Partner Portal User Guide v 2.1.0
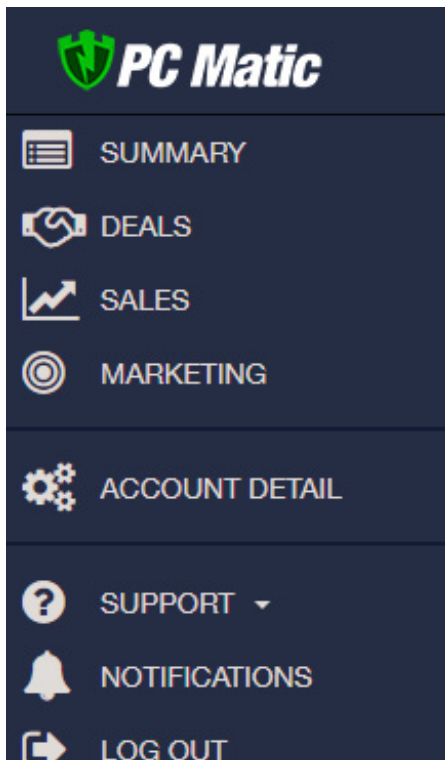## 2022

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Introduction

The PC Matic Partner Portal has been built to help provide our authorized resellers with an easy to use management portal. This portal gives you the ability to track deals, access marketing material, quote prices, manage accounts, and much more. In this user guide we will outline specific abilities available in the Partner Portal.

Partner Portal Home Page

The home page of the Partner Portal provides an overview of your current number of licenses, number of deals, number of approvals, and number of licenses about to expire.

From the sidebar of the Partner Portal, there are several tabs that will help you navigate to the different sections of the console.

1. **Summary**: An overview of your account, including status of deals and licenses.
2. **My Deals**: Access all of your current deals in detail. Register new deals, view assigned leads from PC Matic, and leads you have generated.
3. **Sales**: Access the online quote tool to obtain MSRP and discounted price quotes.
4. **Marketing**: Access and download: Marketing Collateral, Marketing Videos, Lead Generation Links, and Product Banners.
5. **My Account**: Edit your account information and add colleagues to your account.
6. **Support**: Contact our support or sales team for assistance.
7. **Notifications:** Check out new features we're previewing for PC Matic Pro.
8. **Log Out:** Log out of the current account.

Leads

Note: You will only see the Leads tab when you have Leads.

From your Partner Portal homepage, you can view all leads by accessing the My Deals tab from the sidebar. Click on the Leads tab on the left side.

From this tab you can now view information about all of your leads. These may be leads from PC Matic, from your unique marketing links, or from Deal Registration. If the lead is from PC Matic the conversion rate is very high, as they are often looking to purchase immediately.

Using the Actions dropdown on the right hand side you can access several settings for each lead; assign it to a colleague, view account information, add notes, track price quotes, and expire or decline the lead if necessary. *Note: only the main contact on the reseller account can assign leads to colleagues.*

To assign a lead to another colleague, select the actions dropdown for that lead and choose Assign to Colleague. Now you can select the name and email address of the colleague you want to assign this lead to from the drop down list. If necessary you can move the lead back to yourself by selecting your email from the dropdown.

Using the contact log will allow you to keep meticulous notes on each lead and share the notes with our team. This will aid our sales team in having correct information for the lead to know status and provide you any help you need with the sale.

Active Accounts

Note: You will only see the Active Accounts tab when you have active accounts.

From the active accounts tab you can view all of your existing accounts from your partner portal. This gives you an easy way to track and stay on top of your accounts that you sold in the past when they come up for renewal.

In the Active Accounts tab you will see a status shield on the left side letting you know the approximate time left until expiration.

- Green - The account has more than 180 days left until expiration.
- Yellow - The account has less than 180 days left until expiration.
- Red - This account is currently expired/past due.

Deal Registration

To register new deals, visit the My Deals tab from the Partner Portal sidebar and choose the tab for Deal Registration. Here you can fill out a form with all details of the new deal that you are registering. This will allow you to track new deals along with potential software they are interested in and notes on next steps.

Note: The minimum for Deal Registration is 50 seats.

Price Quote Tool

To get easy access to pricing quotes for potential customers, navigate to the Sales tab from the Partner Portal sidebar. Here you can choose different options from each dropdown list to totally customize the pricing for each deal.

After making your selections, choose Find Products. You don't need to fill out each drop down to see the pricing, infact if you only fill out one or two it will show all of the options in a broad range below. At the bottom of the list provided to you, you can export the list to a .csv for use in excel.

Marketing Documents

We are continually working to provide you with valuable collateral for use with your current and potential customers. In the Marketing tab of the Partner Portal you will find a variety of PDFs that cover our products.

- **1 Pagers** – You will frequently find new relevant one page documents appear here covering a variety of topics.
- **Case Studies** – Our customers love us so much they want to shout it from the rooftops! But these case studies will have to do for now.
- **Product Guides** – To get a deeper dive into PC Matic Pro, the product guide gives you some great reading material.
- **Videos** – Here you'll find various videos available for you to use in marketing or as customer testimonials.
- **Links** – Access links for prospect registration under your company.
- **Banners** – You can use these banners as you see fit to display that you are a PC Matic Pro Authorized Reseller.

Unique Links

Introduced by partner request, we have added a section for unique links for your use in recruiting potential prospects. These links are automatically attributed to you, whether it's for lead gathering or trial registrations. The links can be found in the marketing section of your Partner Portal under the links tab.

There are a few different ways you can use these links. We have pre shortened the link for you so it will appear as a bitly link in the tab. However, if you access the link you'll see the full very long URL. If you have your own method of shortening links to a branded domain, copy that long URL without changing any characters and place it in your URL shortener of choice.

PC Matic Pro Trial Registration Link

Now host the link on your website or social media to allow prospective customers to register for a trial of PC Matic Pro while automatically being attributed to your company.

After the customer registers they will appear in your Leads tab automatically, and you'll receive an email notification about the prospect. The lead will automatically be assigned a 90-day trial for 10 licenses. You can then begin the sales process and follow up.

PC Matic Pro Pricing Request Link

After a prospective customer fills out the request for pricing information, you'll see them appear in your assigned leads tab and receive an email notification. You can then follow up with the customer.

PC Matic Pro Demo Request

When the customer fills out this form, you'll receive a notification via email and be able to manage the lead from your assigned leads tab. You can connect with our team via your PC Matic Sales Representative to either work with the customer and get a demo scheduled or check for available times.

My Account

From the My Account tab in the sidebar, you can edit your account information in the first tab and add colleagues in the second tab. Adding colleagues can be done by selecting the green plus sign next to "My Colleagues".

After filling out the information for your colleague, choose the save button and this will send a registration email to the colleague so they can create their login information. They will now be able to log into your partner portal. Once the colleague has completed registration, they will appear in the Assign to Colleague dropdown and you can select their name/email address. You can always reassign a lead at any time by using the same steps you used to assign it originally. Colleagues will only be able to view leads that are assigned to them.

✕ Add Colleague

First Name

First Name

Last Name

Last Name

Email

Email

Phone

Phone

Close   💾 Save

Whitelabeling

PC Matic Pro accounts can be whitelabeled individually based on your criteria. If you want to brand accounts with your logo and name, we can replace any instances of PC Matic Pro within our web console, emails, and reports. This can be done by sending your logo, along with product name to your PC Matic Pro sales representative. They will need the following information:

Logo

- Format: JPG | PNG | GIF
- Size: Height: Maximum 150px | Width: No Maximum

Name

- Choose the Product or Company name to display

Support

To get any support from our team, please reach out to your PC Matic sales representative that you normally work with. If you are unable to reach them, there are several other contact methods available below.

- Email: partners@pcmatic.com
- Call: 1-844-235-3301