



Renew OnDemand Distributor User Guide

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1: Welcome to Renew OnDemand!

Overview

Renew OnDemand is a cloud application, purpose-built to maximize recurring revenue. Renew OnDemand arms sales teams, executives and channel partners—including distributors and resellers—with a complete system to renew customer contracts and subscriptions.

Designed by software professionals with deep experience in all phases of the contract renewal sales process, Renew OnDemand consolidates the tasks and information you may have previously gathered from many different systems and puts them in one place where everyone involved in the sales process can collaborate. This provides better data visibility into your renewals business and ensures a consistent approach to managing opportunities, quotes and bookings across the team.

This chapter covers the following aspects of Renew OnDemand:

- Basic Features
 - User Roles
 - Sales Process
 - Key Terminology
-

Features

- Easy pipeline management
- 360° views of customer inventory
- Team collaboration tool
- Built-in real-time analytics to track progress

User Roles

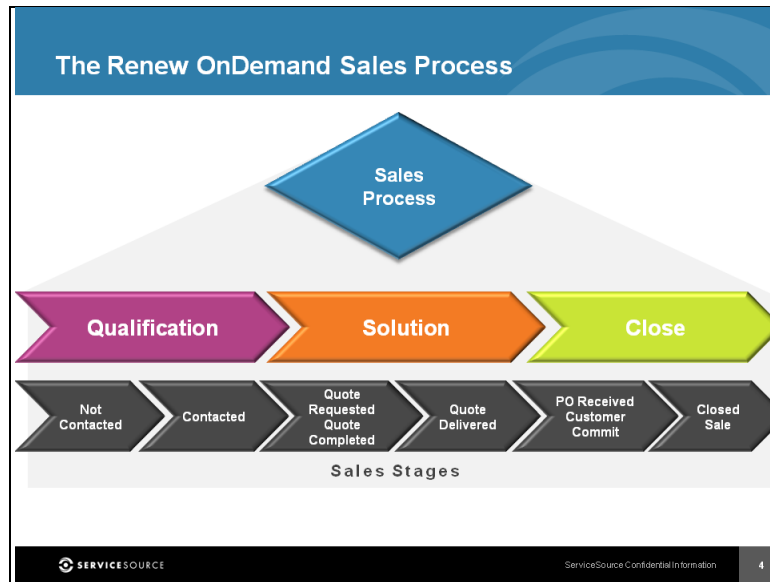
To streamline productivity, Renew OnDemand supports and facilitates sales activities that can be performed by different roles:

- **Distributor Sales Rep:** Customer and reseller contact. Identifies sales prospects, develops relationships with customers and resellers, and closes deals.
- **OEM Sales Rep:** Supports distributor rep in advancing sales. Can act on behalf of distributor rep within Renew OnDemand.
- **Sales Ops:** Sales support, administrative tasks, and data entry.

Note: Since distributor sales reps and OEM sales reps can perform the same functions within Renew OnDemand, the term *sales rep* in this user guide can apply to both roles.



The Sales Process



Sales Stages

The service contract renewal sales process typically follows three steps: qualification, solution, and close.

Renew OnDemand refines and expands these steps into a series of sales stages so you can easily assess your progress and identify the next action needed to advance the sale.

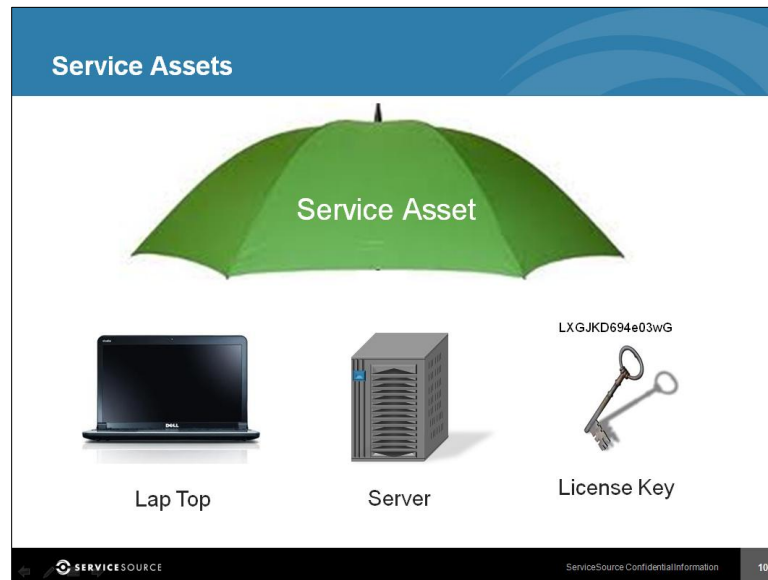
As the sales team completes actions during the sales process, Renew OnDemand advances the opportunity to the next sales stage.

In this user guide, you will learn the specific screens, steps and tasks used to advance a sale through the sales stages.

Defining Key Terms

Here are some key terms you'll see frequently along with a brief definition of how they are used in Renew OnDemand.

Assets: Covered Assets and Service Assets



About Assets

A customer's inventory is made up of assets. These can be physical assets or software licenses they have purchased, as well as the service contracts or subscriptions that entitle the customer to support on those assets. Renew OnDemand gives insight into both types of inventory: covered assets and service assets.

Covered Assets

A covered asset might be physical, for example, a computer or another piece of equipment, usually represented by a serial number. Or a covered asset might be software, usually represented by a license key.

Service Assets

A service asset is the specific instance of support coverage for a covered asset. It has a unique ID such as a contract number.

If a customer purchases service for their covered asset, Renew OnDemand considers it to be a service asset.

***How
Covered
Assets and
Service
Assets
Work
Together***

Renew OnDemand represents the relationship between the covered asset and the service asset in the way that best represents the way your customers purchase them from your company.

For example, let's say that your company sells servers and several types of service contracts, such as hardware maintenance and hard drive retention services. Renew OnDemand tracks one covered asset representing the server, and two service assets representing each type of services covering the server.

Or, let's say your company sells service contracts that cover bundles of products. For example, a customer can purchase a contract for two hundred software licenses. In this case, Renew OnDemand can represent the contract as one service asset and the software licenses as two hundred individual covered assets.

As a rule, the relationship between the covered assets and service assets should mirror the way you provide pricing to the customer.



Offers and Opportunities



Creating Renewal- Ready Sales Opportunities

Renew OnDemand generates sales opportunities based on expiring service assets. Offers and opportunities allow you to track both line-item and header-level detail about the potential sale.

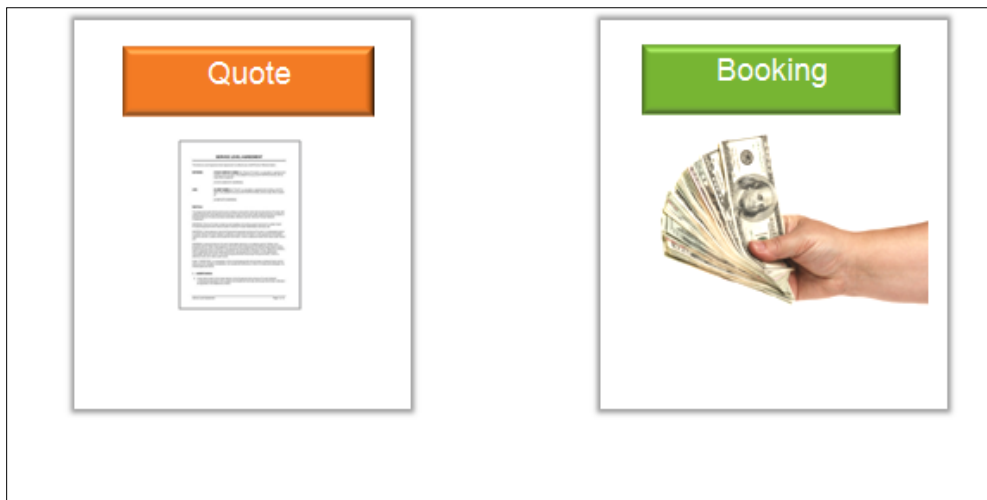
Offers

As an existing service contract nears its expiration date, Renew OnDemand creates one or more offers based on the terms of the expiring contract. The offer represents the desired outcome of the renewal of the expiring service contract.

Opportunities

Renew OnDemand groups offers into opportunities for easy updates. The opportunity contains a record of every action that takes place as the opportunity advances through the sales stages, as well as your notes and forecast information.

Quotes and Bookings



Transaction Information Is Tracked

In addition to tracking asset and sales information, Renew OnDemand tracks all iterations of pricing and order information as you progress the sale. Quote and booking records are created to keep track of all the transaction details.

Quotes

Renew OnDemand generates a quote record for every quote request performed by the sales rep. Quote records contain version, pricing, term length and service level detail, as well as a copy of the quote to be sent to the customer.

Bookings

Booking records are created when a sales rep requests a booking. The booking record contains payment information and the final details of the customer's purchase.

Sales Stages: The Lifecycle of an Opportunity

During the lifecycle of an opportunity, sales reps collaborate with sales ops for quotes and bookings. Sales ops prepares quotes for you to present, and then handles bookings once the sale is made. Grey rows in this chart represent sales ops actions.

Sales Procedure	Operations Procedure	Action	Sales Stage Advances
Log Customer Contact		The sales rep selects an opportunity and calls the customer to describe the offers the opportunity contains.	From <i>Not Contacted</i> to <i>Contacted</i>
Requesting a Quote (Handoff to Sales Ops)		If the customer is interested, the sales rep indicates which offers the customer wishes to buy and requests a quote from sales ops.	From <i>Contacted</i> to <i>Quote Requested</i>
	Sales ops completes the quote	The sales op rep completes the quote.	From <i>Quote Requested</i> to <i>Quote Completed</i>
Delivering a Quote		The sales rep sees this request in their <i>Quotes Ready</i> queue and delivers the quote to the customer.	From <i>Quote Completed</i> to <i>Quote Delivered</i>
Logging a Customer Commitment		If the customer commits to a payment date, the sales rep logs the customer commitment.	From <i>Quote Delivered</i> to <i>Customer Commitment</i>
Requesting a Booking (Handoff to Sales Ops)		Sales rep receives payment and sends closing information to sales ops.	From <i>Customer Commitment</i> to <i>Purchase Order Received</i>
	Sales ops completes the booking.	Sale is closed.	From <i>Purchase Order Received</i> to <i>Closed Sale</i>
Resolving an Opportunity as a Loss		No sale is made or the opportunity is identified as invalid.	From any sales stage to <i>No Service/House Account</i>

Note: In some cases, distributors or resellers may perform these actions and the OEM sales rep is only an informed party. In other cases, the OEM sales rep may act on behalf of channel partners by taking action from the partner opportunity.

2: A Guided Tour

Overview

This chapter details the sales role as supported by Renew OnDemand and serves as a guided tour to introduce the pages and basic functions you'll be using. Here's what we'll cover:

- The Sales Role
- Localization Preferences
- Renew OnDemand Pages



The Sales Role

Renew OnDemand allows you to spend your valuable time talking to customers, keeping track of their contract renewal needs, and following up on specific opportunities to maximize sales.

Sales reps provide focus and direction for the sales process while sales operations reps provide administrative and logistical support.

Basic Tasks

As a sales rep, your basic job involves the following:

- Beginning the service contract renewal sales cycle by selecting an opportunity and contacting the customer.
- Presenting the offer to the customer.
- Closing the sale when payment is received.

Advanced Tasks

As you become familiar with Renew OnDemand, you'll be able to do more:

- Perform customer research.
- Manage contacts, tasks, bookings and quotes.
- Use productivity tools to bulk edit and tag records.
- Create sales forecasts.

Basic Page Navigation

The screenshot shows the 'Opportunities' page in the Renew OnDemand DynaPro application. The page has a top navigation bar with tabs: Overview, Analytics, Opportunities (selected), Contacts, Assets, Tasks, and More. Below the tabs, the 'Opportunities' section is displayed. It includes a filter bar with tabs: ALL, OPEN, QUOTES READY, EXPIRED, EXPIRING THIS WEEK, TOP DEALS, RESOLVED, and MY OPPORTUNITIES. A search icon is located to the right of the filter tabs. Below the filter bar is a table with columns: NAME, SALES STAGE, EXPIRATION DATE, CUSTOMER, SALES REP, UNWEIGHTED AMOUNT, AMOUNT, and COMMIT. The table contains several rows of opportunity data. Numbered callouts are placed on the page: 1 points to the search icon, 2 points to the filter tabs, 3 points to the column headers, 4 points to a blue name link in the first row, and 5 points to a check box in the first row.

NAME	SALES STAGE	EXPIRATION DATE	CUSTOMER	SALES REP	UNWEIGHTED AMOUNT	AMOUNT	COMMIT
☐ BLUE CROSS BLUE SHIELD OF NORTH CAROLINA-FY13Q1-1	Not Contacted	03-21-2013	BLUE CROSS BLUE SHIELD OF NORTH CAROLINA	Alex May	19,957 USD	21,355 USD	Green
☐ AVAYA INC.-FY13Q1-1	Not Contacted	02-17-2013	AVAYA INC.	Alex May	19,928 USD	21,323 USD	Green
☐ ACXIOM-CDC-FY13Q1-1	Not Contacted	02-11-2013	ACXIOM-CDC	Alex May	19,922 USD	21,317 USD	Green
☐ AFENTIS-FY13Q1-1	Contacted	03-30-2013	AFENTIS	Alex May	19,966 USD	21,364 USD	Black
☐ NVIDIA CORP-FY13Q1-1	Contacted	03-30-2013	NVIDIA CORP	Alex May	19,966 USD	21,364 USD	Yellow
☐ LINDSLEY'S LUMBER-FY13Q1-1	Contacted	03-30-2013	LINDSLEY'S LUMBER	Alex May	19,966 USD	21,364 USD	Red

Here are some of the ways you can navigate and manage the information displayed in Renew OnDemand. These features behave similarly throughout the application.

#	Description
1	Click the magnifying glass to search.
2	Filters display specific sets of opportunities.
3	Column headers sort records in ascending or descending order.
4	Click the blue name link to open the associated record. Throughout Renew OnDemand, blue text represents clickable links.
5	Click check boxes to select records.

Localization Preferences

Renew OnDemand can translate the interface into a number of different languages.

1. Click the **Preferences** link to open the *User Preferences* window.



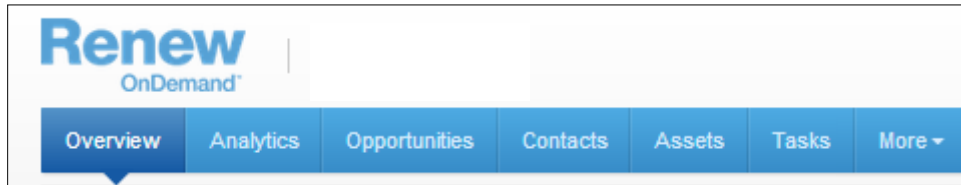
2. Select your desired location/language combination from the *Language* list.



3. Click **Save**.

Renew OnDemand Pages

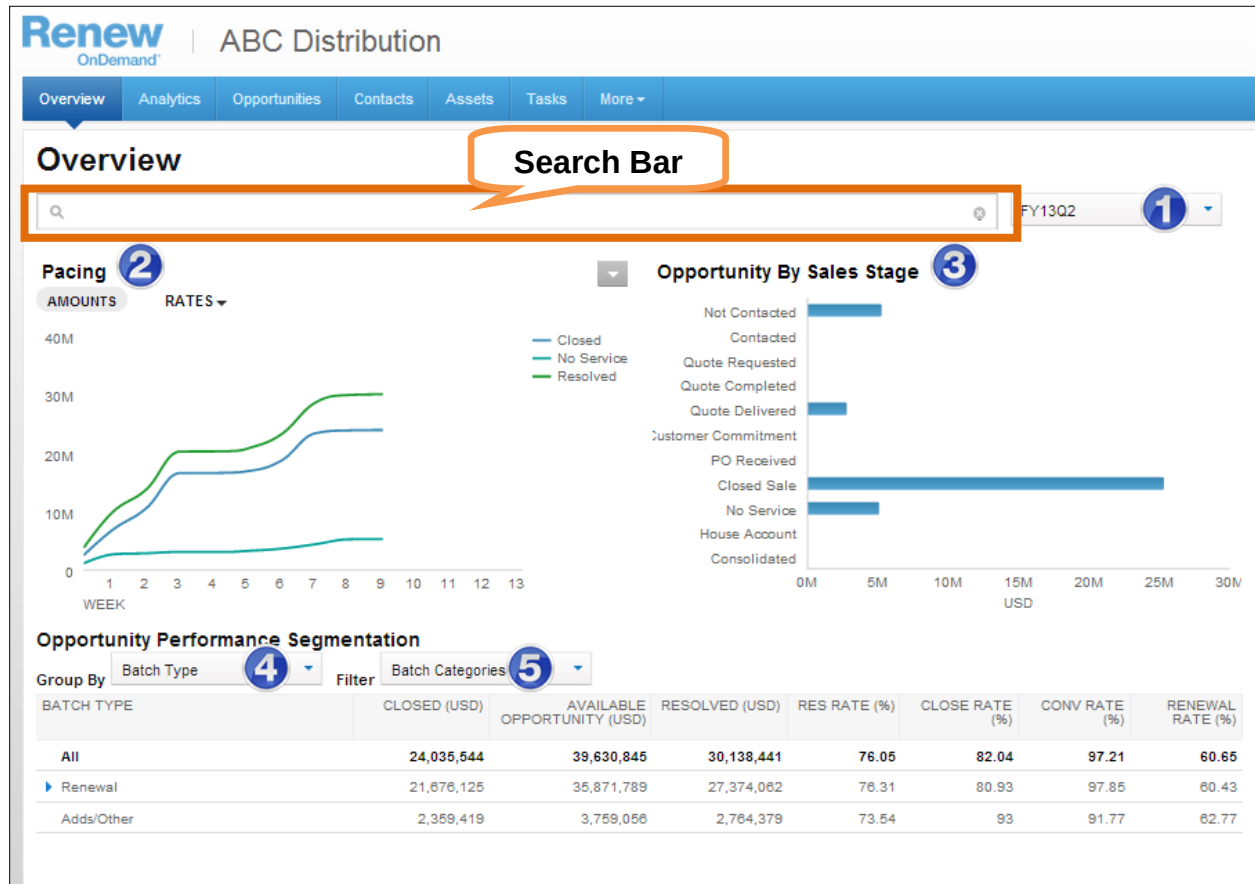
Renew OnDemand displays the overview page when you sign in. Click the tabs at the top to navigate to other pages.



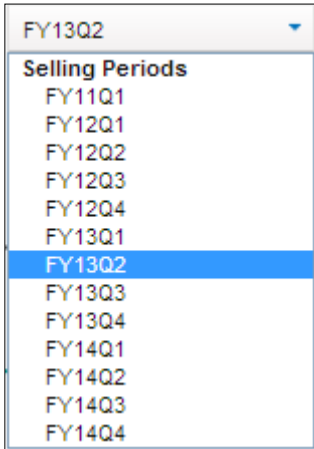
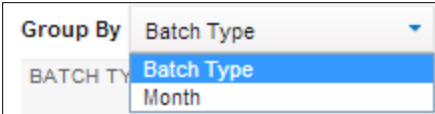
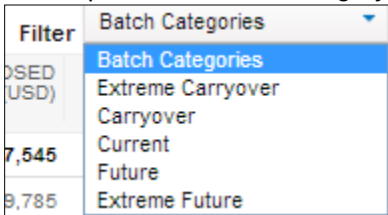
Page Name	Description
Overview	Provides immediate, up-to-date performance statistics to help plan your daily workflow, including key performance indicators (KPIs).
Analytics	Displays metrics to help you plan your workflow by identifying areas that need attention.
Opportunities	Research and select opportunities to work on.
Contacts	Lists customer companies and contacts.
Assets	Lists covered assets and service assets.
Tasks	Tasks and status.
More	Click the arrow to display a list of additional functions, including Quotes and Bookings. More ▾ Bookings Locations Products Quotes

Overview

The overview page displays a visual summary of information so you can quickly and easily monitor your performance by viewing a variety of charts, graphs, or data grids.



Note: The **Overview** page and the **Analytics** page show all available opportunities by default. Use the search bar to limit overall totals and narrow the information, for example, to show just a particular reseller or region. The search bar is a powerful tool and is covered more extensively in chapter 5.

#	Description
1	Select the Selling Period that you would like to view data for. 
2	Pacing An interactive chart that is updated depending on your selections. Amounts: View your Closed, No Service, and Resolved values by week of the quarter. Rates: Select one of the KPIs from the list: All Batch Categories, Current, Carryover and Future. Legend: Legend lines can be clicked on or off to instantly update the chart.
3	Opportunities By Sales Stage Displays the weekly progress for all opportunities according to their current sales stage. Click any progress bar to open a list of all opportunities with that status.
4 & 5	Opportunity Performance Segmentation Use this details grid to view available opportunity, closed sales, forecasts, and KPI by month and batch. View performance details grouped by batch type or month:  Filter details based on contract expiration or batch category: 

Analytics

Analytics provides a deeper dive and more specific information and analysis.

Renew OnDemand		ABC Distribution				
Overview	Analytics	Opportunities	Contacts	Assets	Tasks	More ▾
Analytics						
				FY13Q2		
METRIC	VALUE	TARGET TO DATE	TARGET	GAP	GAP (%)	
Total Available Opportunity	39,630,845 USD	-	-	-	-	
Renewal Rate	63.78%	75%	75%	-11.22	-14.96%	
Closed Opportunity Value	24,035,544 USD	11,850,000 USD	8,880,000 USD	+12,185,544 USD	+102.83%	
Conversion Rate	97.10%	95%	95%	+2.10	+2.21%	
Resolution Rate	79.34%	90%	90%	-10.66	-11.84%	
Close Rate	82.78%	70%	70%	+12.78	+18.26%	
No Service Rate	13.66%	20%	20%	+6.34	+31.7%	
Quotes Requested Count	-	-	-	-	-	
Quotes Requested Amount	-	-	-	-	-	
Quotes Delivered Count	33	-	-	-	-	
Quotes Delivered Amount	2,737,804 USD	-	-	-	-	
Bookings Requested Count	101	-	-	-	-	
Bookings Completed Value	0 USD	-	-	-	-	

Core metrics are displayed as numeric values; definitions are provided below:

Metric	Definition
Renewal Rate	The transaction value of won opportunities against the total potential opportunity available to close. This metric indicates how much of your potential opportunity is converting to a win.
Closed Opportunity Value	Targeted or potential value of all won opportunities where customer payment has been received and processed. This baseline value allows you to compare actual performance against what was possible.
Conversion Rate	Compares transaction amount of won opportunity against the targeted or potential value of the won opportunity. Conversion rate measures the ability of the sales team to maximize the value of every opportunity.
Resolution Rate	The percentage opportunity where the sales cycle has been definitively completed, whether the opportunity is resolved positively or not. It's a performance measure of customer base coverage and indicates your team's skill at getting your potential customers to respond.
Close Rate	The percentage of opportunity where customers agreed to renew out of the total value of opportunity where customers responded yes or no. It measures your team's skill at selling the value of the service.

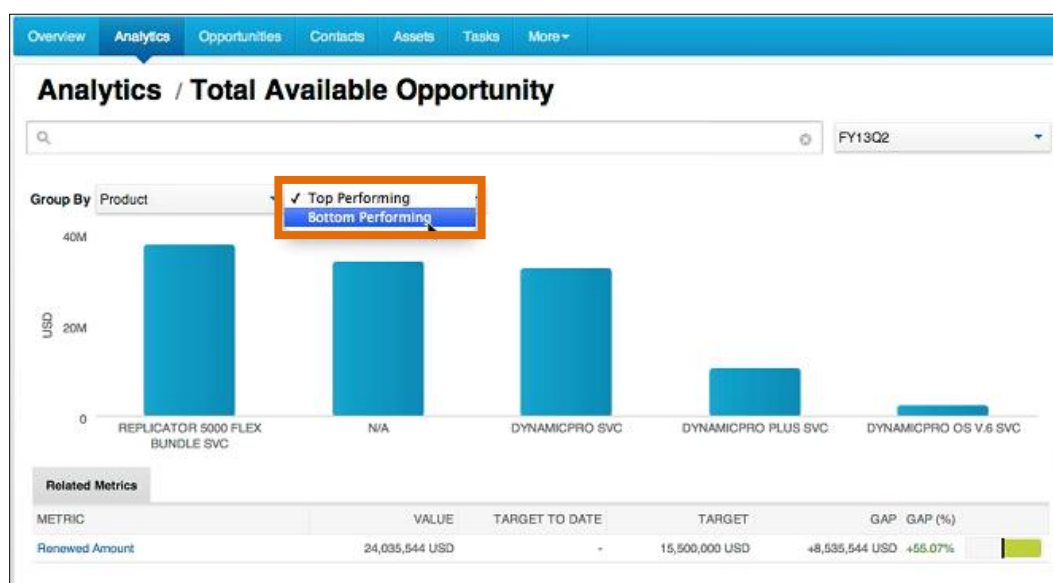
When you click a link on the **Analytics** chart, it opens another page with further details, for example, **Total Available Opportunity**, as shown below.

Analytics						
FY13Q2						
METRIC	VALUE	TARGET TO DATE	TARGET	GAP	GAP (%)	
Total Available Opportunity	21,876,282 USD	-	-	-	-	
Renewal Rate	44.03%	-	-	-	-	
Closed Opportunity Value	9,011,622 USD	-	-	-	-	
Conversion Rate	97.03%	-	-	-	-	
Resolution Rate	52.81%	-	-	-	-	

Click the arrow to display the *Group By* list. You can filter by reseller rep, territory or product.



After grouping, you can display by top performing or bottom performing.



Opportunities

The opportunities page is where you can view, track, and manage all available opportunities.

Renew OnDemand | DynaPro

Welcome Jerry | Preferences | Help | Training

Overview | Analytics | **Opportunities** | Contacts | Assets | Tasks | More ▾

Opportunities

ALL **OPEN** QUOTES READY EXPIRED EXPIRING THIS WEEK TOP DEALS RESOLVED MY OPPORTUNITIES 1

NAME 2	SALES STAGE	EXPIRATION DATE	CUSTOMER	RESELLER	SALES REP	TARGET AMOUNT	AMOUNT	COMMIT
BRYAN CAVE LLP-FY13Q2-1	Quote Delivered	03-13-2013	BRYAN CAVE LLP	Com-Link	Jerry Lee	20,810 USD	21,227 USD	Green
LIMITED BRANDS-FY13Q2-1	Quote Delivered	03-02-2013	LIMITED BRANDS	SoftPlus Pros	Jerry Lee	20,800 USD	21,216 USD	Green
BANK MIDWEST-FY13Q2-1	Quote Delivered	03-21-2013	BANK MIDWEST	TechSmart	Jerry Lee	20,818 USD	21,235 USD	Green
ALBERTA JUSTICE-FY13Q2-1	Quote Delivered	07-28-2013	ALBERTA JUSTICE		Jerry Lee	20,945 USD	21,364 USD	Green
EXTOL INC-FY13Q2-1	Quote Delivered	05-09-2013	EXTOL INC		Jerry Lee	20,866 USD	21,284 USD	Green
ALLEN INSTITUTE FOR BRAIN SCIENCES-FY13Q2-1	Not Contacted	07-23-2013	ALLEN INSTITUTE FOR BRAIN SCIENCES	1SYNC, INC., 3N GLOBAL INC., 7 SAFE LTD	Jerry Lee	20,940 USD	21,359 USD	Black
BANNER PHARMACAP-FY13Q2-1	Quote Delivered	03-06-2013	BANNER PHARMACAP	Primatex	Jerry Lee	20,803 USD	21,220 USD	Yellow
W. BELL & CO.-FY13Q2-1	Quote Delivered	03-13-2013	W. BELL & CO.	TWCP Technologies	Jerry Lee	20,810 USD	21,227 USD	Green
DFLABS SRL-FY13Q2-1	Quote Delivered	03-17-2013	DFLABS SRL	SoftPlus Pros	Jerry Lee	20,814 USD	21,231 USD	Green
COLT TELECOM GROUP PLC-FY13Q2-1	Quote Delivered	05-24-2013	COLT TELECOM GROUP PLC	TechSmart	Jerry Lee	20,881 USD	21,299 USD	Green
ATI PHYSICAL THERAPY-FY13Q2-1	Not Contacted	06-08-2013	ATI PHYSICAL THERAPY	TWCP Technologies	Jerry Lee	20,896 USD	21,314 USD	Black
DIGITAL ONE LEGAL SOLUTIONS-FY13Q2-1	Not Contacted	05-14-2013	DIGITAL ONE LEGAL SOLUTIONS	TWCP Technologies	Jerry Lee	20,871 USD	21,289 USD	Black

Activities ▾
STREAM TASKS View

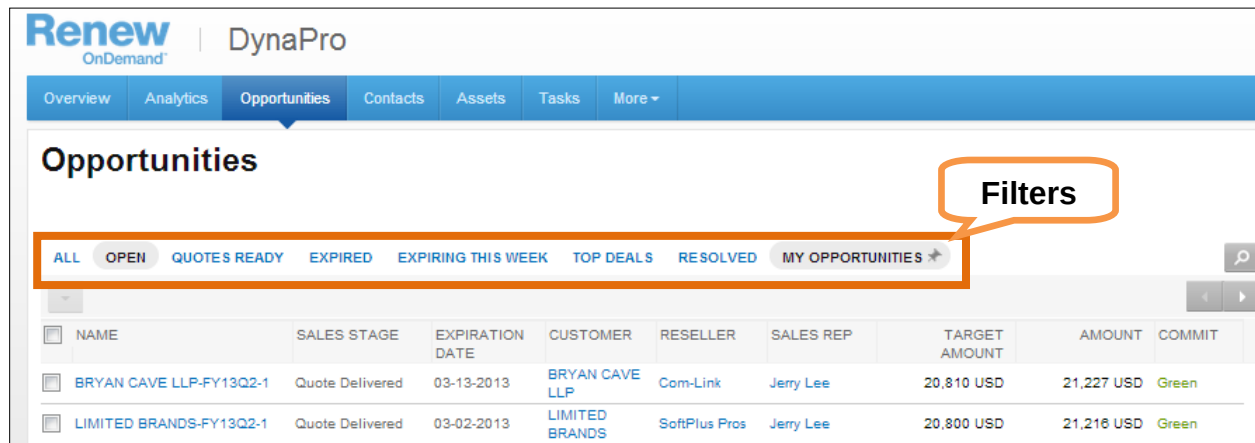
Contacts ▾
PEOPLE ORGANIZATIONS

- Amber Porch
Procurement, BRYAN CAVE LLP
- Amy Folk
IT Manager, LIMITED BRANDS
- Andrew Brewer
IT Manager, BANK MIDWEST
- Anna Williams
Procurement, EXTOL INC
- Beth Mana

In Renew OnDemand, information is organized on each page by filters and by headers.

#	Description
1	Filters sort through all available information to display only the information you need to use. For example, you can filter to view only open opportunities or top deals.
2	Headers define the kind of information displayed in each column. When you click a header, Renew OnDemand sorts the information by that parameter. Clicking the same header again reverses the sort order (from ascending to descending).

Opportunities Filters



When you select a filter, Renew OnDemand displays all the records that match your filter request. This list describes each filter. You will learn how to create custom filters in chapter 5 of this user guide.

Filter	Description
OPEN	Automatically selected when you open the Opportunities tab; shows all your open opportunities.
QUOTES READY	Shows opportunities that have been returned from sales ops with a completed quote and are ready to be sent to the customer.
EXPIRED	Contracts that have lapsed.
EXPIRING THIS WEEK	Opportunities that are about to expire.
TOP DEALS	The top fifty opportunities expiring this quarter.
RESOLVED	Contracts that have been resolved as either a win or loss.
MY OPPORTUNITIES	Opportunities assigned to you. Note: My Opportunities is a sticky filter as indicated by the pin next to its name. Sticky filters can be used with other pre-set filters at the same time.

Opportunities Headers

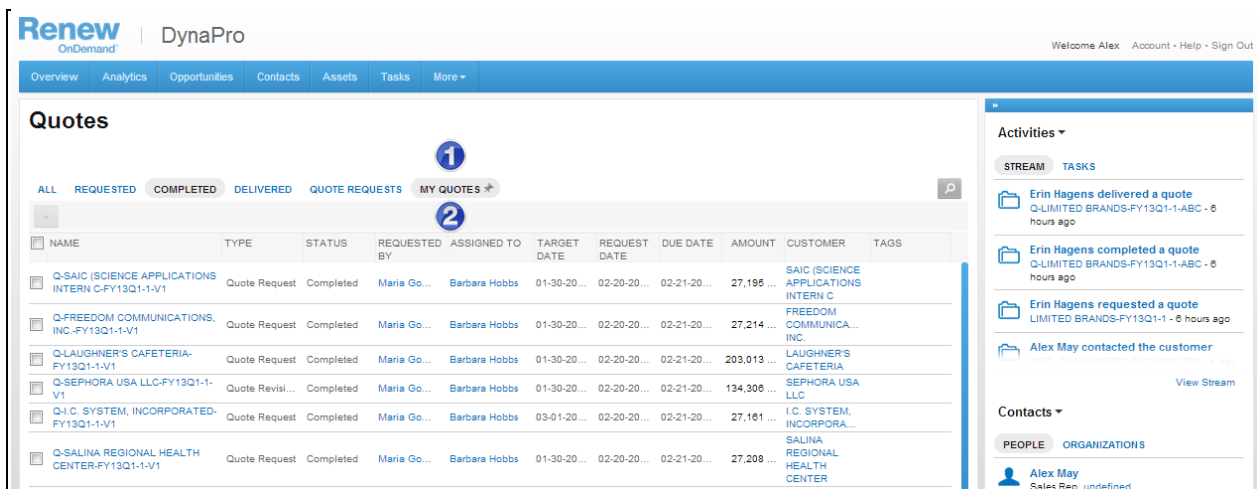
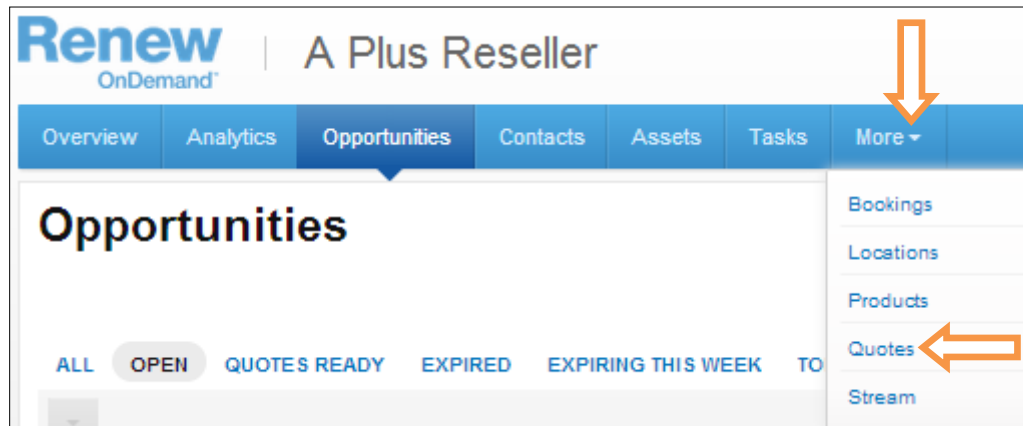
NAME	SALES STAGE	EXPIRATION DATE	CUSTOMER	RESELLER	SALES REP	TARGET AMOUNT	AMOUNT	COMMIT
BRYAN CAVE LLP-FY13Q2-1	Quote Delivered	03-13-2013	BRYAN CAVE LLP	Com-Link	Jerry Lee	20,810 USD	21,227 USD	Green
LIMITED BRANDS-FY13Q2-1	Quote Delivered	03-02-2013	LIMITED BRANDS	SoftPlus Pros	Jerry Lee	20,800 USD	21,216 USD	Green

When you select a header, Renew OnDemand sorts the information displayed by that header parameter. Click again to reverse the sort order.

Header	Description
NAME	Opportunity name
SALES STAGE	Indicates current sales stage of the opportunity
EXPIRATION DATE	The date the opportunity expires
CUSTOMER	Customer name
RESELLER	Reseller name. If there are multiple resellers, each is separated by a comma: A Plus Reseller, 1SYNC, INC., 7 SAFE LTD
SALES REP	Name of the sales rep
TARGET AMOUNT	Projected or desired amount
AMOUNT	Quoted or closed transaction amount
COMMIT	Commit level (by color code)

Quotes

To access the **Quotes** page, click the **More** menu, and then select **Quotes**.



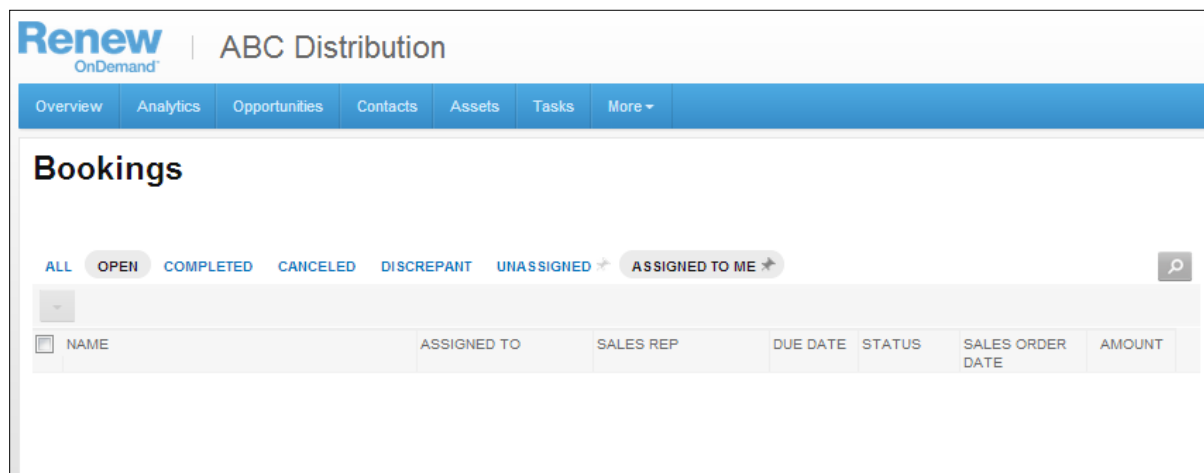
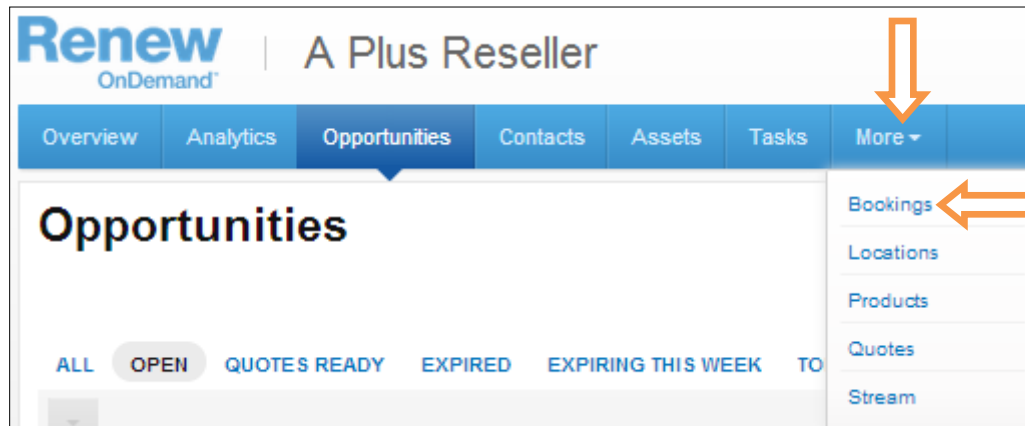
The **Quotes** page shows all quotes pending delivery. Use filters and headers to limit the display.

#	Description
1	Filters: All, Requested, Completed, Delivered, Quote Requests, and My Quotes (quotes assigned to you)
2	Headers: Quote Name, Type, Status, Requested By, Assigned To, Target Date, Request Date, Due Date, Amount, Customer, and Tags.

The **Quotes** page filters, headers and other features are covered in more detail later in this guide.

Bookings

To access the **Bookings** page, click the **More** menu, and then select **Bookings**.



The **Bookings** page shows all available bookings by default. Use filters and headers to limit the display.

Filters:	Open, Completed, Canceled, Discrepant, and Assigned To Me
Headers:	Name, Assigned To, Sales Rep, Due Date, Status, Sales Order Date, and Amount

Bookings filters and headers are described in more detail in chapter 10.

Contacts

The **Contacts** page displays information about the people and organizations you are working with.

Contacts				
1 2				
ORGANIZATIONS PEOPLE				
NEW GENERATE OPPORTUNITIES				
NAME	CONTACT TYPE	ROLE	COMPANY	EMAIL
1-800 CONTACTS INC.	Organization			info@1-800contactsinc.c...
10000 AUTO PARTS	Organization			info@10000autoparts.com
15VINC INC	Organization			info@15vinc-inc.com

#	Description
1	Displays the organizations you are working with.
2	Displays the names of your contacts.

Assets

The **Assets** page displays information about service assets and covered assets.

Assets						
2 1						
SERVICE ASSETS COVERED ASSETS						
NAME	START DATE	END DATE	CUSTOMER	PRODUCT	AMOUNT	RESELLER
UNITY-VM-USR/92143089	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	31,860 USD	
L-CUWL-MISC/92143081	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
L-UNITYCN7-USR-ADD/92143081	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	190,000 U...	

#	Description
1	Covered Assets Filter A covered asset might be physical, for example, a computer or another piece of equipment, usually represented by a serial number. Or, a covered asset might be software, usually represented by a license key.
2	Service Assets Filter A service asset is the specific instance of support coverage for a covered asset. It will have a unique ID such as a contract number. If a customer purchases service for their covered asset, Renew OnDemand considers it to be a service asset.

The Right-Hand Panel

The right-hand panel shows all activities, tasks and contacts when you are on one of the main tabs.

When you are viewing an individual record, the right-hand panel adjusts to show only activity and contacts for that particular record.

#	Description
1	Activities/Stream: A real-time log of the team's sales activities with the most recent at the top. The Activities stream keeps you informed of others' actions.
2	Activities/Tasks: Displays tasks and task status.
3	Contacts/People: Displays your contacts (individuals).
4	Contacts/Organizations: Displays your contacts (companies).
5	Click the >> icon in the top bar to collapse the right-hand panel and create more space in the main area.

The screenshot shows the right-hand panel of the Renew OnDemand interface. At the top, there's a '5' icon and a dropdown menu labeled 'Activities'. Below this, there are two tabs: 'STREAM' and 'TASKS'. Under 'STREAM', there are two numbered items: '1 Max M... requested a quote' and '2 Ryan Thompson requested a quote'. Below these, there's a 'Contacts' section with two tabs: 'PEOPLE' and 'ORGANIZATIONS'. Under 'PEOPLE', there are two numbered items: '3 Amber Forch' and '4 Amy Folk'. At the bottom right of the panel, there's a 'View Stream' link.

This screenshot shows the Renew OnDemand interface with the right-hand panel open. The panel displays a list of activities and contacts. The activities section shows a stream of recent actions, including quotes requested and tasks. The contacts section shows a list of people and organizations, with Amber Forch and Amy Folk highlighted.

Right-hand panel shown open

This screenshot shows the Renew OnDemand interface with the right-hand panel collapsed. The main content area is expanded, showing a detailed list of opportunities. The right-hand panel is no longer visible, as it has been collapsed into the top bar.

Right-hand panel shown collapsed

3: Managing Reseller Opportunities

Overview

This chapter covers Renew OnDemand's capabilities for managing reseller opportunities involving a distributor and/or one or more resellers. Here's what we'll cover:

- Navigating Channel Opportunities
- Competitive Channel Opportunities

Navigating Channel Opportunities

Renew OnDemand allows for one or more resellers to be tracked for every opportunity record. The application contains a master opportunity record to view details on the partner opportunity identified as most likely to close, and you can click into partner opportunities to view details or take action.

The Master Opportunity Record

The master opportunity record is a summary of customer, reseller and pipeline information based on the partner opportunity that has been identified by the OEM rep as mostly likely to close.

The master opportunity is read only. All sales actions take place on the partner opportunities.

From the master opportunity record you can do the following:

1. View the opportunity details of the partner opportunity the OEM rep has selected as most likely to close (Primary).
2. Navigate to related records.
3. Click the **Partner Opportunities** tab to view and open partner opportunity records.

Renew OnDemand | ABC Distribution

Overview Analytics Opportunities Contacts Assets Tasks More

Opportunity List

THE UNIVERSITY OF TEXAS - PAN AMERICAN-FY13Q2-1

Basic Other Information Extensions

1

2

3

Offers Quotes Bookings Partner Opportunities Notes Related Activities

NAME	PRIMARY	RESELLER	INCUMBENT	SALES STAGE	AMOUNT	TARGET AMOUNT	COMMIT	LATEST END DATE
☒ THE UNIVERSITY OF TEXAS - PAN AMERICAN-FY13Q2-1	Yes	TWCP Technologies	Yes	Not Contacted	21,287.00 USD	20,869.00 USD	Black	
☐ THE UNIVERSITY OF TEXAS - PAN AMERICAN-FY13Q2-1	No	A Plus Reseller	No	Not Contacted	21,287.00 USD	20,869.00 USD	Black	

Partner Opportunity Records

Partner opportunity records can be located from the **Partner Opportunity** tab of the master opportunity record.

From the **Partner Opportunity** tab, you can see a summary of key opportunity details:

1. Partner opportunity name. Click to open opportunity record.
2. Primary opportunity (updates master opportunity record).
3. Reseller name
4. Incumbent reseller
5. Sales stage of each partner opportunity
6. Opportunity values
7. Latest end date quoted to the customer

Offers Quotes Bookings Partner Opportunities Notes Related Activities									
SET PRIMARY RESELLER									
☐	NAME	PRIMARY	RESELLER	INCUMBENT	SALES STAGE	AMOUNT	TARGET AMOUNT	COMMIT	LATEST END DATE
☐	THE UNIVERSITY OF TEXAS - PAN AMERICAN-FY13Q2-1	Yes	TWCP Technologies	Yes	Not Contacted	21,287.00 USD	20,869.00 USD	Black	
☐	THE UNIVERSITY OF TEXAS - PAN AMERICAN-FY13Q2-1	No	A Plus Reseller	No	Not Contacted	21,287.00 USD	20,869.00 USD	Black	

All sales activity takes place on the partner opportunity. If the reseller is using Renew OnDemand, they can manage sales activity from the partner opportunity. You and the OEM rep can also act on behalf of the reseller to log sales activity including contacting customers, requesting quotes and processing customer orders.

From the partner opportunity you can take the following actions:

1. Log sales activity (See chapter 4, *The Sales Process* for more details.)
2. View opportunity details.
3. Navigate to related records.
4. Click the **Offers** tab to view and select the offers the customer wants to purchase.

Renew OnDemand | ABC Distribution

Welcome Max | Preferences | Help | Training

Overview Analytics Opportunities Contacts Assets Tasks More

Opportunity List

THE UNIVERSITY OF TEXAS - PAN AMERICAN-FY13Q2-1

Basic Other Information Extensions

Sales Stage: Not Contacted

Commit Level: Black

Amount: 21,287.00 USD

Target Amount: 20,869.00 USD

Upsell Amount: 0.00 USD

Expiration Date: 05-12-2013

Forecasted Close Date: 04-28-2013

Earliest New Start Date

Latest New End Date

Earliest Existing Start Date

Selling Period: FY13Q2

Relationships

- Reseller: TWCP Technologies
- Assigned Team: Team1
- Customer: THE UNIVERSITY OF TEXAS - PAN AMER...
- Distributor: ABC Distribution
- Distributor Rep: Max Munn
- Reseller Rep: Max Munn
- Sales Rep: Jenny Lee

Tags

Offers

ALL TO QUOTE DO NOT QUOTE

NAME	INCLUDE ON QUOTE	START DATE	END DATE	PREVIOUS ASSET	PRODUCT	AMOUNT	QUANTITY	RESELLER	QUANTITY
SD11714724_DYNAMICPR...	Yes	04-13-2013	04-12-2014	DYNAMICPRO PLUS SVC#7...	DYNAMICPRO PLUS SVC	21,287.00 USD			21,287.00 USD

Competitive Channel Opportunities

When more than one reseller is competing for an opportunity, Renew OnDemand lets you track and manage these opportunities independently, giving you greater visibility and control over the outcome.

As a reseller, you collaborate with your OEM and reseller team to manage opportunities to close. While you and the OEM rep can perform many actions on the opportunity, you need to contact your OEM rep to manage competitive situations.

The chart below indicates which actions can be performed by each role:

Action	OEM Rep	Distributor Rep	Reseller Rep
Log Sales Activity	X	X	X
Request Reseller Opportunity Access		X	X
Grant Reseller Opportunity Access	X		
Select Primary Reseller	X		
Consolidate Opportunities	X		

Visibility

Renew OnDemand is designed so that distributors can view all reseller information that falls under their domain. However, to maintain confidentiality in a competitive bidding situation, resellers cannot see each other's records or data.

Granting a reseller access to an opportunity gives access to that opportunity only, and no other customer information.

4: The Sales Process

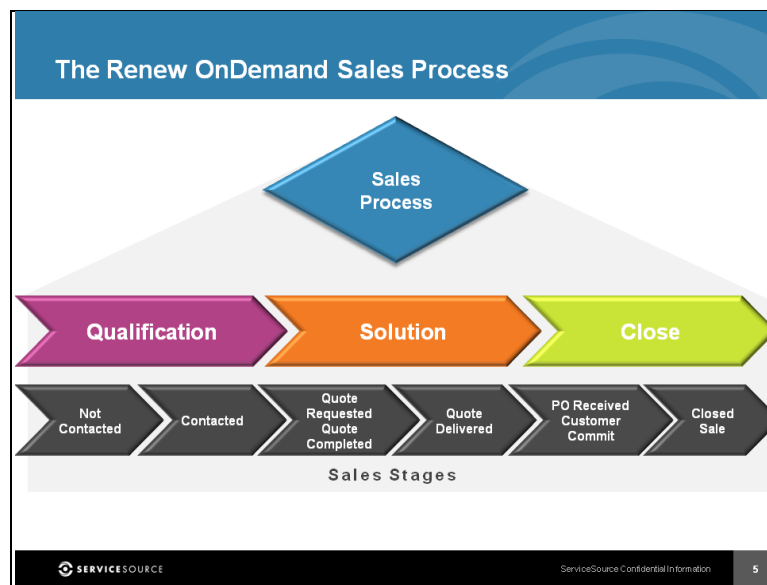
Overview

In this chapter, you will learn how to complete basic sales rep procedures in Renew OnDemand, building a firm foundation upon which you can build additional skills.

Note: Since both distributor sales reps and OEM sales reps can perform the same functions within the application, the term *sales rep* in this user guide can apply to both roles.

This chapter covers the following:

- The Sales Process
- Basic Sales Rep Procedures



Sales Divided by Roles

This chapter reviews the steps that sales reps perform and outlines what to do to advance an opportunity to the next sales stage.

The Lifecycle of an Opportunity: Procedures

For your reference, please review the *Lifecycle of an Opportunity* chart in chapter 1. This section outlines the steps you'll need to perform to advance the sales stage.

Step 1: Logging a Customer Contact

Action	Sales Procedure	Sales Stage Advances
The sales rep selects an opportunity and calls or emails the customer to describe the offers the opportunity contains. You should log a customer contact each time you contact a customer about an opportunity.	Log Customer Contact	From <i>Not Contacted</i> to <i>Contacted</i>

1. Go to the **Opportunities** page.
2. Be sure you have the **My Opportunities** filter engaged, so only your opportunities are listed (this is the default).
3. Identify an opportunity with sales stage of *Not Contacted*.
4. Click the opportunity name to open the opportunity record.

Renew OnDemand | ABC Distribution

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

Opportunities

ALL OPEN QUOTES READY EXPIRED EXPIRING THIS WEEK TOP DEALS RESOLVED **MY OPPORTUNITIES** 🔍

NAME	SALES STAGE	EXPIRATION DATE	CUSTOMER	RESELLER	SALES REP	TARGET AMOUNT	AMOUNT	COMMIT
SUTTER HEALTH-FY13Q2-1	Quote Requested	05-26-2013	SUTTER HEALTH		Jerry Lee	20,883 USD	21,301 USD	Black
MIKE MISECHOK (BANK OF NY)-FY13Q2-1	Consolidated	06-03-2013	MIKE MISECHOK (BANK OF NY)	Altimate	Alex May	0 USD	0 USD	Black
EPIQ SYS-FY13Q2-1	Not Contacted	05-19-2013	EPIQ SYS INC.	Altimate, A Plus Reseller	Alex May	19,900 USD	21,294 USD	Green

5. Click the **Partner Opportunities** tab.
6. Click the partner opportunity name.

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

◀ Opportunity List ▶ Previous Next Opportunity ▶

EPIQ SYSTEM, INC.-FY13Q2-1

▼ CANCEL SAVE

Basic Other Information

Sales Stage	Not Contacted	Relationships ▾
Commit Level	Green	* Assigned Team Team1
Amount	21,294.00 USD	▶ Customer EPIQ SYSTEM, INC.
Target Amount	19,900.00 USD	* Distributor ABC Distribution
Upsell Amount	0.00 USD	* Distributor Rep Max Munn
Expiration Date	05-19-2013	* Primary Reseller A Plus Reseller
Forecasted Close Date	04-15-2013	▶ Reseller 2 organization records
Earliest New Start Date		* Reseller Rep Mohamed Tenu
Latest New End Date		* Sales Rep Alex May
Earliest Existing Start Date		Tags
Earliest Existing End Date		
Selling Period	FY13Q2	

Offers Quotes Bookings **Partner Opportunities** Notes Related Activities

SET PRIMARY RESELLER ▾

NAME	PRIMA RY	RESEL LER	INCUMBENT	SALES STAGE	AMOUNT	TARGET AMOUNT	COMMIT	LATEST END DATE
EPIQ SYS INC.-FY13	No	Alt...	Yes	Quote Delivered	21,294.00 USD	19,900.00 USD	Green	
EPIQ SYSTEM, INC.-FY13Q2-1	Yes	A Plus Rese...	No	Not Contacted	21,294.00 USD	19,900.00 USD	Green	

7. From the partner opportunity record, click **LOG CUSTOMER CONTACT**.

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

◀ Opportunity List ▶

EPIQ SYSTEM, INC.-FY13Q2-1

LOG CUSTOMER CONTACT REQUEST QUOTE ▼ CANCEL SAVE

Basic Other Information

Sales Stage	Quote Delivered	Relationships ▾
Commit Level	Green	▶ Reseller Altimate
Amount	21,294.00 USD	* Assigned Team Team1

8. Select the contact name from the *Contacted* list.
9. Select contact method and edit date contacted if needed.
10. Enter any notes.
11. Select the *Successful Contact* check box.
12. Click **LOG CUSTOMER CONTACT**.

The screenshot shows the 'Log Customer Contact' form. At the top is a blue header bar with the title 'Log Customer Contact'. Below the header are three buttons: 'CANCEL', 'NEXT', and 'LOG CUSTOMER CONTACT'. The 'LOG CUSTOMER CONTACT' button is highlighted in blue and has a blue circle with the number 12 next to it. Below the buttons is a navigation bar with three tabs: '1. Log Activity', '2. Update Opportunity', and '3. Create Follow Up Task'. The '1. Log Activity' tab is selected. The form contains several fields: 'Contacted' with a dropdown menu showing 'Ashley Osborne' and a blue circle with the number 8 next to it; 'Contact Method' with a dropdown menu showing 'Phone' and a blue circle with the number 9 next to it; 'Date Contacted' with a text box showing '06-18-2013'; 'Successful Contact' with a checked checkbox and a blue circle with the number 11 next to it; and 'Close Related Task' with a dropdown menu. Below these fields is a 'Notes' section with a text box containing the text 'Enter any notes about the call. This is required' and a blue circle with the number 10 next to it. At the bottom right of the form is a button labeled 'ADD ATTACHMENT'.

Step 2: Requesting a Quote

Action	Sales Procedure	Sales Stage Advances
If the customer is interested, the sales rep indicates which offers the customer wishes to buy and requests a quote from sales ops.	Requesting a Quote	From <i>Contacted</i> to <i>Quote Requested</i>

Let's continue with the opportunity used in the previous procedure:

Renew OnDemand | DynaPro

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

Opportunity List Previous Next Opportunity

SUTTER HEALTH-FY13Q2-1 LOG CUSTOMER CONTACT REQUEST QUOTE CANCEL SAVE

1 Basic Other Information

Sales Stage: Contacted
Commit Level: Black
Amount: 21,301.00 USD
Target Amount: 20,883.00 USD
Upsell Amount: 0.00 USD
Expiration Date: 05-26-2013
Forecasted Close Date: 04-07-2013
Earliest New Start Date
Latest New End Date
Earliest Existing Start Date
Selling Period: FY13Q2

Relationships ▾
* Assigned Team: Team1
* Customer: SUTTER HEALTH
* Distributor Rep: Max Munn
* Reseller Rep: Hugh Lipp
* Sales Rep: Jerry Lee
* Distributor: ABC Distribution

Tags

1 Offers Quotes Bookings Notes Related Activities

ALL TO QUOTE DO NOT QUOTE

MARK TO QUOTE MARK DO NOT QUOTE 1 selected

NAME	INCLUDE ON QUOTE	START DATE	END DATE	PREVIOUS ASSET	PRODUCT	AMOUNT	QUANTITY	RESELLER AMOUNT	QUANTITY
☒ SID11864584...	Yes	04-27-2013	04-26-2014	DYNAMICPR...	DYNAMICPR...	21,301.00 U...		21,301.00 U...	

1. Go to the **Offers** sub-tab of the opportunity at the bottom of the screen.
2. Select the offer or offers that you want to have quoted.
If there are multiple offers, they are all included in the quote by default. Select the check box beside any offers that you do *not* want to include, then click **MARK DO NOT QUOTE**.
3. Click **Request Quote**.

Request Quote

Quote Name Q-SUTTER HEALTH-FY13Q2-1-V1

Requested By Max Munn

Priority Medium

Due Date 06-13-2013

Currency USD

Request Reason *

Tags

Notes

ADD ATTACHMENT

4. Adjust **Priority**, if necessary (default is Medium). You can also adjust **Due Date** and **Currency** (default is USD).
5. Select a **Request Reason**. This required field helps sales ops determine priority.

Request Reason *

Notes

- Initial Quote
- Term Change, Service Level Change, Inventory
- Original Quote Expired
- Discount Change
- Quote Consolidation
- Quote Split
- Quote Correction - Incorrect Dates
- Quote Correction - Incorrect Inventory
- Quote Correction - Incorrect Discounts
- Quote Correction - Incorrect Service Level

6. Enter any notes for the sales ops rep. You can also add attachments, if needed.
7. Click **Request Quote**.

Step 3: Delivering a Quote

Action	Sales Procedure	Sales Stage Advances
The sales rep sees this request in their Quotes Ready queue and delivers the quote to the customer.	Delivering a Quote	From <i>Quote Completed</i> to <i>Quote Delivered</i>

1. Go to the **Opportunities** page.
2. Click **Quotes Ready**.
3. Click opportunity name to open the master opportunity record.

Renew OnDemand | ABC Distribution

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

Opportunities

ALL OPEN **QUOTES READY** EXPIRED EXPIRING THIS WEEK TOP DEALS RESOLVED MY OPPORTUNITIES

Q QUOTES-READY: Yes

NAME	SALES STAGE	EXPIRATION DATE	CUSTOMER	RESELLER	SALES REP	TARGET AMOUNT	AMOUNT	COMMIT
Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q1	Quote Completed	03-21-2013	PALM BEACH COUNTY SCHOOL DISTRICT...	A Plus Reseller		422,955 USD	422,955 USD	Red

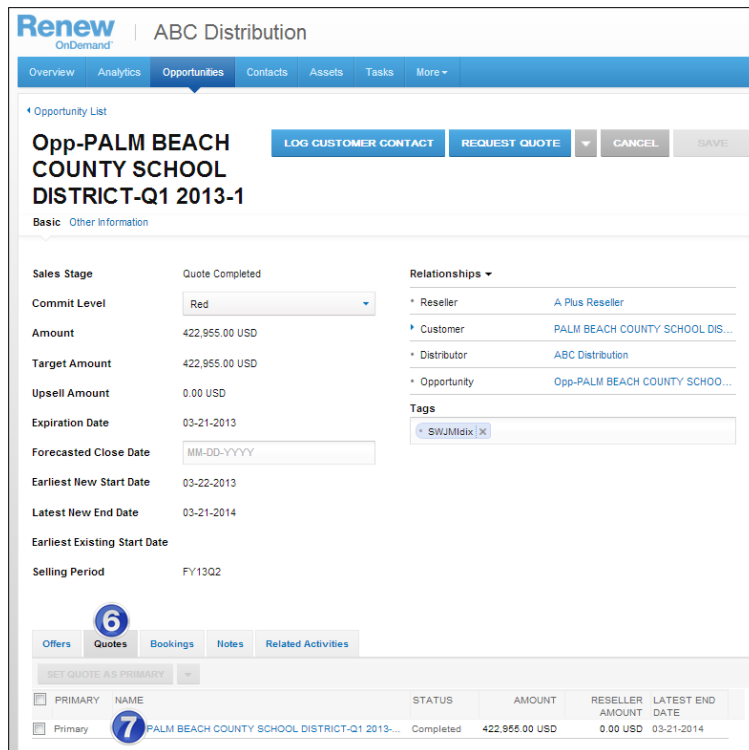
4. In the master opportunity record, click the **Partner Opportunities** tab.
5. Click the opportunity name to open the partner opportunity record.

Offers Quotes Bookings **Partner Opportunities** Notes Related Activities

SET PRIMARY RESELLER

NAME	PRIMARY	RESELLER	INCUMBENT	SALES STAGE	AMOUNT	TARGET AMOUNT	COMMIT	LATEST END DATE
Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q1	Yes	A Plus Rese...	Yes	Quote Completed	422,955.00 USD	422,955.00 USD	Red	03-21-2014

6. In the partner opportunity record, click the **Quotes** tab.
7. Click the quote name to open the quote record.



Renew OnDemand | ABC Distribution

Overview Analytics Opportunities Contacts Assets Tasks More ▾

Opportunity List

Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q1 2013-1

LOG CUSTOMER CONTACT REQUEST QUOTE CANCEL SAVE

Basic Other Information

Sales Stage Quote Completed

Commit Level Red

Amount 422,955.00 USD

Target Amount 422,955.00 USD

Upsell Amount 0.00 USD

Expiration Date 03-21-2013

Forecasted Close Date MM-DD-YYYY

Earliest New Start Date 03-22-2013

Latest New End Date 03-21-2014

Earliest Existing Start Date

Selling Period FY13Q2

Relationships

- * Reseller A Plus Reseller
- * Customer PALM BEACH COUNTY SCHOOL DIS...
- * Distributor ABC Distribution
- * Opportunity Opp-PALM BEACH COUNTY SCHOO...

Tags

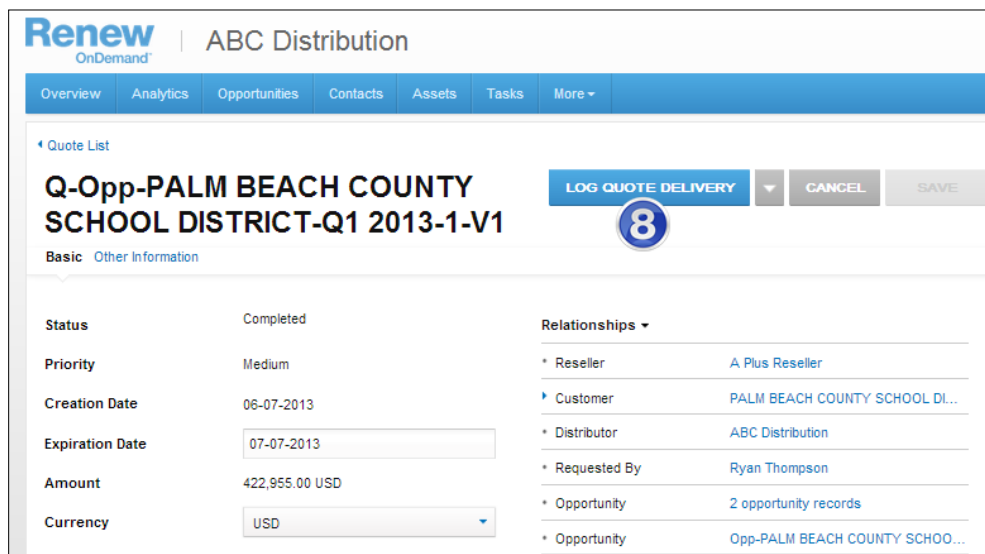
SIWJMidix

Offers **Quotes** Bookings Notes Related Activities

SET QUOTE AS PRIMARY

PRIMARY	NAME	STATUS	AMOUNT	RESELLER	LATEST END AMOUNT	DATE
☒	Primary 7 PALM BEACH COUNTY SCHOOL DISTRICT-Q1 2013-...	Completed	422,955.00 USD	0.00 USD	03-21-2014	

8. Click **LOG QUOTE DELIVERY**.



Renew OnDemand | ABC Distribution

Overview Analytics Opportunities Contacts Assets Tasks More ▾

Quote List

Q-Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q1 2013-1-V1

LOG QUOTE DELIVERY CANCEL SAVE

Basic Other Information

Status Completed

Priority Medium

Creation Date 06-07-2013

Expiration Date 07-07-2013

Amount 422,955.00 USD

Currency USD

Relationships

- * Reseller A Plus Reseller
- * Customer PALM BEACH COUNTY SCHOOL DI...
- * Distributor ABC Distribution
- * Requested By Ryan Thompson
- * Opportunity 2 opportunity records
- * Opportunity Opp-PALM BEACH COUNTY SCHOO...

9. Adjust any information as needed in the *Delivered On*, *Delivered By*, *Delivered To* fields.
10. Enter any notes.
11. Click **LOG QUOTE DELIVERY**.

Log Quote Delivery

CANCEL

LOG QUOTE DELIVERY

Delivered On

06-18-2013

Delivered By

9

Max Munn

Delivered To

Artie Mcmillian

Relationships

* Reseller

A Plus Reseller

* Customer

PALM BEACH COUNTY SCHOOL ...

* Distributor

ABC Distribution

* Requested By

Ryan Thompson

Notes

10

ADD ATTACHMENT

The sales stage advances from *Quote Completed* to *Quote Delivered*.

Step 4: Logging a Customer Commitment

Action	Sales Procedure	Sales Stage Advances
If the customer commits to a payment date, the sales rep logs the customer commitment.	Logging a Customer Commitment	From <i>Quote Delivered</i> to <i>Customer Commitment</i>

You can continue with the opportunity used in the last step, or open another partner opportunity record.

NAME	PRIMARY	TYPE	STATUS	REQUEST DATE	DUE DATE	QUOTE AMOUNT	ACTIVE
☒ QT-ORIGIN DIGITAL-FY13Q1-1-v1	Primary	Quote Request	Delivered	02-19-2013	02-16-2012	363,600.00 USD	
☐ Q-ORIGIN DIGITAL-FY13Q1-1-V1		Quote Request	Completed	02-20-2013	02-21-2013	463,164.65 USD	Yes

1. Go to the **Quotes** sub-tab of the opportunity.
2. Select the check box beside the quote the customer has committed to buy.
3. Click **Log Customer Commitment**.

Log Customer Commitment

CANCEL PREVIOUS NEXT **LOG CUSTOMER COMMITMENT**

1. Log Activity 2. Update Opportunity

Contacted Person George Kendrick **4** **Date Contacted** 03-26-2013

Contact Method Phone **Contacted By** Alex May

Notes **5**

ADD ATTACHMENT

4. Click the pen beside *Contacted Person* to display the name change menu. Change name if needed.
5. Enter any notes.
6. Click **Next**.

Log Customer Commitment

CANCEL

PREVIOUS

NEXT

LOG CUSTOMER COMMITMENT

1. Log Activity
2. Update Opportunity

Forecasted Close Date

Commit Level

Client Quote ID
123564564

Amount
363,600 EUR

Notes

ADD ATTACHMENT

7. Enter the forecasted close date.
8. Select **Commit Level**.
9. Click **Log Customer Commitment**.

Step 5: Requesting a Booking

Action	Sales Procedure	Sales Stage Advances
Sales rep receives payment and sends closing information to sales ops.	Request Booking	From <i>Customer Commitment</i> to <i>Purchase Order Received</i>

You can continue with opportunity used in the last step, or open another partner opportunity record.

1. Go to the **Quotes** sub-tab of the opportunity.
2. Select the check box to the left of the quote you have received payment for.
3. Click **Request Booking**.

4. Enter the purchase order ID.
5. Enter the purchase date.
6. Enter the purchase order amount.
7. Select a win (or loss) resolution as applicable.
8. Click **Request Booking**.

Resolving an Opportunity as a Loss

Action	Sales Procedure	Sales Stage Advances
No sale is made or the opportunity is identified as invalid.	Resolving an Opportunity as a Loss	From any sales stage to <i>No Service/House Account</i>

Renew OnDemand | ABC Distribution

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

Opportunities 1

ALL OPEN QUOTES READY EXPIRED EXPIRING THIS WEEK TOP DEALS RESOLVED MY OPPORTUNITIES +

Q SALES-STAGE: Quote Delivered 2

NAME	SALES STAGE	EXPIRATION DATE	CUSTOM ER	RESELLER	SALES REP	TARGET AMOUNT	AMOUNT	COMMIT
Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q113Q2-1 3	Quote Delivered	03-21-2013	PALM BEACH COUNTY SCHOOL DISTRI...	A Plus Reseller		422,955 USD	422,955 USD	Red
DIGITAL FORENSIC PRO-FY13Q2-1	Quote Delivered	07-28-2013	DIGITAL FOREN... PRO	A Plus Reseller	Alex May	19,966 USD	21,364 USD	Green
PENN FOSTER CAREER SCHOOL-FY13Q2-1	Quote Delivered	05-30-2013	PENN FOSTER CAREER SCHOOL	A Plus Reseller	Betty Haines	24,813 USD	21,340 USD	Green

1. Go to the **Opportunities** page.
2. Select an opportunity in a sales stage of *Quote Delivered*.
3. Click the opportunity name to open the master opportunity record.

Renew

OnDemand™

ABC Distribution

Overview

Analytics

Opportunities

Contacts

Assets

Tasks

More ▾

Opportunity List

Previous

Next Opportunity ▸

Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q1 2013-1

▼

CANCEL

SAVE

Basic

Other Information

Sales Stage

Quote Delivered

Commit Level

Red

Amount

422,955.00 USD

Target Amount

422,955.00 USD

Upsell Amount

0.00 USD

Expiration Date

03-21-2013

Forecasted Close Date

Earliest New Start Date

03-22-2013

Latest New End Date

03-21-2014

Earliest Existing Start Date

Selling Period

FY13Q2

Relationships ▾

Customer

PALM BEACH COUNTY SCHOOL DIS...

Distributor

ABC Distribution

Primary Reseller

A Plus Reseller

Reseller

A Plus Reseller

Tags

SWJMidix X

4

Offers

Quotes

Bookings

Partner Opportunities

Notes

Related Activities

SET PRIMARY RESELLER

▼

☐	NAME	PRIMA RY	RESEL LER	INCUMBENT	SALES STAGE	AMOUNT	TARGET AMOUNT	COMMIT	LATEST END DATE
☐	Opp-PALM BEACH C SCHOOL DISTRICT-Q1 2013-1	Yes	A Plus Rese...	Yes	Quote Delivered	422,955.00 USD	422,955.00 USD	Red	03-21-2014

5

- Click the **Partner Opportunities** tab.
- Click the name of the partner opportunity to open the partner opportunity record.

Renew OnDemand | ABC Distribution

Overview Analytics **Opportunities** Contacts Assets Tasks More ▾

Opportunity List

Opp-PALM BEACH COUNTY SCHOOL DISTRICT-Q1 2013-1

LOG CUSTOMER CONTACT REQUEST QUOTE CANCEL SAVE

Resolve as a Loss Delete

Basic Other Information

Sales Stage	Quote Delivered	Relationships ▾
Commit Level	Red ▾	* Reseller A Plus Reseller
Amount	422,955.00 USD	* Customer PALM BEACH COUNTY SCHOOL DL...
Target Amount	422,955.00 USD	* Distributor ABC Distribution
Upsell Amount	0.00 USD	* Opportunity Opp-PALM BEACH COUNTY SCHOO...
Expiration Date	03-21-2013	Tags
		SWJMidix X

6. Click the menu arrow.
7. Select **Resolve as a Loss**.

Resolve as a Loss

CANCEL RESOLVE AS A LOSS

Loss Date 06-18-2013

Resolution Reason

Notes

MM-DD-YYYY

03-22-2013

03-21-2014

HA - Account Manager Working - AMW
HA - Already Lost - ARL
HA - Already Renewed - ARN
HA - Bad Data - BDT
HA - Cancelled - CNL
HA - Covered - COV
HA - Direct - DIR
HA - Duplicate Account - DUP
HA - End Of Life - EOL
HA - Evergreen Billing - EVG
HA - Independently Renewed - IR
HA - International - INT
HA - Lease - LEA
HA - Not For Resale - NFR
HA - OEM Customer - OEM
HA - Other - OTH
HA - Product Return - PRT
HA - Sales Pull Back - SPB
HA - Renewable License Expiring - REN

ADD ATTACHMENT

Related Contacts

PEOPLE

Artie M...

8. Change the loss date as needed.
9. Select the resolution reason from the menu (required).
10. Enter any notes.
11. Click **Resolve as a Loss**.

5: Searches

Overview

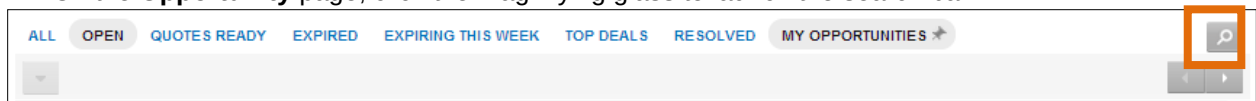
This chapter shows you how to use Renew OnDemand's search features to create custom searches to define and locate specific records. This chapter covers the following:

- Introduction: Searching by Customer
- How Detailed Searches are Constructed
- The Difference between Search Attributes and Search Parameters
- Using the Search Bar for Custom Searches

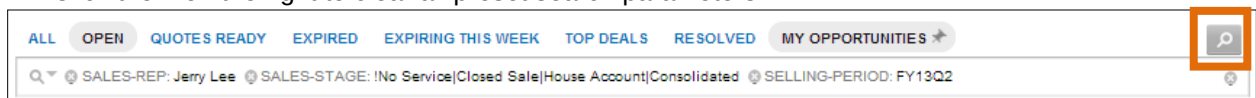
Introduction: Searching by Customer

Renew OnDemand lets you narrow your search focus to find the records you need. You can use preset search filters or customize a search and save it. Here's an example of the steps to search for a *Blue Cross Blue Shield* customer.

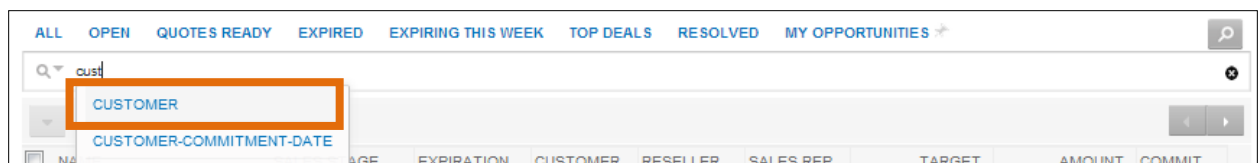
1. On the **Opportunity** page, click the magnifying glass to launch the search bar.



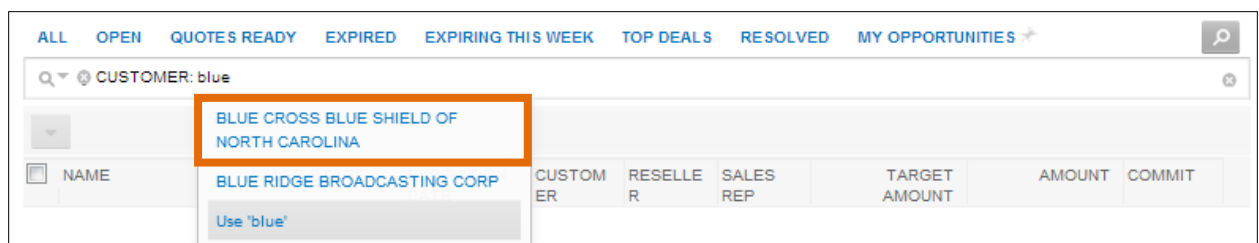
2. Click the x on the right to clear all preset search parameters.



3. To search for a customer, type the first few letters of the word `customer`. Renew OnDemand automatically displays matching choices. Select **Customer** from the list.



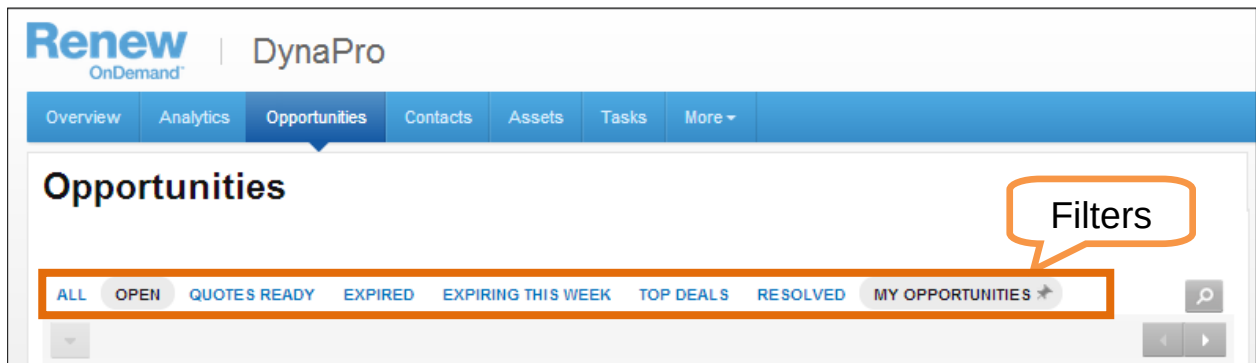
4. The customer search attribute is now applied and visible in the search bar. Begin typing `blue` after the customer search attribute. Renew OnDemand automatically displays matching choices. Select **Blue Cross Blue Shield of North Carolina** from the drop-down list.



Pre-Selected Combinations

When you select a filter, Renew OnDemand automatically uses a prescribed search attribute combination to filter all available records.

The opportunities page is shown here. The standard filters are in blue.

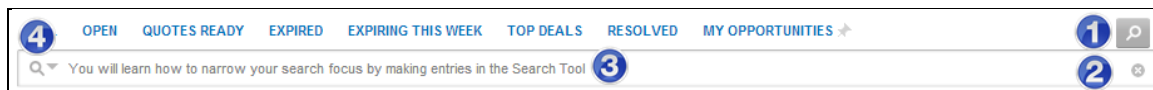


Narrow Your Search Focus

If a single filter displays too many records, use the search bar to add search parameters. This further filters records so you don't have to scroll through a long list to find what you need.

- Narrow a search by adding parameters to what's currently displayed.
- Delete all search attributes and start from scratch to create a custom search. (You can also save your custom searches, if you wish.)

Getting to Know the Search Bar



1. Click the magnifying glass to show or hide the search bar.
2. Click the x at the right of the search bar to clear all search parameters.
3. Enter search attributes.
4. Click the arrow to save or delete custom searches.

Use Menus or Add Text

You add parameters to search attributes by selecting from automatically supplied menus or by typing additional text.

The search bar uses predictive typing and displays a menu of matching choices based on your input. Type the first few letters of what you're looking for, and then select it when you see it.

How Do Searches Work?

Filters Select and Display Records

Filters locate and display records. Each page in Renew OnDemand has a different set of filters, relevant to the topic on that page.

Search Attributes

A search attribute is a type of information, for example SALES-REP or AMOUNT.



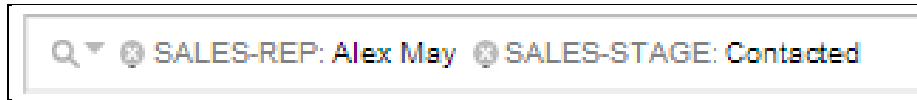
Search Parameters

Search parameters specify and define search attributes. In this example, the attribute is SALES-REP and the parameter is Alex May, an individual sales rep.



Search Attributes Work in Combination

Search attributes work together. In this example, search results are further refined to show SALES-REP Alex May's opportunities that have a SALES-STAGE of contacted.



Creating Custom Searches

As your skills and confidence grow, you will be able to perform specific searches to suit your needs, such as within certain dollar amount limits or within a particular date range.

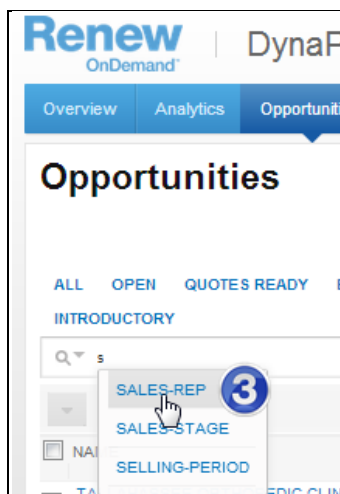
This example will show you how to do the following:

- Create a custom search by deleting the displayed search attributes.
- Add new search attributes and parameters.

This search displays all opportunities for a particular sales rep with a sales stage of contacted. Let's start with the attribute SALES-REP.



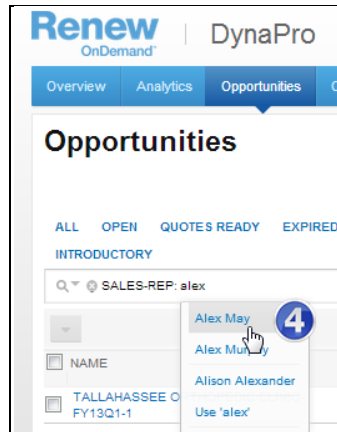
1. Click the magnifying glass to display the search window.
2. Click the x to clear all currently selected search attributes.
3. To display sales reps, begin typing sales. A menu displays the attributes beginning with the letter S. Select SALES-REP.



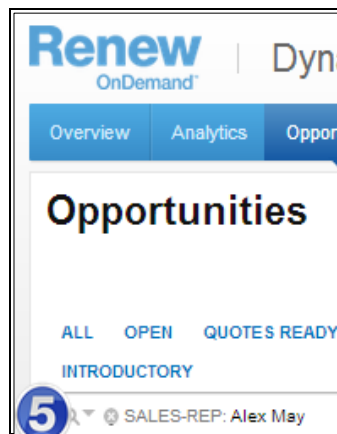
The SALES-REP search attribute appears in the search bar.

To add the sales rep name to the search you are creating, place your cursor next to the SALES-REP search attribute and start typing. For this example, we'll type *Alex*.

1. A menu displays matching choices. Select **Alex May**.



2. The search attribute (SALES-REP) and search parameter (Alex May) now appear in the search bar, and matching opportunities appear below.



To look for Alex May's opportunities with a sales stage of contacted:

1. Place your cursor next to Alex May and begin typing *sales*.
2. Select SALES-STAGE from the list. The SALES-STAGE search attribute appears in the search bar.
3. To look for sales stage of contacted, place your cursor next to SALES-STAGE and begin typing *contacted*.
4. Select **Contacted** from the drop-down list.

The Search Bar displays your custom search. The screen displays all of Alex May's opportunities with a sales stage of contacted.

The screenshot shows the 'Opportunities' section of the Renew OnDemand DynaPro interface. A search bar at the top contains the filter 'SALES-REP: Alex May' and 'SALES-STAGE: Contacted'. Below the search bar, a table lists five opportunities, all with a 'Contacted' sales stage and assigned to Alex May. Two callout boxes highlight the search filter and the resulting data.

Opportunities

ALL OPEN QUOTES READY EXPIRED EXPIRING THIS WEEK TOP DEALS RESOLVED MY OPPORTUNITIES HIGH RISK CHURN NOT CONTACTED

INTRODUCTORY

Q SALES-REP: Alex May SALES-STAGE: Contacted

NAME	SALES STAGE	EXPIRATION DATE	CUSTOMER	SALES REP	UNWEIGHTED AMOUNT	AMOUNT	COMMIT
TALLAHASSEE ORTHOPEDIC CLINIC-FY13Q1-1	Contacted	01-02-2013	TALLAHASSEE ORTHOPEDIC CLINIC	Alex May	19,885 USD	21,277 USD	Green
REALTY ZONE-FY13Q1-1	Contacted	03-05-2013	REALTY ZONE	Alex May	19,942 USD	21,339 USD	Red
NVIDIA CORP-FY13Q1-1	Contacted	03-30-2013	NVIDIA CORP	Alex May	19,966 USD	21,364 USD	Yellow
LINDSLEY'S LUMBER-FY13Q1-1	Contacted	03-30-2013	LINDSLEY'S LUMBER	Alex May	19,966 USD	21,364 USD	Red
AFENTIS-FY13Q1-1	Contacted	03-30-2013	AFENTIS	Alex May	19,966 USD	21,364 USD	Black

Using Conditional Text

Adding Conditional Text

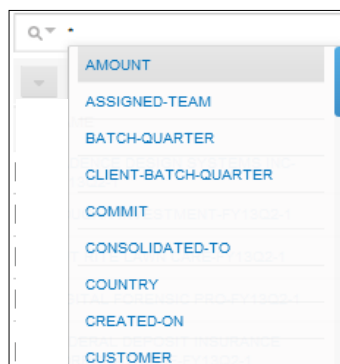
As a final step in narrowing a search focus, you can add conditional text to the search bar to find records that meet certain conditions. This is especially useful when you want to define a search by dates, currency amounts, or other numeric information.

To add text to a search attribute parameter, first type the symbol and then the text. Use the example formats below:

Symbol	Meaning	Use
>	Greater Than	Limit the search results by date or amount. TARGET DATE: > 6/30/2012 Limits the search results to records expiring after the entered date. AMOUNT: > 10,000 Limits the search results to records with amount greater than 10,000.
<	Less Than	Limit the search results by date or amount. TARGET DATE: < 6/30/2012 Limits the search results to records expiring before the entered date. AMOUNT: < 10,000 Limits the search results to records with amount less than 10,000.
!	Does Not Contain	Exclude a specific kind of result. QUOTE-STATUS: !Completed Excludes completed quotes from the results.
	Multiple Values	Include more than one value in the results. SALES STAGE: Contacted Quote Requested Displays records in both sales stages.

The Asterisk (*)

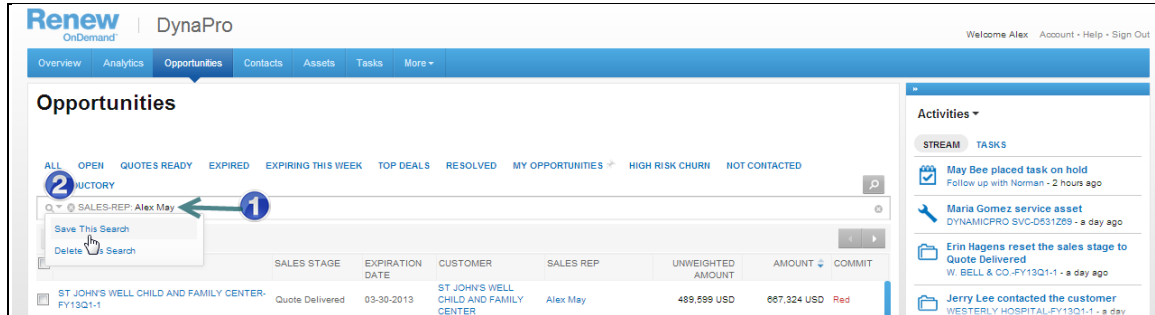
Hint: If you're not sure what your choices are, type the asterisk (*) in the search bar to see a context-sensitive menu of available search parameters.



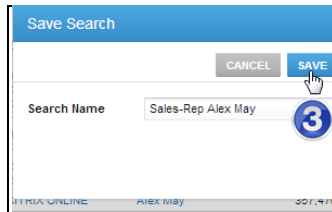
Saving and Deleting Searches

Saving Searches

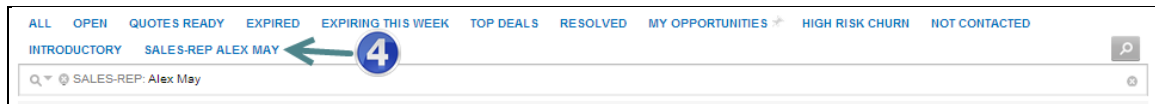
You can save searches you create and use them again. For example, you might want to save a search you create to find all the records for a specific sales rep.



1. Keep the search criteria you want to save engaged in the search bar.
2. Click the arrow in the far left of the search bar, and then select **Save This Search**.

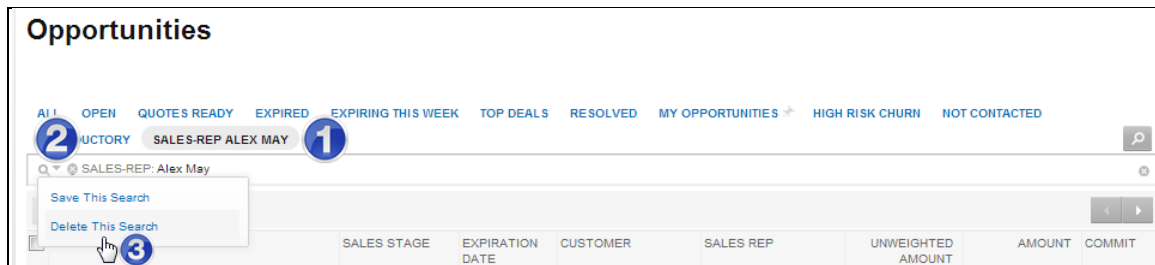


3. Type a name for the search: Sales Rep Alex May, then click **Save**.



Your search now appears as a blue text filter above the search bar.

Deleting Searches



1. Go to the search you created.
2. Click the arrow in the left of the search bar to show the menu.
3. Select **Delete This Search**.

The search is removed from the filters above the search bar.

Making a Search Plan

Now that you're familiar with the search bar and how filters, attributes and parameters work, you may want to think about developing search strategies to locate the records you need. Although you don't need to make a plan before you perform a search, you may find it useful to plan your search before you begin.

1. Be clear about the results you want. Are you looking for a single record? All the records on a particular day?
2. Break down the results you want into the kinds of information you will need. Will you need dates, amounts, asset names? Make a list.
3. Match the kinds of information you need to the search attributes you select.
4. Be familiar with SALES-REP search attributes and conditional search symbols.
5. Decide whether you want to start a new search by deleting all displayed search attributes or build on the results displayed by the search filter.
6. Don't be afraid to experiment. Find out what the tool can do and make it work for you!

6: Tasks

Overview

This chapter describes how to use tasks, including:

- How Tasks Are Used
- Completing a Task
- Creating a New Task

How to Use Tasks

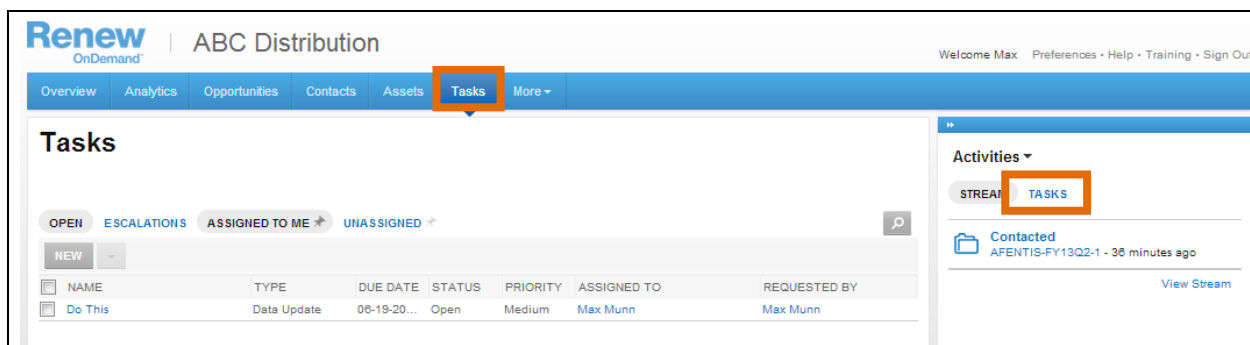
A task can be one of several kinds of things: a data update, an email, a phone call, or a research request.

Use tasks to organize your daily workflow and to collaborate and communicate with your team. You can create a task and assign it to yourself or assign it to someone else, inside or outside of your organization. Other team members or people from other organizations can create and assign tasks to you. You can use tasks as a way of organizing your work day.

Some task requests from OEMs or resellers may be assigned to your organization rather than to you individually. In that case, you need to assign the task to yourself before completing it.

Accessing Tasks

You can access tasks from the tasks page or the right-hand panel, as shown below:

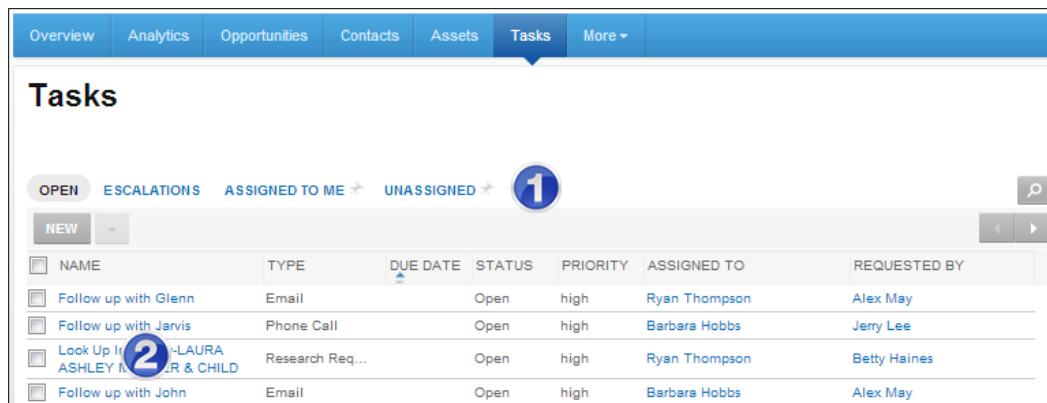


Task Association

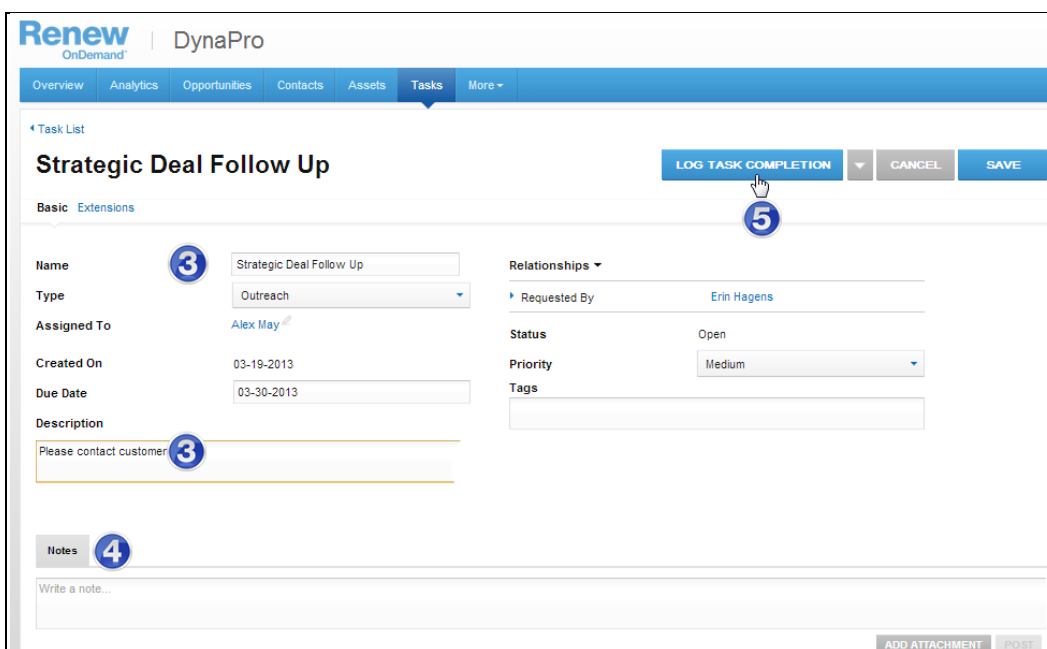
Tasks can be generic or associated with a particular opportunity. If you create a task when a specific opportunity record is displayed, it is associated with that opportunity. A new task created from the **Tasks** tab is generic.

Performing Sales Rep Tasks

#1 – Completing a Task (Assigned to You)



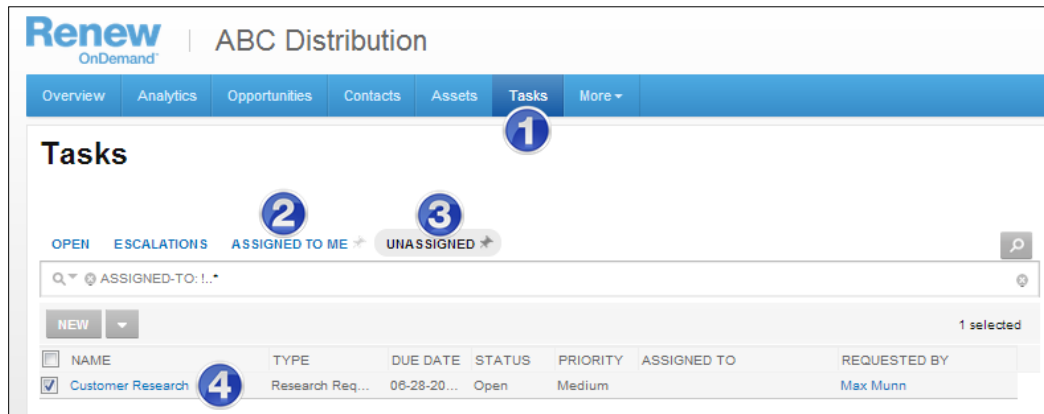
1. On the **Tasks** page, click **OPEN** and the **ASSIGNED TO ME** (default).
2. Click the task name to open the task record.



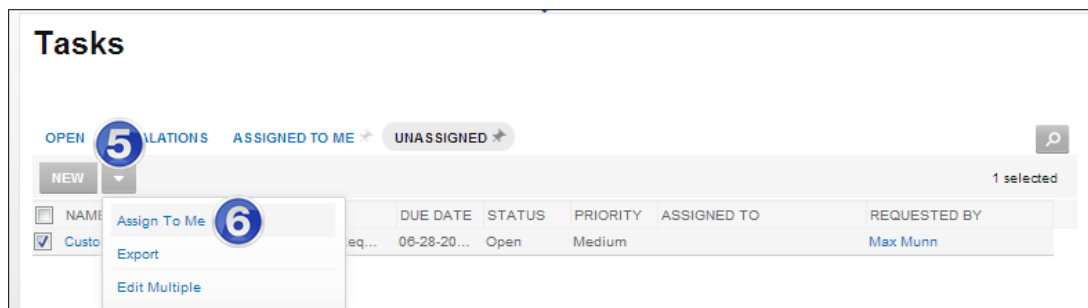
3. Read the task name and description to see what action needs to be taken.
4. Enter any notes.
5. Click **Log Task Completion**.

#2 – Assigning a Task to Yourself

Some task requests from OEMs or resellers may be assigned to your organization, rather than to you individually. In that case, you'll need to assign the task to yourself before completing it.



1. Go to the **Tasks** tab.
2. Remove any filters. Click **ASSIGNED TO ME** to deselect it.
3. Click **UNASSIGNED** to show all tasks that are unassigned.
4. Select the check box beside the task name.

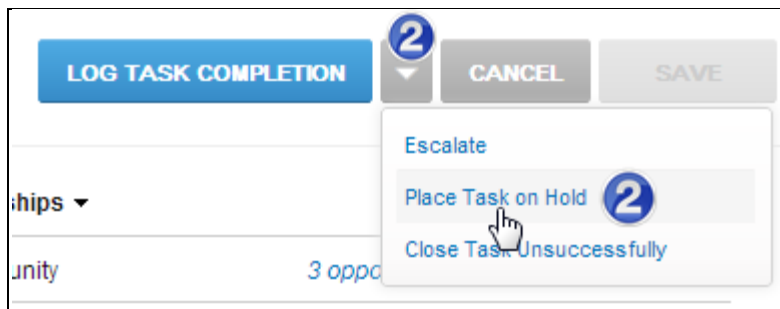


5. Click the menu arrow.
6. Select **Assign To Me**.

#3 – Putting a Task on Hold or Closing a Task Unsuccessfully

Use these features when you are not able to complete a task. If you need more information from another party, you can place the task on hold. If you are not able to complete the task successfully, but there is no further action that can be taken, you can close the task unsuccessfully.

1. On the **Tasks** page, click a task name to open the task record.
2. Click the menu arrow, then select **Place Task on Hold** or **Close Task Unsuccessfully**.



3. Select the hold reason (or close reason) and enter any notes.
4. Select **Place Task on Hold**.

A screenshot of the 'Place Task on Hold' form. The form has a blue header bar with the title 'Place Task on Hold'. Below the header, there are two buttons: 'CANCEL' (grey) and 'PLACE TASK ON HOLD' (blue). The main area of the form contains a 'Hold Reason' dropdown menu, a 'Notes' text area, and an 'ADD ATTACHMENT' button. The 'Hold Reason' dropdown menu is open, showing a list of options: 'Review', 'Quote', 'Quote Enterprise', 'Other - Internal', 'Vendor Case Open', 'Client Order Management', 'Pricing', and 'Cisco'.

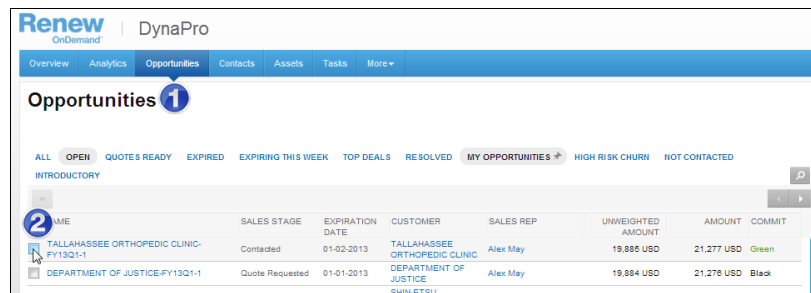
To release the hold on a task, click the menu arrow, then select **Release Hold**.

#4 – Creating a Task Associated with an Opportunity Record

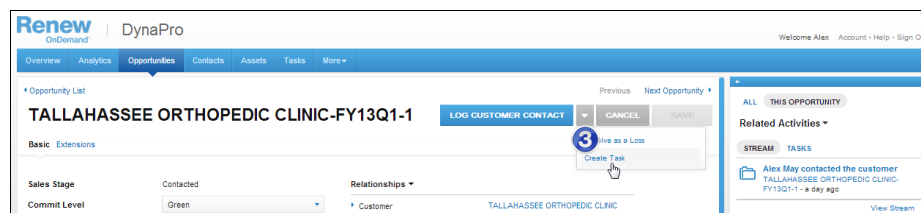
You can use this same procedure with contacts, quotes, bookings and assets.

Note: Be sure that you create the task from the partner opportunity record, not from the master opportunity record. For more information, please review chapter 3, *Managing Reseller Opportunities*.

1. Go to the **Opportunities** page.



2. Select the opportunity you want to associate a task with.



3. In the opportunity record, click the menu arrow and select **Create Task**.

Create Task

Phone Call

Name 4 Phone Call

Type 5 Phone Call

Assigned To 6 Ryan Thompson

Due Date 03-29-2013

Completion Date 7

Description 8 Please Verify contract information.

Relationships 10

* Requested By Alex May

* Opportunity TALLAHASSEE ORTHOPEDI...

* Sales Rep Alex May

Status

Escalation 9 No

Priority Medium

Tags

4. Enter a task name.
5. Select a task type.
6. Click the *Assigned To* menu and select the name of the assignee.
7. Adjust due date as needed.
8. Enter a description.
9. Adjust escalation and priority information as needed.
10. Click **Create Task**.

#5 – Creating a Task to Grant Access to a Channel Partner

A distributor can grant access to a reseller using a task request. Once submitted, the task is completed by sales ops. Be sure to create the task from the original opportunity, not from the partner opportunity.

An example of the completed *Create Task* window is shown here:

The screenshot shows the 'Create Task' window with the title 'Grant Access to A Plus Reseller'. The window has a blue header bar with the text 'Create Task'. Below the header, there are two buttons: 'CANCEL' and 'CREATE TASK'. The form is divided into several sections:

- Name ***: Grant Access to A Plus Reseller
- Type ***: Data Update (dropdown menu)
- Due Date ***: 06-07-2013
- Assigned Organization**: DynaPro (dropdown menu)
- Assigned To**: (dropdown menu)
- Description**: (text area)
- Relationships**:
 - Assigned Organization: ABC Distribution
 - Opportunity: ACXION-CDC-FY13Q2-1
 - Sales Rep: Alex May
 - Requested By: Max Munn
- Priority**: Medium (dropdown menu)
- Tags**: (text area)
- Notes**:
 - I attached the email from the end user
- ADD ATTACHMENT**: (button)
- Uploading...**: (progress bar)

7: Customer Research

Overview

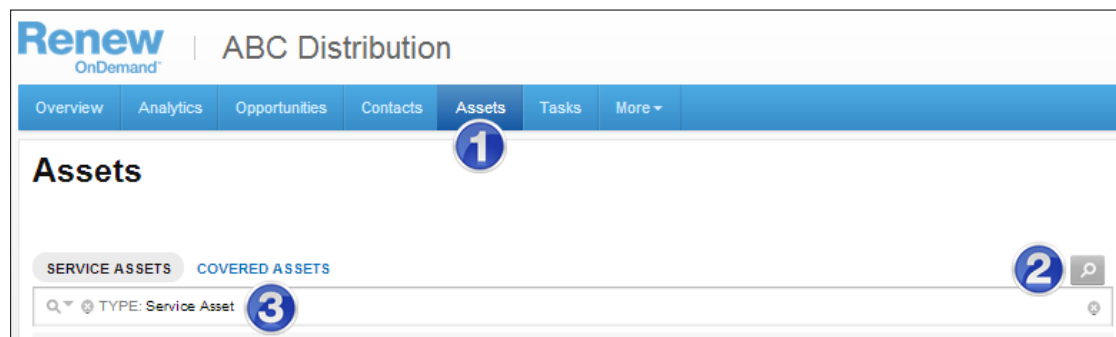
In this chapter, you will learn how to perform customer research. This chapter covers the following:

- Displaying Customer Asset Information
- Displaying All of the Assets and Opportunities Associated with a Customer Record
- Exporting Bulk (Multiple) Customer Asset Information Records

Customer Research: Displaying Customer Asset Information

As a sales rep, you will routinely be making calls to customers whose service contracts are nearing expiration. You can display a customer's service asset information or covered asset information to help you during your call.

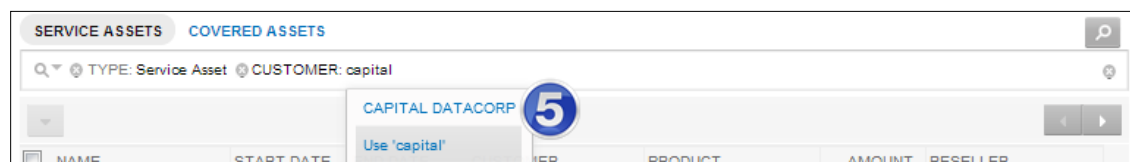
1. To display a customer's asset information, click the **Assets** tab.
2. Engage the search bar by clicking the magnifying glass.
3. Notice that the search bar displays *TYPE: Service Asset*.



4. To search for a particular customer, begin typing *customer* and select *CUSTOMER* when it appears.



5. Begin typing the name of the customer you are searching for. In this example, *Capital Datacorp.*, and select the name when it appears.



6. The customer's asset record link is displayed. We can see that Tallahassee Orthopedic Clinic has one service asset, a Dynamicpro service contract. Click the asset name (in this example, DYNAMICPRO SVC-W361Z5V) to display the asset record.

Assets

SERVICE ASSETS COVERED ASSETS

Q TYPE: Service Asset CUSTOMER: CAPITAL DATACORP

☐	NAME	START DATE	END DATE	CUSTOMER	PRODUCT	AMOUNT	RESELLER
☐	DYNAMICPRO PLUS SVC-W361Z5V	03-07-2012	03-07-2013	CAPITAL DATACORP	DYNAMICPRO PLUS SVC	317,565 U...	A Plus Reseller

The customer's service asset record is displayed.

Renew
OnDemand

ABC Distribution

OverviewAnalyticsOpportunitiesContactsAssetsTasksMore

Asset ListPreviousNext Asset

DYNAMICPRO PLUS SVC-W361Z5V

NameDYNAMICPRO PLUS SVC-W361Z5V

Asset TypeService Asset

DescriptionService Contract-Gold

Amount317,565.00 USD

Contract NumberSID111565591

PO NumberPO# RR0060606

SO Number

Start Date03-07-2012

End Date03-07-2013

Batch TypeRenewal

Batch QuarterQ1 2013

Client Batch QuarterQ1 2013

Relationships

* CoveredDYNAMICPRO PLUS -W361Z5V

* CustomerCAPITAL DATACORP

* DistributorABC Distribution

* ProductDYNAMICPRO PLUS SVC

* ResellerA Plus Reseller

Serial NumberW361Z5V

TheatreNALA

TerritoryNALA

RegionNorth Midwest

CountryUnited States

Exporting Multiple Asset Information

If you need to export multiple asset information for customers, Renew OnDemand provides an export feature.

Assets

MORE ▾

Q TYPE: Service Asset

2

9 selected

1

3

	DATE	END DATE	CUSTOMER	PRODUCT	AMOUNT	RESELLER
☐	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	40 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	1,700 USD	
☒	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☐	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	
☐	03-30-2012	03-30-2013	PFIZER INC	Software Maintenance - 1 Year	20 USD	

1. On the **Assets** page, select the check boxes of the assets you want to export.
2. Click the arrow above the *Name* column.
3. Click **Export**.

Export Assets Grid

CANCEL EXPORT TO DOWNLOAD EXPORT TO EMAIL

You are exporting 9 record(s) from Assets.

Include These: 4

☒ Unicode ☒ Multiline Headers

☒ Description **SETTINGS...**

SELECTED GRID DETAILS RELATED FIELDS EXTENDED CORE

SELECTED	GRID	DETAILS	RELATED FIELDS	EXTENDED	CORE
☒	SELECTED FIELDS				SAMPLE
☒	1	Amount			20.00 USD
☒	2	End Date			03-30-2013
☒	3	Name			UNITYV5-USR-E5=I92143082
☒	4	Primary Contact			
☒	5	Related["customer"]			PFIZER INC
☒	6	Related["product"]			Software Maintenance - 1 Year
☒	7	Related["reseller"]			
☒	8	Start Date			03-30-2012
☒	9	Tag			

4. Click **Export to Download**. A .csv file is saved to the *Downloads* folder on your computer.

Displaying All Opportunities and Assets Associated with a Customer

To display all the opportunities and assets associated with a customer, you can navigate to the customer contact record from any opportunity or asset from the *Relationships* section of the record. In the customer contact record, you can view all assets and opportunities associated with the customer.

Open an opportunity or asset record:

Renew OnDemand | ABC Distribution

Welcome Max | Preferences | Help | Training | Sign Out

Overview | Analytics | Opportunities | Contacts | Assets | Tasks | More

Opportunity List

ALLEN INSTITUTE FOR BRAIN SCIENCES-FY13Q2-1

LOG CUSTOMER CONTACT | REQUEST QUOTE | CANCEL | SAVE

Basic | Other Information

Sales Stage: Quote Requested

Commit Level: Black

Amount: 21,359.00 USD

Target Amount: 20,940.00 USD

Upsell Amount: 0.00 USD

Expiration Date: 07-23-2013

Forecasted Close Date: 05-06-2013

Earliest New Start Date

Latest New End Date

Earliest Existing Start Date

Selling Period: FY13Q2

Relationships

- Assigned Team: Team1
- Customer: ALLEN INSTITUTE FOR BRAIN SCIENCES
- Distributor: ABC Distribution
- Distributor Rep: Max Munn
- Reseller Rep: Hugh Lipp
- Sales Rep: Jerry Lee

Tags

Offers | Quotes | Bookings | Notes | Related Activities

ALL | TO QUOTE | DO NOT QUOTE

MARK TO QUOTE | MARK DO NOT QUOTE

NAME	INCLUDE ON QUOTE	START DATE	END DATE	PREVIOUS ASSET	PRODUCT	AMOUNT	QUANTITY	RESELLER AMOUNT	QUANTITY
SID122502...	Yes	06-24-2013	06-23-2014	DYNAMICP...	DYNAMICP...	21,359.00 U...		21,359.00 U...	

View Contact

ALLEN INSTITUTE FOR BRAIN SCIENCES

Phone

Email: info@alleninstituteforbrains...

Website: alleninstituteforbrainscience...

Related Contacts

PEOPLE | ORGANIZATIONS

- Ian Richardson
Customer Primary Contact
IT Manager, ALLEN INSTITUTE FOR BRAIN SCIENCES
- Max Munn
Distributor Sales Rep, ABC Distribution
- Chris Sullivan
Distributor Account Manager, ABC Distribution
- Max Munn
Reseller Sales Rep, ABC Distribution
- abcdistribution admin
ABC Distribution

1. On the displayed record, click the customer name (under *Relationships*).
2. The **View Contact** window appears.
3. Click **View Contact**.

Renew OnDemand | ABC Distribution

Overview Analytics Opportunities **Contacts** Assets Tasks More ▾

◀ Contact List

ALLEN INSTITUTE FOR BRAIN SCIENCES

▼ CANCEL SAVE

Website alleninstituteforbrainsciences.com

Preferred Language ▾

Reseller Tier

Relationships ▾

* Location 2362 Cost Avenue, Washington, MD, ...

* Sales Rep Betty Haines

Email ▾

Primary ▾ info@alleninstituteforbrainsciences....

Phone ▾

4 5

Opportunities Assets Notes

NAME	SALES STAGE	EXPIRATION DATE	TARGET AMOUNT	AMOUNT	COMMIT
1SYNC, INC.-FY13Q1-1	Closed Sale	03-13-2013	220,367.00 USD	224,775.00 USD	Green
1SYNC, INC.-FY13Q1-1	Closed Sale	03-13-2013	220,367.00 USD	224,775.00 USD	Green
ACCUVANT INC-FY13Q1-1	Closed Sale	04-05-2013	95,088.00 USD	101,745.00 USD	Green
ACCUVANT INC-FY13Q1-1	Closed Sale	04-05-2013	95,088.00 USD	101,745.00 USD	Green
ACXIOM CDC FY13Q1-1	Not Contacted	06-11-2013	19,922.00 USD	21,317.00 USD	Black

On the sub-tabs of the **Contacts** record,

4. Click **Opportunities** to display all opportunities associated with the customer.
5. Click **Assets** to display all Assets associated with the customer.

You can perform single or bulk exports from the lists you display on the sub-tabs of the contact record.

8: Managing Contacts

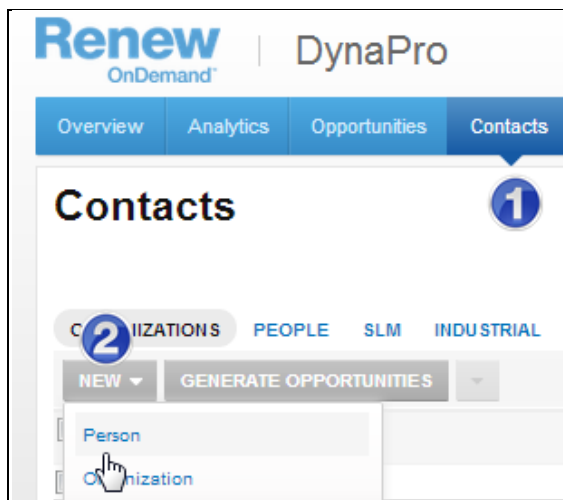
Overview Contacts can change from year to year or even during a single sales cycle. Renew OnDemand provides multiple ways to keep your contact records up to date.

This chapter covers how to add a new contact in several ways:

- From the Contacts Tab
- From an Opportunity
- While Logging a Customer Contact

Adding a Contact from the Contacts Tab

1. Go to the **Contacts** tab.
2. Click **New**, then select **Person** from the menu.



Fill in the contact details, then click **Save**.

- **First Name, Last Name**
- **Organization:** Associate the person with a company. Click the arrow in the text box to search for the name of the company. As you type, the list of selections narrows. Select the company when it appears.
- **Title:** The person's organizational title
- **Role:** The person's functional role
- **Department:** Affiliated group within the organization
- **Preferred Language:** Select from the list.
- **Relationships:** Click the arrow and select Manager, Location or Office Address
- **Email:** Click the arrow, then click **Add an Item**. Enter a primary email address. You may also add a secondary email address, if desired.
- **Phone:** Enter one or more phone numbers and select the type of phone for each one (Business, Home, Mobile, etc.)

Adding a Contact from the Opportunity Record

You can also add a contact from within an opportunity record:

1. Display an opportunity record. Click the arrow next to **Related Contacts**.
2. Select **Create Contact > Person** to launch a blank contact record.

The screenshot displays the Renew OnDemand DynaPro interface. The top navigation bar includes tabs for Overview, Analytics, Opportunities, Contacts, Assets, Tasks, and More. The main content area shows an opportunity record for 'TALLAHASSEE ORTHOPEDIC CLINIC-FY13Q1-1'. The left sidebar contains a table with opportunity details: Sales Stage (Consolidated), Commit Level (Green), Amount (0 USD), Unweighted Amount (0 USD), Upsell Amount (0 USD), Expiration Date (01-02-2013), Forecasted Close Date (02-09-2013), Business Line (Enterprise), Direct/Channel (Channel Tier 1), and Selling Period (FY13Q1). The right sidebar shows a 'Related Activities' stream and a 'Related Contacts' section. In the 'Related Contacts' section, a 'Create Contact' button is highlighted with a red circle and the number 1, and a 'Person' option is highlighted with a red circle and the number 2.

3. Fill in contact details as shown in the previous example, then click **Save**.

Adding a Contact While Logging a Customer Contact

You can also create a contact from the *Log Customer Contact* window. Follow this same process to add a contact while logging a quote delivery and logging a customer commitment.

1. Go to the **Opportunities** page.
2. Engage the search bar and search for an opportunity with sales stage of *Not Contacted*.
3. Click the opportunity name to open the opportunity record.

Renew OnDemand | DynaPro

Overview Analytics Opportunities Contacts Assets Tasks More

Opportunities 1

ALL OPEN QUOTES READY EXPIRED EXPIRING THIS WEEK TOP DEALS RESOLVED MY OPPORTUNITIES HIGH RISK CHURN NOT CONTACTED

INTRODUCTORY

Q SALES-STAGE: Not Contacted 2

NAME 3	SALES STAGE	EXPIRATION DATE	CUSTOMER	SALES REP	UNWEIGHTED AMOUNT	AMOUNT	COMMIT
RUSSELL MEDICAL CENTER-FY13Q1-1	Not Contacted	02-24-2013	RUSSELL MEDICAL CENTER	Alex May	19,934 USD	21,330 USD	Green
BURGESS CONSULTING-FY13Q1-1	Not Contacted	02-06-2013	BURGESS CONSULTING	Alex May	39,841 USD	42,631 USD	Green
OCEAN COUNTY PROSECUTOR'S OFFICE-FY13Q1-1	Not Contacted	03-10-2013	OCEAN COUNTY PROSECUTOR'S	Alex May	19,847 USD	21,344 USD	Green

4. Click the **Partner Opportunities** tab.
5. Click the name of the partner opportunity.

Offers Quotes Bookings Partner Opportunities 4 Notes Related Activities

SET PRIMARY RESELLER

NAME 5	PRIM ARY	RESE LLER	INCUMBENT	SALES STAGE	AMOUNT	TARGET AMOUNT	COMMIT	LATEST END DATE
EPIQ SYSTEM, INC.-FY13Q1-1	No	Alti...	Yes	Quote Delivered	21,294.00 USD	19,900.00 USD	Green	
EPIQ SYSTEM, INC.-FY13Q2-1	Yes	A Plus Res...	No	Not Contacted	21,294.00 USD	19,900.00 USD	Green	

6. From the partner opportunity record, click **LOG CUSTOMER CONTACT**.

The screenshot shows the 'Renew OnDemand' interface for 'ABC Distribution'. The top navigation bar includes 'Overview', 'Analytics', 'Opportunities', 'Contacts', 'Assets', 'Tasks', and 'More'. The 'Opportunity List' section displays the record for 'EPIQ SYSTEM, INC.- FY13Q2-1'. A blue circle with the number 6 highlights the 'LOG CUSTOMER CONTACT' button. Other buttons include 'REQUEST QUOTE', 'CANCEL', and 'SAVE'. The record details include:

- Sales Stage:** Commit Level (Green), Amount (21,294.00 USD), Target Amount (19,900.00 USD), Upsell Amount (0.00 USD), Expiration Date (05-19-2013), Forecasted Close Date (04-15-2013), Earliest New Start Date, Latest New End Date, Earliest Existing Start Date, and Selling Period (FY13Q2).
- Relationships:** Reseller (Altimate), Assigned Team (Team1), Customer (EPIQ SYSTEM, INC.), Distributor (ABC Distribution), Distributor Rep (Max Munn), Reseller Rep (Mohamed Tenu), and Sales Rep (Alex May).
- Tags:** A text input field for adding tags.

7. Click the pen beside the contact name.
8. Click **Create New** to launch a blank contact record.

The screenshot shows the 'Log Customer Contact' form. The top navigation bar includes 'CANCEL', 'NEXT', and 'LOG CUSTOMER CONTACT'. The form is divided into three sections: '1. Log Activity', '2. Update Opportunity', and '3. Create Follow Up Task'. The 'Contacted' dropdown menu is open, showing 'Ashley Osborne' with a blue circle and the number 7. The 'Contact Method' dropdown menu is also open, showing 'Ashley Osborne'. The 'Date Contacted' field is empty. The 'Notes' section has a text input field. The 'Successful Contact' checkbox is unchecked. The 'Close Related Task' dropdown menu is empty. The 'Create New' button is highlighted with a blue circle and the number 8. The 'ADD ATTACHMENT' button is located at the bottom right.

9. Fill in the contact details, then click **SAVE**.

Contact

New Person

CANCEL

SAVE

First Name *

John

Last Name *

Doe

Organization

ABC Distribution

Title

Manager

Role

Department

Preferred Language

English(US)

Reseller Tier

Relationships ▼

Email▼

Primary ▼

john@abc.com

Phone▼

Business ▼

999-123-4567

9

9: Creating and Managing Tags

Overview

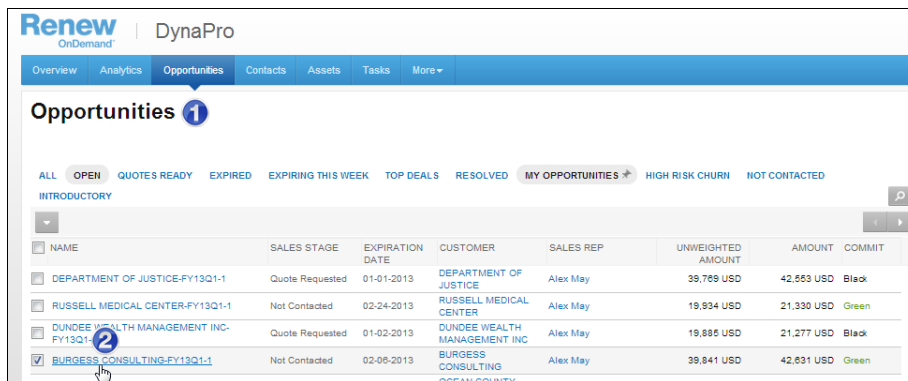
Use the tag feature in Renew OnDemand to identify records you want to group and display together. You can create any tag you think will be useful to you in retrieving opportunity, quote, booking, asset or task records.

This chapter covers how to do the following:

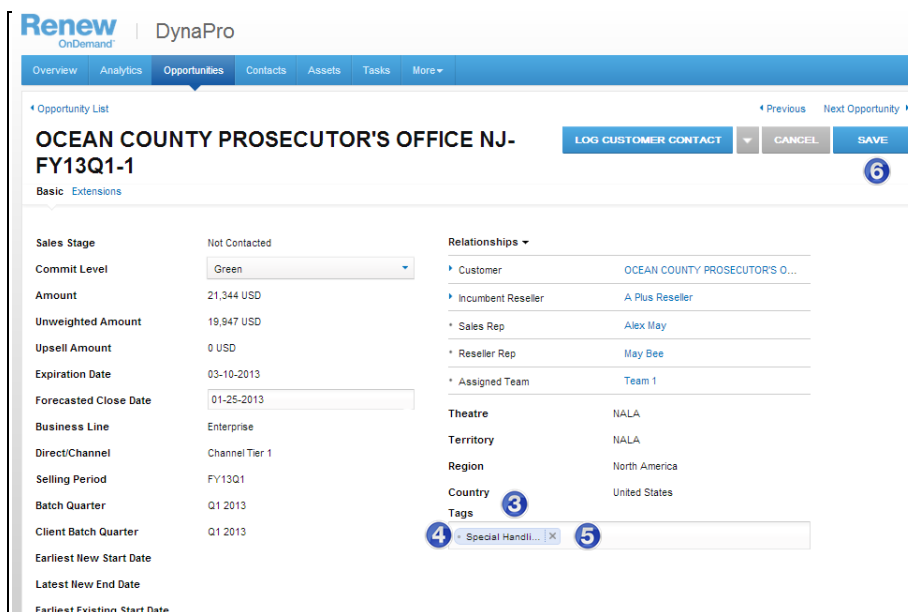
- Create a Tag and Associate it with an Opportunity Record
- Display All the Opportunity Records Associated with a Tag

Creating a Tag for an Opportunity Record

1. Go to the **Opportunities** page.
2. Select the opportunity that you want to create a tag for.



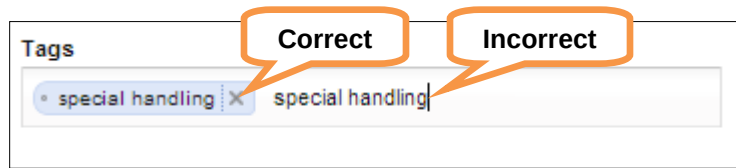
3. Locate the **Tags** field in the lower right of the screen.



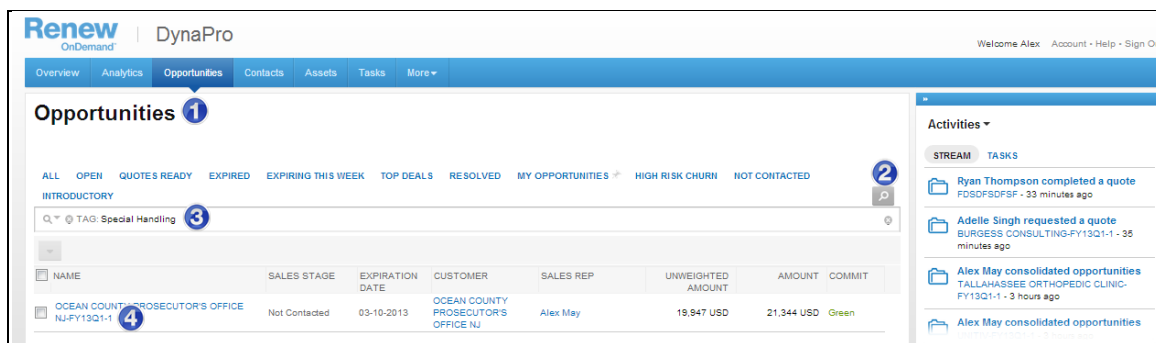
4. Begin typing the tag name, in this case **Special Handling**.

5. Press the **Tab** or **Enter** key on your keyboard, then click **Save**.

You can tell when a tag has been added when the words are enclosed in a tag icon.



Displaying Tagged Opportunity Records



1. Go to the **Opportunities** page.
2. Engage the search bar by clicking the magnifying glass.
3. Begin typing the word **tag**. Select the **Tag** option when it appears. After the **Tag** prompt, type **Special Handling** and press **Enter**.
4. You should now see the opportunity record that you tagged as *Special Handling*.

10: Understanding Filters and Headers for Quotes, Bookings and Tasks

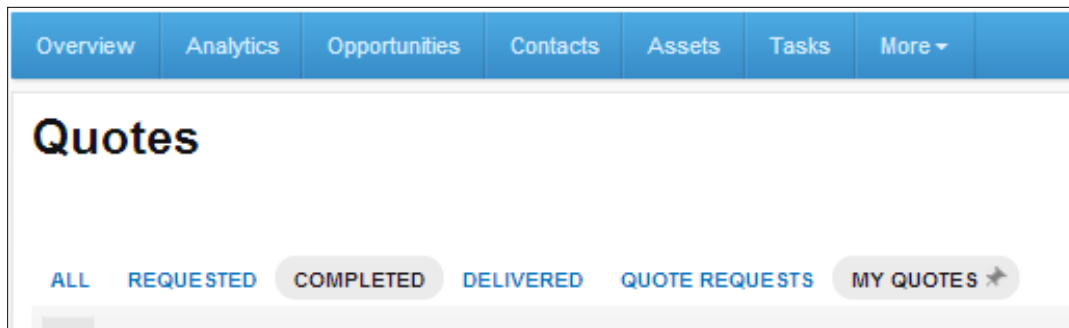
Overview

You can understand the status of your quotes, bookings and tasks by reviewing the filters and headers on these pages.

This chapter covers filters and headers on the quotes, bookings and tasks pages.

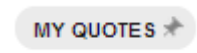
Quotes Page Filters and Headers

Click the **More** tab, then select **Quotes** to open the sales rep quotes page.



The list below describes each filter:

Quotes Filter	Description
ALL	Displays all quotes
REQUESTED	This filter displays quotes that have been requested by you and not yet completed.
COMPLETED	This filter displays quotes that are ready for delivery but have not yet been delivered.
DELIVERED	This filter displays quotes that have been delivered to the customer.
QUOTE REQUESTS	This filter displays all quotes that have been requested.
MY QUOTES	Displays all quotes associated with the Sales Rep who is logged in.

My Quotes is a sticky filter as indicated by the pin next to the filter name. This means it can be used with other pre-set filters at the same time. 

The **All** and **My Quotes** filters selected together display the quotes that you have requested.

This list below describes the headers on the **Quotes** page.

Overview

Analytics

Opportunities

Contacts

Assets

Tasks

More ▾

Quotes

ALL

REQUESTED

COMPLETED

DELIVERED

QUOTE REQUESTS

MY QUOTES ↗

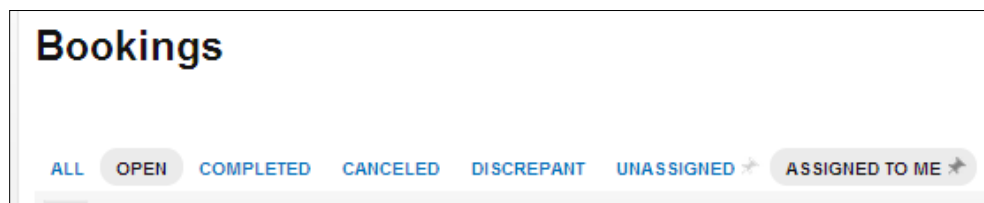
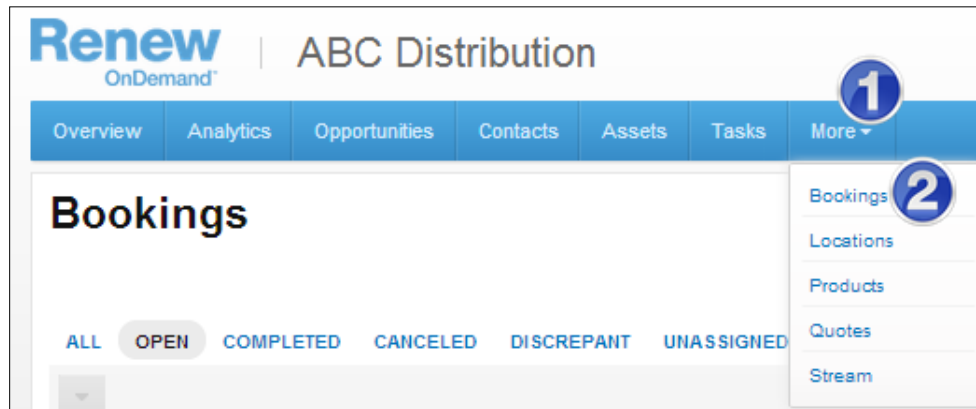
	NAME	TYPE ↕	STATUS	REQUESTED BY	ASSIGNED TO	EXPIRATION DATE	REQUEST DATE	DUE DATE	AMOUNT	CUSTOMER	TAGS
-------------	------	--------	--------	--------------	-------------	-----------------	--------------	----------	--------	----------	------

Quotes Headers	Description
NAME	Display name of quote and link to quote record.
TYPE	Indicates of this is a request for a new quote or a quote revision.
STATUS	Indicates where a quote is in its lifecycle: • Staged – Unassigned and incomplete. • Requested – Assigned and incomplete. • On Hold – Quote cannot be completed until more information is received. • Pending Review – Quote is waiting for peer audit for quote quality. • Rejected – Quote failed quality check. • Completed – Quote is completed. • Delivered – Quote has been delivered to the customer. • Booked – Payment for quote has been received and sent for processing. • Closed Unsuccessfully – Quote is not able to be completed with the information provided.
REQUESTED BY	Name of person who logged the quote request.
ASSIGNED TO	Name of person who is assigned to complete the quote.
EXPIRATION DATE	Date the quote expires.
REQUEST DATE	Date quote request was logged.
DUE DATE	Date quote should be completed by.
AMOUNT	Actual quoted or closed amount of the transaction.
CUSTOMER	Customer name.
TAGS	Tags (if any).

Bookings Page Filters and Headers

When you select a filter, Renew OnDemand displays all the records that match your filter request.

1. To open the **Bookings** page, click the **More** tab.
2. Select **Bookings**.



Bookings Filter	Description
ALL	Displays all bookings.
OPEN	Tells you how many open bookings you have.
COMPLETED	Displays bookings where the sales order has been successfully processed.
CANCELLED	Displays cancelled bookings.
DISCREPANT	Displays bookings where the sales order has been successfully processed, but Renew OnDemand was updated incorrectly with mismatched financial values.
UNASSIGNED	All unassigned bookings.
ASSIGNED TO ME	Displays all quotes associated with the logged-in sales rep.

ASSIGNED TO ME is a sticky filter as indicated by the pin next to the filter name. This means you can use it with other pre-set filters at the same time.

ASSIGNED TO ME ★

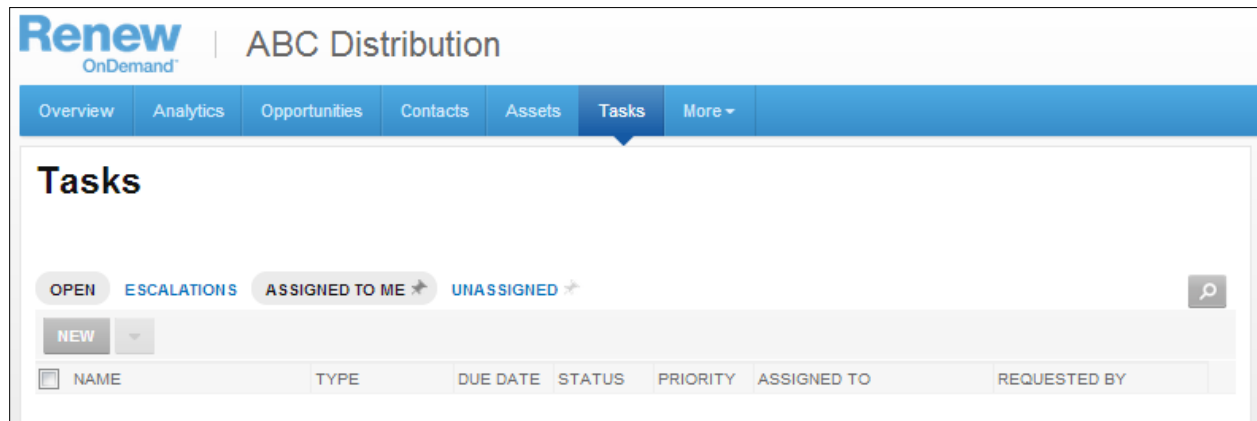
The **ALL** and **ASSIGNED TO ME** filters selected together display the bookings you have requested.

This list below describes the headers on the **Bookings** page.

☐ NAME	ASSIGNED TO	SALES REP	DUE DATE	STATUS	SALES ORDER DATE	AMOUNT
-------------------------------	-------------	-----------	----------	--------	------------------	--------

Bookings Header	Description
NAME	Display name of booking and link to booking record.
ASSIGNED TO	Name of person assigned to complete the booking.
SALES REP	Name of sales rep who logged the booking request.
DUE DATE	Date booking should be completed by.
STATUS	Indicates where booking is in its lifecycle. • Pending – Unassigned and incomplete. • On Hold – Booking cannot be completed until more information is received. • Cancelled – Sales rep or sales ops identifies booking is invalid or incorrect and cancels booking. • Completed – Booking is correct and complete. • Discrepant – Booking is completed incorrectly with mismatched financial values. • Closed Unsuccessfully – Booking is not able to be completed with the information provided.
SALES ORDER DATE	Date the transaction was booked in client system.
AMOUNT	Closed amount of the transaction.

Tasks Page Filters and Headers



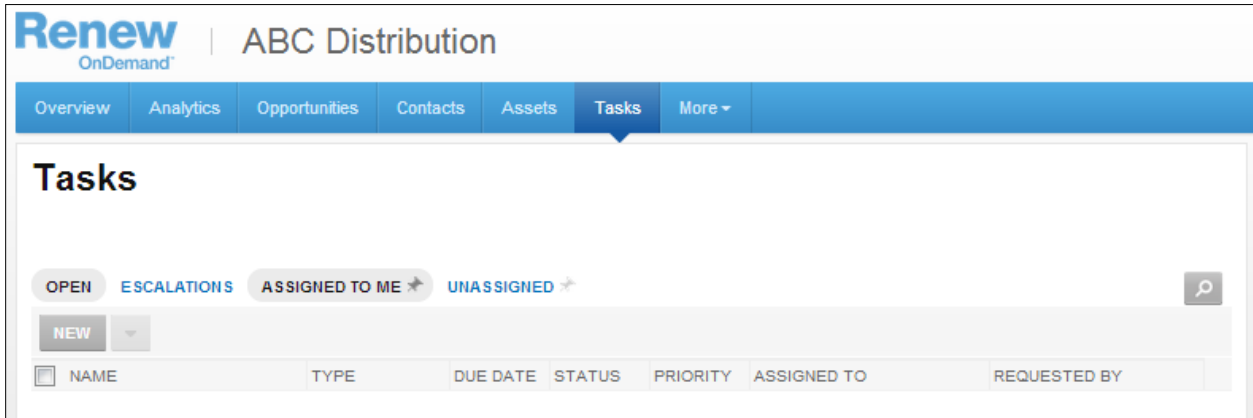
The list below describes the function of each filter.

Tasks Filter	Description
OPEN	The default filter, showing all tasks that have not been completed.
ESCALATIONS	Displays tasks that have been escalated by management for immediate attention.
ASSIGNED TO ME	Displays all tasks assigned to you, regardless of who requested them.
UNASSIGNED	All unassigned tasks.

The **OPEN** and **ASSIGNED TO ME** filters selected together display tasks that have been assigned to you.

ASSIGNED TO ME is a sticky filter as indicated by the pin next to the filter name. This means you can use it with other pre-set filters at the same time.

The list below describes each column header on the **Tasks** page.



Tasks Header	Description
NAME	Display name of the task and link to task record.
TYPE	Indicates whether the task is a data update request or a research request.
DUE DATE	Date the booking should be completed by.
STATUS	Indicates where a task is in its lifecycle: • Due Date - Date by which booking should be completed • Status - Indicates where task is in its lifecycle • Open - Unassigned and incomplete • On Hold - Task cannot be completed until more info. received • Closed - Task is complete • Closed Unsuccessfully - Task cannot be completed
PRIORITY	Level of urgency assigned to the task by the task creator.
ASSIGNED TO	Person who is assigned to complete the task.
REQUESTED BY	Person who logged the task request.

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