

Productsup Partner Program

Partner Portal User Guide

User Guide

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Productsup Partner Portal User Guide

Welcome to the Productsup Partner Portal!

As a Partner, you are a critical component of Productsup. We are committed to your business success and offer resources and tools to help you create new opportunities, accelerate your time to market, and empower you in your business.

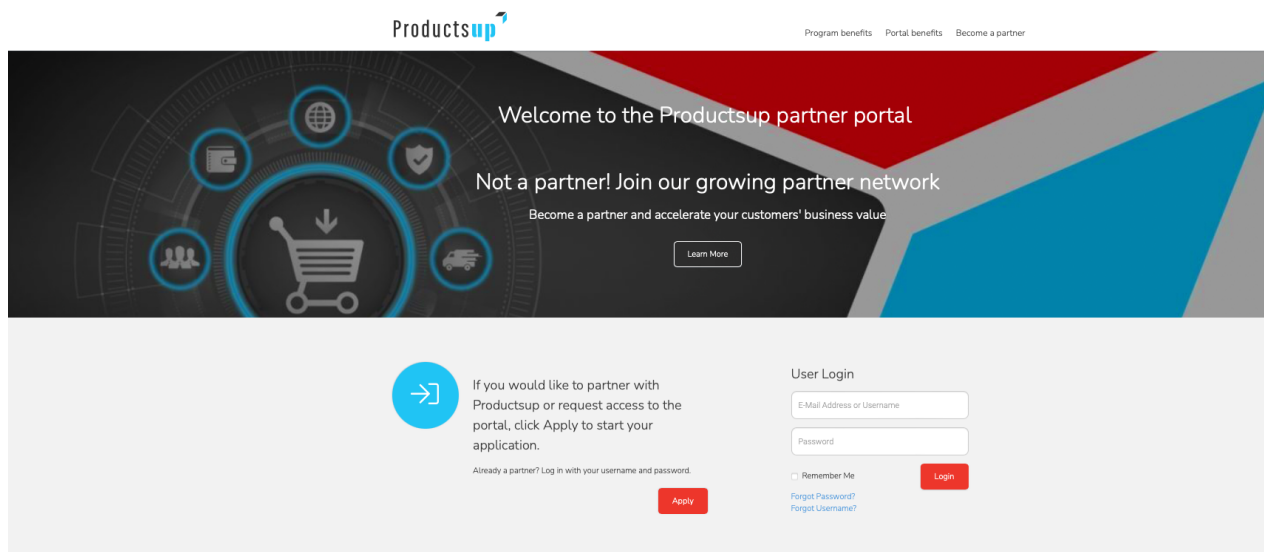
The purpose of this guide is to help you get the most out of your valuable time while using the Productsup Partner Portal. If you take a few minutes to read this guide, we are confident you will soon be using the Partner Portal like an expert!

The page layout displayed are examples based on the most current available functionality but can be different based on your User Profile, Partner Type or added new functionality.

1. Registering for Access

The Productsup Partner Portal supports self-registration for access. If you or anyone in your company needs access to the portal, registering takes only a moment.

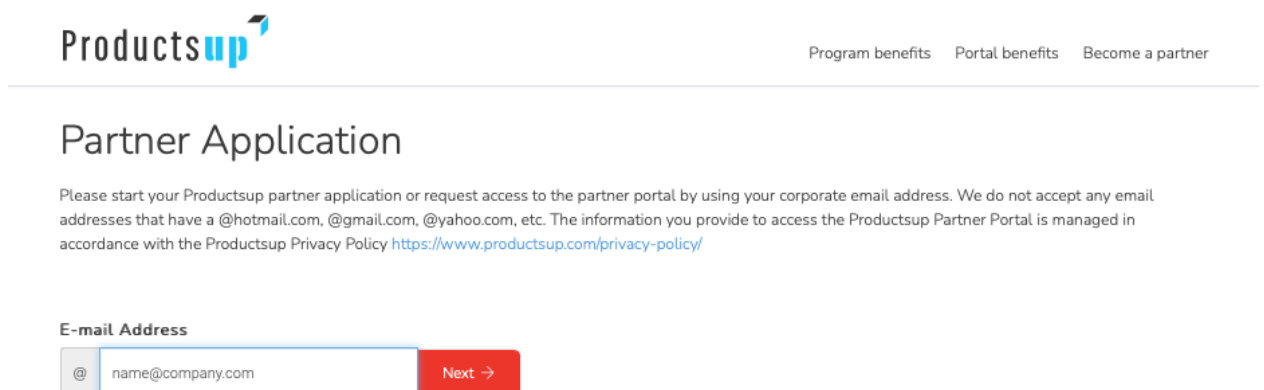
On the portal **login screen** you can either use the *Apply* button, or alternatively select *Apply* to become a Partner in the top right corner. Either link will take you to the registration form.



The screenshot shows the Productsup Partner Portal login interface. At the top, the Productsup logo is on the left, and navigation links for "Program benefits", "Portal benefits", and "Become a partner" are on the right. The main banner area features a dark background with a circular diagram of icons representing various business functions. The text "Welcome to the Productsup partner portal" is displayed, followed by "Not a partner! Join our growing partner network" and "Become a partner and accelerate your customers' business value". A "Learn More" button is present. Below the banner, there are two main sections: "If you would like to partner with Productsup or request access to the portal, click Apply to start your application." with an "Apply" button, and a "User Login" section with input fields for "E-Mail Address or Username" and "Password", a "Remember Me" checkbox, and a "Login" button. Links for "Forgot Password?" and "Forgot Username?" are also provided.

In order to gain access to the portal, your company must have signed Partnership Specification Form, this Partner Portal User Guide is subject to and forms part of the General Partner Agreement and the applicable Go-to-Market Schedule, as concluded between you and Productsup.

For security purposes, all users need to register using their corporate email address.



The screenshot shows the Productsup Partner Application form. At the top, the Productsup logo is on the left, and navigation links for "Program benefits", "Portal benefits", and "Become a partner" are on the right. The main heading is "Partner Application". Below the heading, a paragraph states: "Please start your Productsup partner application or request access to the partner portal by using your corporate email address. We do not accept any email addresses that have a @hotmail.com, @gmail.com, @yahoo.com, etc. The information you provide to access the Productsup Partner Portal is managed in accordance with the Productsup Privacy Policy <https://www.productsup.com/privacy-policy/>". Below this, there is a form section titled "E-mail Address" with a text input field containing "@ name@company.com" and a "Next ->" button.

You will be asked to select from the list of options available which of your company locations you wish to associate your user profile with. Once you have selected your option, click on the *Next* button.

If the list of locations does not match your requirements, you can choose to add a new location by selecting *"No, I am not an employee at any of the above companies"* and click on the *Next* button. This will take you to a longer form where you can provide more details.

Company Selection

Please review the companies listed below and indicate whether you are an employee at any of them.

☐ **Yes, I am an employee at one of the following companies.**

Please indicate which company you are an employee of.

☐ **Chaz Tech PRM Test**

Barcelona, Catalonia 08024
Spain

☐ **No, I am not an employee at any of the above companies.**

You will be required to complete a new account registration form on the next page.

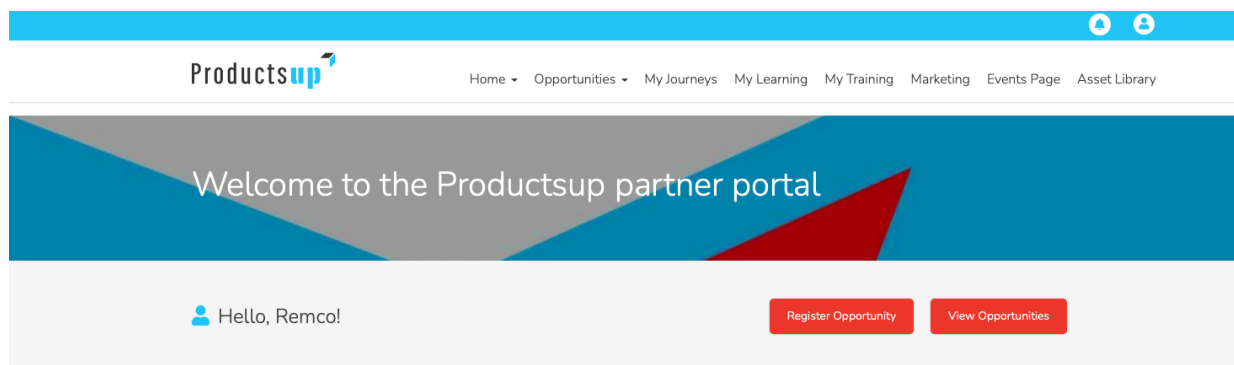
Next →

You will also be asked to select whether you want to receive additional communications from us regarding the Productsup Partner Program.

Once you submit the form, you will receive an email confirming your portal access application. A subsequent email will be sent with your temporary password, as soon as your application has been approved.

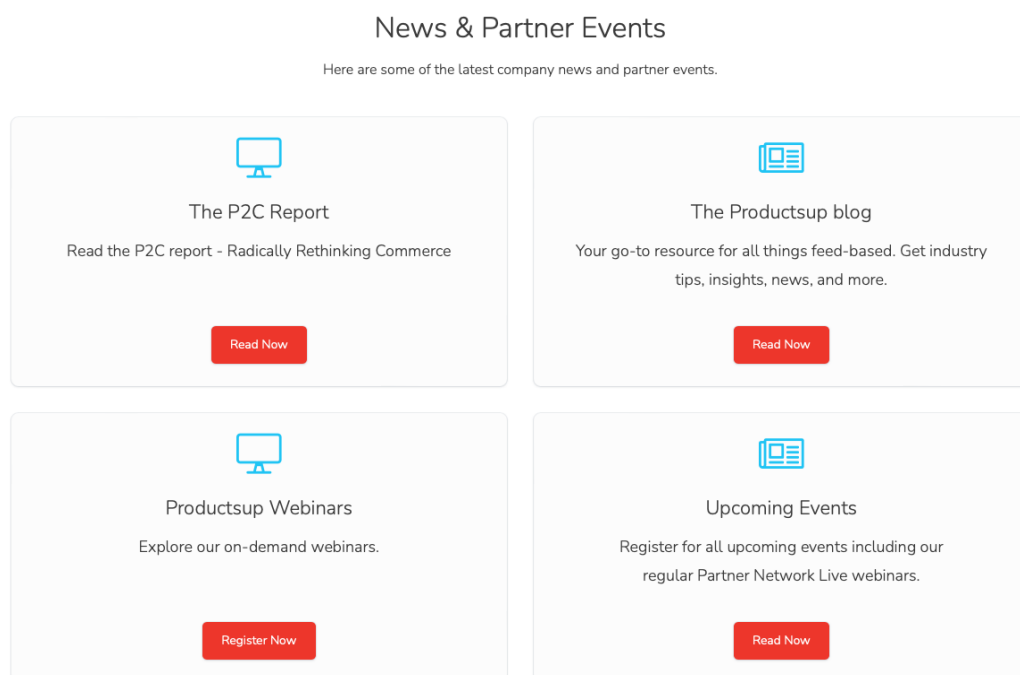
2. Home Page

Personalized welcome page; this section greets you by name. There is a quick link to your account profile and a logout link to log out of the Portal.



The welcome page of the portal may display the latest company and Partner relevant events and other information from time to time.

This area will also show you latest notifications relevant to you, when applicable.



3. Portal Navigation

Nearly all the content in the Portal is reached by using the horizontal top navigation.

From here you can access all main functionality, such as registering and viewing your opportunities, locate documents and collateral in our Asset Library, access your Journeys and the provided training.

A detailed instruction on each of the functionalities will be provided throughout this User Guide.



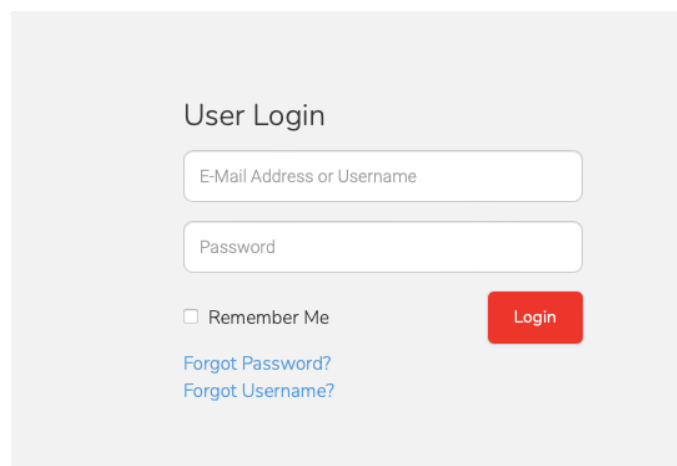
4. Forgot Password

If you have forgotten your password, you can quickly get a new temporary password emailed to you.

Just click the link *Forgot My Password* on the **main home page** before you log in and enter your email address. You will receive an email with your new temporary password almost immediately.

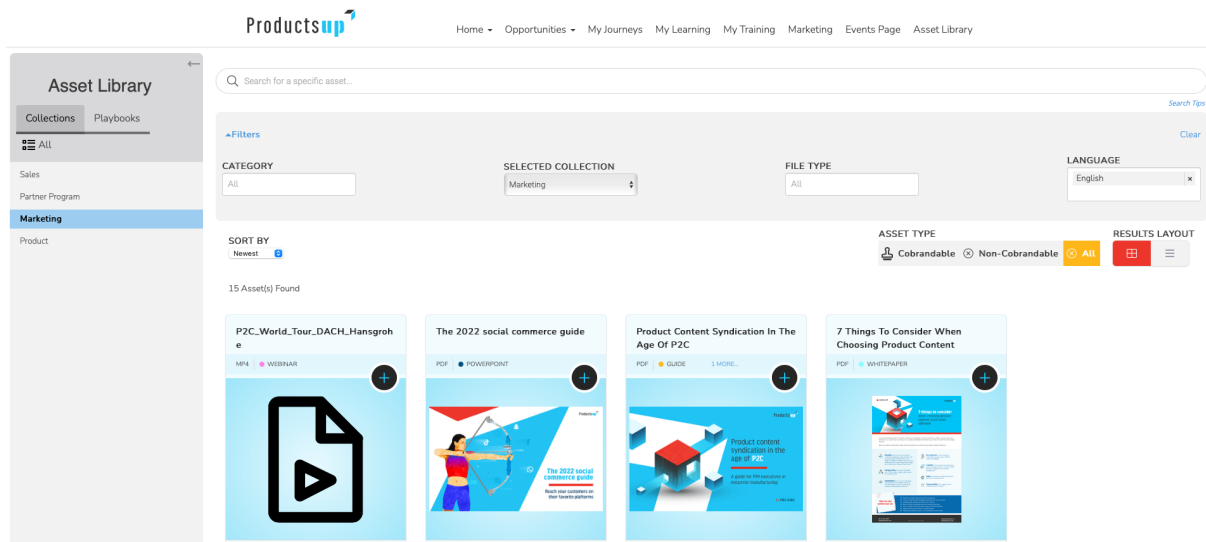
If you don't receive your reset password email, please make sure you have our email address **partners@Productsup.com** whitelisted with your spam filters and try again, or alternatively check your junk inbox.

If you are still experiencing issues then please email us directly at **partners@Productsup.com** so we can assist you.

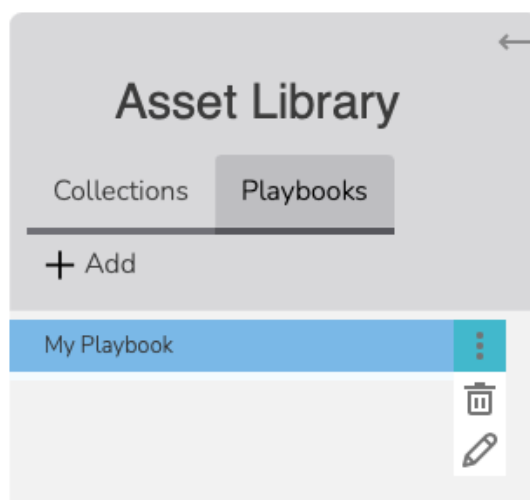


5. Finding Resources

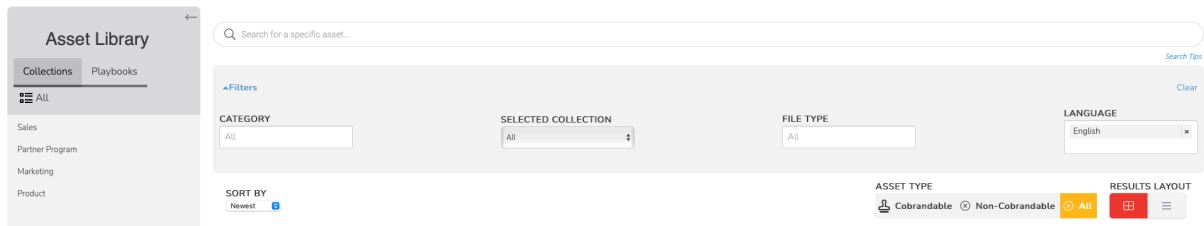
The Productsup Partner Portal offers a wide variety of resources that can help you grow and market your business with Productsup. To access these resources use the horizontal top navigation and go to the *Asset Library*.



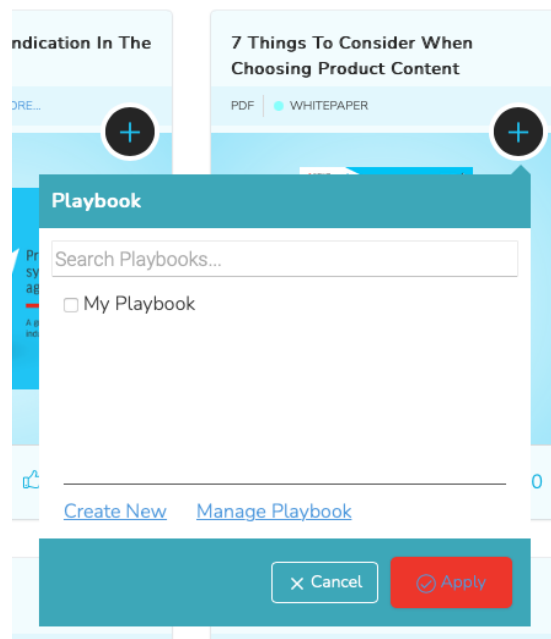
Within the Asset Library, you'll find the list of collections on the left-hand sidebar. This is how Productsup has grouped the assets to help you navigate quickly to what you're looking for. The sidebar also includes a Playbooks option. Here you can create a personalized environment with assets relevant for you all quickly accessible under *Playbooks*.



Alternatively, you can use the *Search* bar, or the *Filters* to help you fine-tune your results. You can also use the *Sort By* feature and change the layout view. To use the *Filters* simply select from the drop-down menus what you are looking for, and the results will automatically appear. To clear the filters, simply click the X alongside each option you originally chose in the drop-down menu.



When clicking on the “+ sign” of each asset, this will make them appear in your Playbook.



Each asset can be liked, downloaded or shared. Note, sharing will only work for assets that Productsup has considered can be publicly shared. If the share option does not work then this asset is for your use only and should not be shared externally.

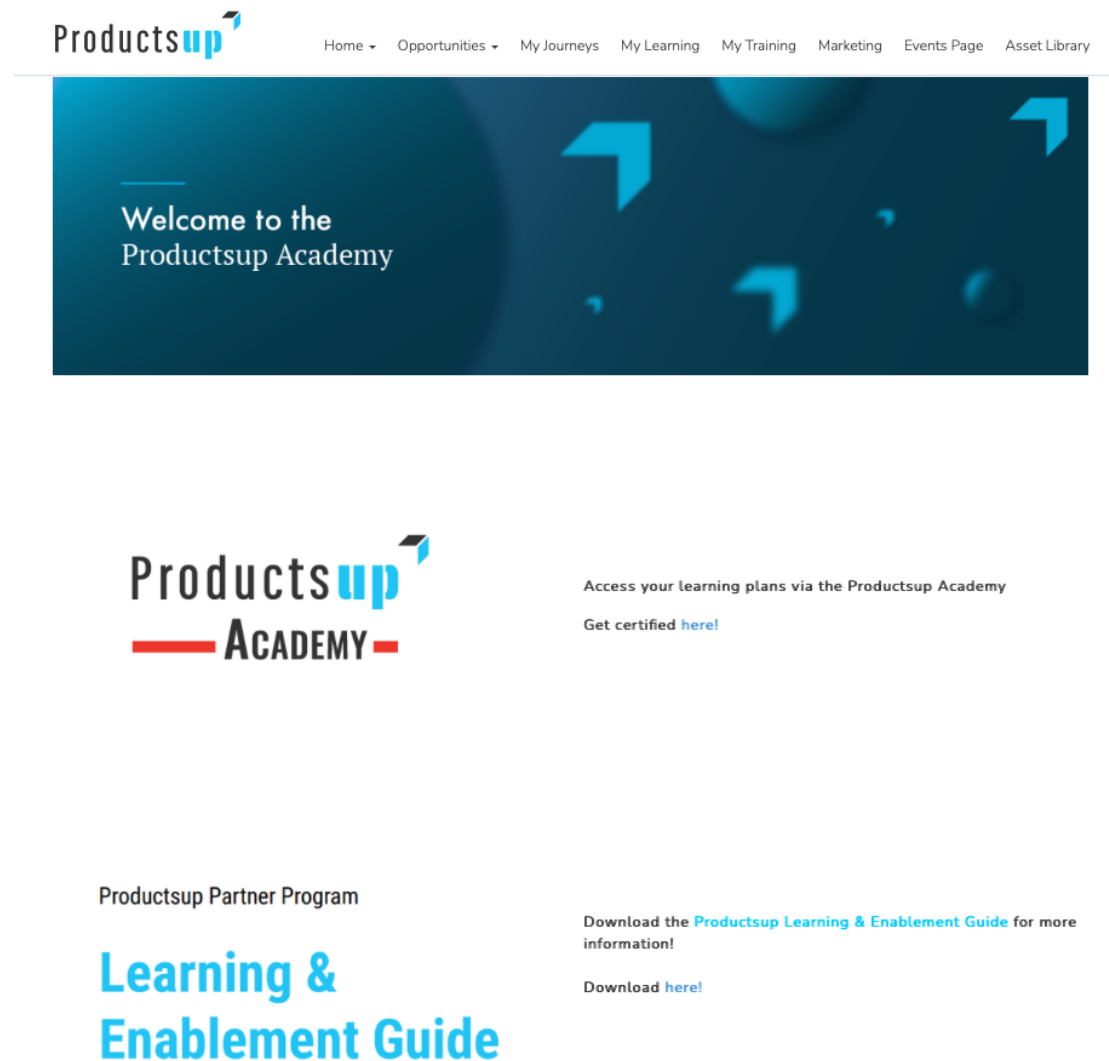
6. My Learning

The Productsup Partner Portal gives you access to a continuously growing range of online training courses.

Currently the Productsup Academy is accessible via a direct link only which you can access via the portal. See reference on the My Learning page including the downloadable Productsup Learning & Enablement Guide which will help you navigate. Familiarize yourself with the guide before starting your learning journey.

We are implementing a seamless integration between the Partner Portal and our Academy learning management system to provide you a better user experience.

To get started with the Productsup online training materials click *My Learning* in the top navigation of the portal.



The screenshot shows the Productsup Academy landing page. At the top, there is a navigation bar with the Productsup logo and links: Home, Opportunities, My Journeys, My Learning, My Training, Marketing, Events Page, and Asset Library. Below the navigation bar is a large blue banner with the text "Welcome to the Productsup Academy" and several blue arrows pointing in different directions. Below the banner, there is a section with the Productsup Academy logo on the left and the text "Access your learning plans via the Productsup Academy" and "Get certified [here!](#)" on the right. Below this, there is a section with the text "Productsup Partner Program" on the left and "Download the [Productsup Learning & Enablement Guide](#) for more information!" and "Download [here!](#)" on the right. At the bottom left, there is a large blue text "Learning & Enablement Guide".

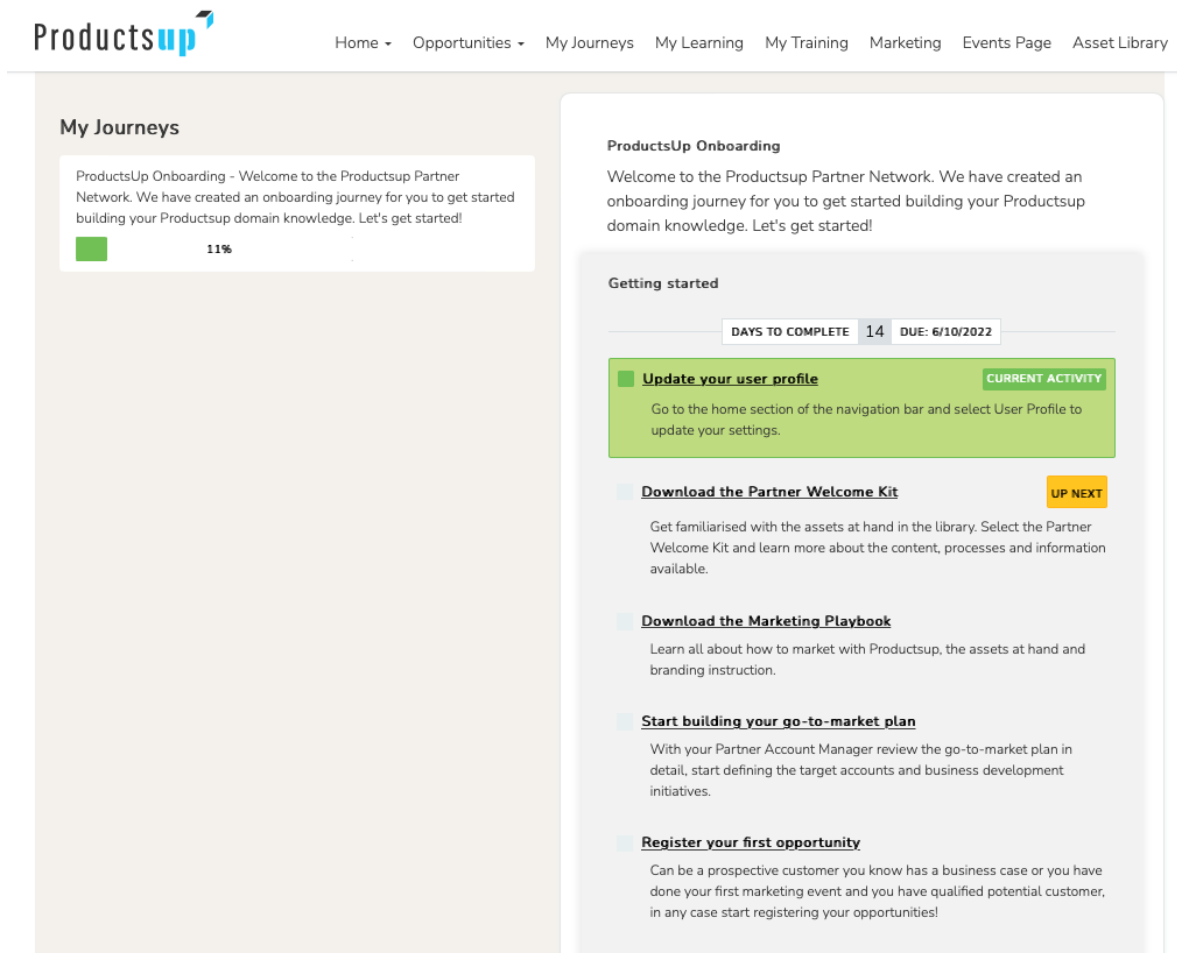
7. My Journeys

To make your onboarding as effective as possible via *My Journey* you can access tailored Productsup journeys and be guided step by step to get acquainted with all Productsup has to offer.

Depending on your role, being either commercial or technical, we can assign multiple journeys to you.

And we will be adding new journeys for you to consume relevant to your role. For example, new products launched and new training modules.

Below you will find an example of such journey:



The screenshot shows the 'My Journeys' section of the ProductsUp interface. It features a progress bar for the 'ProductsUp Onboarding' journey, which is currently at 11% completion. Below the progress bar, there is a list of tasks to be completed, each with a description and a 'UP NEXT' button. The tasks are: 'Update your user profile' (marked as the current activity), 'Download the Partner Welcome Kit', 'Download the Marketing Playbook', 'Start building your go-to-market plan', and 'Register your first opportunity'.

ProductsUp Onboarding

Welcome to the Productsup Partner Network. We have created an onboarding journey for you to get started building your Productsup domain knowledge. Let's get started!

Getting started

DAYS TO COMPLETE 14 DUE: 6/10/2022

Update your user profile CURRENT ACTIVITY

Go to the home section of the navigation bar and select User Profile to update your settings.

Download the Partner Welcome Kit UP NEXT

Get familiarised with the assets at hand in the library. Select the Partner Welcome Kit and learn more about the content, processes and information available.

Download the Marketing Playbook

Learn all about how to market with Productsup, the assets at hand and branding instruction.

Start building your go-to-market plan

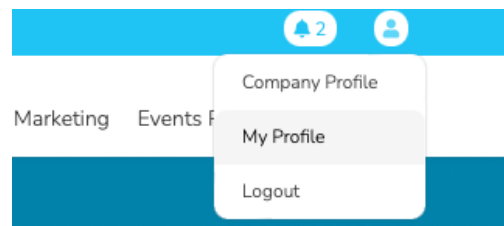
With your Partner Account Manager review the go-to-market plan in detail, start defining the target accounts and business development initiatives.

Register your first opportunity

Can be a prospective customer you know has a business case or you have done your first marketing event and you have qualified potential customer, in any case start registering your opportunities!

8. Managing your User Profile

You can reach your User Profile by clicking on the avatar icon.



On this page you can edit the contact information Productsup has for you. You can update the information by editing the fields, and then clicking on the *Submit* button at the bottom of the page.

You can also change your password if needed, by clicking on the *Change Password* button. Here you will be able to set a new password.

My Profile

Please update your information below.

Contact Information

Please update your contact information below.

<p>* First Name</p> <input type="text" value="Name"/>	<p>* Last Name</p> <input type="text" value="Last name"/>
<p>* E-mail Address</p> <input type="text" value="name@productsup.com"/>	<p>Title</p> <input type="text" value="Sales Director"/>
<p>* Phone</p> <input type="text" value="0049 30 60989999"/>	

Address Information

Please update your address below.

<p>* Address</p> <input type="text" value="Alex-Wedding-Straße 5"/>	<p>Address 2</p> <input type="text"/>
<p>Country</p> <input type="text" value="Germany"/>	<p>State</p> <input type="text" value="Berlin"/>
<p>* City</p> <input type="text" value="Berlin"/>	<p>* Postal Code</p> <input type="text" value="10178"/>

Submit

Change Password **Update Language** **Manage Logos And Avatars**

9. Registering and viewing Opportunities

9.1 Registering an Opportunity

Opportunities can be registered and subsequently viewed by either using the buttons on the homepage or accessing from the top navigation.

Home ▾ Opportunities ▾ My Journeys

When registering an Opportunity, you will be asked to complete a form which will provide us with key information we need to accurately qualify this Opportunity. This includes the client's key contact information and details about the Opportunity. Not providing this information fully may mean that we are unable to accept the registration and/or may reject it.

Register New Opportunity

To register a new opportunity fill out the form below. Fields with an asterisk (*) are required.

In addition to completing the form, you can also attach any additional documents you think may be relevant for us, i.e. an RFI or RFP.

When you are satisfied with the details within the form, click on the *Submit* button.

Submit

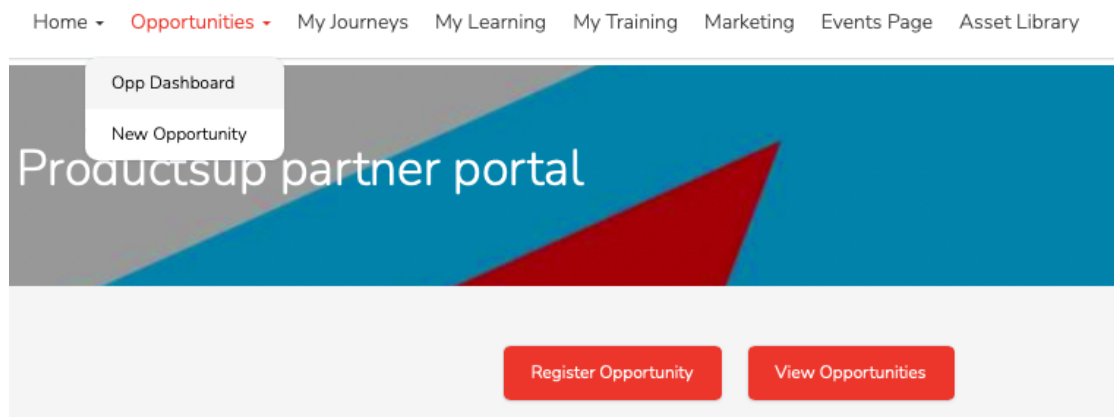
Upon submitting the Opportunity, you will receive an email confirming that we have received the information and are currently reviewing it.

The information will have been made available to the relevant Productsup Partner Account Manager for their review prior to accepting as an Approved Opportunity. The Productsup Partner Account Manager will determine if we are able to continue with this Opportunity, and if so will re-assign it to an appropriate sales team member, who, with you, will work to further qualify the Opportunity and progress it forward as per Productsup sales stages. You will receive email notifications as an Approved Opportunity progresses through these stages.

If for any reason, we are unable to continue with the approval of the Opportunity, the Productsup Partner Account Manager will "reject" the Opportunity and you will receive an email notification advising you of this.

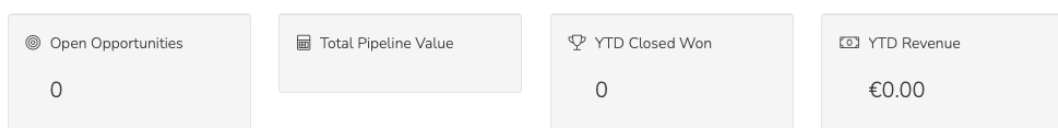
9.2 Viewing and Editing Opportunities

All your Opportunities are available for you to view from the main home page, by either clicking on the *View Opportunities* button, or selecting *Opportunity Dashboard* from the top navigation menu.



This will take you to the *Opportunity Dashboard*.

At the very top of the dashboard you will have a quick view of the total number of *Approved Opportunities*, and alongside are the number of *Closed Won* Opportunities within the current calendar year. Further down the dashboard you will be able to complete a number of actions. This includes registering a new Opportunity, viewing your pending, approved, closed or denied Opportunities, and searching through or exporting your Opportunity information.



Opportunity Dashboard

Your pending and approved opportunities are listed in the dashboards below.



To view the status of your Opportunities, simply click on the appropriate button
– *Pending, Approved, Closed or Denied.*

Pending Opportunities and Editing

Pending will show you all the Opportunities that you have registered and are currently awaiting approval by Productsup. Up until the time it is approved you can edit the Opportunity information simply by clicking on the company name.

This will take you to an *Edit Pending Opportunity* window where you can update the information you have previously shared.

Note: Any fields grayed out cannot be edited.

Once you are satisfied with the changes you have made, click on the *Submit* button and this will update the information Productsup has within our Salesforce environment accordingly.

To view other opportunities, navigate back to the *Opportunity Dashboard* and then click on another one of the view buttons – *Pending, Approved, Closed or Denied.*



Approved Opportunities

Approved are all Opportunities that you have registered and have been approved and accepted by Productsup as Approved Opportunity. You will now see the Productsup sales information which includes the Productsup Opportunity number, sales stage and anticipated close date for the deal.

<div> Pending Approved Closed Denied </div>				
<input type="text" value="Search"/>		<div> Last Updated Last 90 Days Q </div>		
Name ^	Stage	Amount	Close Date	Last Modified Date
Company X Inc-	0.0 Discovery Call	€120,000.00	06/30/2022	05/27/2022

You can click on the *Company Name* to view the Approved Opportunity and add any additional information you may wish to share, up until the time the Approved Opportunity is closed.

Edit Approved Open Opportunity

Fields with an asterisk (*) are required.

Opportunity Information

Please update the opportunity information below.

Opportunity Name

Opportunity Stage

ACV (Annual Contract Value)

Expected Close Date

Opportunity Details and Notes ⓘ

Once you are satisfied with information you wish to share, click on the *Submit* button and this will update the information Productsup has within our Salesforce environment accordingly.

Closed Approved Opportunities

Approved are all opportunities that you have registered and were approved and accepted by Productsup, that have subsequently been won or lost. You will now see the Productsup sales information which includes the Productsup Opportunity number, sales stage and the date the opportunity was closed.

Denied Opportunities

Denied Opportunities that you have registered and have not been approved and accepted by Productsup, you will be able to see the reason why that Opportunity was not accepted and the date, however you will be unable to view any further information.

10. Administration User

If you are an Administrator for your company within the Productsup Partner Portal, then you have access to a small number of additional features within the Portal that will allow you to manage your Company and team information. This section outlines what those features are.

10.1 Managing Other User Profiles

As an Administrator within the Productsup Partner Portal you will have the ability to manage other User Profiles, as well as your own. You can update, delete, and create new Users for your Company as needed. To access the functionality, navigate to *the Company Profile* under the Avatar icon.

Once on the Company Profile page, scroll to the bottom and click on *the Manage Team Members* button.



From within *the Manage Team Members* view, you will be able to now add or edit a Team Member. To add a new team member click on the “+ Add a Team Member” button.

Please note, if you create a New User this way (as opposed to having them self-register) they will not receive an email with their temporary password; rather you will need to communicate to them what you set their password to.

In most cases the preferred method of adding New Users is to have them register themselves. See the *Registering for Access* section of this guide for more information on the registration process.

To edit a User click on the checkmark alongside their name.

Manage Team Members

Use the Add a Team Member button below to provide access to a team member. They will receive instructions assisting them in gaining access to the portal.



Team Member

E-Mail Address

Phone

Active

You will now be in the *Edit Team Member* window. This will allow you to update a Users' personal information and edit their member access for the Productsup Partner Portal.

Member Information

Please enter your Team Member's information below.

* First Name

* Last Name

* E-mail Address

Title

* Phone

Member Address

Please enter your Team Member's address below.

* Address

Address 2

* Country

State

* City

* Postal Code

Submit

To edit access rights to the Productsup Partner Portal, simply change the *Active dropdown box* from *Yes* to *No*. You'll typically only need to deactivate Users when that person no longer works for your Company and should not have access to the information contained in the Productsup Partner Portal.

To edit administrative rights to the Productsup Partner Portal for other Users within your Organization, you can select one or more of the *Administrative Privileges*.

Member Access

Please update your Team Member's access privileges.

Administrative Privileges

☐ Account Profile Administrator ☐ Member Administrator

Active

The three Administrative Privileges have the following meanings:

- **Account Profile Administrator** the User will be able to edit the Company Profile information on the Productsup Partner Portal
- **Opportunity Administrator** the User will have access to view all Opportunities registered by Team Members and re-assign them to other Users
- **Member Administrator** the User will have access to add and edit Team Members

10.2 Managing Your Company Profile

If you are an administrative User for your Company, you have access to maintain your Company's profile within the Productsup Partner Portal. Non-administrative Users have view-only access to your Company profile and cannot make changes to the information contained within the profile.

To access the functionality, navigate to *the Company Profile* under the *Avatar icon*.

Account Profile

Please update your company profile below as needed. All fields marked with an asterisk (*) are required.

You will now be able to edit the information, and then click on *Submit*. This will automatically update the Productsup Salesforce and ensure that we hold the relevant information for your Company at all times.

Note, fields marked with an asterisk are required fields, and must be completed in order to submit any updates. We highly encourage you to keep your Company profile up to date.

10.3 View, Edit and Reassign Opportunities for other Users

If you are an administrative User for your company, you have access to view and edit all the Opportunities registered by yourself and other Team Members within the Productsup Partner Portal. You also have the ability to reassign Opportunities to other Team Members. This is useful in instances where your Colleagues may no longer be working on an Opportunity and you wish to reassign to another User.

Note: Non-administrative Users can only view and edit Opportunities they have registered themselves.

Viewing All Opportunities

As an Administrator you will automatically be able to view all Opportunities registered by your Team Members and yourself, within the Productsup Partner Portal. To see these, simply click on *View Opportunities* from either the homepage of the Portal, or the top navigation menu. This will take you to the Opportunities dashboard.

Here you will see a list of all the Opportunities, and you'll notice that to the far right of the list is the column Team Member. This is your Team Member who the Opportunity is currently owned by.

Editing Opportunities

To edit any Opportunity, either yours or your Team Members, simply click on the *Company Name* of the Opportunity you would like to edit. Follow the same process as outlined earlier in this manual for editing Opportunities.

Reassign Opportunities

As an Administrator, you can reassign Opportunities – either yours or your Team Members – to other Colleagues. To do this, you will navigate to either your Pending or Approved list of Opportunities in your *Opportunity Dashboard*. Click on the *Company Name* of the Opportunity you would like to reassign. You will see that beneath the *Submit button*, there is a *Partner Information section*.

Click on the *Reassign* button.

Partner Information

Partner Account

Chaz Tech PRM Test

Partner Member

Jorge Chavez

Reassign

You will be taken to the *Reassign Opportunity* page. Under the *Team Member* drop down box, select the new Team Member that you would like to assign the Opportunity to.

Click on the *Reassign* button.

Reassign Record

To reassign this record to another team member in your company, select the person's name in the Team Member field below and click the Reassign button.

Record Information

Name

Company X Inc-

Assignment Details

Account

Chaz Tech PRM Test

* Team Member

✓ - Select One -

Jorge Chavez

Reassign

You will now be able to navigate your way back to the *Opportunities* Dashboard and see that the Opportunity will now display the new Team Member's name.

11. Frequently Asked Questions (FAQ)

Most of these questions are answered throughout this guide; we have included them here for easy reference.

11.1 How do I register for the Portal and get my credentials?

Click the *"Apply Here"* button on the login page located at **partners.Productsup.com**.

See the section in this guide titled "Registering for Access" for further details on how to register for the Portal.

11.2 Who do I contact if I have trouble logging in to the Portal?

Have you first registered for the Portal? If so, and you did not receive an email with your temporary password it is likely your password email got filtered as spam.

Try whitelisting the email address 'partnerops@productsup.com' and then use the "Forgot My Password" link on the login page to have the portal email you a new temporary password.

If you still can't login to the Portal, please contact the following: **partnerops@Productsup.com**

11.3 What if I lose my password?

Use the "Forgot My Password" link on the login page – **partners.Productsup.com** to have the Portal email you a new temporary password.

If you do this and still don't receive an email with your temporary password it is likely your password email is getting filtered as spam.

Try whitelisting the email address **partnerops@Productsup.com** and then use the *"Forgot My Password"* link again.

11.4 What marketing and sales materials will I find on the portal?

As a Partner, Productsup provides marketing, sales and technical information you need to better understand the benefits of the Productsup P2C platform and effectively engage your prospects with the most relevant content. On the Portal, you'll find a complete description of several aspects of the Productsup Partner Program, such as technical and functional training, marketing collaterals and an Opportunity registration tool. In addition, you'll find a broad range of marketing, sales and technical content in the Asset Library. In our Library, you'll find the latest marketing information, as well as the sales and technical materials you need to be prepared to sell (quick reference guides, case studies, product demos etc.)

11.5 What is the best way for me to quickly find specific materials and resources?

You can use the top navigation to browse resources if you don't know exactly what you are searching for. See the section of this Guide titled "Finding Resources" for further information on easily locating materials and resources.

11.6 Who should I contact at Productsup if I have questions or suggestions?

You can contact us at **partnerops@Productsup.com**

12. More Information

- In all instances, please first contact your Productsup Partner Account Manager.
- The Productsup Partner Portal is the primary source for key information and will be updated regularly, so check it often.

Other:

- This Productsup Partner Portal User Guide sets forth further guidelines in the context of Partnership between the Partner (“you”, “your”) and Productsup. When incorporated in a Partnership Specification Form, this Guide is subject to and forms part of the General Partner Agreement and the applicable Go-to-Market Schedule, as concluded between you and Productsup. Productsup may post or publish supplements, policies, pricing and, or, guidelines to this Guide.
- Some supplements and other information may be specific to certain regions and/or certain (types or groups of) Partners.
- Please review this Guide carefully, along with all additional documentation of the Productsup Partner Program, posted on the Partner Portal or provided to you otherwise.

Visit the Partner Portal frequently for the most up-to-date information and version of this guide.