PRMDeals

SIMPLY MANAGE PARTNERS

Administrator User Manual

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Copyright Information

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Introduction

Welcome to PRMDeals! The PRMDeals system enables any organization to begin leveraging their existing network or customers, partners, referrals and others to generate highly qualified deals which can be turned into closed business quickly and efficiently.

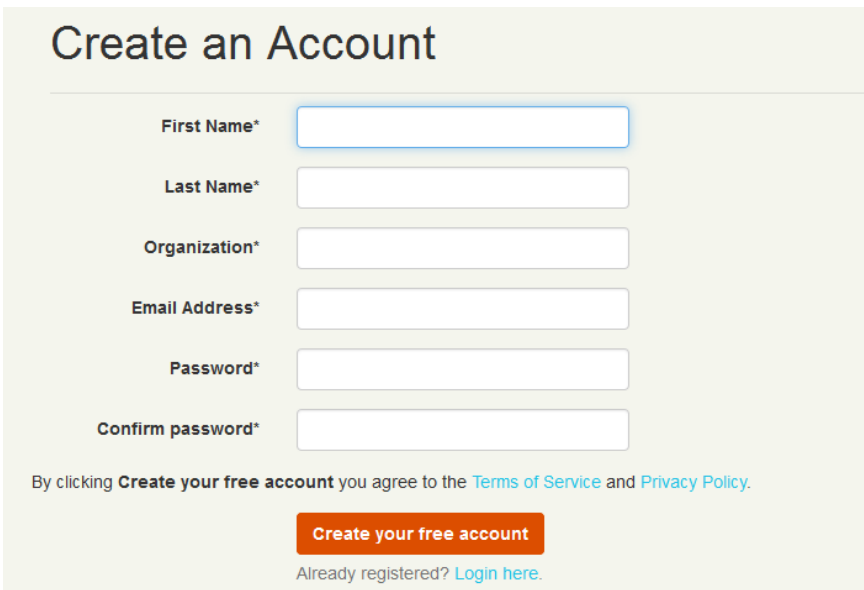
We have poured a lot of user interaction experience gathered over a decade of developing systems for E-Learning, Training, Recurring Billing and Subscription Management and Vacation Tracking and Leaves of Absence Management. PRMDeals is simply a complete, smart and fun way to organize and streamline deal registration, processing and optimizing to generate increased revenues.

From our super simple registration, to accessing your account Dashboard, PRMDeals provides a secure and encrypted environment for you to manage all partners, users, deals, and marketing documents. When you first login, you will be presented with an intuitive interface for setting up your organization specific parameters.

The purpose of this document is to provide you with complete, detailed instructions on setting up and working with your PRMDeals account so that you can make the most of the application's powerful functionality.

Registering Your Account

Access to PRMDeals requires that you register for an account by visiting https://prmdeals.com/register/ and filling out the **Registration** form, illustrated below, that is located at the [Register Free] or [Sign up Free] links. Follow the steps below to successfully complete the **Registration** form.



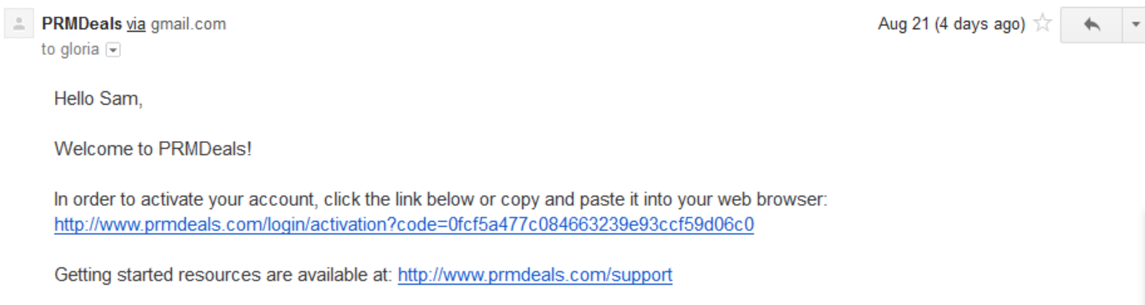
On the Registration form page:

1. Enter your First Name in the **First Name** text field. **This is a required entry.**
2. Enter your Last Name in the **Last Name** text field. **This is a required entry.**
3. Enter your Organization in the **Your Organization** text field. **This is a required entry**.
4. Enter your Email Address in the **Your Email** text field. **This is a required entry**.
5. Enter and confirm the password that you would like to use when accessing the system in the **Password** text field. **This is a required entry**.
6. Click 

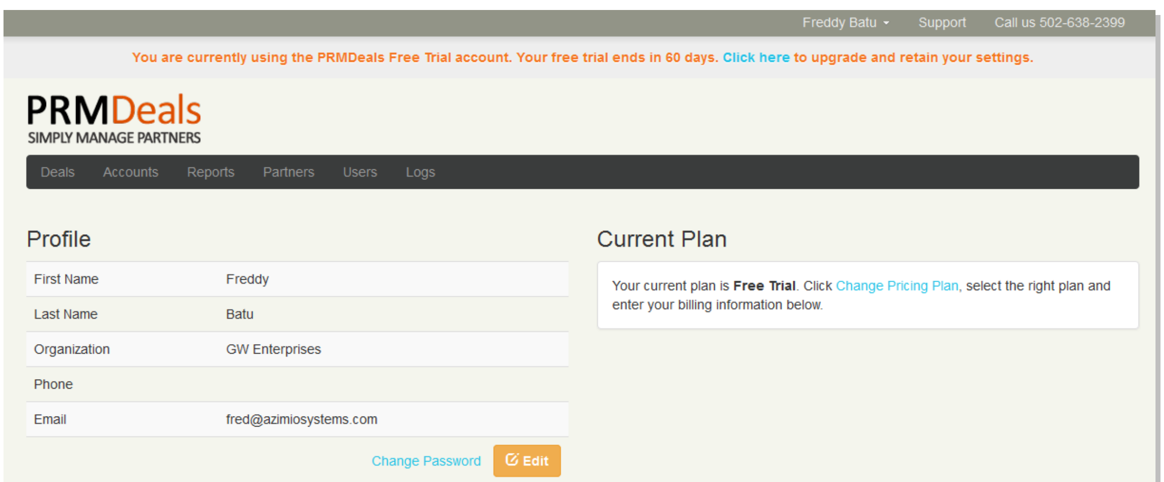
 to submit your Registration form.

Logging into the System

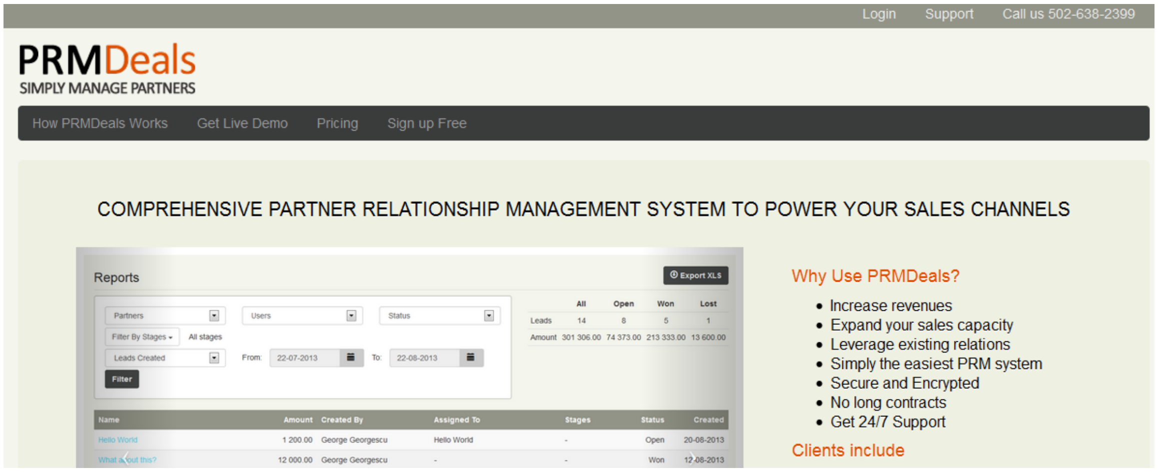
Upon successful completion of the **Registration** form, you will need to confirm your registration in order to gain access to the PRMDeals system. Check your email for further instructions on how to confirm your account.



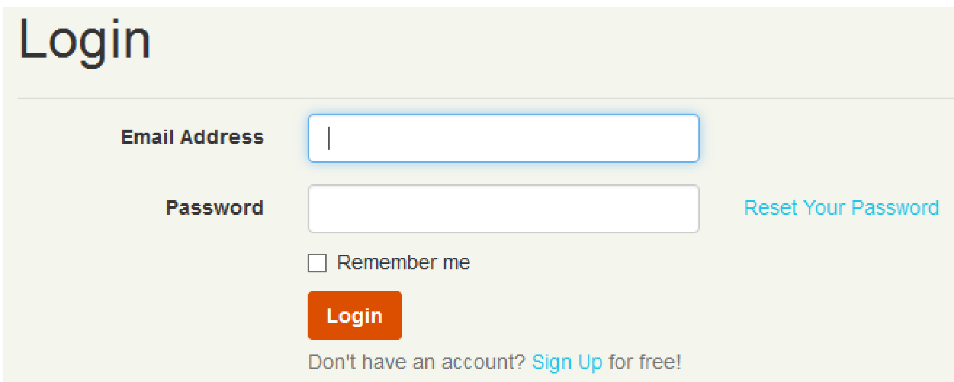
Once you confirm your account by clicking on the link provided in your email, you will automatically be logged into PRMDeals.



Subsequent logins can be done from the home or login page of PRMDeals.com



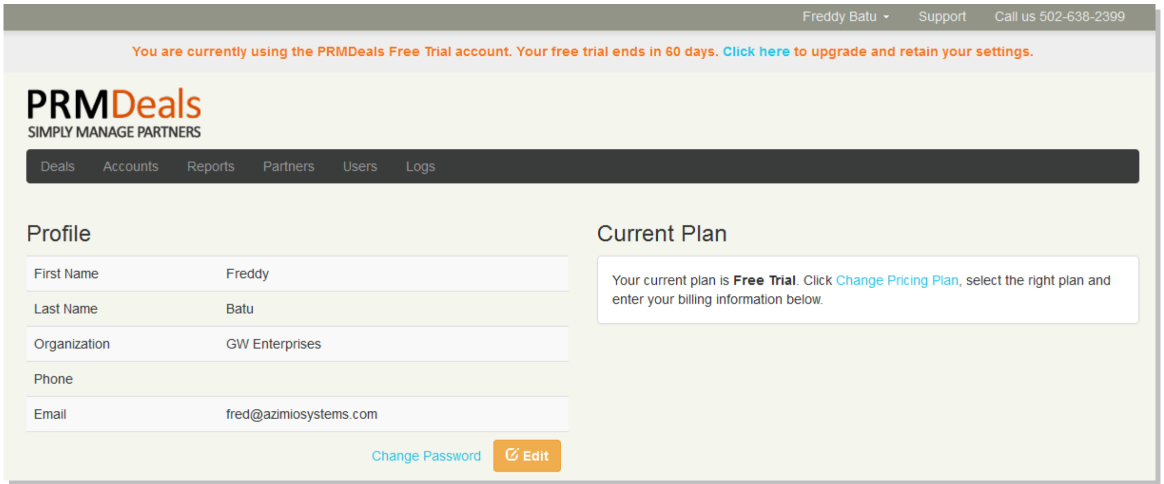
Follow the steps below to successfully log in to PRMDeals.



1. Enter the Email Address that you used when completing the **Registration** form in the **Email** text field.
2. Enter the Password that you chose when completing the **Registration** form in the **Password** text field.

Click the **Login** button to login to PRMDeals.

When you first log into PRMDeals, you will be taken to your **Profile** tab.



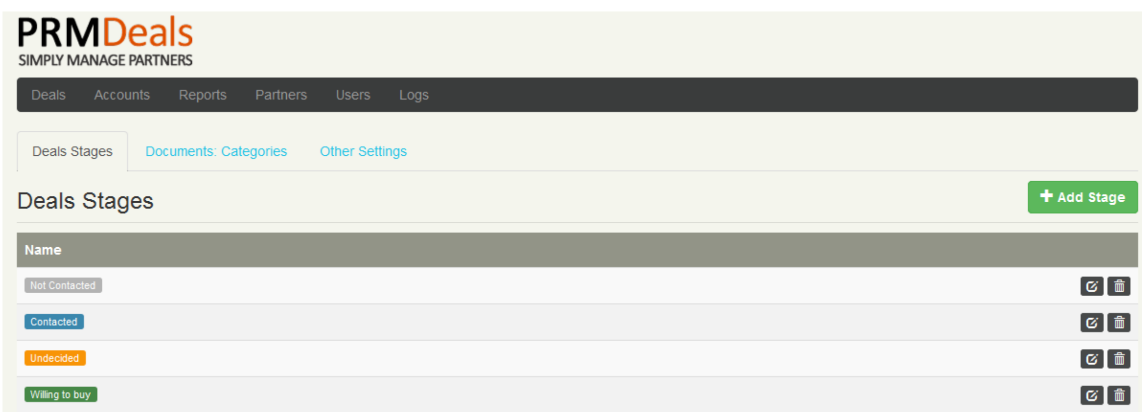
From your **Profile** page, you can edit your **Profile** or change your **Current Plan**.

You can use your account dropdown menu to access your [**Settings**] and [**Documents**] tabs.

Settings

Deals Stages Settings

Selecting the **Settings** option from your account dropdown menu displays the Deals Stages settings.

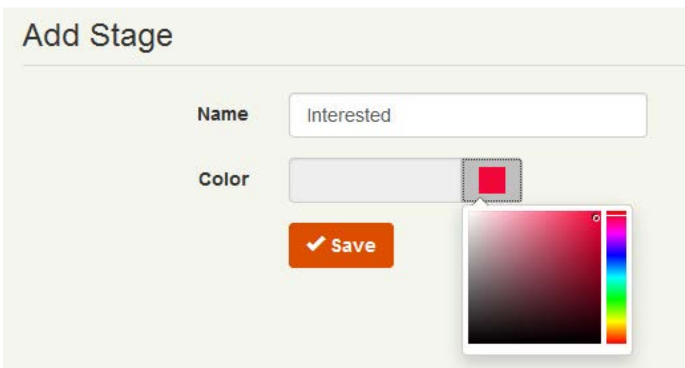


Deals Stages are the various options you can use to tag your deals. Think about stages as the various contact points and dispositions you and your sales team will categorize a deal under. For example, has the deal been contacted or not? Has the deal decided on whether they wish to buy or not? Is the deal undecided at this time? Use Deal Stages to make designations that will help your sales organization improve the management of your deals and chances of taking a deal all the way from brand new to closed, won.

Add Stage

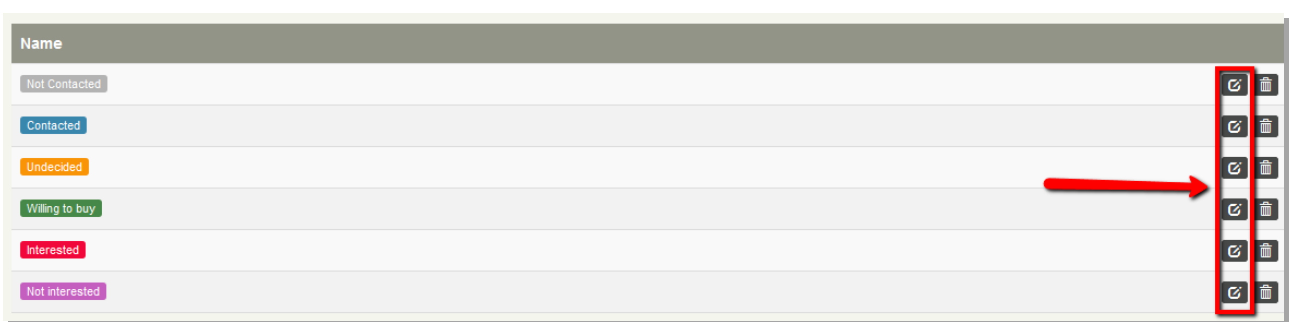
To add a new stage to your deals, click

1. Add the name of the new stage i.e. 'Interested
2. Select a color for this new stage, i.e. 'red'
3. Click to continue

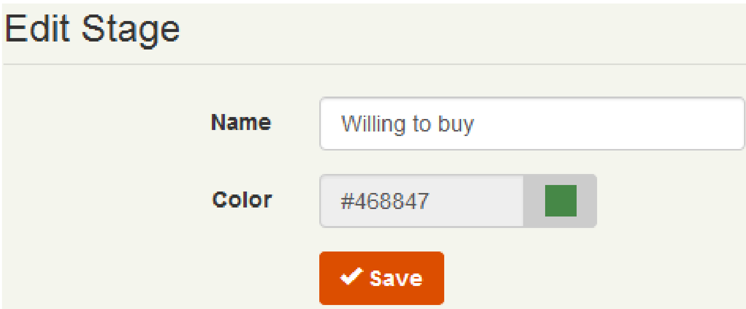


Edit Deals Stage

To edit an existing Deals Stage, click the [edit] icon next to the Deal stage

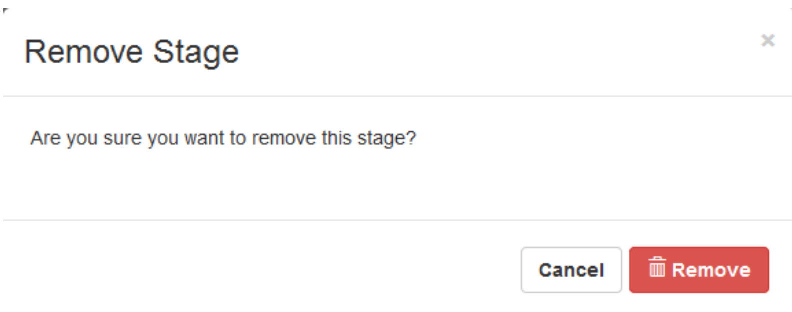


Once you finish editing the Deals Stage, click Save to continue



Delete Deal Stage

To delete a Deals Stage, click the [delete] icon next to the particular stage. Confirm deletion or removal by clicking the Remove button.



You can click [Cancel] to return to the Deal Stages page.

Note

Take the time to set up your Deals Stages. In our experience, the payoff will be great. With properly formatted Deal Stages, you and your team can easily sort, filter, search and categorize deals.

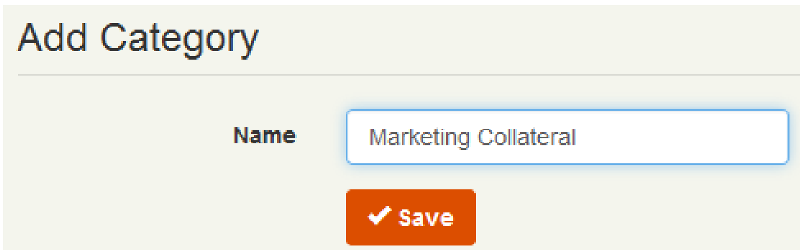
Documents Categories Settings

PRMDeals provides a powerful Documents management system so that you can easily share marketing and sales documents and collateral with your team and partners. Using categorization can help your organization easily access the right documents to improve results.

Click on the Documents: Categories menu to launch this tool kit.

Add Category

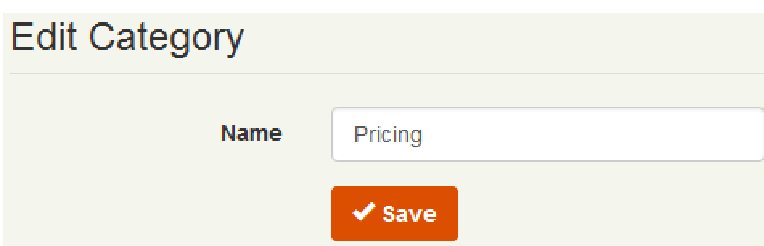
1. To add new categories, click the **+ Add Category** button.
2. Add the category name and click [Save] to add a new category



Edit Document Categories

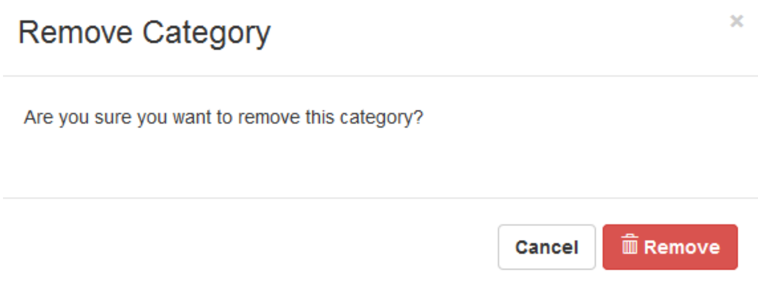
To edit an existing Documents Categories, click the [edit] icon next to the Category

Once you finish editing the Documents Category, click **Save** to continue



Delete Document Category

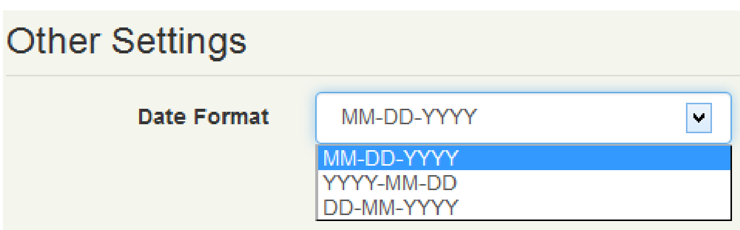
To delete a Documents Category, click the [delete] icon next to the particular category. Confirm deletion or removal by clicking the Remove button.



You can click [Cancel] to return to the Documents Categories page.

Other Settings

Click the Other Settings button to access the date format settings. Regardless of your location around the world, you can use PRMDeals. Simply select the date format that suits your needs.

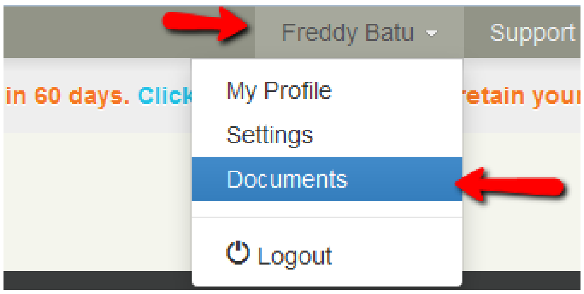


Once selected, click ✔ Save to continue.

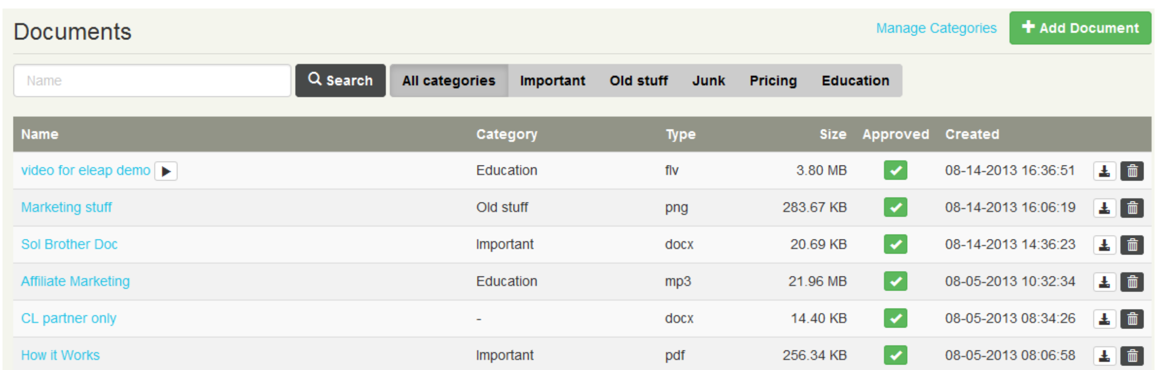
Documents

Knowledge is power. Give your entire team the tools they need to succeed. PRMDeals is designed specifically with this mission in mind. With PRMDeals, you are able to upload documents in any format you want and provide general or granular access as your needs dictate.

To access your Documents area, click the account dropdown menu, and select Documents menu item.



Documents Dashboard



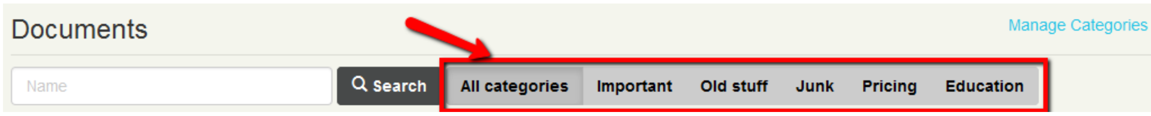
Name	Category	Type	Size	Approved	Created
video for eleap demo	Education	flv	3.80 MB	✓	08-14-2013 16:36:51
Marketing stuff	Old stuff	png	283.67 KB	✓	08-14-2013 16:06:19
Sol Brother Doc	Important	docx	20.69 KB	✓	08-14-2013 14:36:23
Affiliate Marketing	Education	mp3	21.96 MB	✓	08-05-2013 10:32:34
CL partner only	-	docx	14.40 KB	✓	08-05-2013 08:34:26
How it Works	Important	pdf	256.34 KB	✓	08-05-2013 08:06:58

Your Documents dashboard is organized by Document Name, Category, Type, Size, Approval status, Date Created as well as [Download] and [Delete] options.

Documents Categories

We already discussed the Documents Categories feature which enables organizations to organize large amounts of sales and other documents available in their PRMDeals account. You can manage the Documents Categories by clicking on the Manage Categories tab.

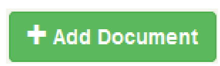
You can click on the dynamically generated *Categories* tabs to view documents listed under each specific category. For example

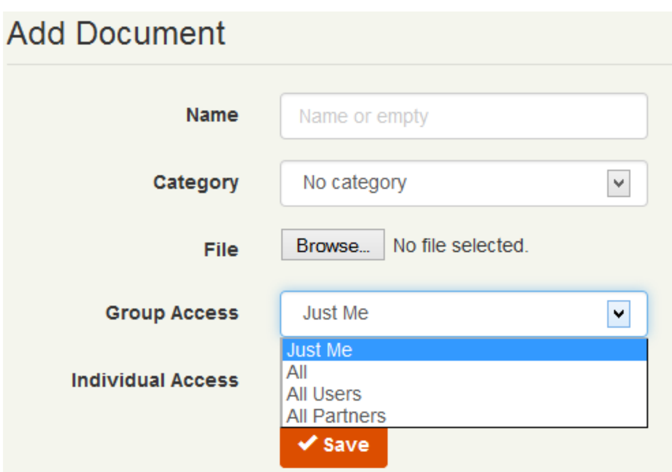


Documents Search

You can search for specific documents using the search feature available in PRMDeals. Simply input the search term and click the search icon. See an example:

Add Document

To add a new document to your collection, click  button.

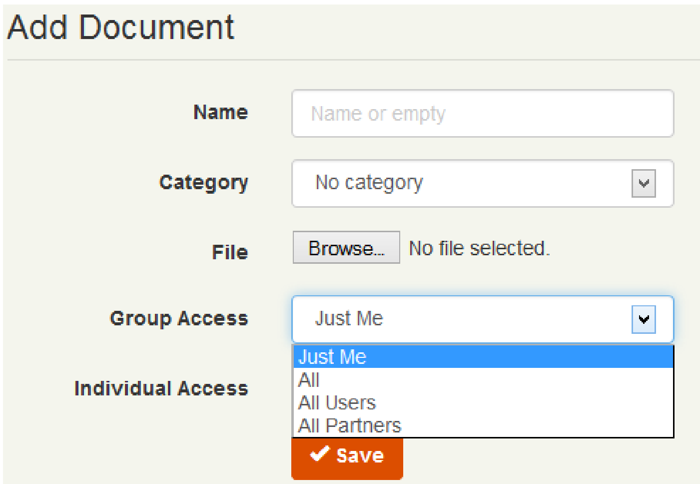


1. Enter the Document Name
2. Select a Document Category

3. Click 

to select your document to be added

4. Choose the type of **Group Access** rules you wish to deploy for this document;



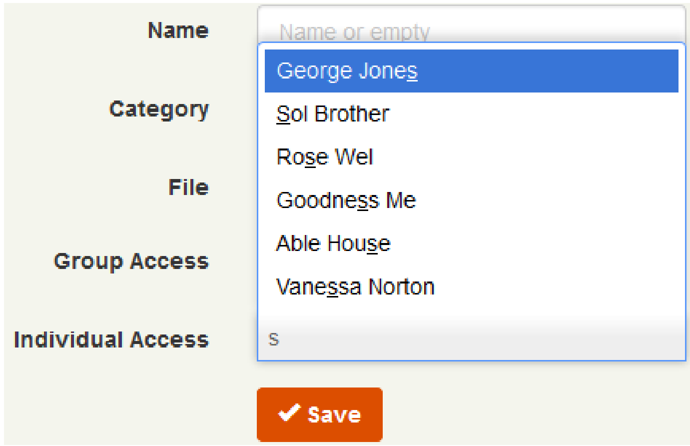
   a. Just Me: Only you as Admin gets to access this document

   b. All: All users and partners on your PRMDeals account can access this document

   c. All Users: Only users set up on your PRMDeals account will have access to this document

   d. All Partners: Only partners set up on your PRMDeals account will have access to this document.

5. **Individual Access** rules enable you to set who in your organization can access this document. You can start typing a user or partner's name and PRMDeals will automatically display all possible matches. Select the user or partner you wish to add to this document.



Document Approval

Once a document is added either by you as Admin or by Partners or Users, the document needs to be approved before it becomes available for viewing. This is a fail-safe feature to prevent accidental document distribution.

To approve a document, click the icon. The approved document will show status.

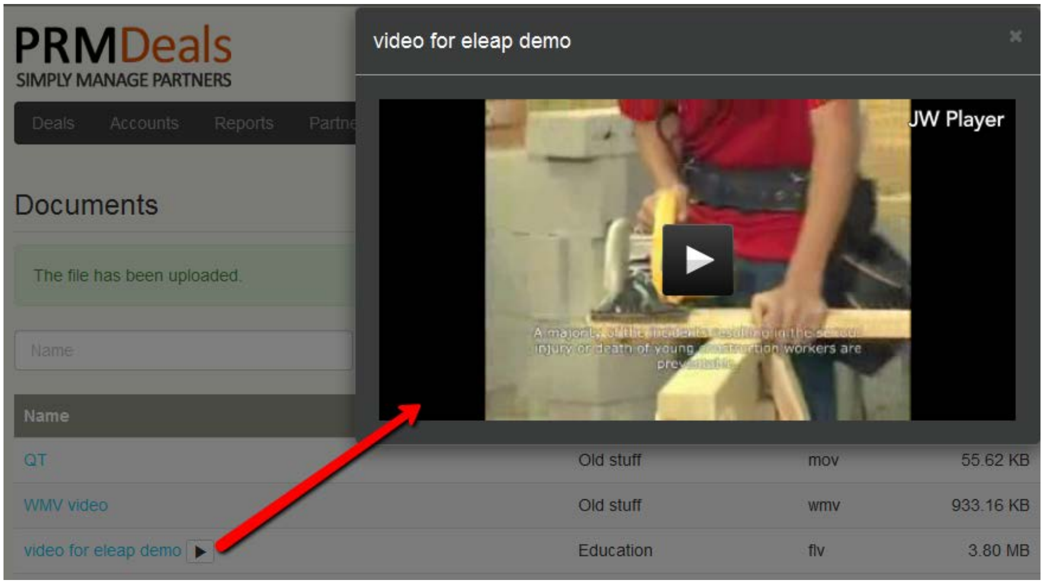
Edit Document

To edit a document click the document name. You can then edit all aspects of the document and click Save to continue.

Name	Category
video for eleap demo	Education
Marketing stuff	Old stuff
Sol Brother Doc	Important

Video Files

If you have embeddable video files like Flash or FLV, PRMDeals will display your videos in the browser without the need to download first and then play. For example



Download Files

Downloading Document files is easy. Simply click on the download icon to begin the process.

Document Logs

To ensure complete accountability, we have designed PRMDeals to log activity reports on your account. The Documents Logs area enables you to review the changes that occurred in your Documents center.

Click on the logs icon Logs 22 to see details of Documents logs

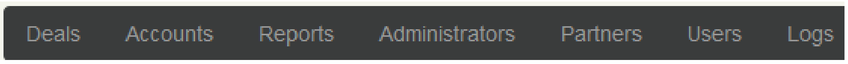
Logs 22

08-25-2013 21:30	Don Weobong	QT (id: 18)	The document QT was uploaded.
08-25-2013 21:28	Don Weobong	WMV video (id: 17)	The document WMV video was uploaded.
08-25-2013 21:20	Don Weobong	demo.docx (id: 2)	The document demo.docx was approved.
08-19-2013 16:02	Don Weobong	How it Works (id: 3)	The document How it Works was approved.
08-19-2013 16:02	Don Weobong	CL partner only (id: 5)	The document CL partner only was approved.
08-19-2013 16:02	Don Weobong	CL partner only (id: 5)	The document CL partner only group access was changed from Just Me to All.

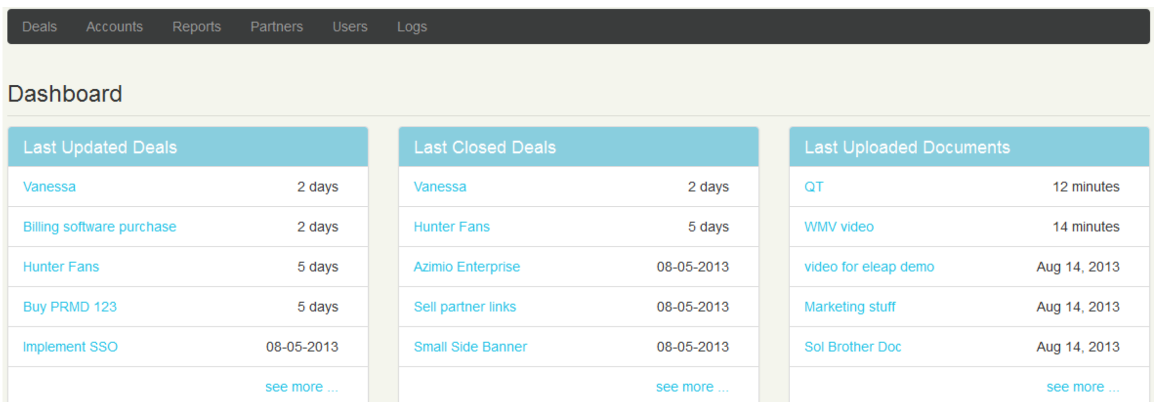
PRMDeals Dashboard

Your PRMDeals dashboard contains a quick overview of your account. At a glance you can see information for *Last Updated Deals, Last Closed Deals, Last Uploaded Documents*

You can also click on the main menu tabs:

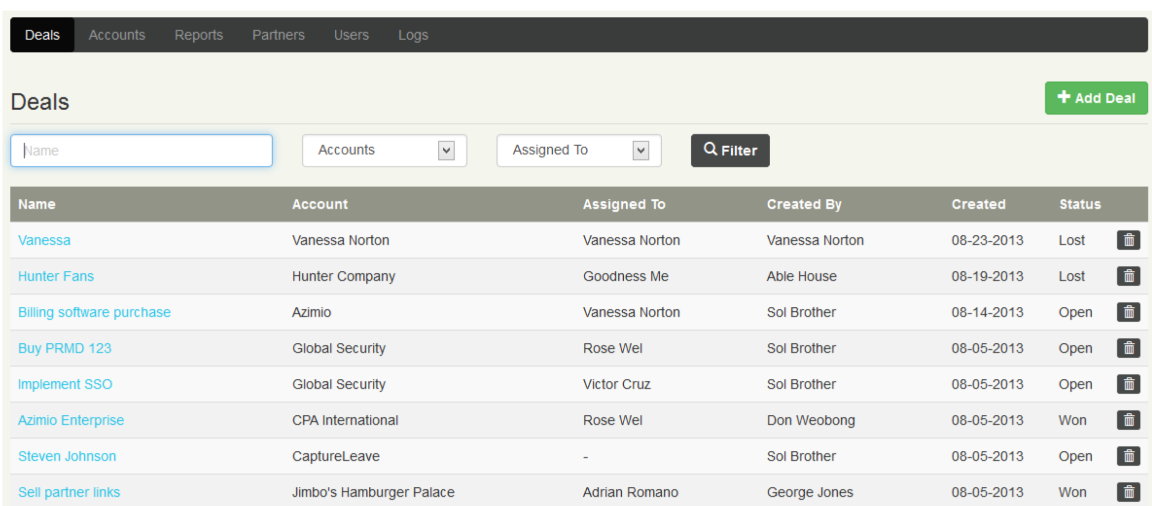


to access those areas.



Deals

The Deals area is the nerve center of the PRMDeals system.

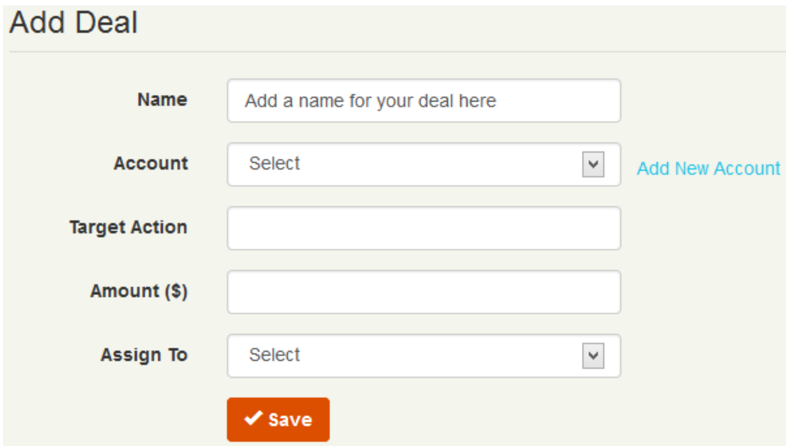


You can easily search through submitted or listed deals, click on a deal to get more details, filter deals according to Accounts or Assigned To Users and of course Add new Deals.

Add Deal

To add a new deal, click 

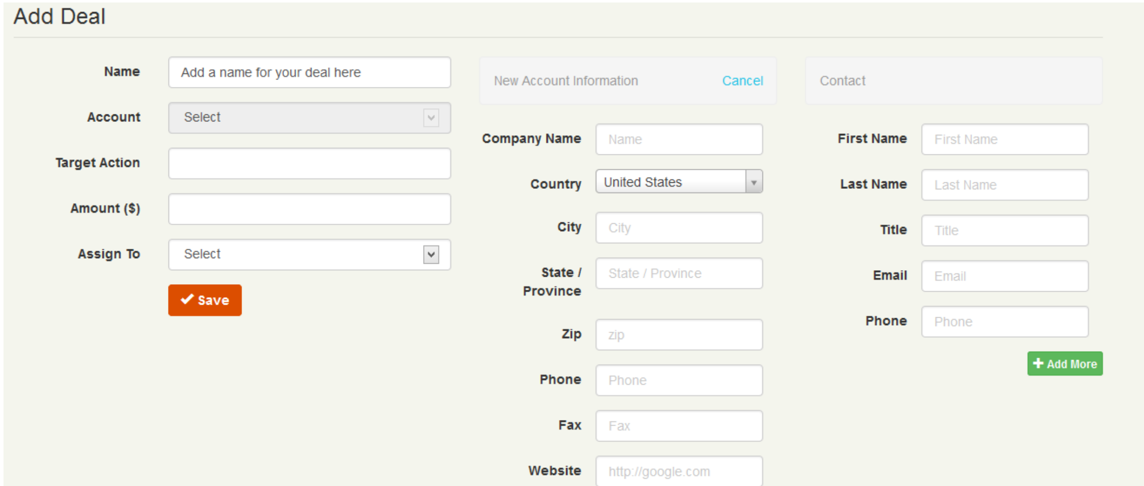
.



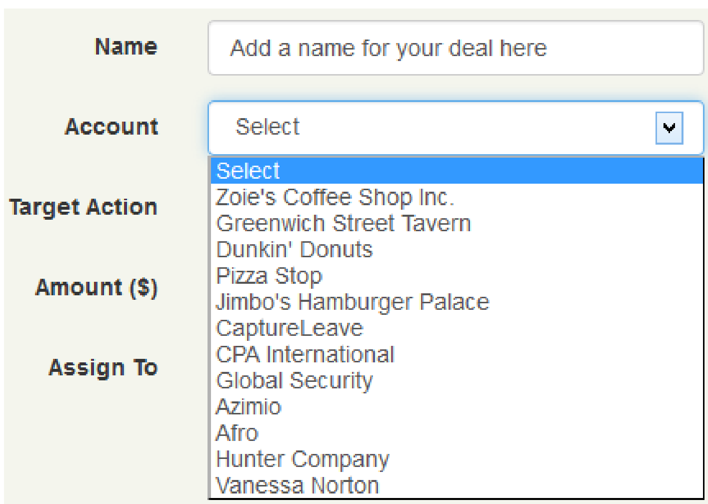
Next:

1. Add a name for your new deal. A deal name can be something like 'New Software Package Purchase'

2. Select from an existing account to add or click [**Add New Account**] to create a new Account. We will discuss Accounts in greater detail in the Accounts section. However if you are submitting a new deal to a new account, it is important to complete the New account part of the form before [**Saving**] your new deal. An account consists of an Account Organization and at least one an Account Contact – both of which are required.



a. If you do have existing accounts already established and wish to add this new deal to an existing **Account**, simply select the existing account from the drop down menu.



3. Set the **Target Action**. This is an important piece of the new deal submission process. The Target Action will enable your sales team to quickly categorize this incoming deal. For example a Target Action which says 'Contact to close by end of the quarter' certainly gives critical time horizon information to your sales organization.

4. The next piece is the estimated deal **Amount**. This is another one of those important pieces of information which can help your sales staff properly

prioritize incoming leads. Having said the above, this field is not required to submit a new deal.

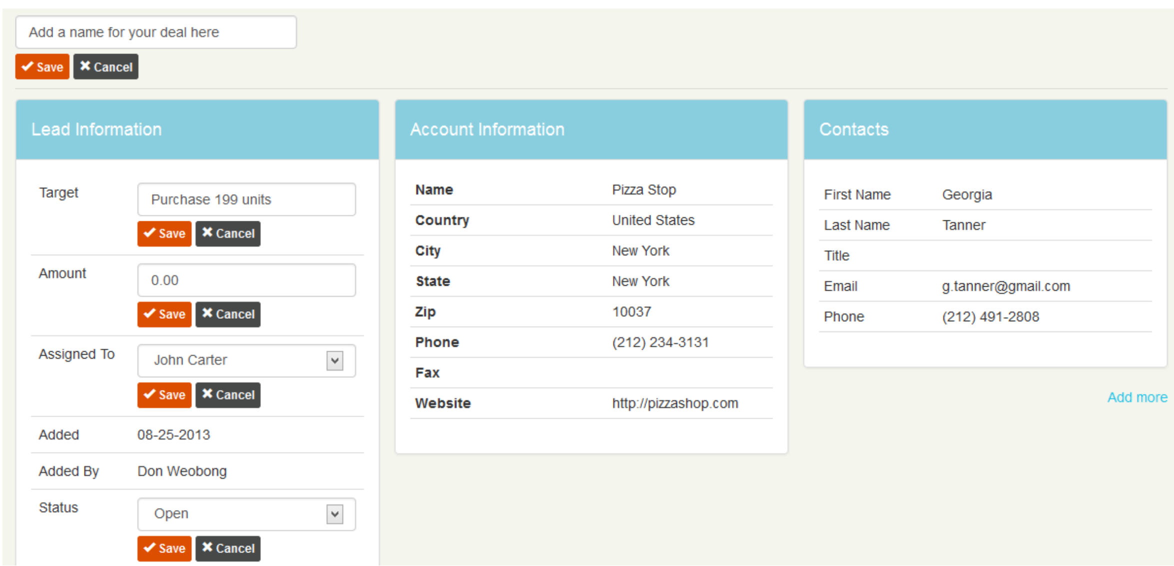
5. **Assigned To** enables you the Admin to assign a submitted deal to your sales staff. Click [Select] to assign this deal to any of your users. If you are submitting your deals online, you can certainly select which in your team this lead should go to using the [Assigned To] tool.

6. Click ✔ Save to continue.

Edit a Deal

To edit an existing deal, click on the name of the deal in your Deal listings.

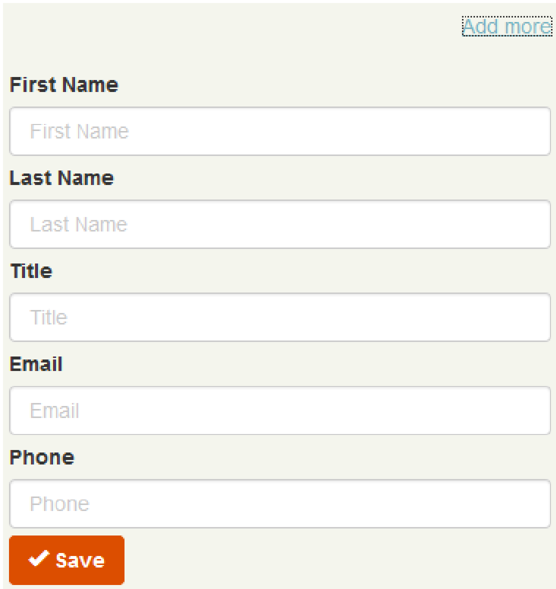
Next, put your cursor over the Deal Name, Target Action, Amount, Assigned To, or Status and click on the edit icon to edit.



Adding More Contacts

If your new deal has multiple contacts, you can add as many additional contacts as you like. Simply click on the [Add more] link to add more contacts. The required fields are First and Last Name and email or phone.

Click ✔ Save to continue.



Deal Stage

You can select from the available Deal Stages to add to this Deal's profile. For example if deal has not been contacted, you can click on the Not Contacted stage. You can add as many stages as are applicable.

Note

The **Available** Deal **Stages** are set by the Administrator. Make sure to update the deals stages in your Admin profile so your users can take advantage of this powerful.

Deal Notes

Enter notes pertaining to this deal. This is a powerful feature which enables you to take notes during phone calls and other follow up efforts. Click Add Note to begin adding notes to this deal. Click ✔ Save to continue.

View Notes

To view Notes pertaining to your deals, click the [Notes] section.

Notes 1 Add Note

08-25-2013 23:06	Don Weobong	Started calling program for this lead.

Deal Logs

To see a record of the changes that occur in regards to your deal, click on the Logs 2 option to get more details like:

Logs 4

08-26-2013 14:52	Don Weobong	The amount was changed from 35 000.00 to 35 800.00.
08-26-2013 14:51	Victor Cruz	Note was added.
08-26-2013 14:50	Victor Cruz	Stage Willing to buy was added.
08-26-2013 14:50	Victor Cruz	Stage Rejected was removed.

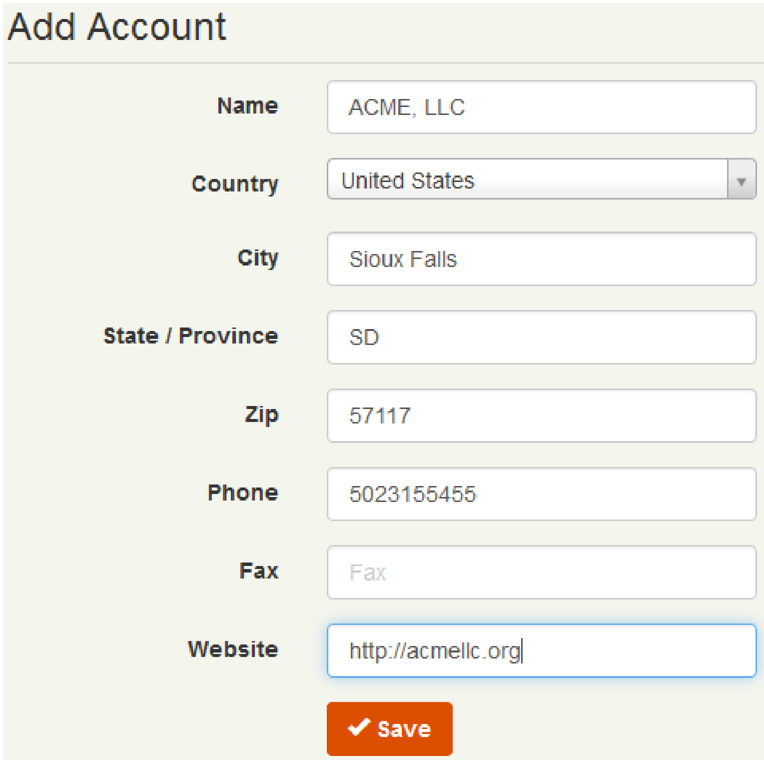
This complete transparency enables our clients and their teams to have complete confidence in the PRMDeals system.

Accounts

Accounts are companies or organizations that are associated with Deals. The Account represents the organization that will purchase or close the deal. Once Accounts are created, they can continue to be used for new deals to be created.

To add an account, click the **+ Add Account** button.

The only required fields needed to create an account are the Name and Phone fields.



Edit Account

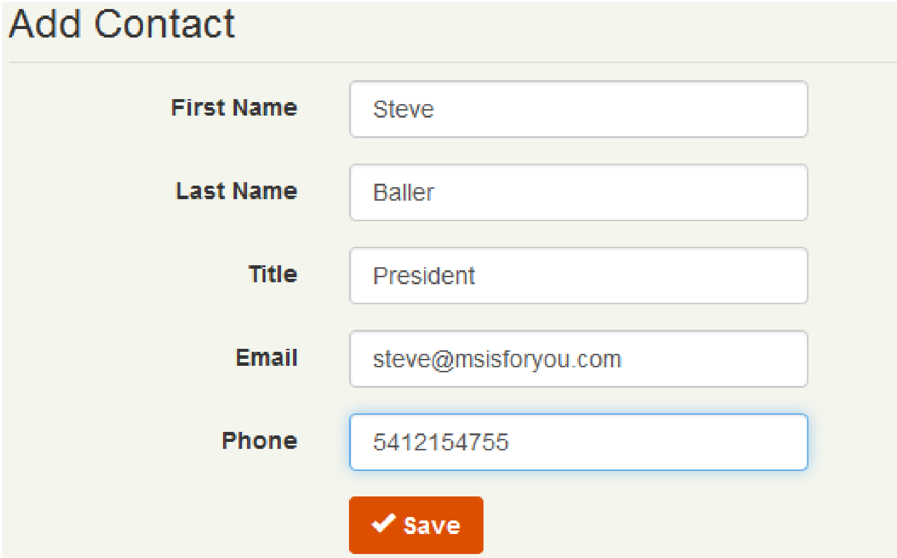
To edit an existing account, click on the name of the account and then select .

Make the necessary changes and click  to continue.

Account Contacts

Each account needs to have a contact or contacts associated with it. Contacts are the actual people you will need to call or otherwise connect with to move the deal forward.

To add a new contact to an account, click . Contacts require at least First Name, Last Name and email or phone fields.

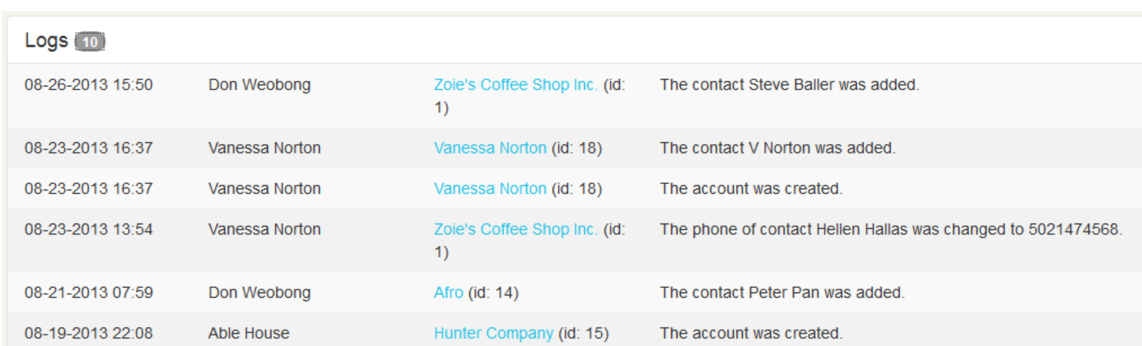


You can also click to edit specific contacts or to delete the contact.

To quickly add a contact from the Accounts page, click the icon.

Accounts Logs

To access the logs for your Accounts, click the Logs 2 option to see details like



Logs 10

08-26-2013 15:50	Don Weobong	Zoie's Coffee Shop Inc. (id: 1)	The contact Steve Baller was added.
08-23-2013 16:37	Vanessa Norton	Vanessa Norton (id: 18)	The contact V Norton was added.
08-23-2013 16:37	Vanessa Norton	Vanessa Norton (id: 18)	The account was created.
08-23-2013 13:54	Vanessa Norton	Zoie's Coffee Shop Inc. (id: 1)	The phone of contact Hellen Hallas was changed to 5021474568.
08-21-2013 07:59	Don Weobong	Afro (id: 14)	The contact Peter Pan was added.
08-19-2013 22:08	Able House	Hunter Company (id: 15)	The account was created.

Note:

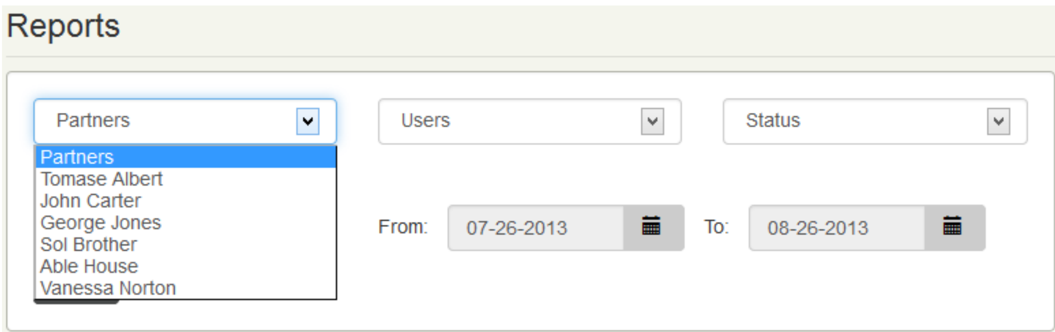
You can also search for Accounts using the search box.

Reports

Use the PRMDeals Reports area to get complete system reports. Reports can be viewed on-demand or downloaded into an Excel file for additional processing.

Partner Reports

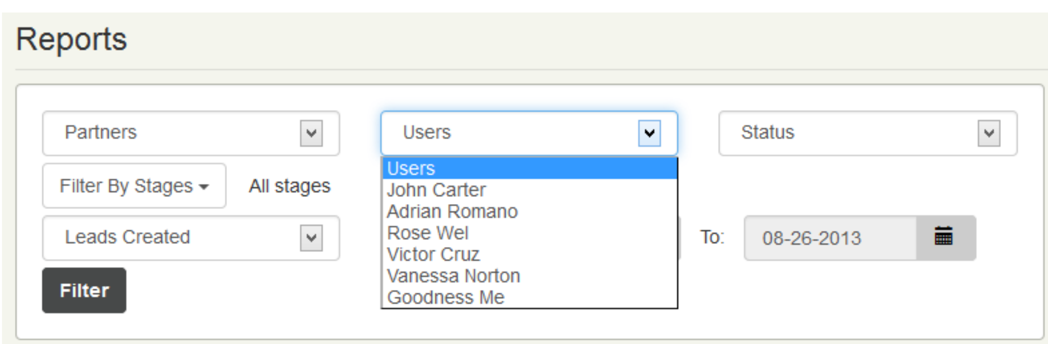
To get Partner level reports, click on the Partners drop down and select the relevant partner:



You can also select [From] and [To] dates to filter by Date selection. To get reports based on Deal Status, use the drop down selector to select whether you want all Open, Won or Lost Deals.

Users Reports

To analyze reports based on the production of your sales staff, use the Users' Reports. Click the Users drop down and select the particular user you want reports on.



Report Summary

PRMDeals gives you a quick report overview of your account. The top right section of your Reports page shows the quick summary report.

	All	Open	Won	Lost
Leads	13	8	2	3
Amount	1 957 774.00	1 055 774.00	873 000.00	29 000.00

Report Details – Easy Visuals

Designed to be intuitive, the details area of the **Reports** section enable you to perform a visual sweep of your deals. For example the **Stages** column shows color coded **Deal Stages** reports which present you with a quick pictorial representation of how your deals are faring.

Name	Amount	Created By	Assigned To	Stages	Status	Created
Add a name for your deal here	0.00	Tomase Albert	-	-	Open	08-25-2013
Vanessa	1 000.00	Vanessa Norton	Vanessa Norton		Lost	08-23-2013
Hunter Fans	25 000.00	Able House	Goodness Me		Lost	08-19-2013
Billing software purchase	874.00	Sol Brother	Vanessa Norton		Open	08-14-2013
Buy PRMD 123	1 000 000.00	Sol Brother	Rose Wel	-	Open	08-05-2013
Implement SSO	35 800.00	Sol Brother	Victor Cruz		Open	08-05-2013
Azimio Enterprise	870 000.00	Tomase Albert	Rose Wel		Won	08-05-2013
Steven Johnson	3 500.00	Sol Brother	-		Open	08-05-2013
Sell partner links	3 000.00	George Jones	Adrian Romano		Won	08-05-2013
Small Side Banner	3 000.00	Tomase Albert	John Carter		Lost	08-05-2013
Big Pop Up Ad	11 500.00	John Carter	Adrian Romano		Open	08-05-2013
Articles for Sale	1 500.00	John Carter	Adrian Romano		Open	08-05-2013
Ads to sell	2 600.00	Tomase Albert	John Carter		Open	08-05-2013

You can click or hover over the particular Deal Stages icon to get more info. For example

Goodness Me	Contacted	Lost	08-19-2013
Vanessa Norton		Open	08-14-2013

Export to Excel

To download your PRMDeals Reports, click the **Export XLS** button. Your report will be downloaded in Microsoft Excel format. Once downloaded, you are free to integrate this report into other systems you might already have.

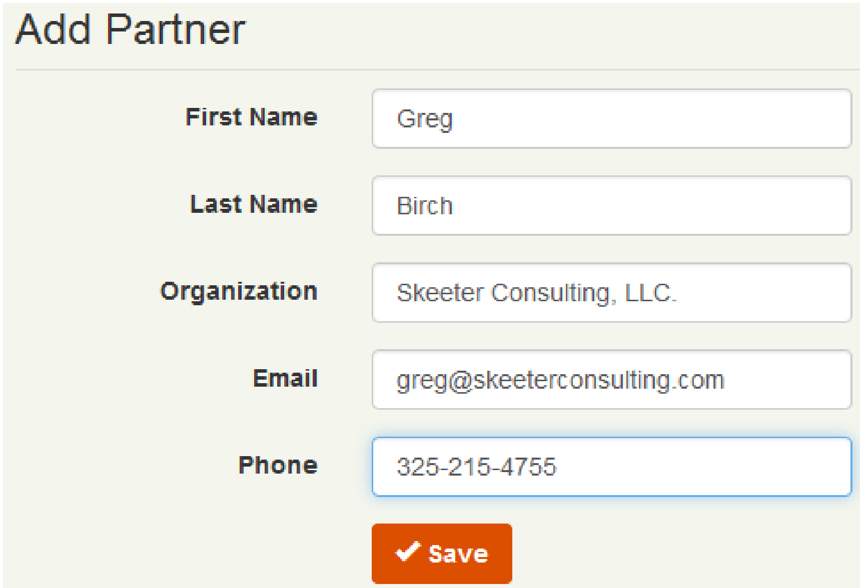
A	B	C	D	E	F	G
Name	**Amount**	**Created By**	**Assigned To**	**Stages**	**Status**	**Created**
Add a name for your deal here	0	Tomase Albert	-		Open	08-25-2013
Vanessa	1000	Vanessa Norton	Vanessa Norton	Bad Lead	Lost	08-23-2013
Hunter Fans	25000	Able House	Goodness Me	Contacted, Rejected	Lost	08-19-2013
Billing software purchase	874	Sol Brother	Vanessa Norton	Not Contacted, Contacted, Undecided, Willing to buy	Open	08-14-2013
Buy PRMD 123	1000000	Sol Brother	Rose Wel		Open	08-05-2013
Implement SSO	35800	Sol Brother	Victor Cruz	Contacted, Willing to buy	Open	08-05-2013
Azimio Enterprise	870000	Tomase Albert	Rose Wel	Contacted, Willing to buy	Won	08-05-2013
Steven Johnson	3500	Sol Brother	-	Contacted, Bad Lead	Open	08-05-2013
Sell partner links	3000	George Jones	Adrian Romano	Contacted, Willing to buy, Sold	Won	08-05-2013
Small Side Banner	3000	Tomase Albert	John Carter	Contacted, Rejected	Lost	08-05-2013
Big Pop Up Ad	11500	John Carter	Adrian Romano	Contacted, Willing to buy	Open	08-05-2013
Articles for Sale	1500	John Carter	Adrian Romano	Not Contacted	Open	08-05-2013
Ads to sell	2600	Tomase Albert	John Carter	Contacted, Out of Office	Open	08-05-2013

Partners

The 'P' in PRMDeals is for Partners. This is the lifeblood of any PRM account. Partners are the people or organizations who are going to supply you with all these incredible deals. There's no question that having a **strong recruitment program** to target the right partners can have a profound impact on the success of your PRM initiative.

To add a partner account, click the **+ Add Partner** button.

The required fields to create Partner accounts are the First Name, Last Name, Phone and Email.



Edit Partner

To edit an existing Partner account, click on the icon next to the name of the Partner you wish to edit. Make the necessary changes and click Save to continue.

Change Partner Account Password

To change the password of a Partner account, click and then click [Change Password] to enter the new password for the Partner. You can also click to delete the contact.

Note:

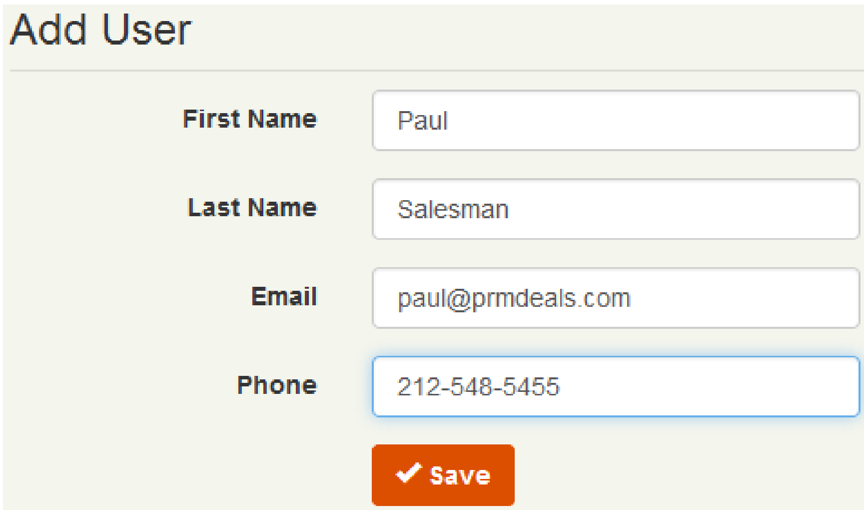
You can also search for Partners using the search box.

Users

Users are members of your sales team. You can add as many users as your account size permits. Once deals are submitted, you want to assign them to your users (sales team) for immediate follow up. Users make sure your deals are not being wasted. You can assign deals to Users and also share documents and other collateral with them.

To add a User account, click the + Add User button.

The required fields to create User accounts are the First Name, Last Name, and Email.



Edit User

To edit an existing User account, click on the icon next to the name of the User you wish to edit. Make the necessary changes and click Save to continue.

Change User Account Password

To change the password of a User account, click and then click [Change Password] to enter the new password for the User. You can also click to delete the contact.

Note:

You can also search for Users using the search box. Or click on the various column headers to sort i.e. Name, Email or Phone:

Name ↑	Email	Phone	
Charina Beltran	charina@eleapsoftware.com		
John Carter	van.testing@aol.com	(212) 226-5960	
Victor Cruz	don@telaniamail.com	5023030657	
Rob Gurka	rob@eleapsoftware.com		
Goodness Me	donatus@eleapsoftware.com		

Logs

The Logs Center provides you with detailed log reports on a micro level. We track granular changes that occur in your account. With the logs, you no longer have to guess who deleted or changed what in your account. This ensures complete transparency and peace of mind.

The logs area is organized into four main areas: All logs, Deals logs, Accounts logs and Documents logs.

You click on each of the main areas to get details on that section.

Logs

All Deals Accounts Documents

Date	User	Module	Item	Text
08-26-2013 15:50	Tomase Albert	Accounts	Zoie's Coffee Shop Inc. (id: 1)	The contact Steve Baller was added.
08-26-2013 14:52	Tomase Albert	Deals	Implement SSO (id: 9)	The amount was changed from 35 000.00 to 35 800.00.
08-26-2013 14:51	Victor Cruz	Deals	Implement SSO (id: 9)	Note was added.
08-26-2013 14:50	Victor Cruz	Deals	Implement SSO (id: 9)	Stage Willing to buy was added.
08-26-2013 14:50	Victor Cruz	Deals	Implement SSO (id: 9)	Stage Rejected was removed.
08-26-2013 14:44	Tomase Albert	Documents	video for eleap demo (id: 15)	The document video for eleap demo was approved.
08-26-2013 14:44	Tomase Albert	Documents	video for eleap demo (id: 15)	The document video for eleap demo is no longer approved.
08-26-2013 14:41	Tomase Albert	Documents	Documents (id: 17)	The document WMV video was deleted.
08-26-2013 14:41	Tomase Albert	Documents	Documents (id: 18)	The document QT was deleted.

Support

PRMDeals Support is available 24 hours per day, 7 days a week. Getting started or managing your PRMDeals account is easy. The PRMDeals Online Library 'How to do everything' videos and manuals/ user guides with step-by-step instructions, will help you manage all aspects of your PRMDeals System account.

Contact PRMDeals 24/7 via

Phone : (502) 638-2399

Fax : (502) 585 2345

Email : support@prmdeals.com