Welcome to the Partner Portal

Getting started

By joining CUSTOMER NAME'S partner portal, you will receive immediate access to new resources and features to help your business and teams grow.

The portal is your gateway to the latest information about CUSTOMER NAME'S partner programs, products, support, and integrations. In addition, you can register and track new merchant deals.

How to Register and Get Access

1. Request an account for the partner portal at (insert your portal link here)

2. Enter your company email address and create your password

3. If your email address is recognized you will receive an email to verify your account. If not, then we'll review it within 1 business day.

4. Verify your email address and gain immediate access to the portal

Features

The key features of the CUSTOMER NAME partner portal are:

- Marketing tools
- Content for merchants
- Deal registration

The Portal Dashboard shows you the latest updates from CUSTOMER NAME as well as links to relevant documentation, brand resources, and sales tools so you can strengthen your competitive advantage.

Team members who use the partner portal have different roles and levels of access. We understand that Sales Managers and Developers have specific interests and things they need from CUSTOMER NAME.

We want to make it easy for you to find content that's interesting to you. That's why we give users in your company access to the best-fitting features and resources.

Create your company profile and invite your colleagues, and teams, to join you in exploring the CUSTOMER NAME partner portal.

As a valued partner of CUSTOMER NAME, we welcome your feedback and we're excited to hear your thoughts! Contact us within the portal with any questions or comments.

Dashboard

Welcome to the main dashboard and center of the partner portal.

Here you'll find the main menu taking you to all corners of the portal, our latest and most popular content, and quick links to the CUSTOMER NAME website and helpful documentation.

As you're diving into exploring the portal, use the left menu bar to navigate. Edit your personal and company profile by clicking on your name on the top bar.

Content & Resources

We've put together a content library highlighting our latest product features, sales pitches and handy one-pagers. As our partner, we want you to feel confident when pitching CUSTOMER NAME to your customers!

Therefore, you will have access to the same resources that the CUSTOMER NAME sales teams use when pitching. You can share this content with your customers

In addition, you can find whitepapers and knowledge pieces in the Content & Resources tab.

Co-Branded Content

You can co-brand many of the materials which you will find in the Content & Resources tab. Co-brand documents and sales presentations by adding your company logo alongside CUSTOMER NAME'S. Look out for the co-brand tag and test it out.

You can add a new logo and a short text box within the editor. The logo size should be 800×500 pixels, ideally without a background. Once you're done editing, download a copy of the co-branded document and feel free to share it with your merchants!

Playbooks

As we continue to share the latest CUSTOMER NAME content through the partner portal, we want to make it easy for you to find the right resources. We've grouped together specific content into Playbooks so that it's faster to find what you need. Within the Playbooks, you can download content, and pin it to your dashboard for even quicker access. Playbooks are a quick way to engage with our Content & Resources library.

Events Calendar

Connect with CUSTOMER NAME and other partners through our events calendar. We'll add information on in-person and online events that we're attending and hosting. If you'd like to highlight an event then let us know so we can also add this to the calendar. As a valued partner we are very keen on meeting up with you at these events!

Prospect Pages

Create prospect pages and share resources from the Content & Resources section with existing or potential merchants or partners. Each prospect page is dedicated to a contact person. Once you've added the merchant's details, you can select the playbook or piece(s) of content you want to share. Personalize the prospect page by adding your own profile photo and contact information. Hit the create button and share the link with your customer or partner. They don't need to register to use the portal and can access the prospect page through the link. You're able to track engagement such as page views and downloads, and you can continue to add new content even after you've shared the link.

Pipeline

Through the portal you can register and track your own merchant deals in collaboration with CUSTOMER NAME'S sales teams. If you're not yet ready to register your first deal, then take a look at how the process works, so when the time comes, you'll feel prepared!

How to Register A Deal

1. Identify Opportunity Identify an opportunity with a merchant through sales activities or marketing campaigns
2. First Sales Step Engage in the first stages of your sales process
    - Reach out to the contact person
    - Qualify the opportunity size (expected monthly translation volume)
3. Register Deal via Partner Portal Register the deal via the CUSTOMER NAME Partner Portal
4. Deal Update Receive notifications through the Partner Portal when a deal is updated
5. Pipeline Tab View your lead referrals, and deal stages within the Pipeline tab
6. CUSTOMER NAME connects When a deal is won, our sales team will connect the merchant to your account. PS We will never reach out to new deals without contacting you first and aligning on the best approach together!
    - New opportunity
    - In Progress
    - Signed
    - Live
    - Lost Timeline

Marketing Development Funds (MDF)

CUSTOMER NAME'S Marketing Development Fund co-funds campaigns organized by our partners. Campaigns we've worked on with our partners include co-hosted events, paid ads, and social media competitions. Apply for MDF through the partner portal and track your application as the status changes. Work with our Partner Marketing Team to launch a campaign targeting potential merchants! Your Partner Manager will contact you if you're eligible for MDF. Selected Partners Only Contact us with any questions!