WidgetCloud

Partner Portal

Partner User Guide

Home Page & Navigation

Contact Partner Portal Support

Requesting Access for Additional Users/ Create New Users

Content Library

Co-Branded Collateral

Deal/Opportunity Registration

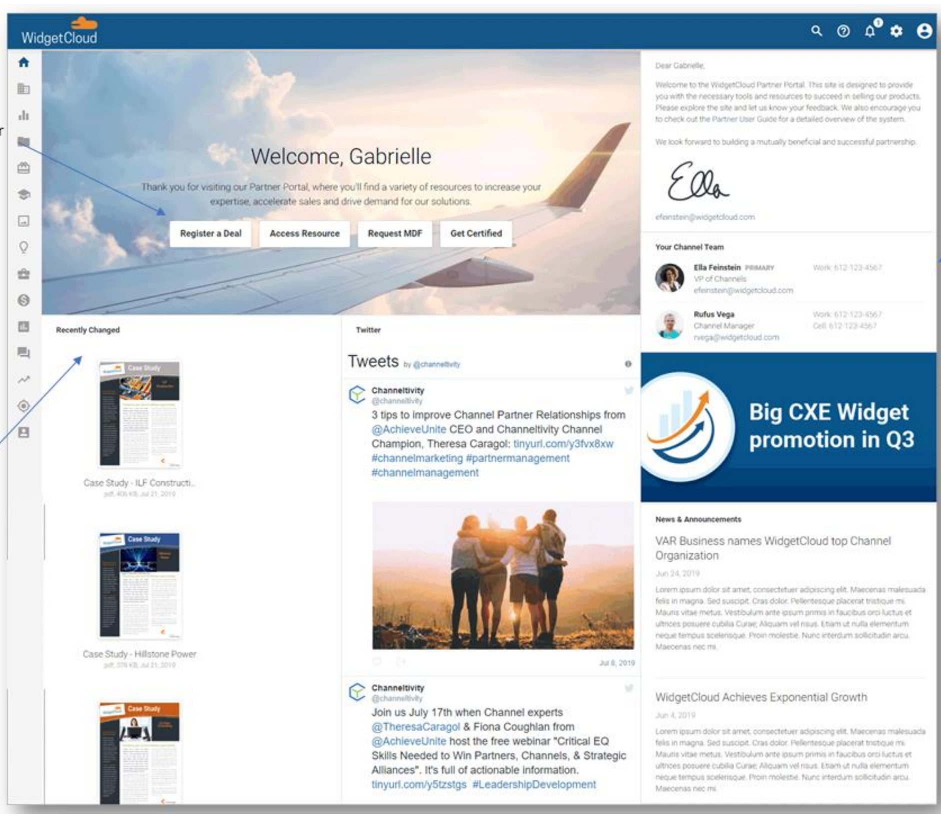
Submitting MDF Requests

Reports/Views

Home Page & Navigation

Use the buttons in the Welcome Message to Register Deals, View Library Content, Submit MDF Request and Complete Certifications

Recently updated or added documents will appear in the Recently Changed section of the home page.

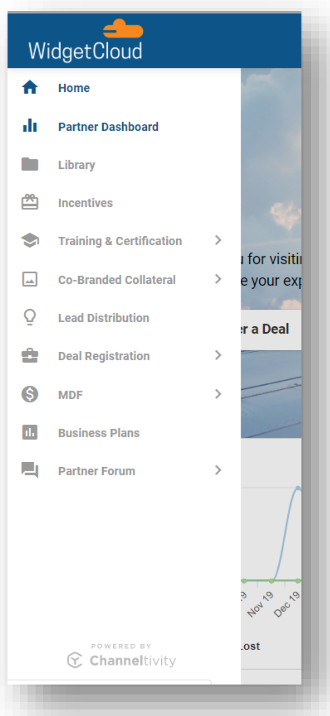


The Channel Managers assigned to your Organization will appear in the “Your Channel Team” section.

Promotions/ News & Announcements

Home Page

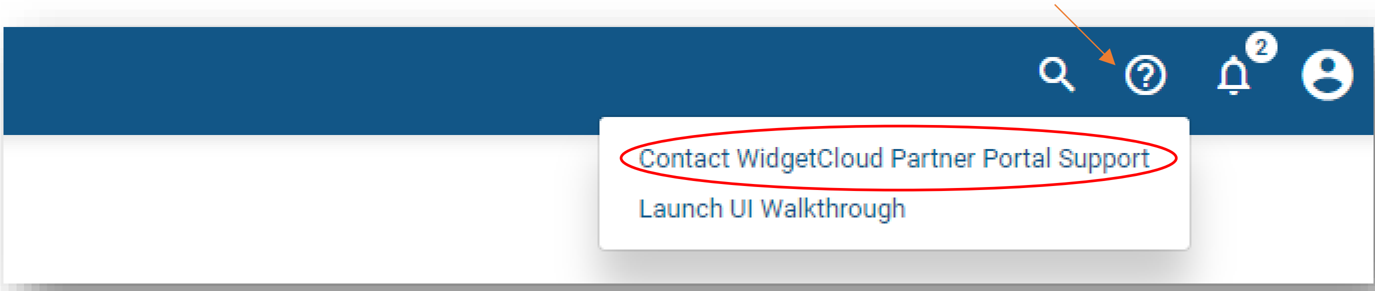
Use the left navigation menu to access other areas of the portal, such as Deal Registration, MDF, and the Library.



Left Navigation Menu

Contact Partner Portal Support

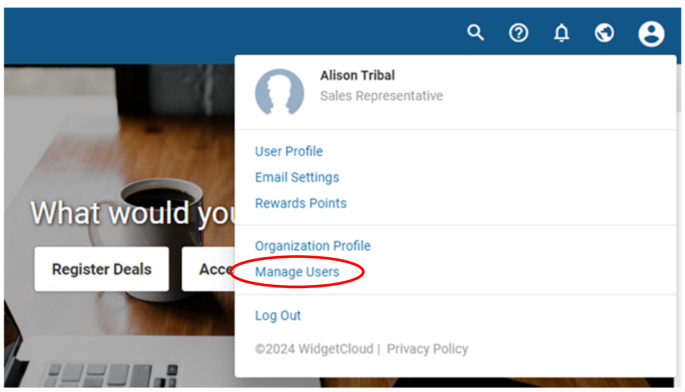
If you have questions or run into issues while using the portal, click the Question Mark icon in the top right corner of the page and select Contact WidgetCloud Partner Portal Support.

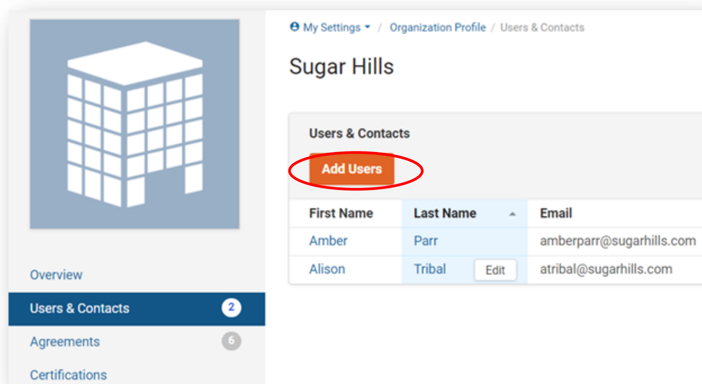


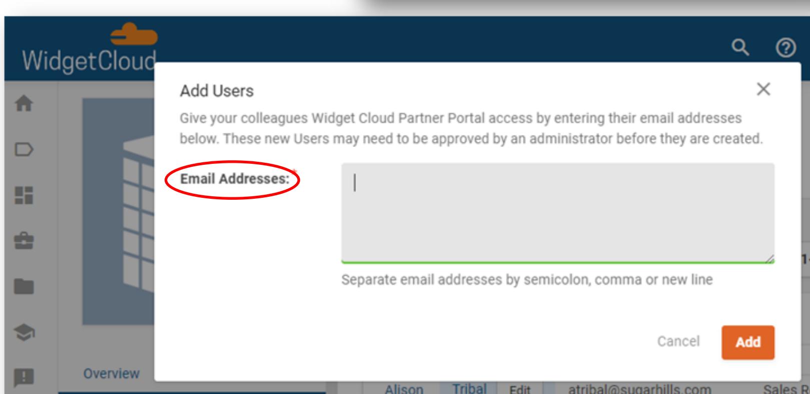
Requesting Access for Additional Users/ Creating New Users

To request access for additional Users at your Organization and/or create new Users:

1. Click your profile picture or icon in the upper right corner of the portal.
2. Select Manage Users > Add Users.
3. Enter the email addresses of the Users you would like to have access to the portal, separating the email addresses using a semicolon, comma, or a new line.
4. Click the "Add" button once you've added all of the email addresses.

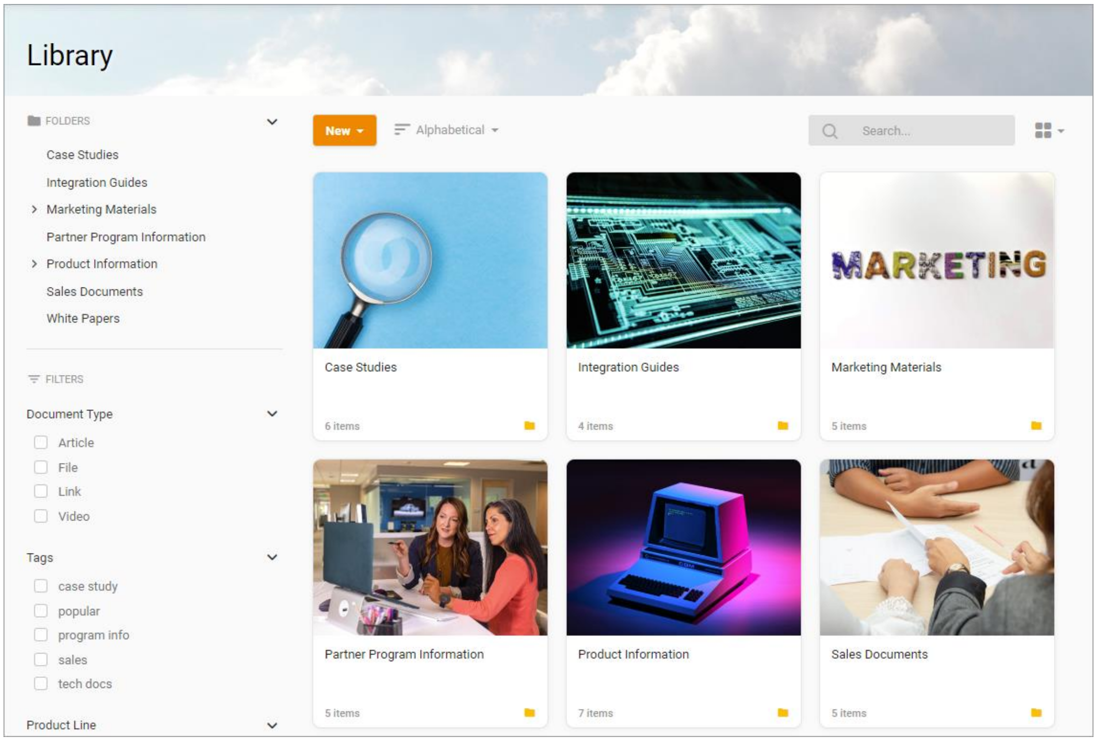






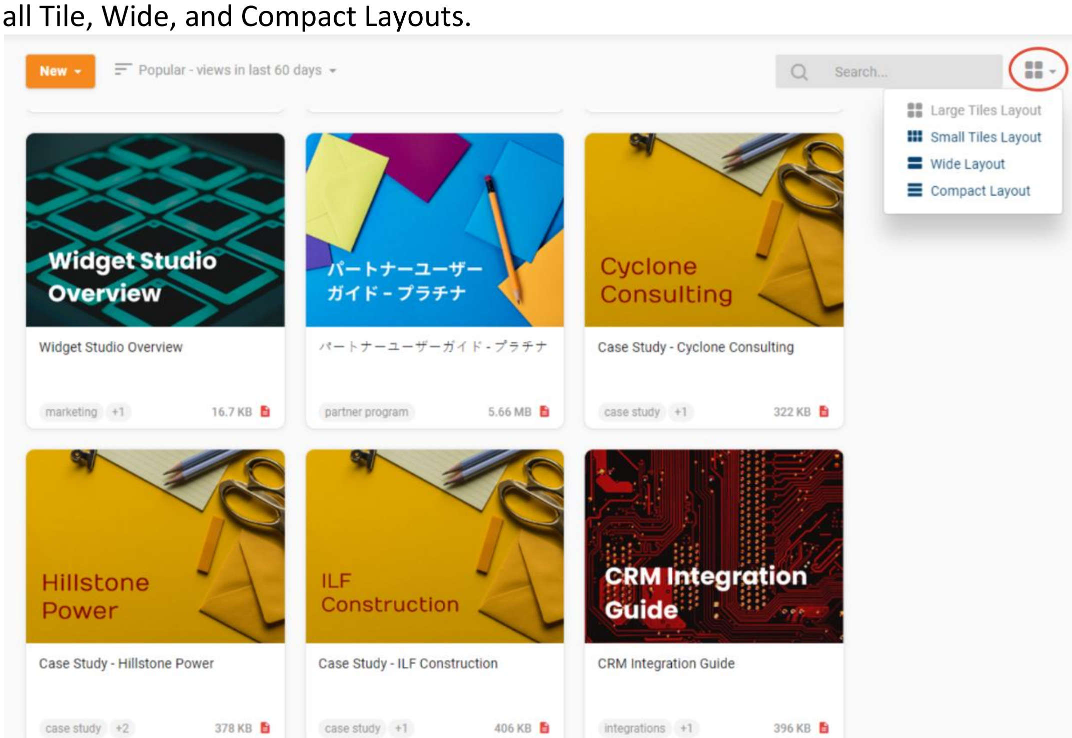
Content Library

To access content in the portal, select "Library" from the left navigation menu or "Access Resources" from the "Welcome Message." The Library is the centralized content repository for the portal, where content is categorized using Folders.

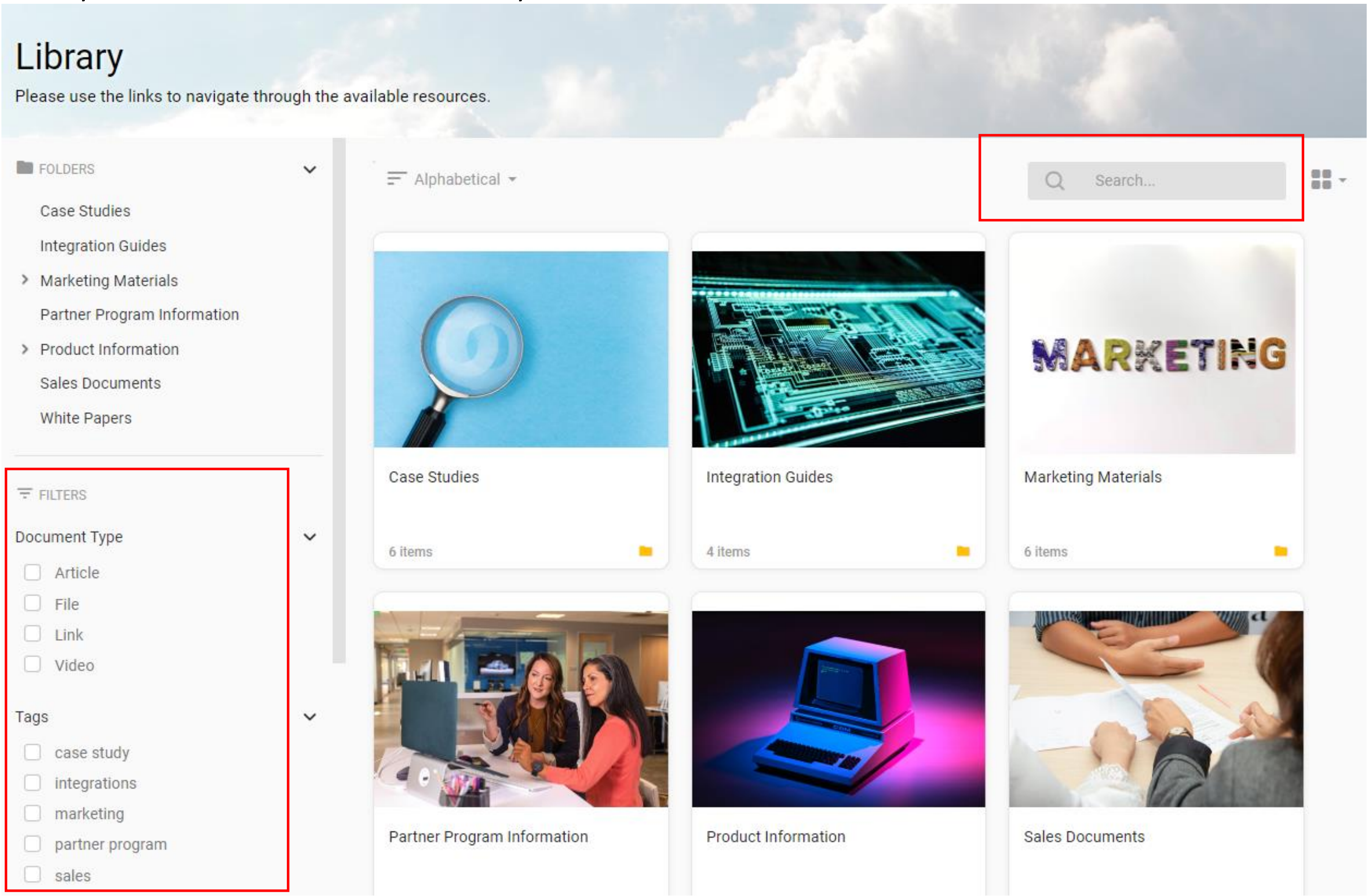


Library – Large Tile Layout

Once you click into a Folder, you can download a file by clicking on the file. You can also switch between the Large Tile, Small Tile, Wide, and Compact Layouts.



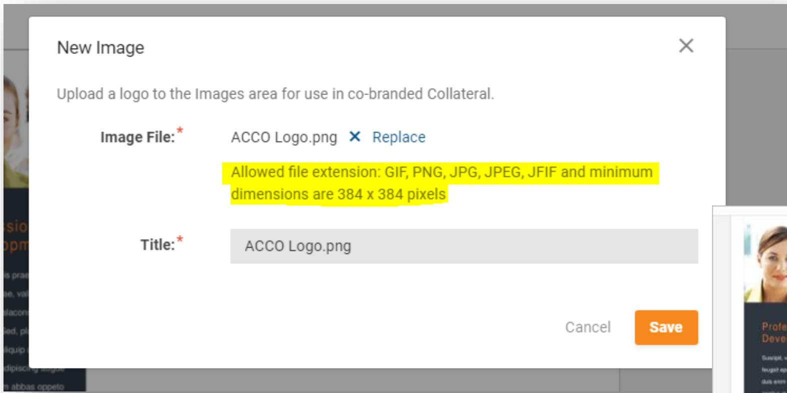
Looking for something specific? Use the filter area on the left and the search box on the right to help narrow down your search and locate the content you need.

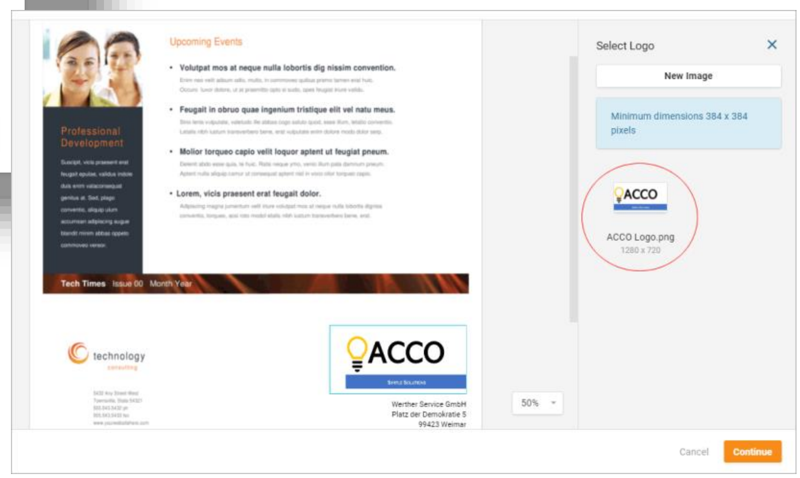


Cobranded Collateral:

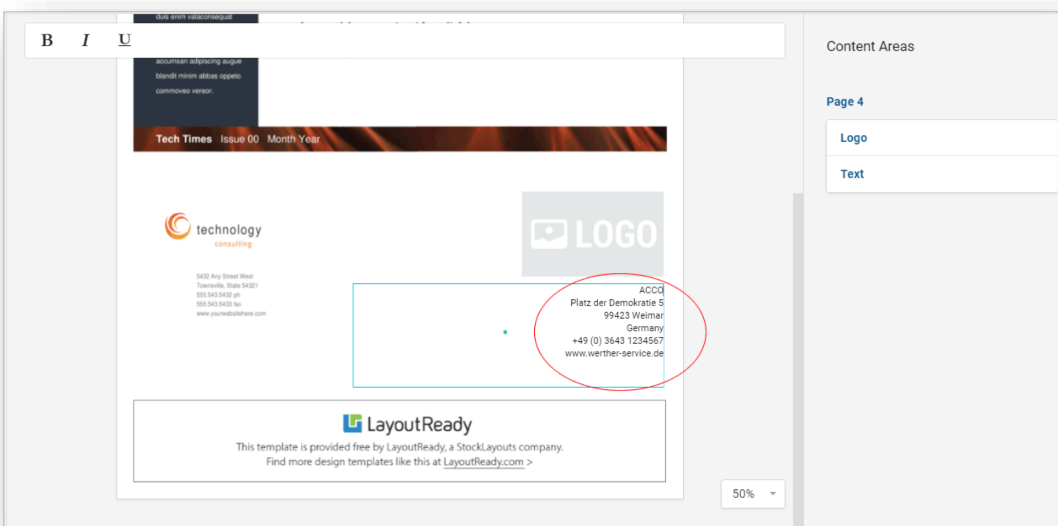
1. Select "Cobranded Collateral" in the left navigation menu.
2. Click on an Asset to begin co-branding the file with your logo and contact information.
3. Click the "Create Collateral" button in the top left corner of the page.

4. Verify your Organization and User profile data and click "Continue."
5. Select the Logo and Text content areas on the right-side panel to add your company's logo and contact information.
    a. Logo Content Area: Click the "New Image" button to add your logo, and be sure to upload a high-resolution image that meets the below requirements highlighted in yellow. You'll then select the logo to add it to the logo content area.

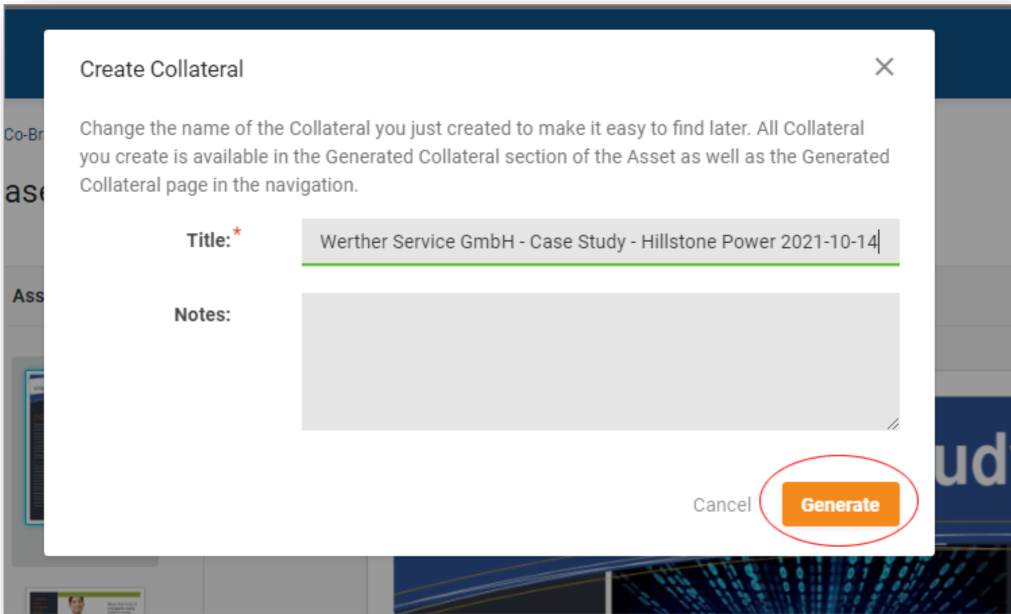




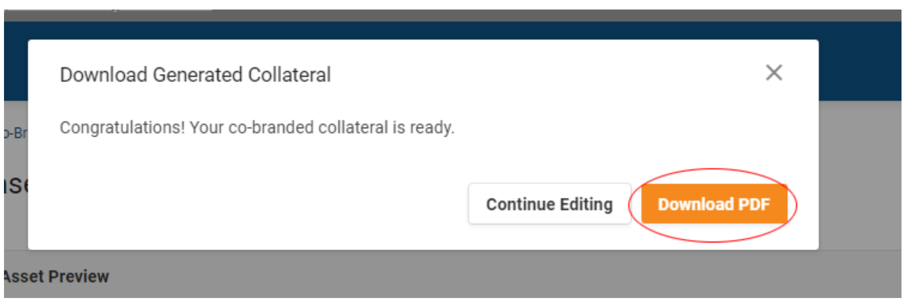
    b. Text Content Area: Your company's contact information will appear in the text content area. Click the text content area to make edits if needed.



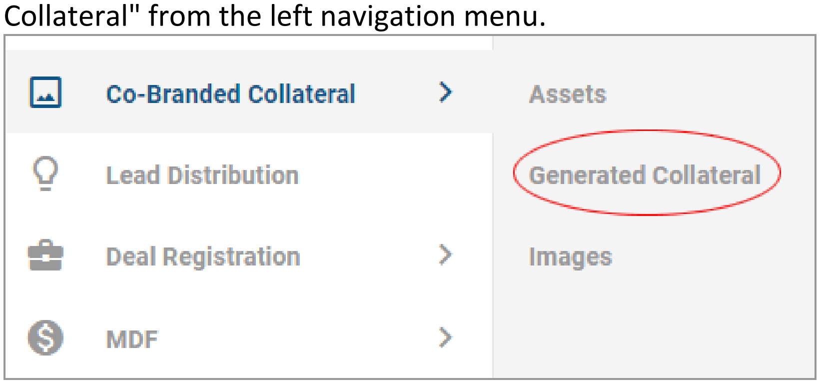
6. Click the "Continue" button when you are finished, and then select "Generate" to generate your collateral.



7. You can then download the PDF by clicking the "Download PDF" button.



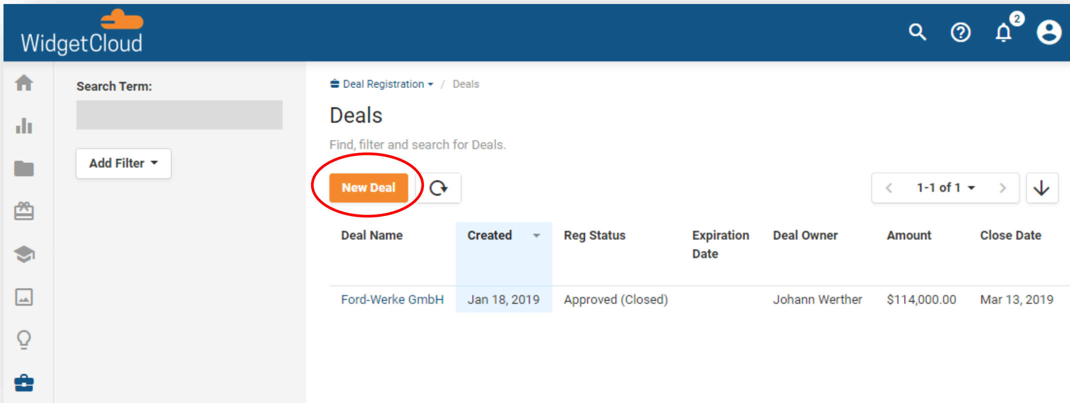
8. You can view all of the collateral generated by users at your Organization by selecting "Generated Collateral" from the left navigation menu.



Deal Registration

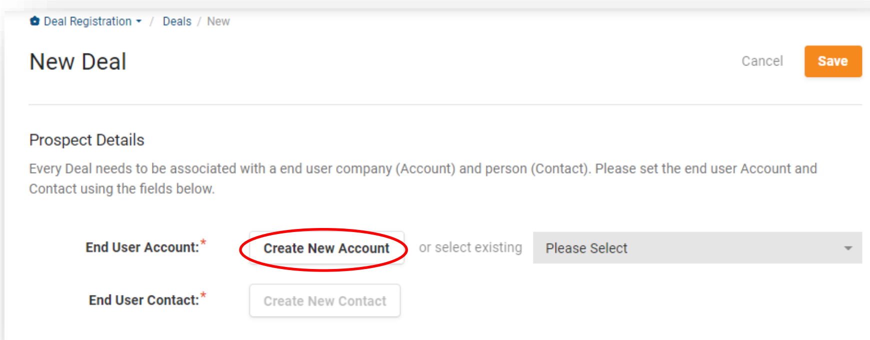
1. Click the Deal Registration icon in the left navigation menu or click "Register a Deal" in the Welcome Message on the home page.

2. Click the “New Deal” button to complete the Deal Registration form.

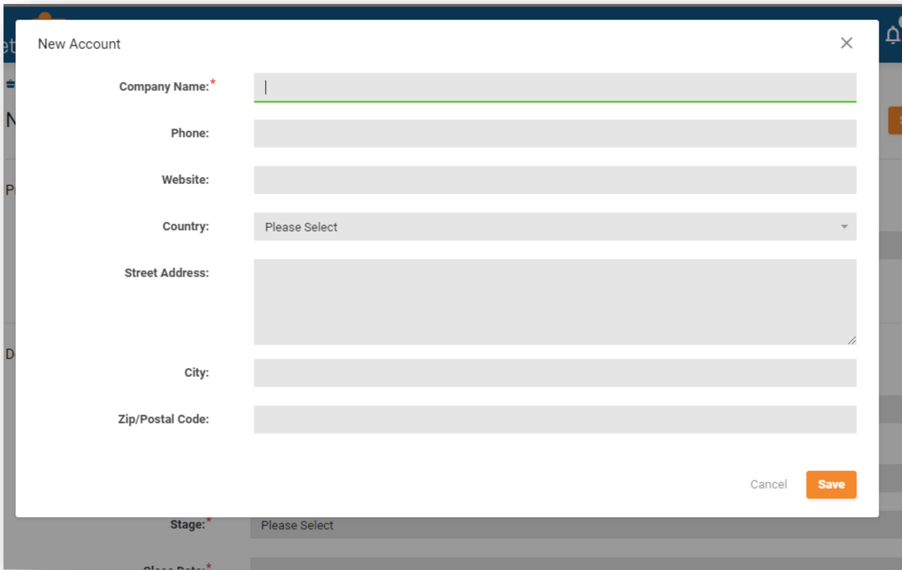


Deals/Opportunities Page

3. Enter the Customer Account & Contact associated with the Deal by selecting Create New Account. Once you register an Account and Contact, they will appear in the drop-down menu for future use.

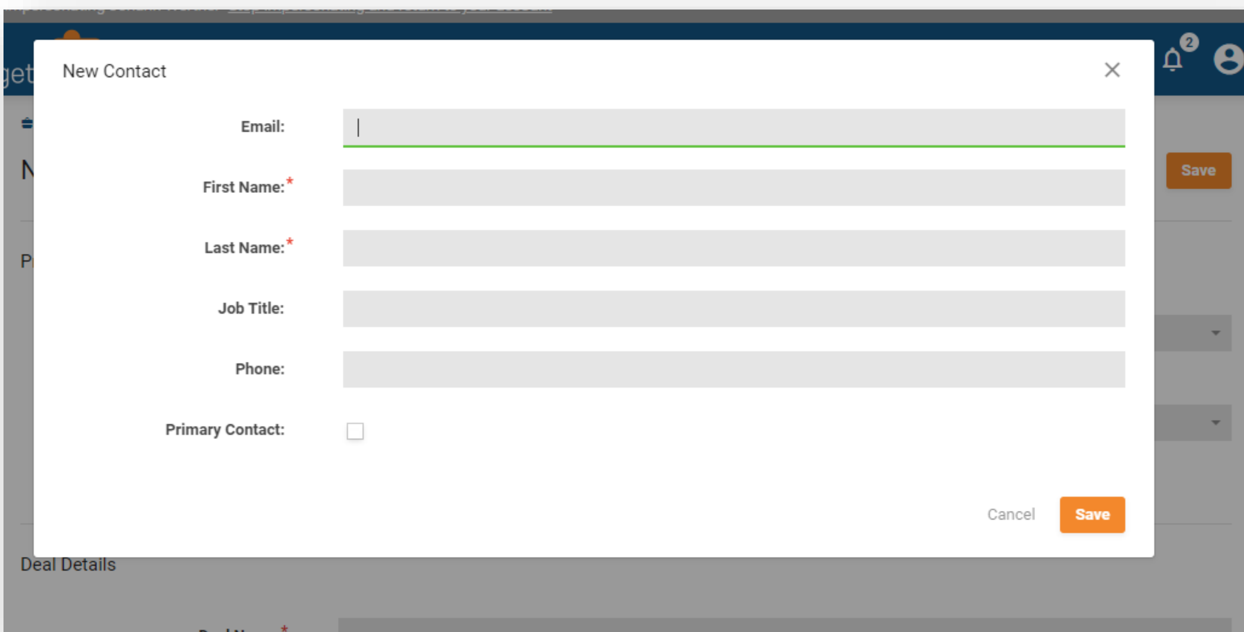


Prospect Account & Contact Details



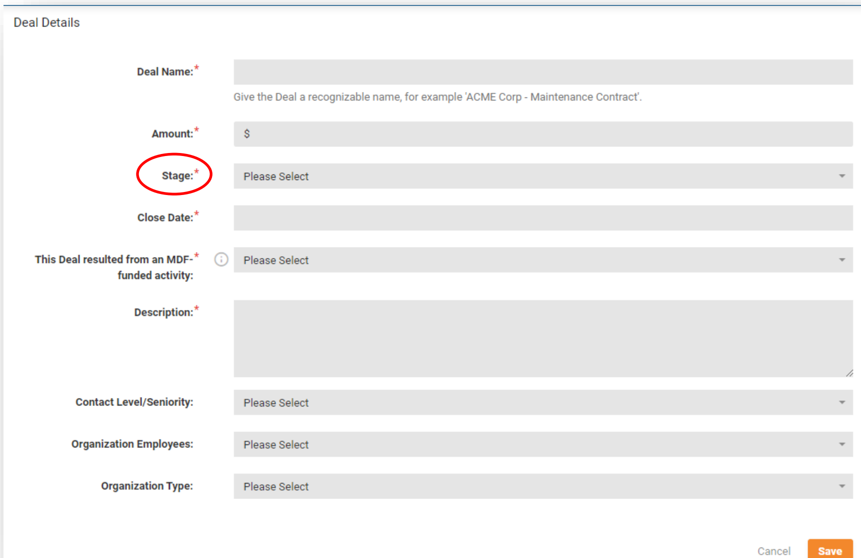
New Account Screen

4. After entering an Account, click the “Create New Contact” button to enter a Contact and complete the contact details.



New Contact Screen

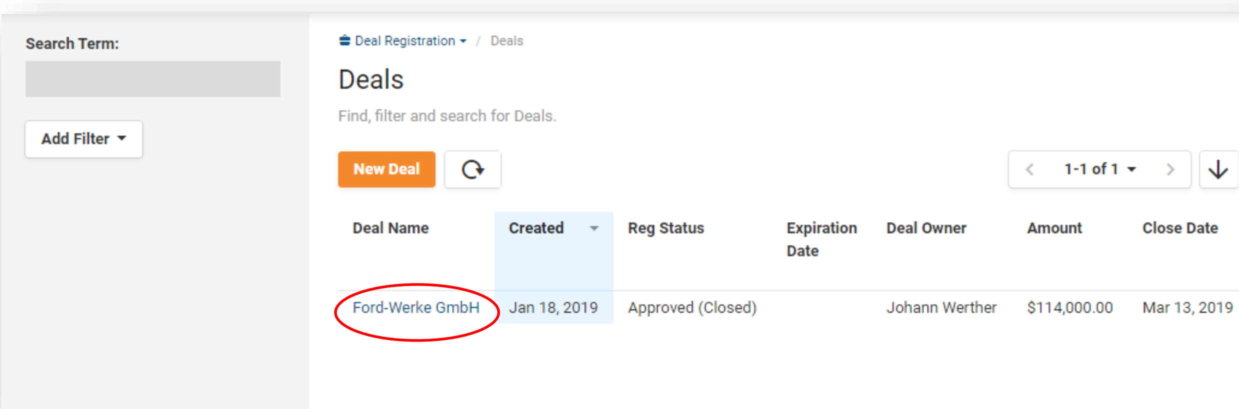
5. With the Account and Contact added, you can scroll down the page to complete the fields in the Deal Details section. Make sure to update the Stage field to indicate where you are in the Deal's lifecycle. **You'll need to update the Stage throughout the sales process.** The Sales Stages include:
   - Prospecting
   - Qualification
   - Proposal
   - Closing
   - Closed Won
   - Closed Lost



Deal Details Screen

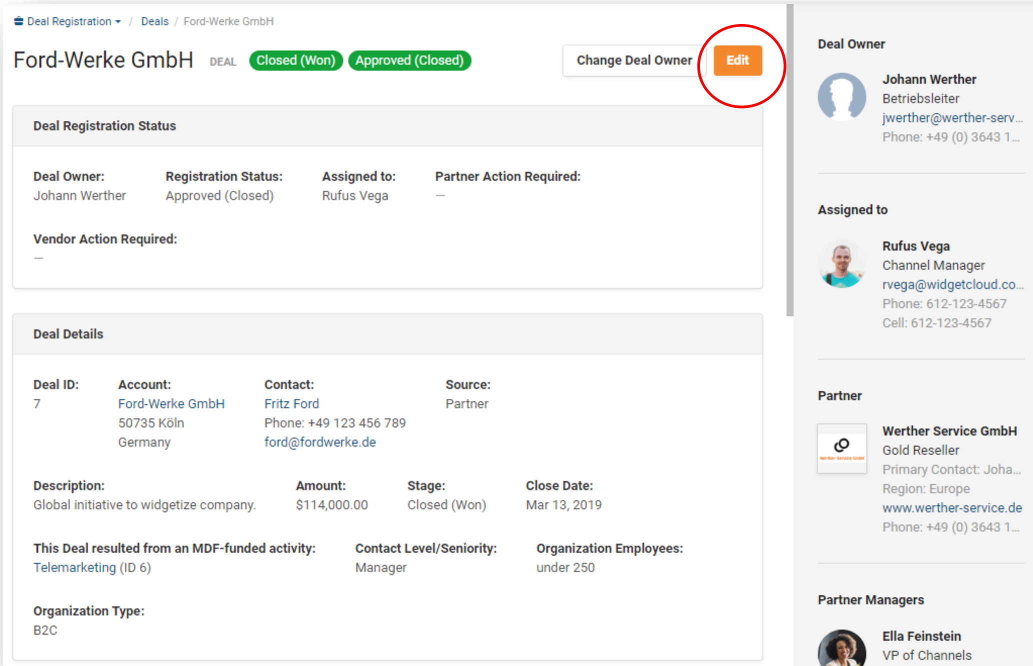
Updating Existing Deals

Once you have registered your Deal, you'll need to update it throughout the sales process. To view and update registered Deals, click on the title of the Deal to view its details and make updates.



Registered Deals Screen

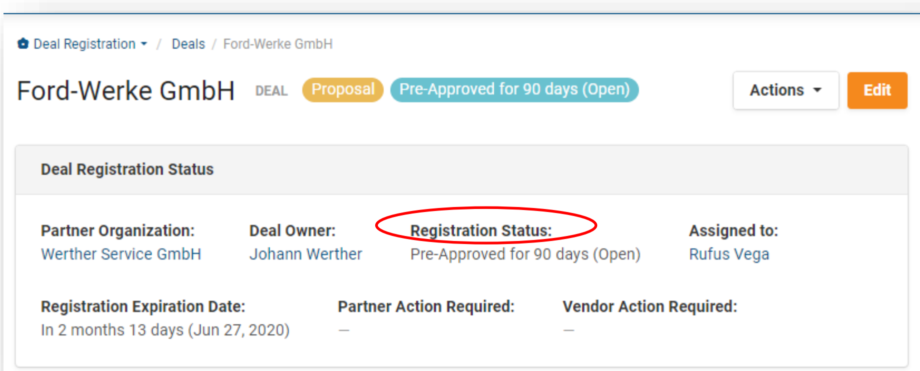
From the Deal Details page, click "Edit" in the top right corner of the page to update the Deal details.



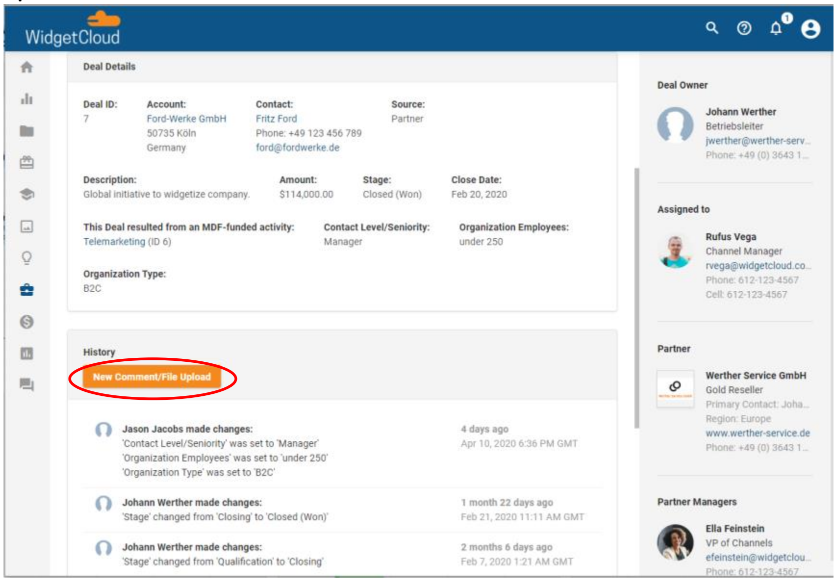
Individual Deal/Opportunity Screen

Once we review the Deal, we will notify you of the Deal's approval status by updating the Registration Status field on the Deal. Approval Statuses include:

- New (Open) – Newly Registered Deals that have not been reviewed or are still in review
- Pre-Approved for 90 Days: The Deal approval expires 90 days after the Deal's creation Date
- Approved (Closed) – Once you update the Stage field to Closed Won, we will close out the Deal
- Rejected (Closed) – The Deal is rejected or expired

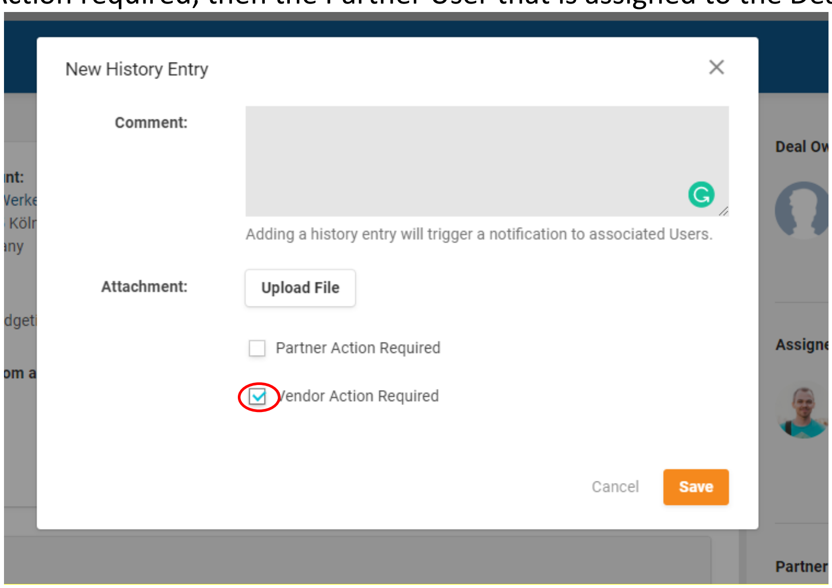


You can also scroll down to the Deal page to view the History section. The History section contains a list of all the changes made to the record. You can add notes and upload files to the History section by selecting "New Comment/File Upload" button.



Deal History Section

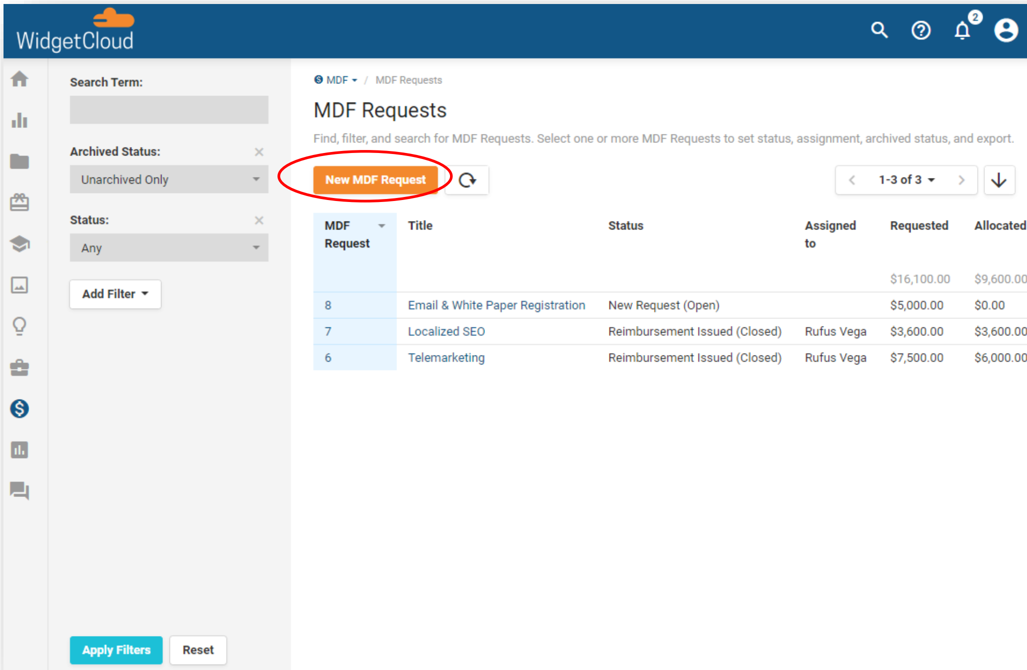
If you select the Vendor Action required checkbox, the vendor will be notified about the note/file upload. If you select Partner Action required, then the Partner User that is assigned to the Deal will be notified.



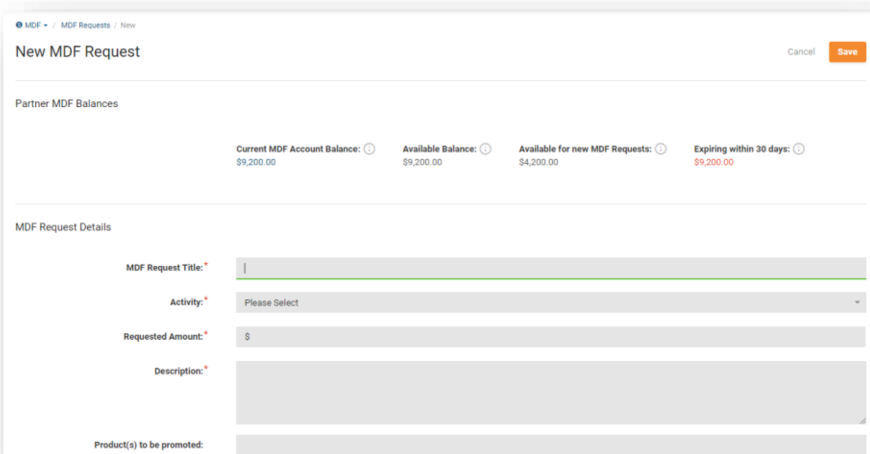
New History Entry Window

Submitting MDF Requests

1. To submit MDF Request, select MDF from the left navigation menu or click the "Submit MDF" button in the Welcome Message. You'll then click the “New MDF Request” button to complete the Request form.

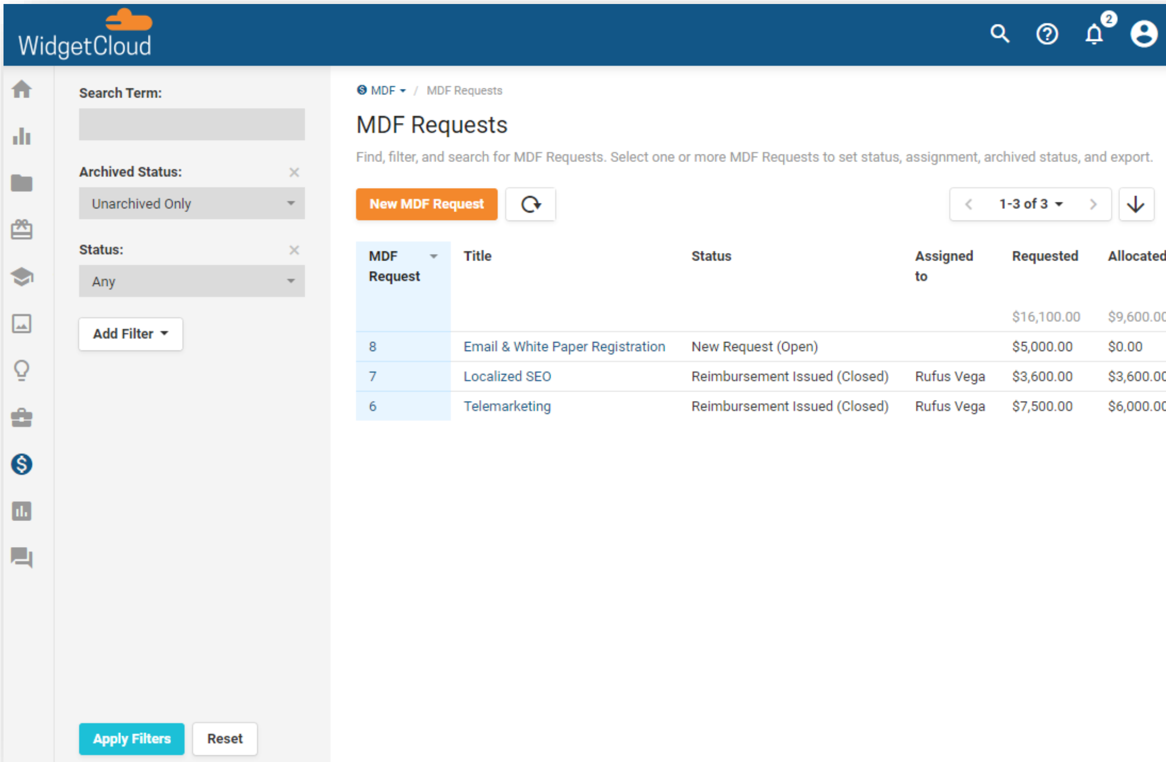


2. Complete the MDF details and click Save to submit your request.



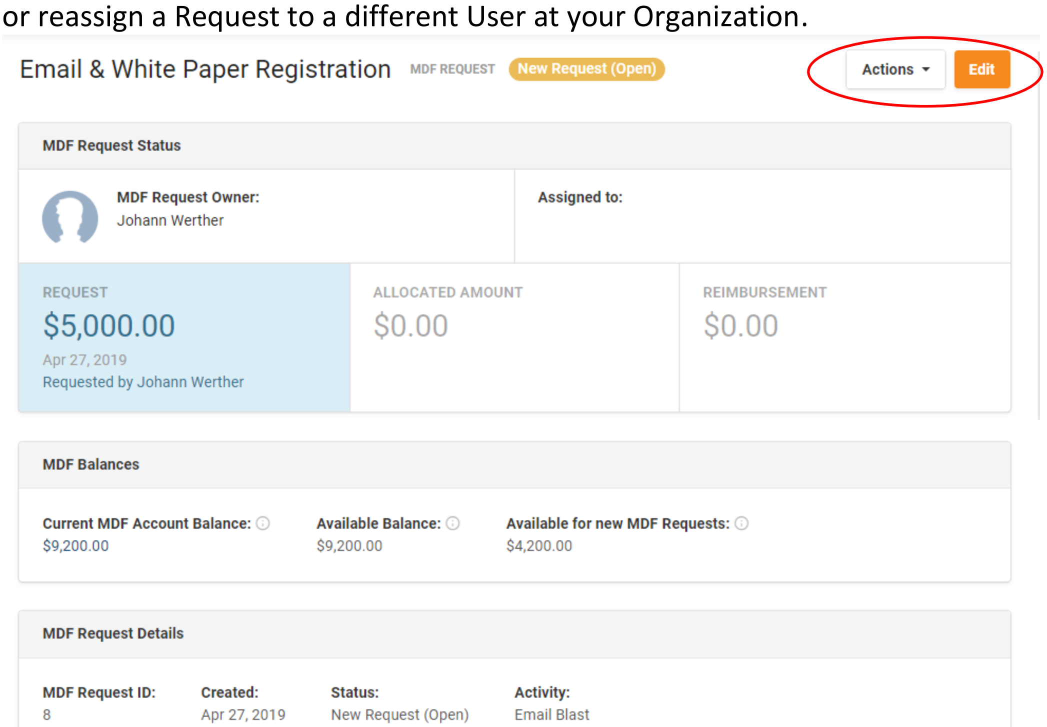
New MDF Requests Page

3. Once your request is submitted, you can view and make updates by clicking on the title of the request on the main MDF Requests Screen.



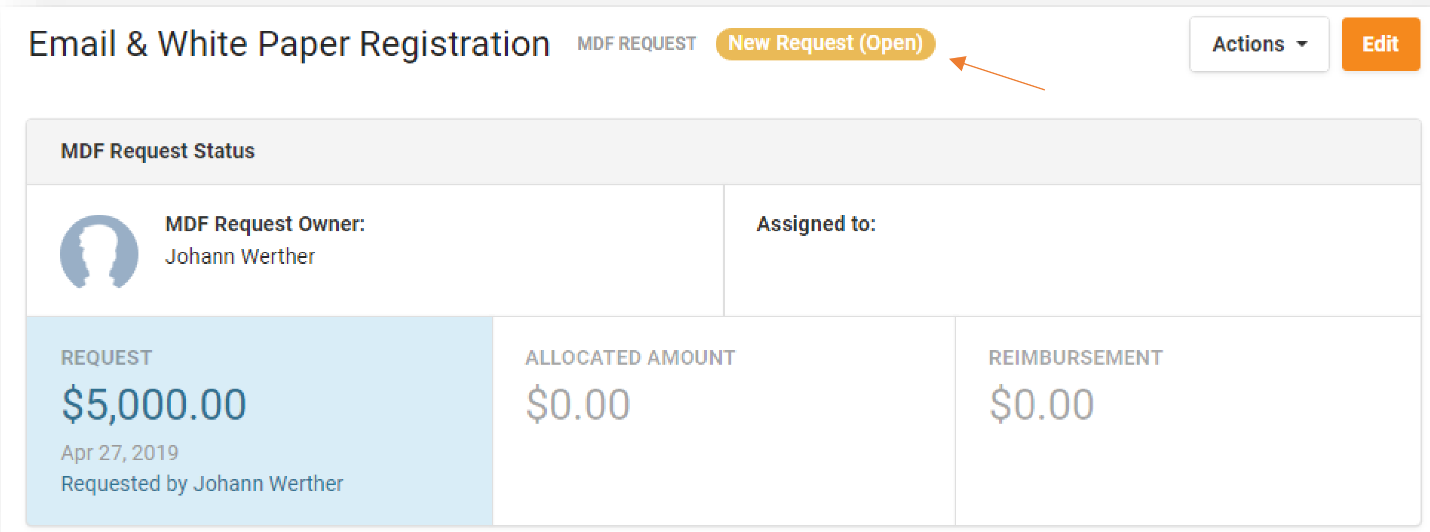
MDF Requests Screen

When you open an existing request, you'll see a detailed overview of your request and funds. To update the Request, click the "Edit" button in the top right. You can also use the "Actions" button to duplicate a Request or reassign a Request to a different User at your Organization.

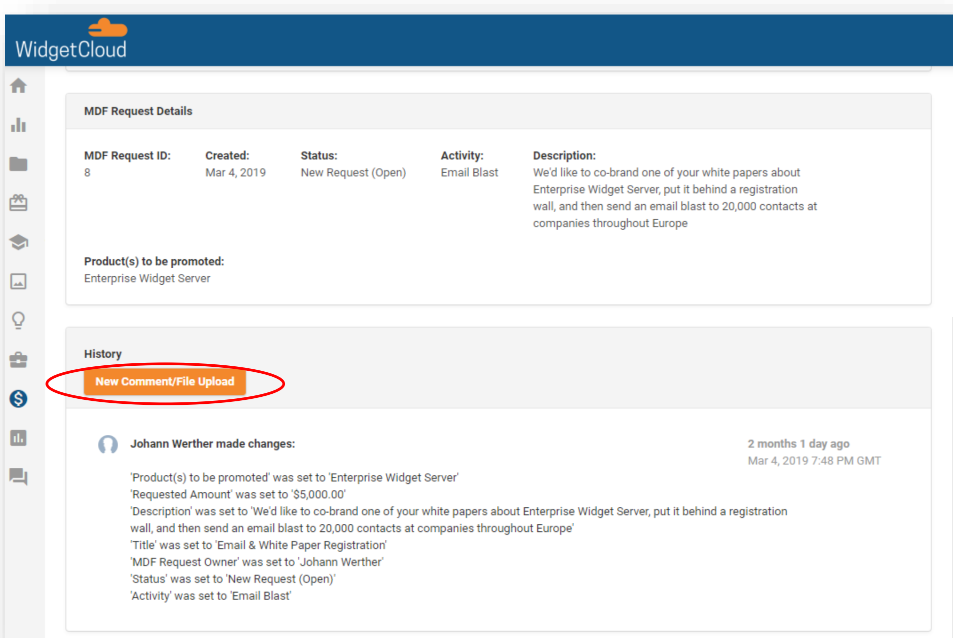


Once we review the Request, we will notify you of its approval status by updating the Status field on the Request. Approval statuses include:

- New Request (Open) – Newly submitted Request
- Pre-Approved for 90 Days: Funds allocated for 90days
- Reimbursement Issued – The activity is complete, and funds have been reimbursed
- Request Declined – Activity not approved
- Reimbursement Declined – Funds will not be reimbursed for the activity
- Request Expired – Activity was not completed within 90days

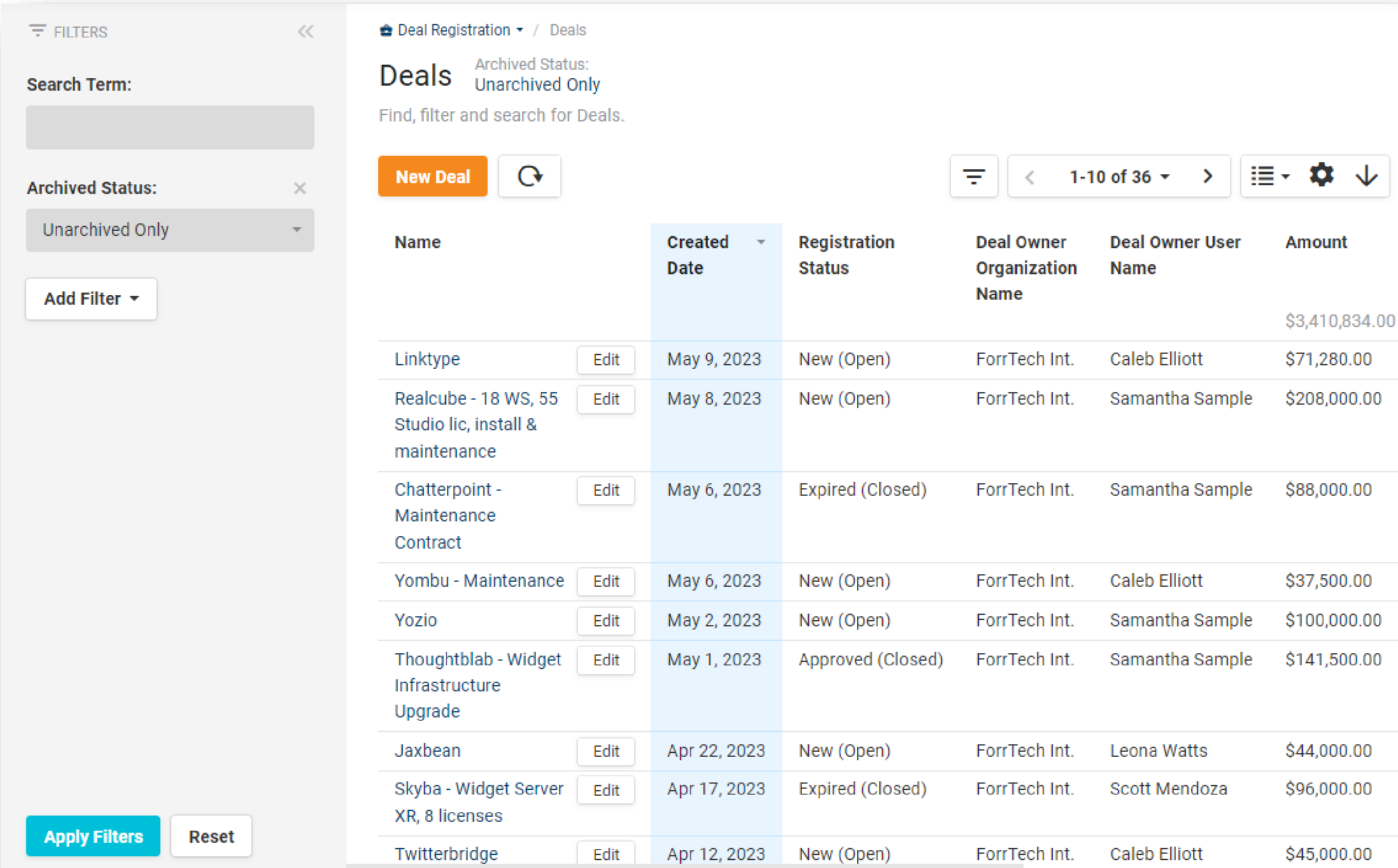


4. If you need to add comments or upload files to a Request, scroll to the bottom of the detailed overview page to the History section and click the "New Comment/ File Upload" button.



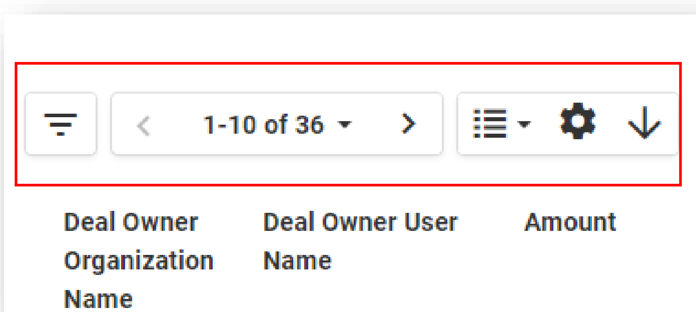
Reporting

Pages that include a list of items such as Deals, Leads, and MDF Requests are called "lister" pages in Channeltivity. Most of the listers in Channeltivity can be customized by adding, removing, and rearranging columns to create custom Reports/Views. Frequently used reports can be saved as well as exported to Excel so that you can easily access them in the future. You can also convert the data to tables, charts, and graphs for visual reporting.

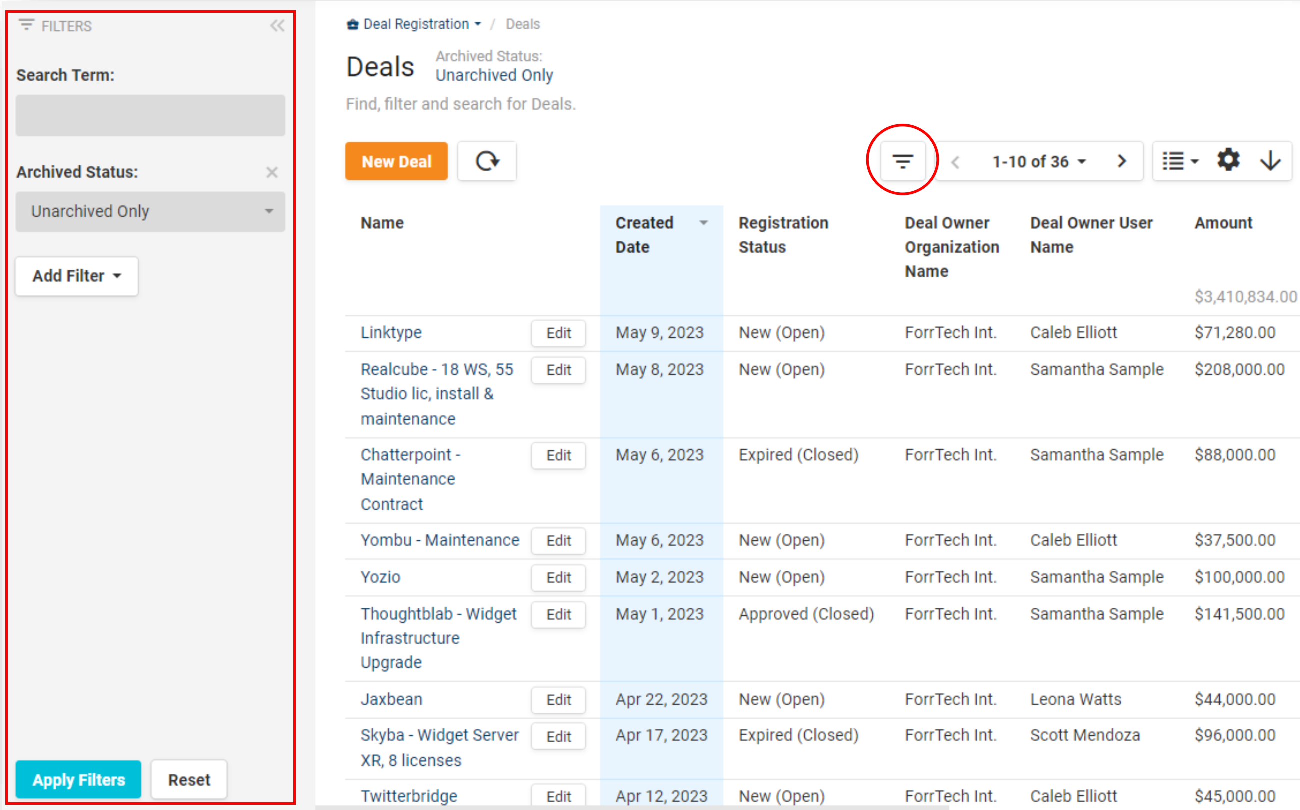


Deals Lister Page

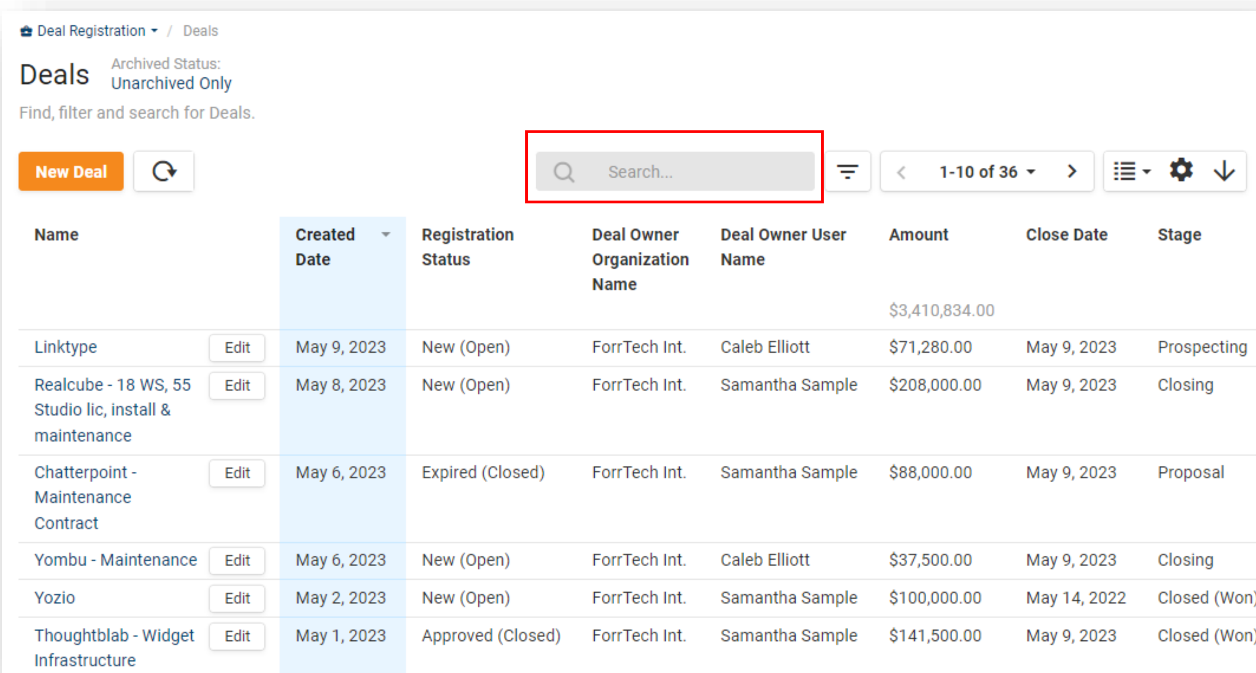
All of the lister configuration options are accessible through the controls in the top right corner:



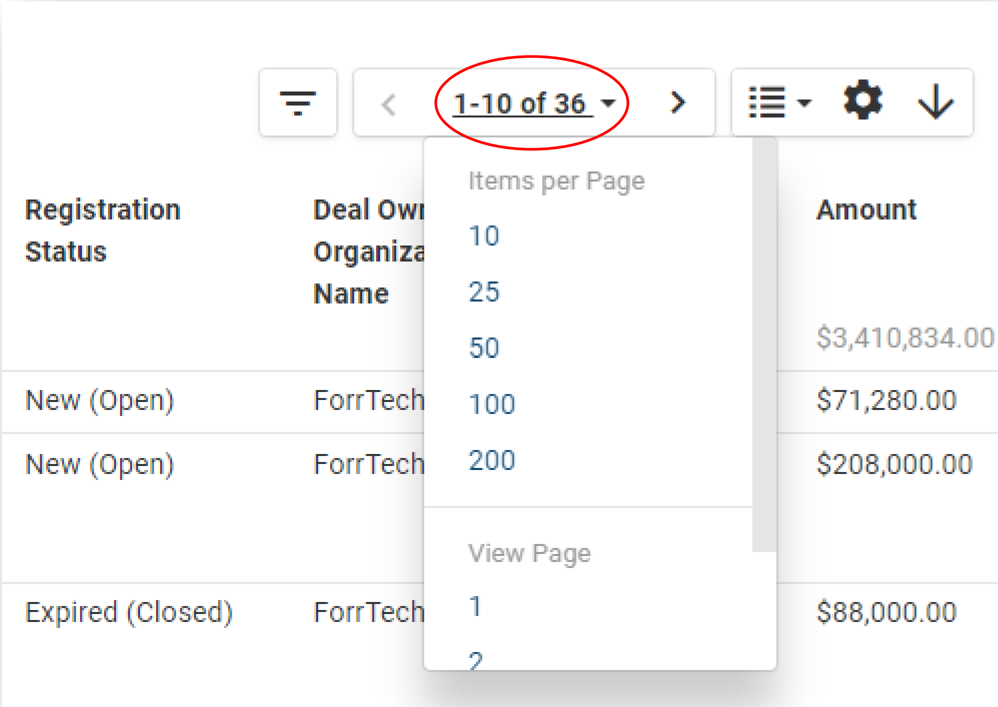
- The filter icon allows you to show and hide the filter menu on the left side panel.



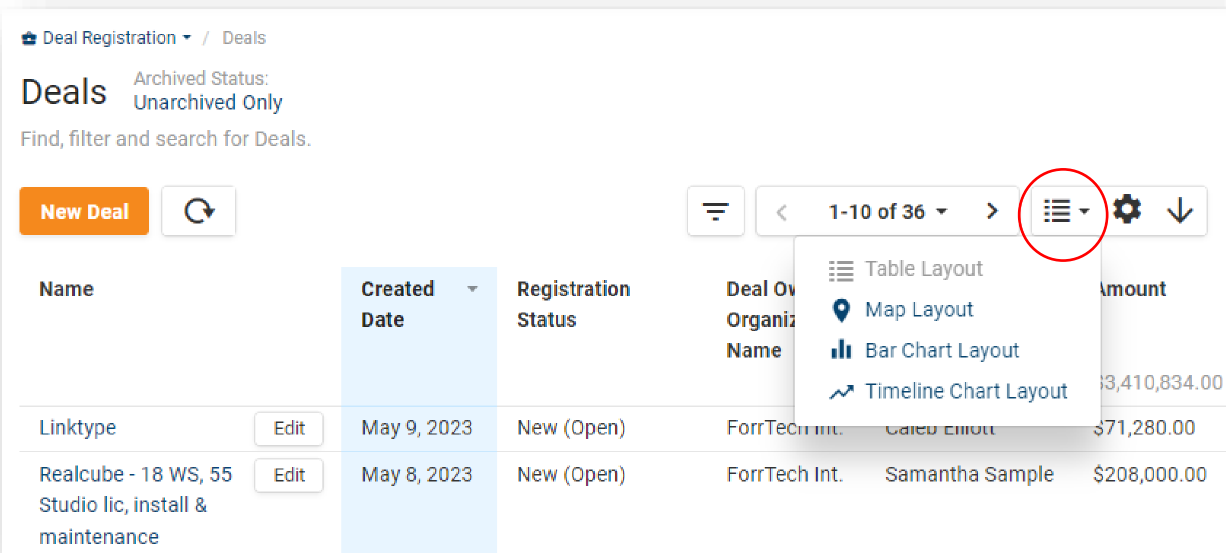
- You can search for items in the search box that appears at the top of the lister page when the filter menu is hidden from your view.



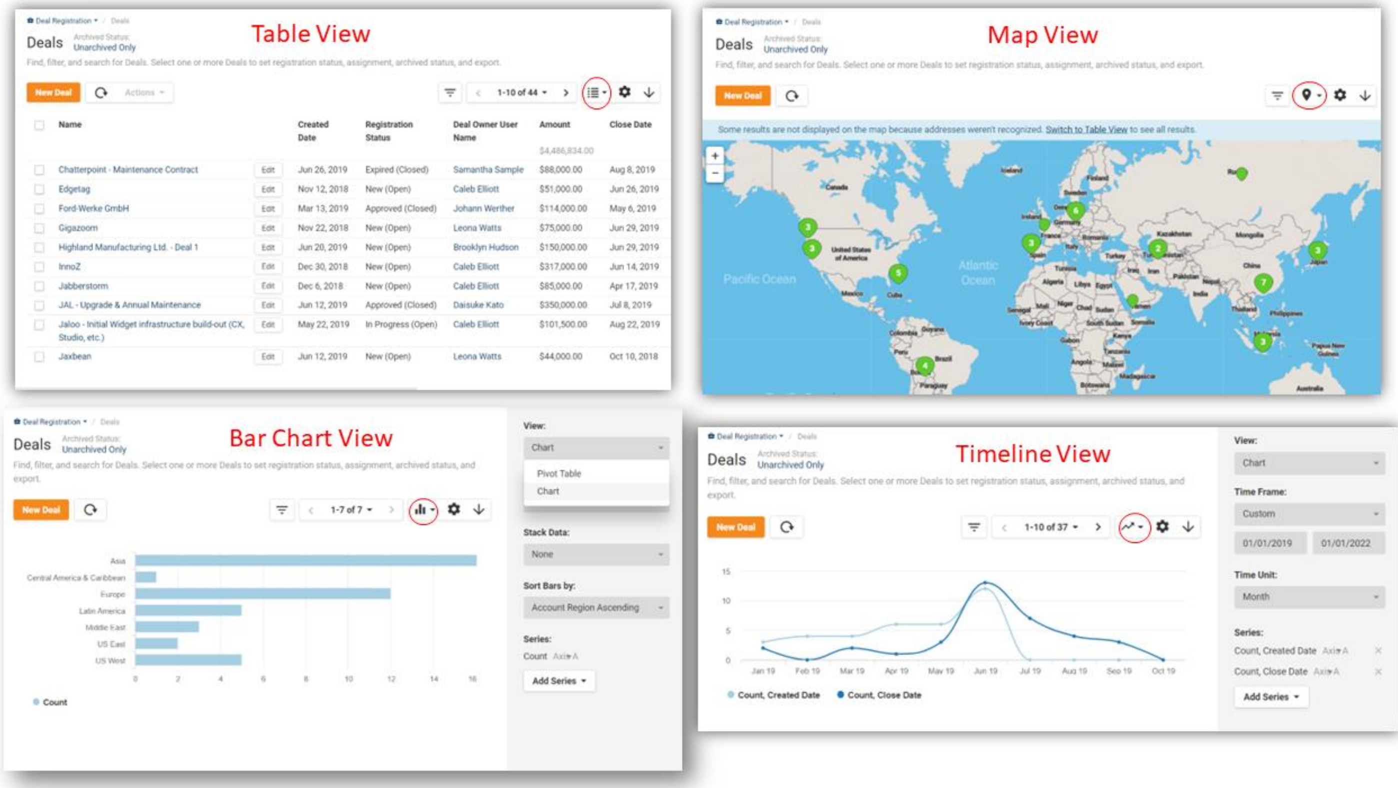
- Lister pages can be configured to display up to 200 items per page:



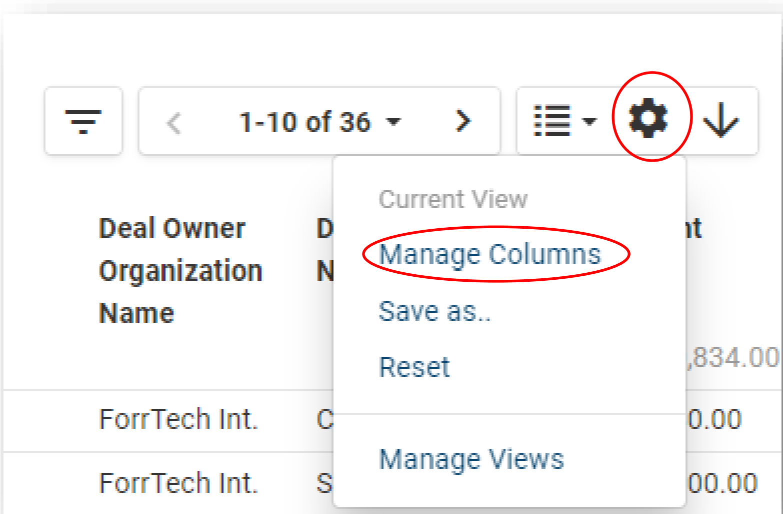
- Lister pages can also be configured to display data in the following formats:



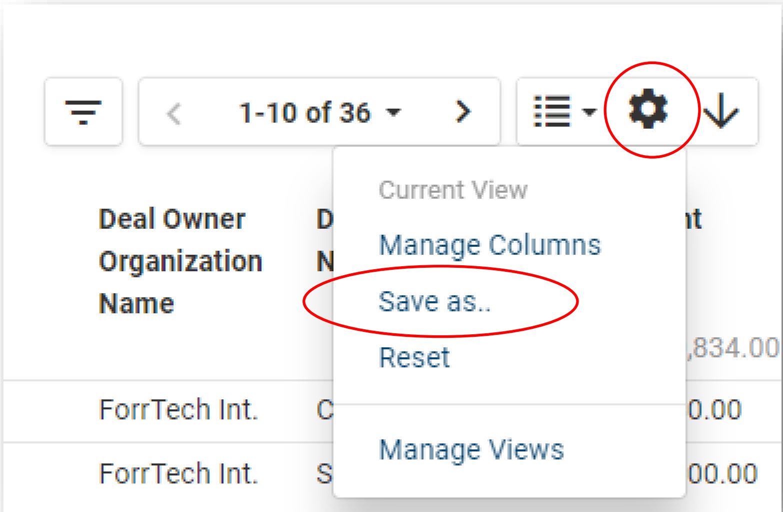
  - **Table Layout**- allows you to view the items on the page in a list format
  - **Map Layout**- gives you a visual representation of all of your records on a geographical map Please note that not all record types support the Map View.
  - Analysis Layouts - provides a visual representation of your data by converting columns to bar charts and graphs
    - **Bar Chart Layout**- shows a bar chart or pivot table with a snapshot of your data
    - **Timeline Chart Layout**- shows a line chart or pivot table with activity over time



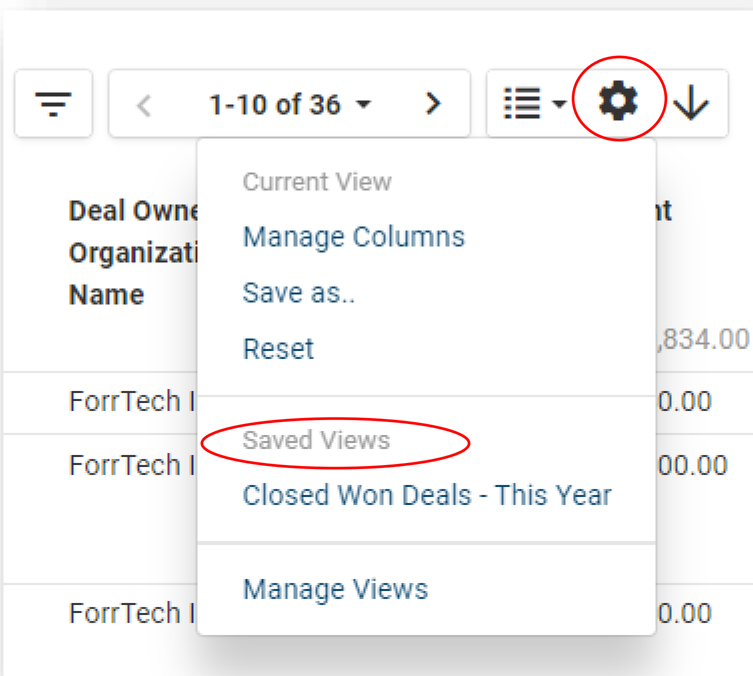
- To add, remove and move columns from the Table View in Channeltivity, click the gear icon in the top right corner of the lister page and select "Manage Columns."



- You can save Views/Reports, by clicking the gear icon > Save As.



- To access saved Views/Reports > click the gear icon to view your saved views.



- To export a View/Report to Excel, click the downward-facing arrow > Export to Excel.