



# User Manual

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### **Notices**

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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.

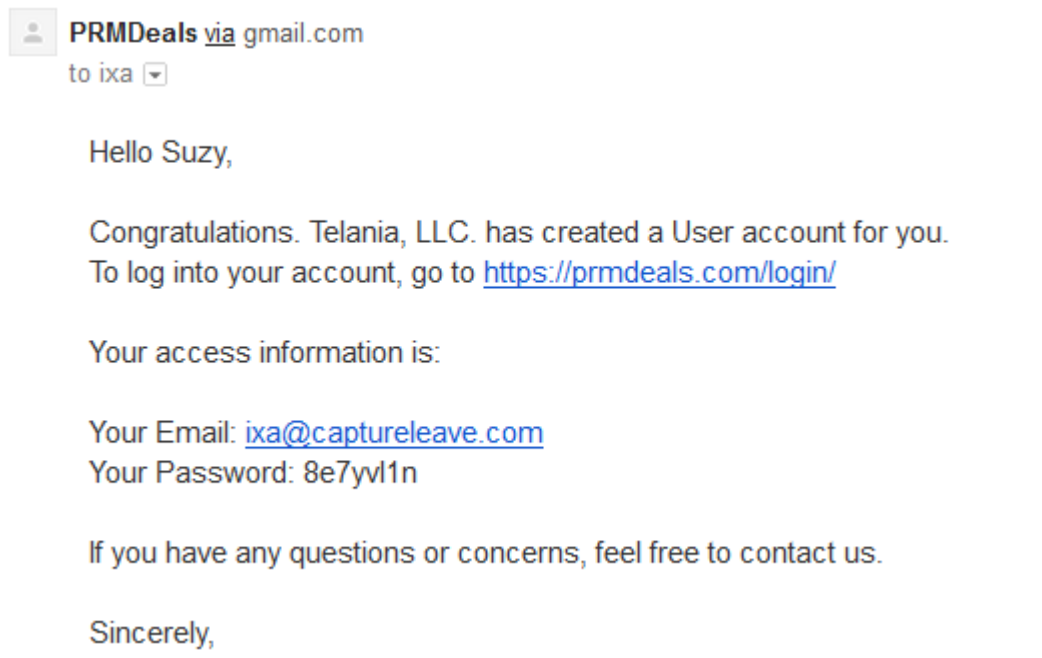
We have poured a lot of user interaction experience(UX) gathered over a decade of developing systems for E-Learning, Training, Recurring Billing and Subscription Management and Vacation Tracking and Leaves of Absence Management. PRMDeals is simply a complete, smart and fun way to organize and streamline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

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.

## Logging into the System

Your account administrator will need to set you up with a user account. Once your account is set up, you will receive an email notification at the email address used to set you up:



Click on the link <https://prmdeals.com/login> and follow the steps below to successfully log in to PRMDeals.

**Login**

Email Address

Password  [Reset Your Password](#)


Remember me

**Login**

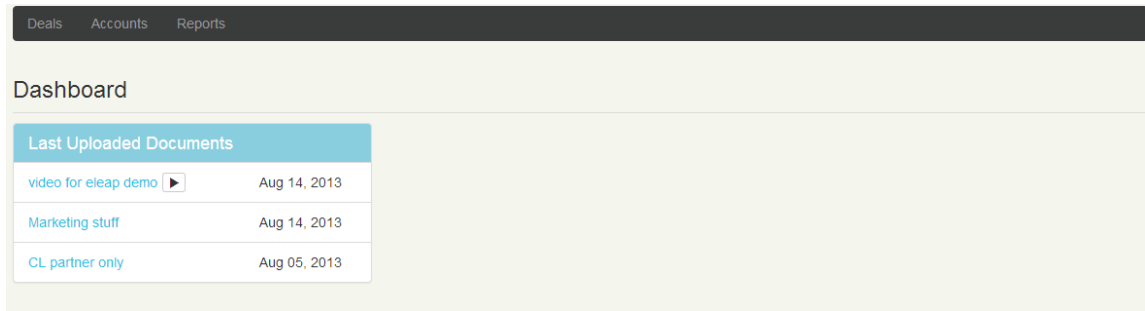
Don't have an account? [Sign Up](#) for free!

1. Enter the Email Address that you were registered under.

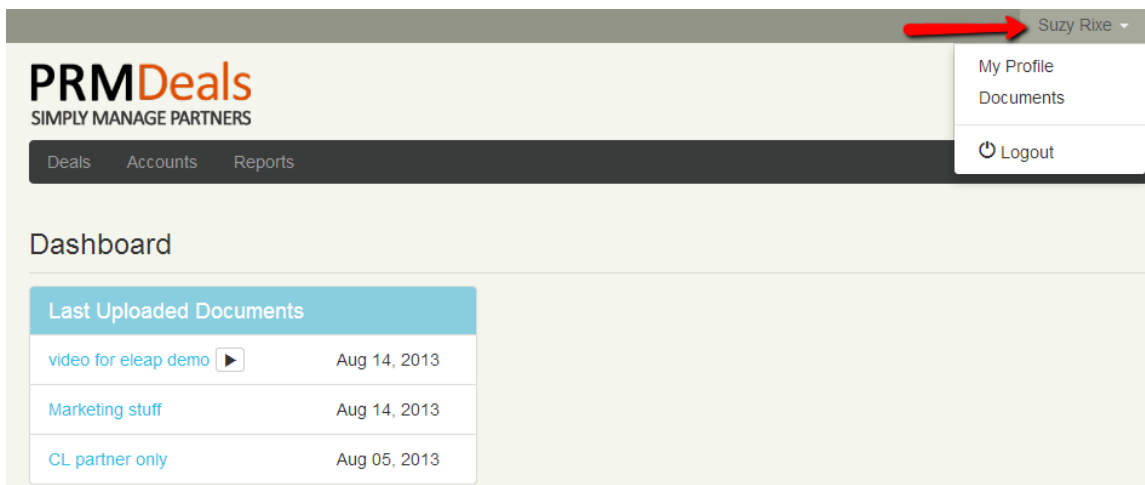
2. Enter the Password that was displayed in your welcome email. Hint: you might want to copy and paste the password in order to avoid errors.

Click the  button to login to PRMDeals.

When you first log into PRMDeals, you will be taken to your account **Dashboard**.




Your dashboard can contain Last Uploaded Documents, Last Closed Deals and Last Updated Deals. You can use your account dropdown menu to access your **[Profile]** and **[Documents]** tabs.



## Profile

### Edit Profile

Your Profile tab enables you to edit your account information. Click the  button to get started.

### Edit profile

First Name	<input type="text" value="Suzy"/>
Last Name	<input type="text" value="Rixe"/>
Organization	<input type="text"/>
Phone	<input type="text" value="512545221"/>
Email	<input type="text" value="ixa@captureleave.com"/>

Make changes and click [Save] to confirm your new changes.

### Change Password

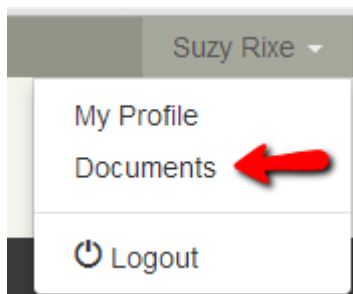
To change your password, you have two options; you can go to the login page and click **[Reset Your Password]** or you can go to your profile page and click [Change Password](#). You will need your old password as well as the new password to make this change.

### Documents

Knowledge is power. Members of your team can share documents with you. These tools are design to help you succeed. With PRMDeals, you are also able to upload documents for distribution in any format you like.

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

 menu item.



## Documents Dashboard

Documents + Add Document

Name  Q Search All categories Important Old stuff Junk Pricing Education

Name	Category	Type	Size	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	↓
CL partner only	-	docx	14.40 KB	08-05-2013 08:34:26	↓

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

### Documents Categories

You can click on the dynamically generated *Categories* tabs to view documents listed under each specific category. For example click on [Important] to see all 'Important' documents.

Name  Q Search All categories Important Old stuff Junk Pricing Education

### 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:

Documents

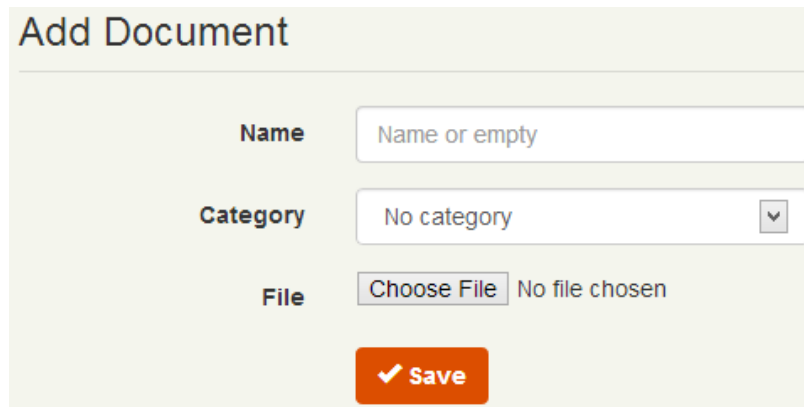
how it works  Q Search All

Name	Category
How it Works	Important

### Add Document

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





**Add Document**

**Name**

**Category**  ▼

**File**  No file chosen

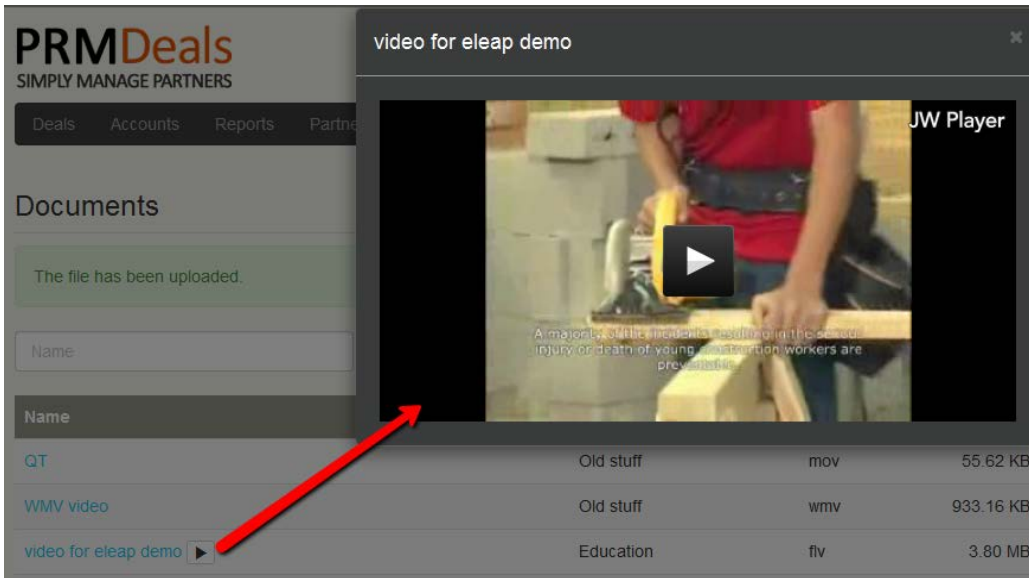
1. Enter the Document Name
2. Select a Document Category
3. Click  or  to select your document to be added

### ***Document Approval***


Once a document is added either by you, the document needs to be approved before it becomes available for viewing. This is a fail-safe feature to prevent accidental document distribution. Your administrator will process the new documents submitted.

### ***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.

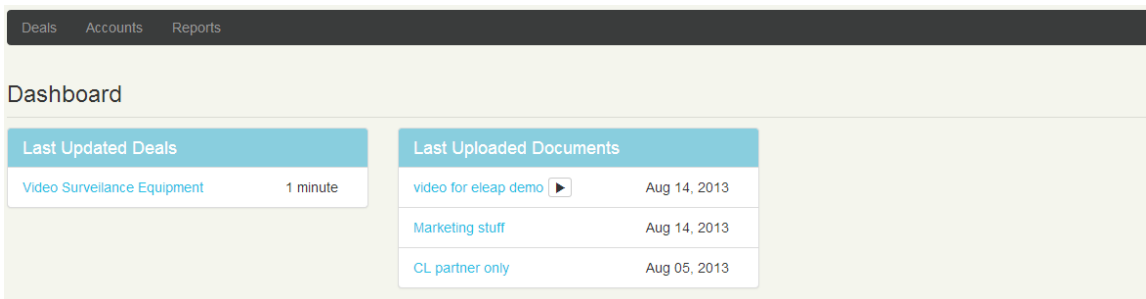
### PRMDeals Dashboard

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.

Deals <span style="float: right;">+ Add Deal</span>					
<input type="text" value="Name"/>	<input type="text" value="Accounts"/>	<input type="text" value="Assigned To"/>	<input type="button" value="Filter"/>		
Name	Account	Assigned To	Created By	Created	Status
<a href="#">Video Surveillance Equipment</a>	Global Security	Suzy Rixe	Sol Brother	08-28-2013	Open
<a href="#">Steven Johnson</a>	CaptureLeave	Suzy Rixe	Sol Brother	08-05-2013	Open

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 + Add Deal.

### Add Deal

<b>Name</b>	<input type="text" value="Add a name for your deal here"/>	
<b>Account</b>	<input type="text" value="Select"/>	<a href="#">Add New Account</a>
<b>Target Action</b>	<input type="text"/>	
<b>Amount (\$)</b>	<input type="text"/>	
<b>Assign To</b>	<input type="text" value="Select"/>	
<input type="button" value="Save"/>		

### 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.

The 'Add Deal' form is structured as follows:


- Deal Information:** Name (text input), Account (dropdown menu), Target Action (text input), Amount (\$) (text input), Assign To (dropdown menu), and a Save button.
- New Account Information:** Company Name (text input), Country (dropdown menu), City (text input), State / Province (text input), Zip (text input), Phone (text input), Fax (text input), and Website (text input).
- Contact Information:** First Name (text input), Last Name (text input), Title (text input), Email (text input), and Phone (text input), along with an Add More button.

- 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.

The 'Account' dropdown menu is open, displaying the following list of accounts:


- Select
- Zoie's Coffee Shop Inc.
- Greenwich Street Tavern
- Dunkin' Donuts
- Pizza Stop
- Jimbo's Hamburger Palace
- CaptureLeave
- CPA International
- Global Security
- Azimio
- Afro
- Hunter Company
- Vanessa Norton

- Set the **Target Action**. This is an important piece of the new deal submission process. The Target Action will enable you or other members of 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.



- The next piece is the estimated deal **Amount**. This is another one of those important pieces of information which can help you or members of your sales staff properly prioritize incoming leads. Having said the above, this field is not required to submit a new deal.
- Click  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, or Status and click on the edit icon  to edit.

Video Surveillance Equipment

Deal Information	Account Information	Contacts
Target <input type="text" value="Customer needs call back to di"/>  	<b>Name</b> Global Security <b>Country</b> United Kingdom <b>City</b> London <b>State</b> England <b>Zip</b> <b>Phone</b> +4452187554121 <b>Fax</b> <b>Website</b> http://globalsecurity.com	First Name Sam Last Name Stevens Title Email sam@captureleave.com Phone 0444854125445 First Name Shirley Last Name Woobly Title Special Instructions - Important Email Phone 5023155455
Amount <input type="text" value="50000.00"/>  		
Assigned To Suzy Rixe Added 08-28-2013 Added By Sol Brother Status <input type="text" value="Open"/>   		

## 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  to continue.

[Add more](#)

**First Name**

**Last Name**

**Title**

**Email**

**Phone**

### 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.



The **Available Deal Stages** are set by the Administrator. If you need more Deal stages than are currently available, contact your Administrator to add them.

### 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  to continue.


### View Notes

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

Notes  [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**  option to get more details like:

Logs 

08-28-2013 14:44	Suzy Rixe	Note was added.
08-28-2013 14:43	Don Weobong	Note was added.
08-28-2013 14:43	Don Weobong	Stage Undecided was added.
08-28-2013 14:42	Don Weobong	The deal was assigned to Suzy Rixe.
08-28-2013 08:53	Sol Brother	The deal was created.

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

### Accounts

Accounts are companies that are associated with Deals. The Account area 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  button.


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

## Add Account

<b>Name</b>	<input type="text" value="ACME, LLC"/>
<b>Country</b>	<input type="text" value="United States"/>
<b>City</b>	<input type="text" value="Sioux Falls"/>
<b>State / Province</b>	<input type="text" value="SD"/>
<b>Zip</b>	<input type="text" value="57117"/>
<b>Phone</b>	<input type="text" value="5023155455"/>
<b>Fax</b>	<input type="text" value="Fax"/>
<b>Website</b>	<input type="text" value="http://acmellc.org"/>
<input type="button" value="✓ Save"/>	


### 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.



## Add Contact

<b>First Name</b>	<input type="text" value="Steve"/>
<b>Last Name</b>	<input type="text" value="Baller"/>
<b>Title</b>	<input type="text" value="President"/>
<b>Email</b>	<input type="text" value="steve@msisforyou.com"/>
<b>Phone</b>	<input type="text" value="5412154755"/>
	<input type="button" value="✓ Save"/>

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.

### 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:

Reports Export XLS

Partners

- Partners
- Sol Brother

Leads Created

Status

From: 07-28-2013 To: 08-28-2013

	All	Open	Won	Lost
Leads	2	2	0	0
Amount	53 500.00	53 500.00	0.00	0.00

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.

### 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

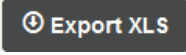
Designed to be intuitive, the details area of the **Reports** section enable you to perform a visual sweep of your deals. For example the **Stages** column shows color coded **Deal Stages** reports which present you with a quick pictorial representation of how your deals are faring.

Name	Amount	Created By	Assigned To	Stages	Status	Created
Video Surveillance Equipment	50 000.00	Sol Brother	Suzy Rixe	■	Open	08-28-2013
Steven Johnson	3 500.00	Sol Brother	Suzy Rixe	■ ■	Open	08-05-2013

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

Assigned To	Stages	Status
Suzy Rixe		Open
Suzy Rixe		Open

### Export to Excel

To download your PRMDeals Reports, click the  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	H
Name	Amount	Created By	Assigned To	Stages	Status	Created	
Video Surveillance Equipment	50000	Sol Brother	Suzy Rixe	Undecided	Open	08-28-2013	
Steven Johnson	3500	Sol Brother	Suzy Rixe	Contacted, Bad Lead	Open	08-05-2013	

### 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](mailto:support@prmdeals.com)