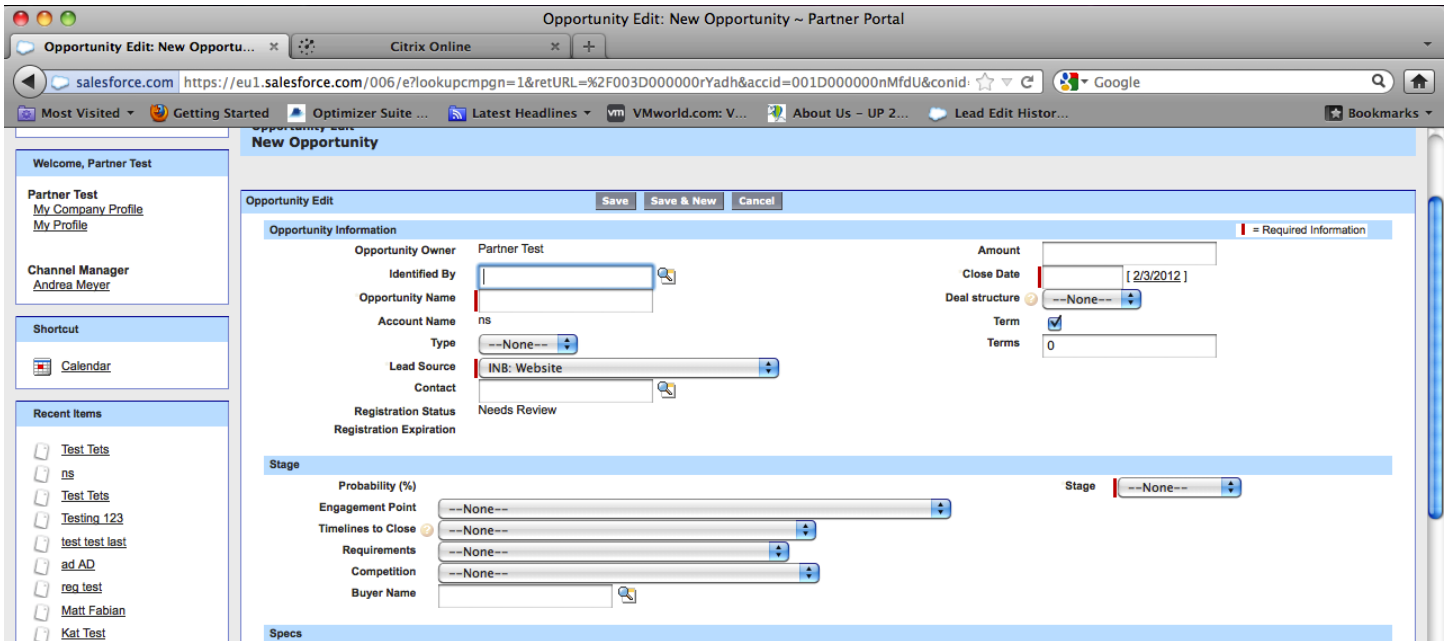
The screenshot shows the 'Opportunity Edit: New Opportunity ~ Partner Portal' page. The form fields are as follows:

Opportunity Edit		Save Save & New Cancel	
Opportunity Information			
Opportunity Owner	Partner Test	Amount	
Identified By		Close Date	[2/3/2012]
Opportunity Name		Deal structure	--None--
Account Name	ns	Term	<input checked="" type="checkbox"/>
Type	--None--	Terms	0
Lead Source	INB: Website		
Contact			
Registration Status	Needs Review		
Registration Expiration			
Stage			
Probability (%)		Stage	--None--
Engagement Point	--None--		
Timelines to Close	--None--		
Requirements	--None--		
Competition	--None--		
Buyer Name			
Specs			
Hypervisor	--None--	Pain points	Available Disposition Hardware Refresh

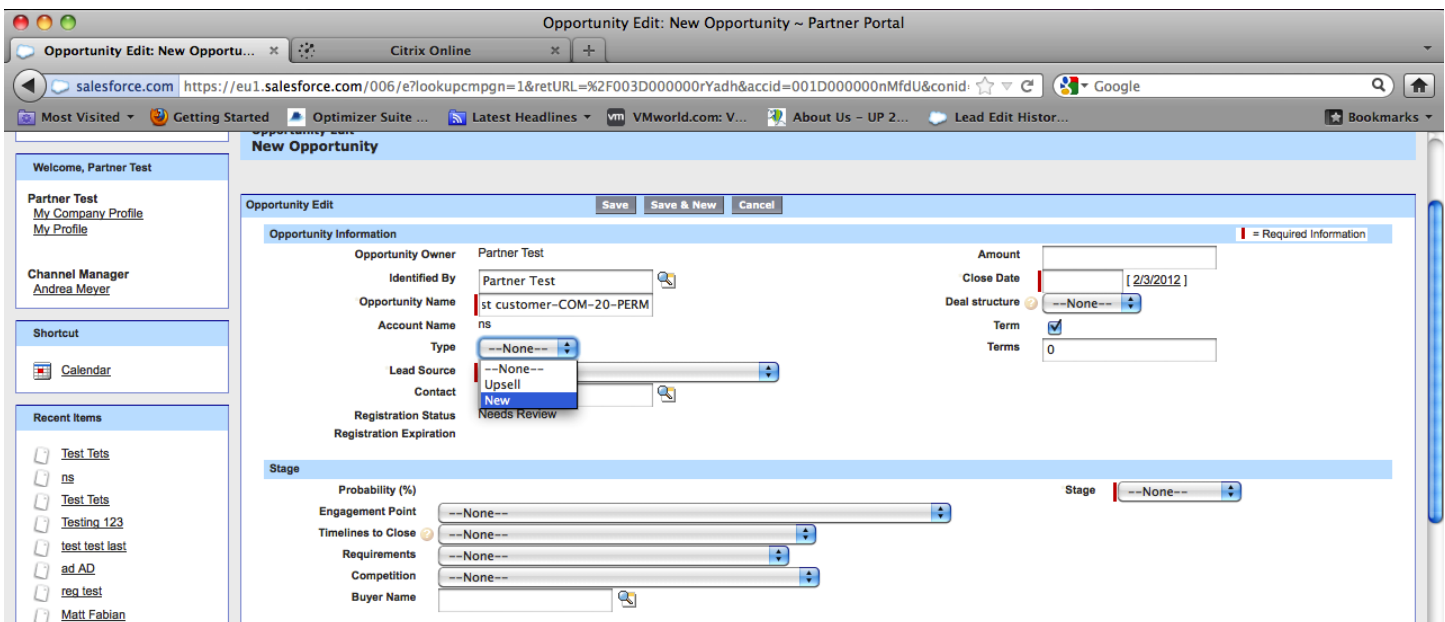
19) Complete all mandatory fields in the Opportunity Information, Stage, Specs & Qualifying details section

20) Opportunity Information to be filled in:

- Indicate Identified by (pick yourself)
- 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

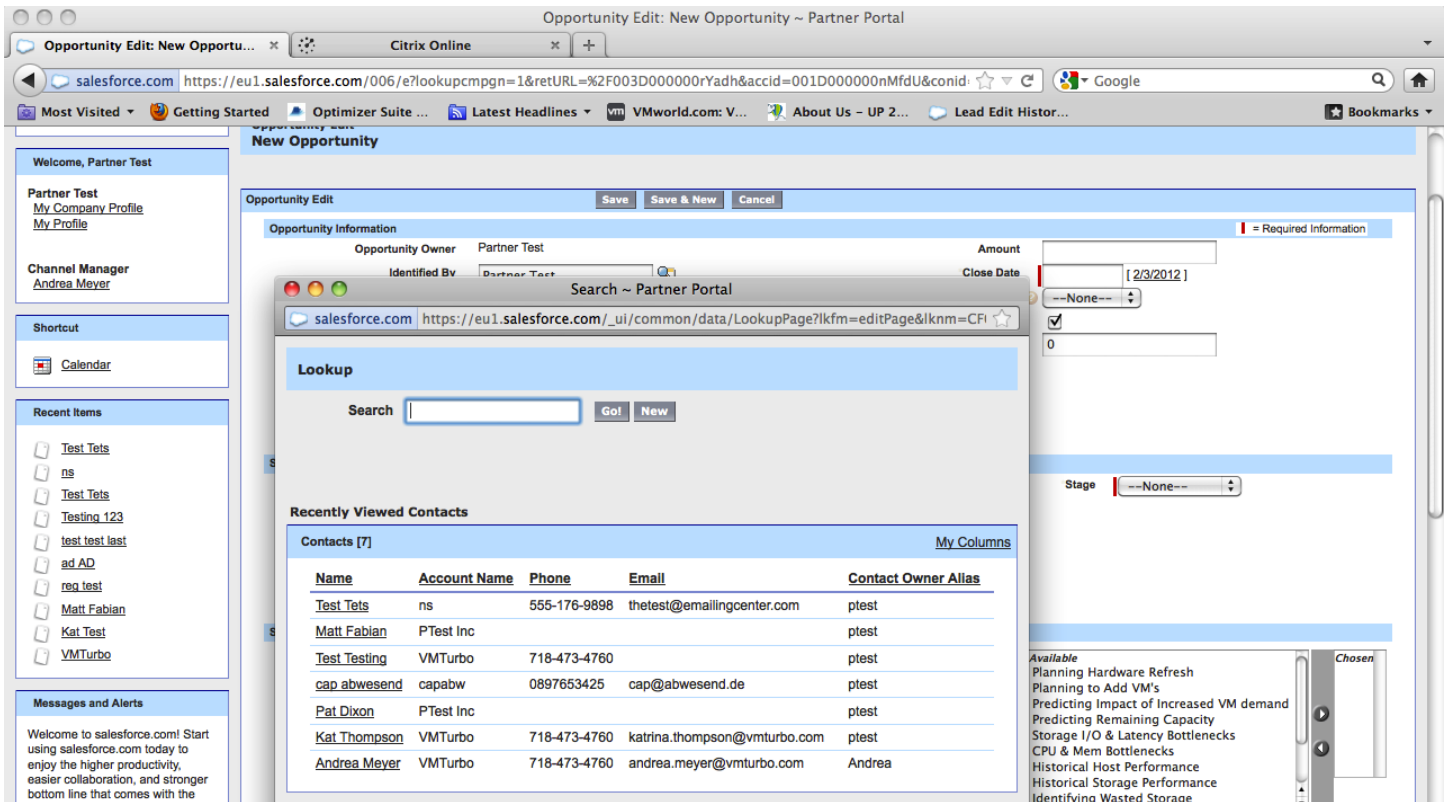


c. Type – whether it's a new business or upsell



d. Lead source – is automatically transferred from the contact

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



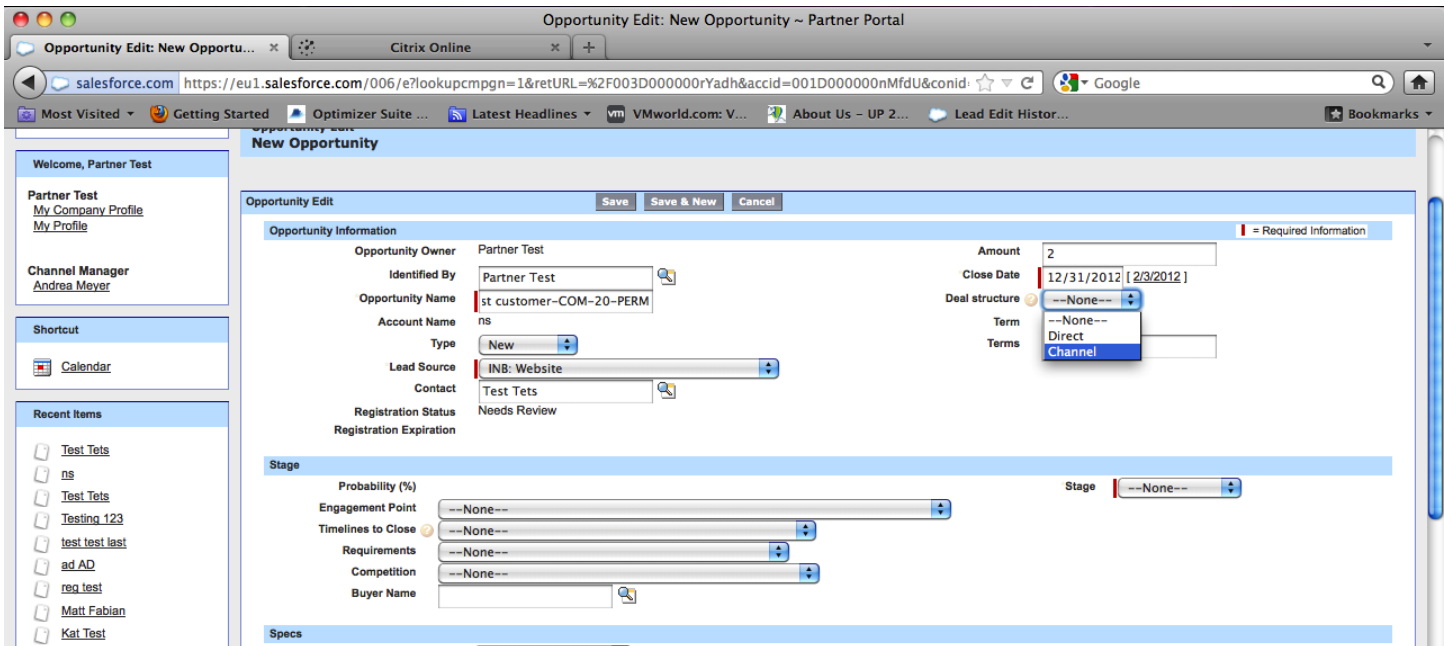
The screenshot shows the Salesforce 'Opportunity Edit: New Opportunity ~ Partner Portal' page. A 'Look up' dialog box is open, displaying a list of 'Recently Viewed Contacts'. The dialog has a search bar and 'Go!' and 'New' buttons. The contact list includes columns for Name, Account Name, Phone, Email, and Contact Owner Alias.

Name	Account Name	Phone	Email	Contact Owner Alias
Test Tets	ns	555-176-9898	thetest@emailingcenter.com	ptest
Matt Fabian	PTest Inc			ptest
Test Testing	VMTurbo	718-473-4760		ptest
cap abwesend	capabw	0897653425	cap@abwesend.de	ptest
Pat Dixon	PTest Inc			ptest
Kat Thompson	VMTurbo	718-473-4760	katrina.thompson@vmturbo.com	ptest
Andrea Meyer	VMTurbo	718-473-4760	andrea.meyer@vmturbo.com	Andrea

On the right side of the main form, the 'Stage' dropdown is set to 'None'. Below the contact list, there is a section titled 'Available' with a list of items: Planning Hardware Refresh, Planning to Add VM's, Predicting Impact of Increased VM demand, Predicting Remaining Capacity, Storage I/O & Latency Bottlenecks, CPU & Mem Bottlenecks, Historical Host Performance, and Historical Storage Performance. A 'Chosen' dropdown is also visible.

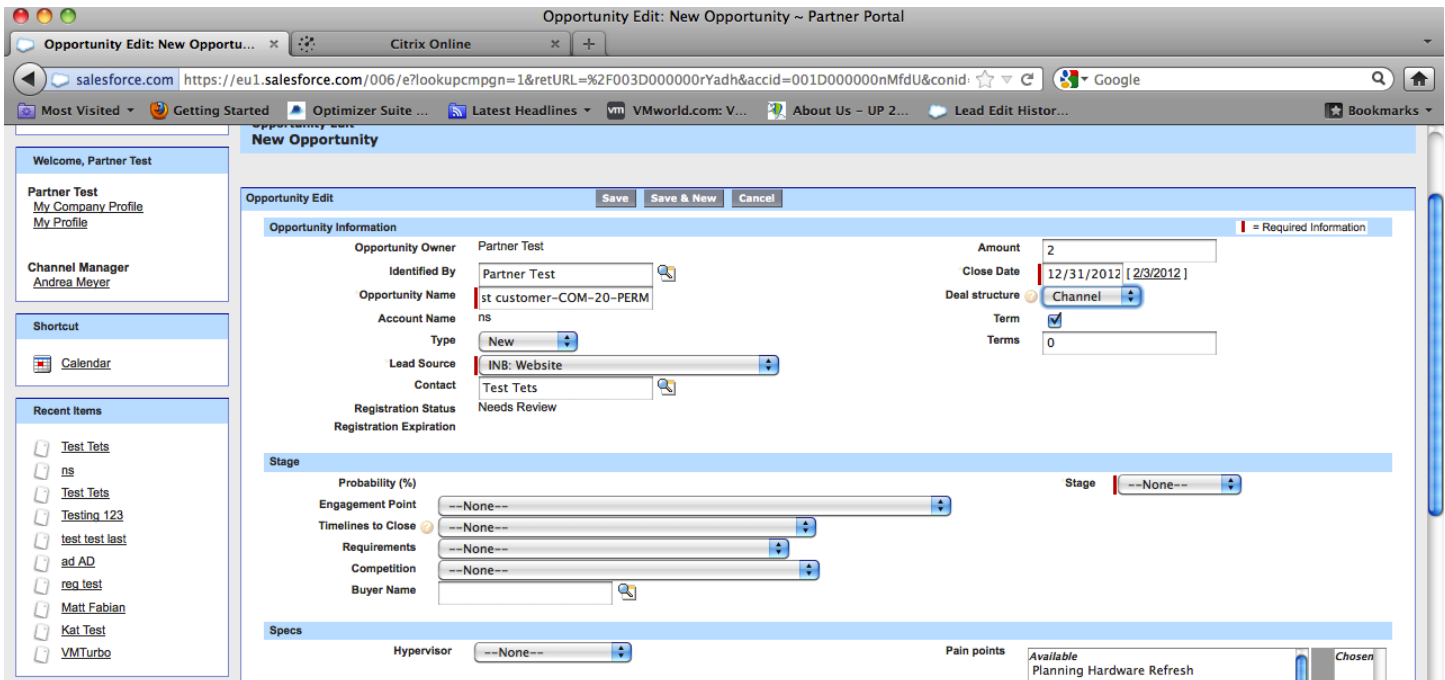
- f. Registration status shows that it "needs review"
- g. Amount
- h. Close date

i. Deal structure is always “Channel”



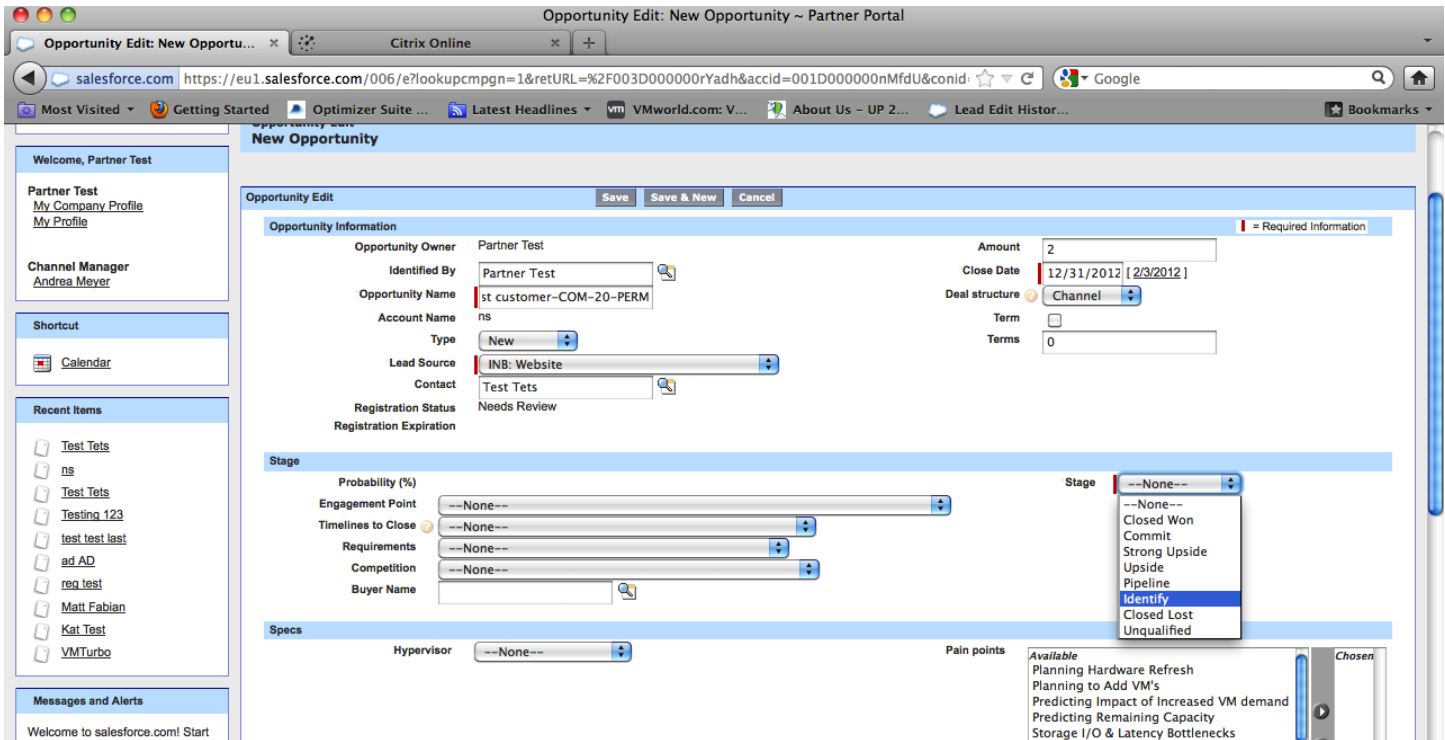
The screenshot shows the 'Opportunity Edit: New Opportunity ~ Partner Portal' interface. The 'Deal structure' dropdown menu is open, showing options: 'None', 'Direct', and 'Channel'. The 'Channel' option is selected. Other visible fields include 'Opportunity Owner' (Partner Test), 'Identified By' (Partner Test), 'Opportunity Name' (st customer-COM-20-PERM), 'Account Name' (ns), 'Type' (New), 'Lead Source' (INB: Website), 'Contact' (Test Tets), 'Registration Status' (Needs Review), 'Amount' (2), 'Close Date' (12/31/2012), 'Term' (None), and 'Terms' (Direct).

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



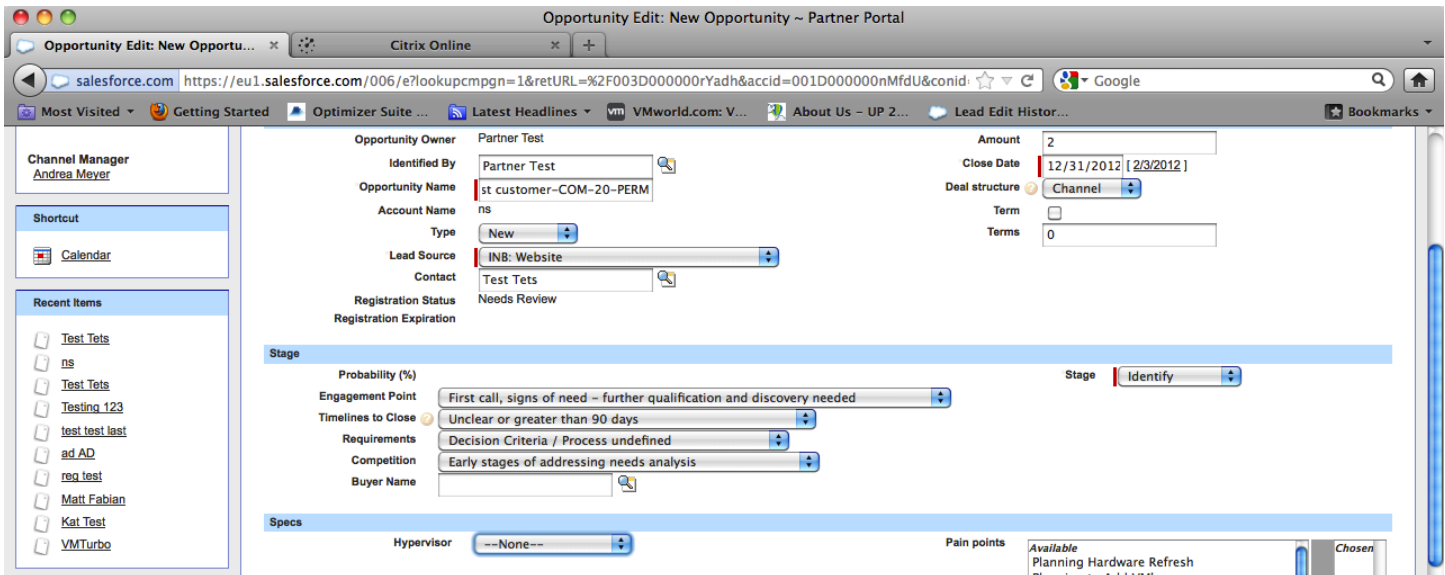
The screenshot shows the same 'Opportunity Edit' interface. The 'Deal structure' dropdown is now set to 'Channel'. The 'Term' checkbox is checked, and the 'Terms' field is set to 0. Other visible fields include 'Opportunity Owner' (Partner Test), 'Identified By' (Partner Test), 'Opportunity Name' (st customer-COM-20-PERM), 'Account Name' (ns), 'Type' (New), 'Lead Source' (INB: Website), 'Contact' (Test Tets), 'Registration Status' (Needs Review), 'Amount' (2), 'Close Date' (12/31/2012), 'Engagement Point' (None), 'Timelines to Close' (None), 'Requirements' (None), 'Competition' (None), 'Buyer Name' (None), 'Hypervisor' (None), 'Pain points' (Available), 'Planning Hardware Refresh' (Planned to Add VMs), and 'Chosen' (Chosen).

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



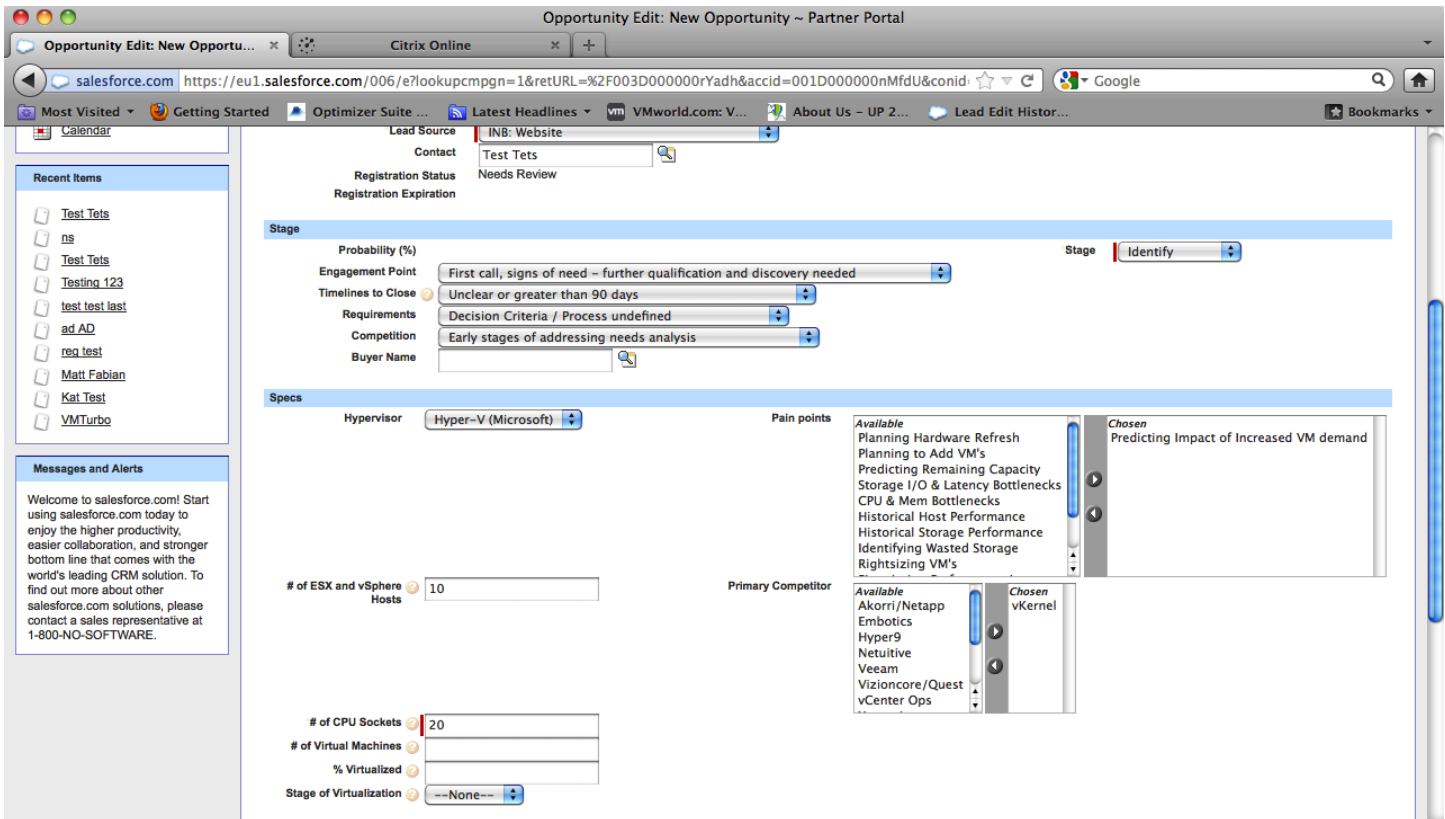
The screenshot shows the 'Opportunity Edit: New Opportunity ~ Partner Portal' interface. The 'Opportunity Information' section includes fields for Opportunity Owner (Partner Test), Identified By (Partner Test), Opportunity Name (st customer-COM-20-PERM), Account Name (ns), Type (New), Lead Source (INB: Website), Contact (Test Tets), Registration Status (Needs Review), and Registration Expiration. The 'Stage' dropdown menu is open, showing options: --None--, Closed Won, Commit, Strong Upside, Upside, Pipeline, Identify (selected), Closed Lost, and Unqualified. The 'Specs' section shows Hypervisor as --None--.

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



The screenshot shows the 'Opportunity Edit: New Opportunity ~ Partner Portal' interface with the 'Identify' stage selected. The 'Engagement Point' is filled with 'First call, signs of need – further qualification and discovery needed'. The 'Timeline to Close' is filled with 'Unclear or greater than 90 days'. The 'Requirements' are filled with 'Decision Criteria / Process undefined'. The 'Competition' is filled with 'Early stages of addressing needs analysis'. The 'Specs' section shows Hypervisor as --None--.

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



Opportunity Edit: New Opportunity ~ Partner Portal

Lead Source: IN8: Website

Contact: Test Tets

Registration Status: Needs Review

Registration Expiration:

Stage: Identify

Probability (%):

Engagement Point: First call, signs of need – further qualification and discovery needed

Timelines to Close: Unclear or greater than 90 days

Requirements: Decision Criteria / Process undefined

Competition: Early stages of addressing needs analysis

Buyer Name:

Specs

Hypervisor: Hyper-V (Microsoft)

Pain points

Available:

- Planning Hardware Refresh
- Planning to Add VM's
- Predicting Remaining Capacity
- Storage I/O & Latency Bottlenecks
- CPU & Mem Bottlenecks
- Historical Host Performance
- Historical Storage Performance
- Identifying Wasted Storage
- Rightsizing VM's

Chosen: Predicting Impact of Increased VM demand

Primary Competitor

Available:

- Akorri/Netapp
- Embotics
- Hyper9
- Netuitive
- Veeam
- Vizioncore/Quest
- vCenter Ops

Chosen: vKernel

of ESX and vSphere Hosts: 10

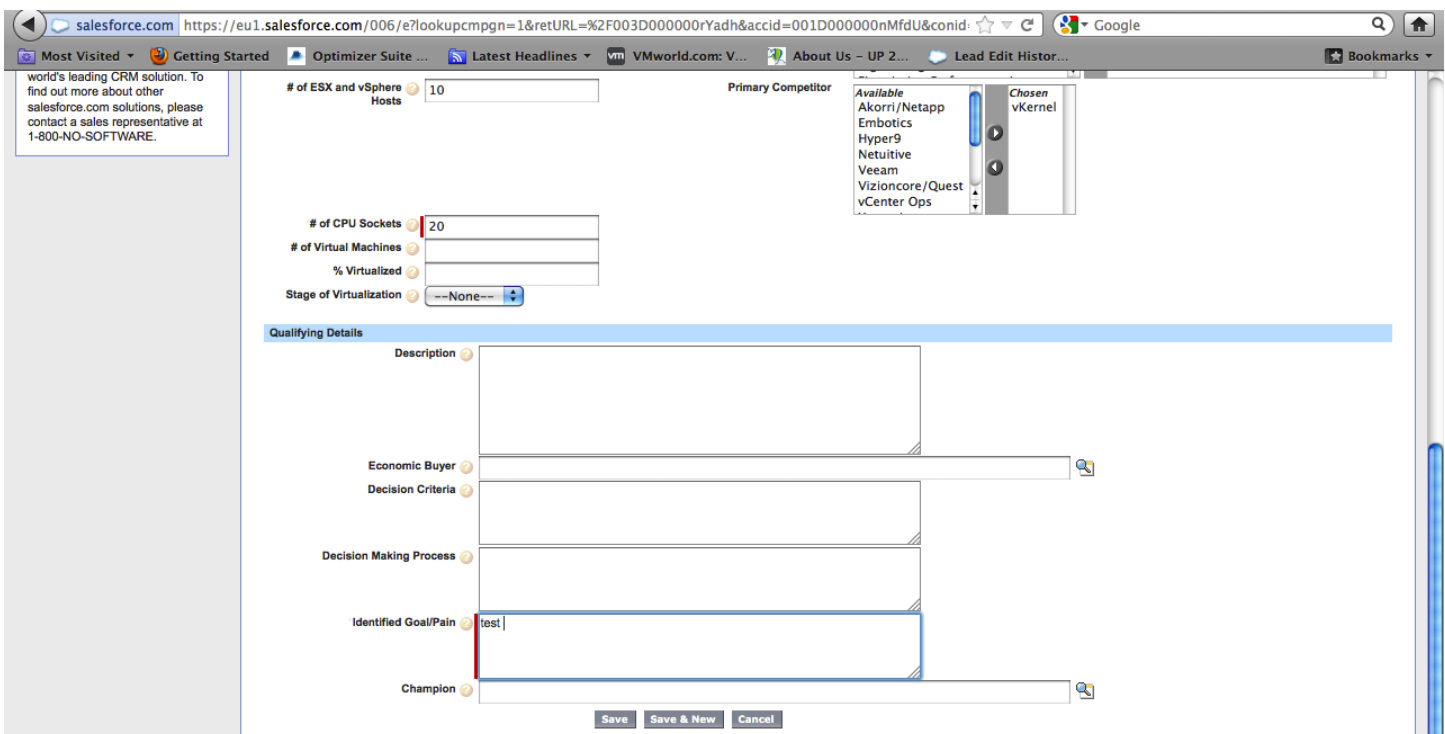
of CPU Sockets: 20

of Virtual Machines:

% Virtualized:

Stage of Virtualization: None

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



world's leading CRM solution. To find out more about other salesforce.com solutions, please contact a sales representative at 1-800-NO-SOFTWARE.

of ESX and vSphere Hosts: 10

Primary Competitor

Available:

- Akorri/Netapp
- Embotics
- Hyper9
- Netuitive
- Veeam
- Vizioncore/Quest
- vCenter Ops

Chosen: vKernel

of CPU Sockets: 20

of Virtual Machines:

% Virtualized:

Stage of Virtualization: None

Qualifying Details

Description:

Economic Buyer:

Decision Criteria:

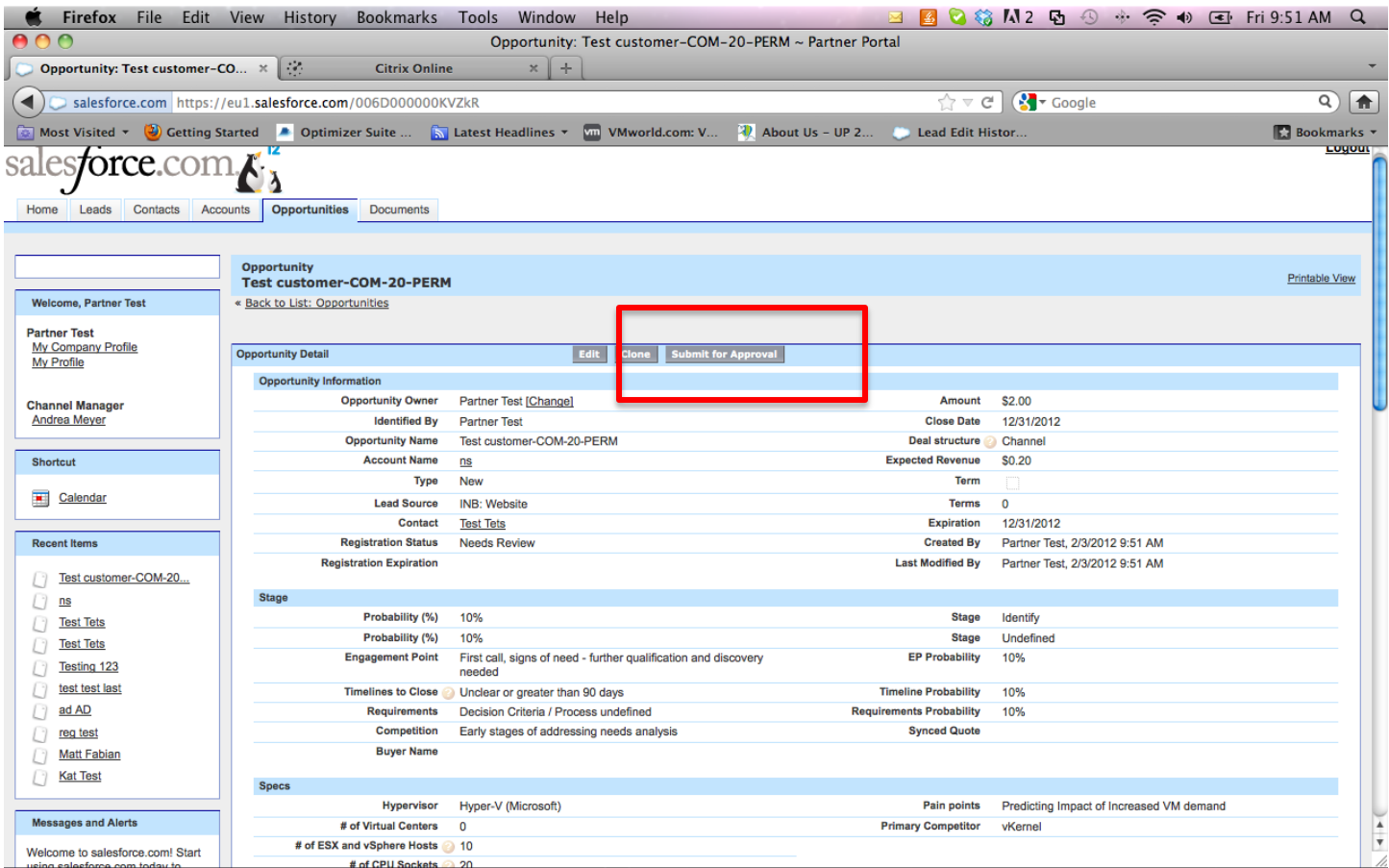
Decision Making Process:

Identified Goal/Pain: test

Champion:

Save Save & New Cancel

25) Submit for Approval



The screenshot shows the Salesforce Partner Portal interface. The browser window is titled "Opportunity: Test customer-COM-20-PERM ~ Partner Portal". The URL is "https://eu1.salesforce.com/006D000000KVZkR". The page displays the "Opportunity Detail" for "Test customer-COM-20-PERM". A red box highlights the "Submit for Approval" button in the top right corner of the "Opportunity Detail" section.

Opportunity Information

Opportunity Owner	Partner Test [Change]	Amount	\$2.00
Identified By	Partner Test	Close Date	12/31/2012
Opportunity Name	Test customer-COM-20-PERM	Deal structure	Channel
Account Name	ns	Expected Revenue	\$0.20
Type	New	Term	
Lead Source	INB: Website	Terms	0
Contact	Test Tets	Expiration	12/31/2012
Registration Status	Needs Review	Created By	Partner Test, 2/3/2012 9:51 AM
Registration Expiration		Last Modified By	Partner Test, 2/3/2012 9:51 AM

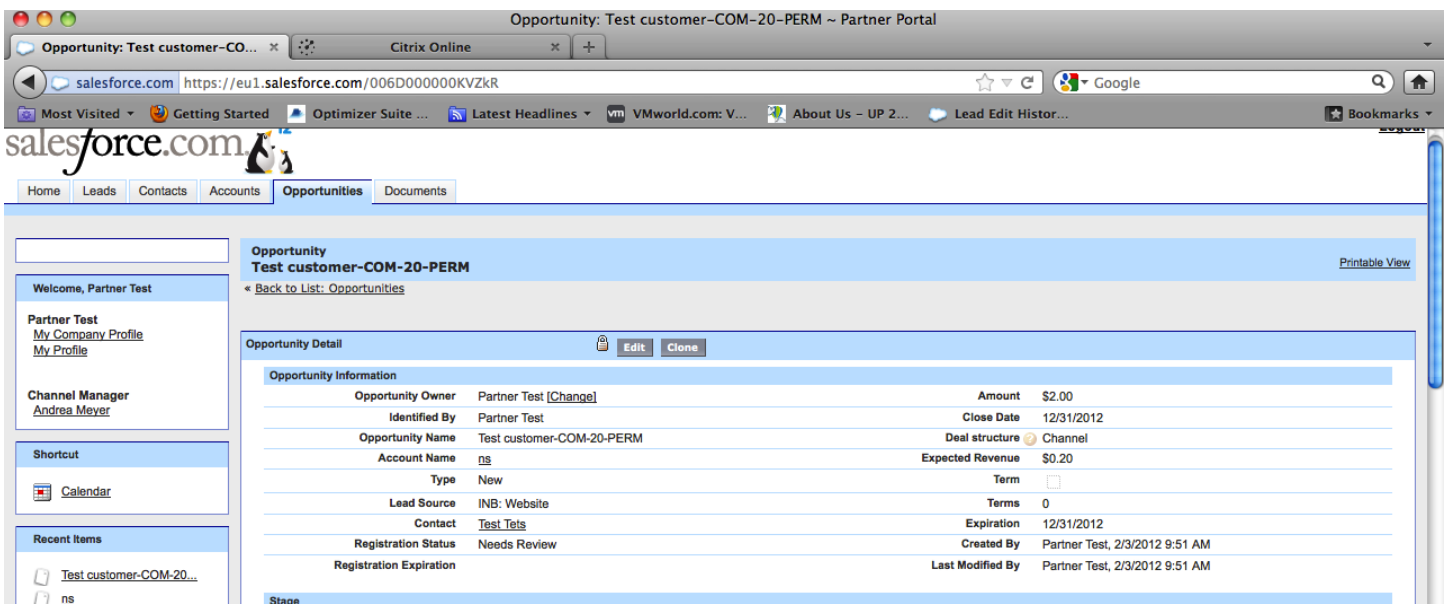
Stage

Probability (%)	10%	Stage	Identify
Probability (%)	10%	Stage	Undefined
Engagement Point	First call, signs of need - further qualification and discovery needed	EP Probability	10%
Timelines to Close	Unclear or greater than 90 days	Timeline Probability	10%
Requirements	Decision Criteria / Process undefined	Requirements Probability	10%
Competition	Early stages of addressing needs analysis	Synced Quote	
Buyer Name			

Specs

Hypervisor	Hyper-V (Microsoft)	Pain points	Predicting Impact of Increased VM demand
# of Virtual Centers	0	Primary Competitor	vKernel
# of ESX and vSphere Hosts	10		
# of CPU Sockets	20		

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



The screenshot shows the Salesforce Partner Portal interface. The browser window is titled "Opportunity: Test customer-COM-20-PERM ~ Partner Portal". The URL is "https://eu1.salesforce.com/006D000000KVZkR". The page displays the "Opportunity Detail" for "Test customer-COM-20-PERM". The "Submit for Approval" button is no longer visible, and the "Edit" and "Clone" buttons are disabled, indicating the opportunity is locked for editing.

Opportunity Information

Opportunity Owner	Partner Test [Change]	Amount	\$2.00
Identified By	Partner Test	Close Date	12/31/2012
Opportunity Name	Test customer-COM-20-PERM	Deal structure	Channel
Account Name	ns	Expected Revenue	\$0.20
Type	New	Term	
Lead Source	INB: Website	Terms	0
Contact	Test Tets	Expiration	12/31/2012
Registration Status	Needs Review	Created By	Partner Test, 2/3/2012 9:51 AM
Registration Expiration		Last Modified By	Partner Test, 2/3/2012 9:51 AM

Stage

Probability (%)	10%	Stage	Identify
Probability (%)	10%	Stage	Undefined
Engagement Point	First call, signs of need - further qualification and discovery needed	EP Probability	10%
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Specs

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# of Virtual Centers	0	Primary Competitor	vKernel
# of ESX and vSphere Hosts	10		
# of CPU Sockets	20		

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.

Opportunity: Test customer-COM-20-PERM ~ Partner Portal

Opportunity: Test customer-CO... Citrix Online

salesforce.com https://eu1.salesforce.com/006D0000000KVZkR

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Edit Clone

Open Activities New Task

No records to display

Activity History Log A Call

No records to display

Contact Roles New

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	Test Tets	ns	thetest@emalingcenter.com	555-176-9898		✓

Notes & Attachments New Note Attach File

No records to display

Stage History

Stage	Amount	Probability (%)	Close Date	Last Modified	Connection
Identify	\$2.00	10%	12/31/2012	Partner Test, 2/3/2012 9:51 AM	

Approval History

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Opp Registration (Pending for first approval)	2/3/2012 9:57 AM	Pending	Bernie Hannon	Bernie Hannon		Pending
	2/3/2012 9:57 AM	Pending	Tom Subatis	Tom Subatis		
Approval Request Submitted	2/3/2012 9:57 AM	Submitted	Partner Test	Partner Test		

Always show me more records per related list

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