



INTEL PARTNER PORTAL LEAD MANAGEMENT TRAINING

PARTNER PORTAL

- The Intel Partner Portal is your one stop shop for Partner Access to Leads from Intel
- The Intel Partner Portal is used for other Intel Partner Programs
 - Intel Premier Support (IPS)
 - Design Registration (DR)
- ***You may not need or have access to these other programs.***
- These slides focus ONLY on Lead Management Support and Training



OVERVIEW OF PARTNER PORTAL LEAD MANAGEMENT SYSTEM TRAINING

- Account Creation
- Receiving Leads
- Accessing Leads Online
- Dispositioning Leads
- Exporting and Reporting

ACCOUNT CREATION

Welcome-to-System Email

- Any new users will receive an email explaining login details and instructions.
- New users and user access varies by Intel Partner Program. Please contact your program administrator for access or program specific questions.
- Follow the instructions on the email
 - Login same as your Intel login
 - You may need to reset your password
- If you have access to other programs on the partner portal, you may already have access or receive a slightly different email.

Action Required

Welcome to Intel Leads Management System

Please retain this e-mail for future reference.

Login ID: example@trashmail.net

E-mail Address: example@trashmail.net

What you need to do first

Please verify your e-mail address and create your password by clicking this [link](#) or by copying the URL into your browser.

Keep your password protected and confidential. Your use of the password and Intel's websites are governed by Intel's Terms and Conditions of Use found on the links at the bottom of each web page.

Click [here](#) to login in and accept your leads.

If you have any questions, click [here](#) for support information.

Visit this [link](#) any time to manage your profile.

Please DO NOT reply to this e-mail message. This is an automated response.

To ensure that you continue receiving our e-mails, please add us to your address book.

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Welcome-to-System Email (continued)

Once you receive your welcome email, follow its instructions.

- First you must verify your email address by clicking on the link.
- You may be required to reset your password when you first log in.

Action Required

Welcome to Intel Leads Management System

Please retain this e-mail for future reference.

Login ID: example@trashmail.net

E-mail Address: example@trashmail.net

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If you have any questions, click [here](#) for support information.

Visit this [link](#) any time to manage your profile.

Please DO NOT reply to this e-mail message. This is an automated response.

To ensure that you continue receiving our e-mails, please add us to your address book.

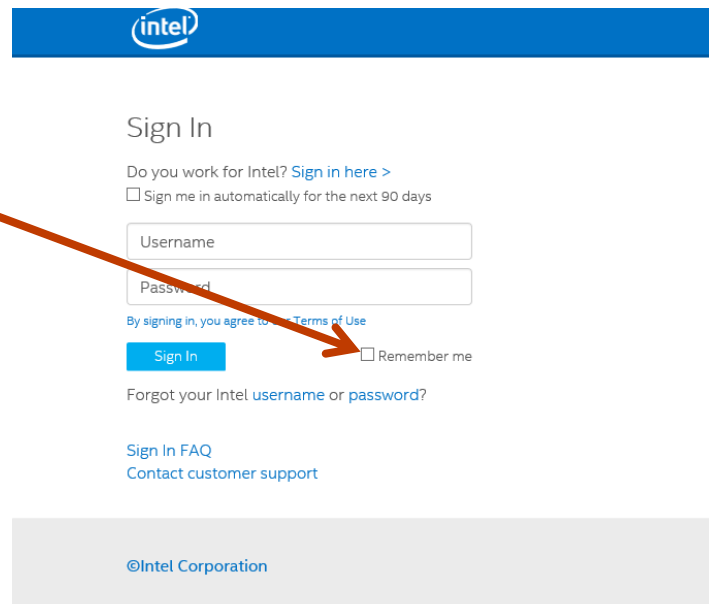
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**Intel is not responsible for content of sites outside our intranet sites.

Login Page

- Log in when you reach the sign-in page.
- Select “Remember me” to have the system remember your username.



The screenshot shows the Intel Sign In page. At the top is a blue header with the Intel logo. Below it, the text "Sign In" is displayed. A link "Do you work for Intel? [Sign in here >](#)" is present. A checkbox labeled "Sign me in automatically for the next 90 days" is shown. Below these are input fields for "Username" and "Password". A link "By signing in, you agree to [Terms of Use](#)" is located below the password field. A blue "Sign In" button is positioned to the left of a "Remember me" checkbox. An orange arrow points from the second bullet point in the list to this checkbox. At the bottom, there are links for "Sign In FAQ" and "Contact customer support". The footer is a grey bar with "©Intel Corporation".

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Sign In

Do you work for Intel? [Sign in here >](#)

☐ Sign me in automatically for the next 90 days

Username

Password

By signing in, you agree to [Terms of Use](#)

☐ Remember me

Forgot your Intel [username](#) or [password](#)?

[Sign In FAQ](#)
[Contact customer support](#)

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RECEIVING LEADS

Lead Notifications

- Each lead generates an email notification that is sent to all members in your company that have leads contact roles
- Email includes contact information about the lead
 - E.g. Name, phone, email, company etc.
- Note the “click here” message for accessing the lead directly (may require login) and to view complete lead details.
- **NOTE:** In some cases of “bulk” lead imports by your program administrator, you may only receive a single notification but may see multiple leads when you log in to the portal. It is always a good idea to log in to the Portal to view your leads.

Intel Leads Management System Lead Notification

You have been assigned a Lead through Intel's Lead Management System. This customer is expecting contact within 24 hours. Please accept or reject this lead as soon as possible and, if accepted, follow up accordingly.

Please click [here](#) to access the lead directly.

Lead Information:

Company: Current Components Inc.

Name: Mauro Bettiga

Phone: [REDACTED]

Email: [REDACTED]

Lead Notes: ETA Transact 2015 Event; Topics of Interest:#1 Intel DPT for Transactions;#12 Intelligent Kiosk;

Address:

Via A Volta 9
Mornago, 21020
Italy

Project Timeframe:

Project Size:

Project Phase:


Please click [here](#) for support.

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Sample Lead

 Sandbox

partner2_user1

[Home](#) [Leads](#) [Reports](#)

Search

Search All

Go!

[Advanced Search...](#)

Links

[My Profile](#)

[Intel Support](#)

 **Lead**
lead200 lead200

[« Back to List: Leads](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

Lead Detail

[Edit](#) [Accept Lead](#) [Reject Lead](#)

Contact Information

Name	lead200 lead200	Partner Lead Owner	partner2_user3 partner2_user3
Title		Email	lead200@test1.com
Job Function		Phone	456 78956
		Mobile	
		Alternate Email	
		Fax	

Business Information

Company	company200	Company Size	
Address		Industry	
	Singapore		

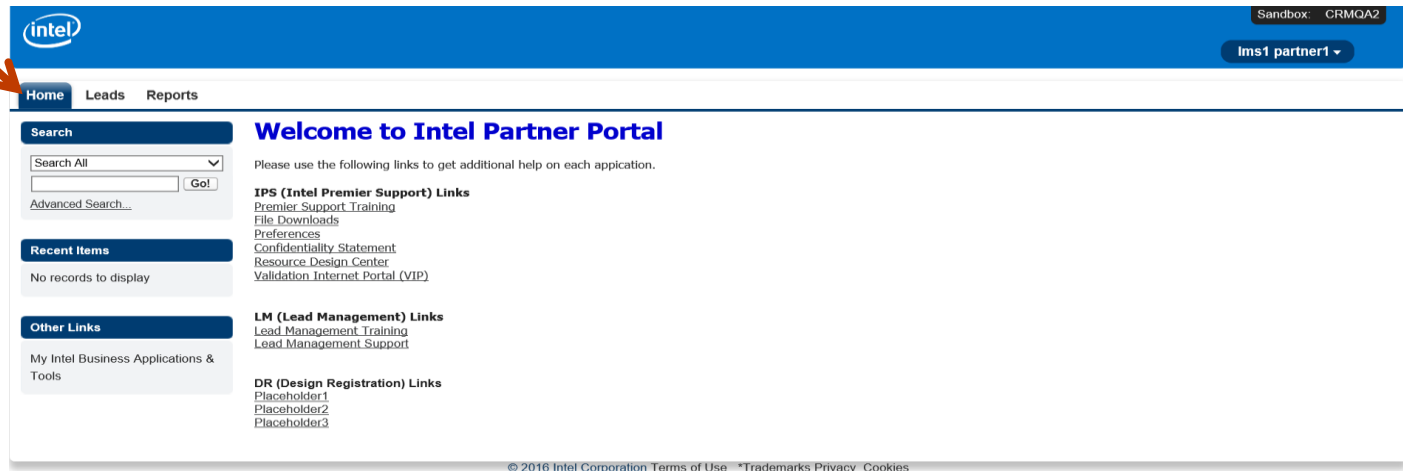
This is how a lead appears when you use the “click here” link in the email.

ACCESSING LEADS ONLINE

Accessing a Lead

- If you click the link provided in a lead email, you go directly to that lead (after logging into the system).
- If you log directly into the Leads Management System, you go to the home page.
- If you have access to “Lead Manage” only, you will see three tabs at the top of the Leads Management System interface**:

- Home tab
- Leads tab
- Reports tab



**** Note: If you have access to additional partner programs through the Intel Partner Portal you will see additional tabs.**



Home Leads Reports

Search

Users

Go!

[Advanced Search...](#)

Recent Items

No records to display

Other Links

[My Intel Business Applications & Tools](#)

Welcome to Intel Partner Portal

Please use the following links to get additional help on each application.

IPS (Intel Premier Support) Links

[Premier Support Training](#)
[File Downloads](#)
[Preferences](#)
[Confidentiality Statement](#)
[Resource Design Center](#)
[Validation Internet Portal \(VIP\)](#)

LM (Lead Management) Links

[Lead Management Training](#)
[Lead Management Support](#)

DR (Design Registration) Links

[Placeholder1](#)
[Placeholder2](#)
[Placeholder3](#)

Home Page View

- Click on the "Leads" tab to access your leads!
- Click on the "Report" Tab to download your leads

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Home Leads Reports

Search

Users

Go!

[Advanced Search...](#)

Recent Items

No records to display

Other Links

My Intel Business Applications & Tools

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[Premier Support Training](#)

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[Preferences](#)

[Confidentiality Statement](#)

[Resource Design Center](#)

[Validation Internet Portal \(VIP\)](#)

LM (Lead Management) Links

[Lead Management Training](#)

[Lead Management Support](#)

DR (Design Registration) Links

[Placeholder1](#)

[Placeholder2](#)

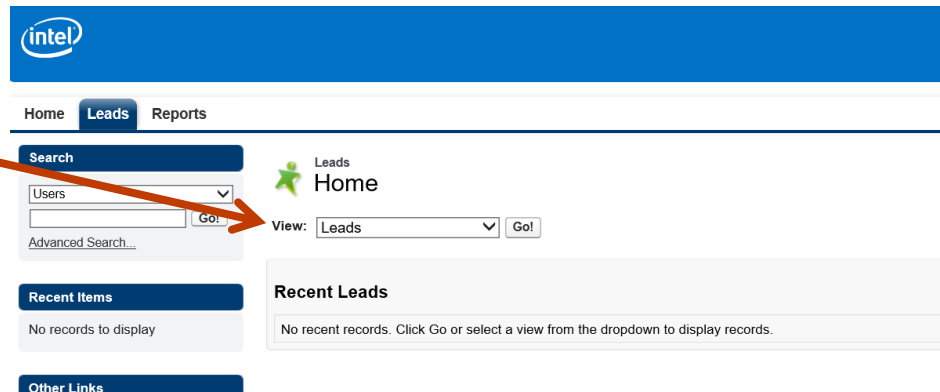
[Placeholder3](#)

Home Page View

- You will see links to multiple partner programs
- ***The Links to Lead Management Support are located here!!***

Accessing Leads Online

- Click on Leads tab
 - The default leads tab view shows only recent leads.
 - You **must** select “**All Leads**” and click “**Go!**” to view all of your leads for your company
 - Other view choices include:
 - All Leads – Accepted
 - All Leads – Open
 - All Ledged – Rejected
 - Recently Viewed Leads




Accessing Leads Online

- Clicking the link's name takes you to the lead
- Clicking "Edit" takes you directly into Edit Mode, allowing you to update that lead's information

Action	Name	Email	Phone	Country	Company	Lead Notes	Lead State
Edit	Partner Last, Partn...	partner_lead_test@intel.com	55555555	Australia	Intel	Lead Received fro...	Open
Edit	test_partner1_lead3...	test_partner1_lead3@abc.com	456 6789	Malaysia	test_company3	Another Test Lead.	Open
Edit	test_partner1_lead4...	test_lms_user1@trashmail.com	897 6423	Poland	company2	Lead for Test Partner1	Open
Edit	test_partner1_lead2...	test_partner1_lead2@test.com	456 7890	United States	test_company1	Testing123	Rejected
Edit	Moman, Aaron	justatest@gmail.com	858-456-5696	United States	Fusion Media	Second test	Accepted
Edit	test_partner1_lead1...	test_partner1_lead1@test.com	456 7890	United States	test_company1	Testing123	Accepted

Sample Lead



Sandbox

partner2_user1

HomeLeadsReports

Search

Search All

Go!


Advanced Search...

Links

My Profile

Intel Support

Lead

 lead200 lead200

[Back to List: Leads](#)

[Open Activities \[0\]](#) | [Activity History \[0\]](#)

Lead Detail

EditAccept LeadReject Lead

Contact Information

Name	lead200 lead200	Partner Lead Owner	partner2_user3 partner2_user3
Title		Email	lead200@test1.com
Job Function		Phone	456 78956
		Mobile	
		Alternate Email	
		Fax	

Business Information

Company	company200	Company Size	
Address		Industry	
	Singapore		

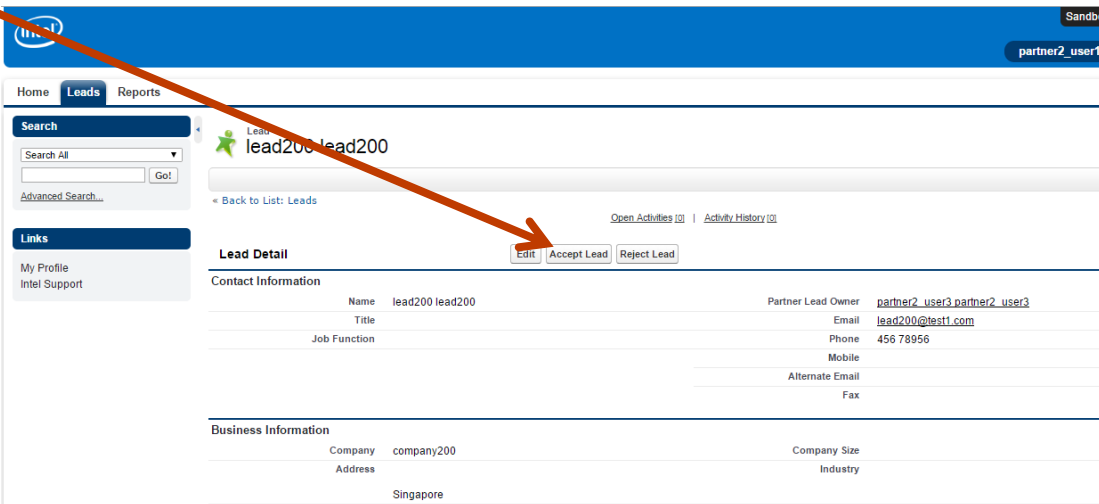
This is how a lead appears when you open it.

DISPOSITIONING A LEAD

Dispositioning a Lead

- Select the “Accept” or “Reject” button to quickly disposition a lead

Note: Accept/Reject buttons are *NOT* available or visible when editing a lead!



The screenshot shows the Intel CRM interface for a lead named 'lead200'. The page has a blue header with the Intel logo and a user profile 'partner2_user1'. The main content area is divided into sections: 'Search', 'Links', 'Lead Detail', 'Contact Information', and 'Business Information'. The 'Lead Detail' section contains buttons for 'Edit', 'Accept Lead', and 'Reject Lead'. The 'Contact Information' section displays fields for Name, Title, Job Function, Partner Lead Owner, Email, Phone, Mobile, Alternate Email, and Fax. The 'Business Information' section displays fields for Company, Address, Company Size, and Industry.

Contact Information	
Name	lead200 lead200
Title	
Job Function	
Partner Lead Owner	partner2_user3 partner2_user3
Email	lead200@test1.com
Phone	456 78956
Mobile	
Alternate Email	
Fax	

Business Information	
Company	company200
Address	Singapore
Company Size	
Industry	

Accepting a Lead

Lead Detail

[Edit](#) [Accept Lead](#) [Reject Lead](#)

Contact Information

Name	Aaron Moman
Title	Title
Job Function	

To accept a lead, click the “Accept Lead” tab.

After accepting the lead, you will be added as the lead owner.

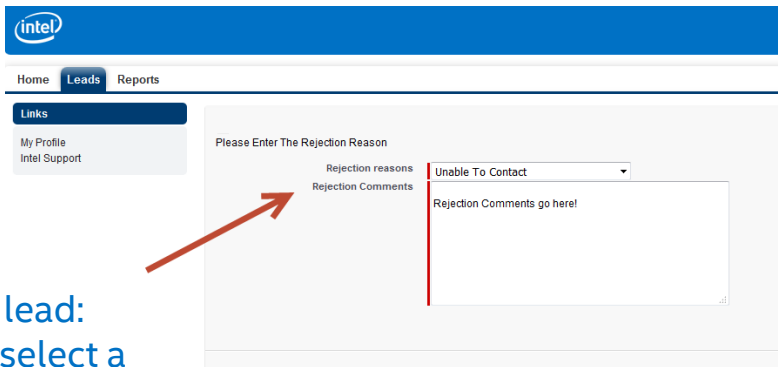
Others at your company can still see and edit the lead.

Partner Lead Owner	test lms_user1 test lms_user1
Email	testlms1@gmail.com
Phone	858-456-7890
Mobile	
ate Email	
Fax	

	usion Media
Address	7911 Herschel Ave ste 200 123 La Jolla, California 92037

any Size	
Industry	

Rejecting a Lead



The screenshot shows the Intel Lead Rejection form. The 'Rejection reasons' dropdown menu is open, and 'Unable To Contact' is selected. A red arrow points to the 'Rejection Comments' text area, which contains the placeholder text 'Rejection Comments go here!'.

If you reject a lead:

- You must select a rejection reason and provide comments.
- Intel uses this information to improve lead quality.



The screenshot shows the Intel Lead Rejection form with the 'Rejection reasons' dropdown menu open. The menu is displaying a list of rejection reasons, with 'Not a Relevant Opportunity' highlighted. A red arrow points to the dropdown menu.



The screenshot shows the Intel Lead Rejection form with 'Not Relevant Contact' selected in the 'Rejection reasons' dropdown menu. A red arrow points to the 'Next' button at the bottom right of the form. A text box overlay on the right side of the form contains the following text:

Select your
“Rejection Reason”
Add “Rejection Comments”
Hit the “Next” button to
reject the lead.

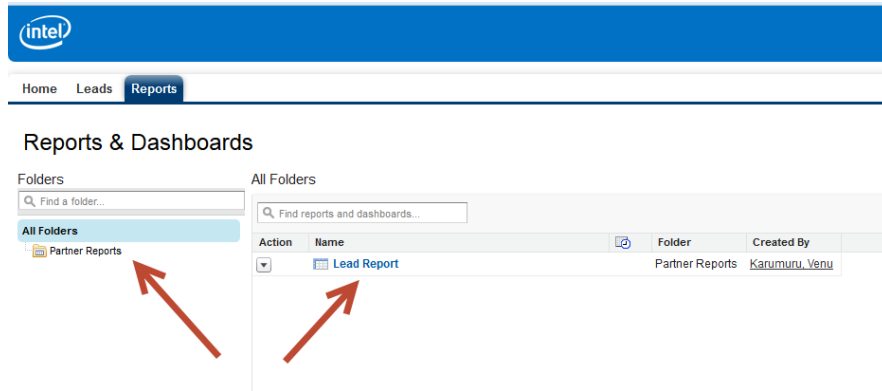
EXPORTING AND REPORTING

Reporting and Exporting

Reports allow you to track lead status including the Lead Owner in your organization and any notes they have made.

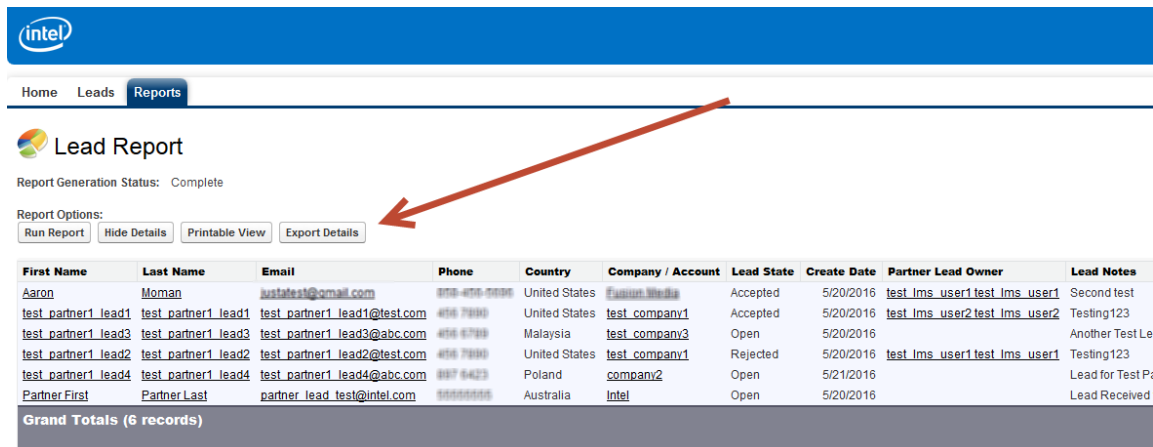
To view reports:

- Click on the “Lead Management Reports” tab.
- Go to Lead Reports.
- If you do not see any reports listed, select and click a folder icon on the left side of the screen.
- Click on the report to view it.
- **Note:** You may see other reports for other programs but may not have permission to run those reports!



Reporting and Exporting (continued)

- Select the “Export Details” tab to export the report.
 - In “Export File Format” choose Excel or .csv.
 - Click “Export” and then save or open report.
 - If you export to Excel, you may receive a warning that the file is in a different format. Click “Yes” anyway – the report will open in Excel.
 - All leads will be exported along with relevant information.



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Home Leads Reports

Lead Report

Report Generation Status: Complete

Report Options:

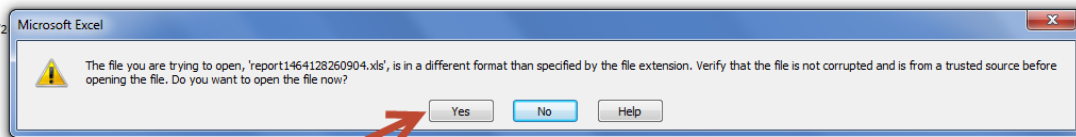
First Name	Last Name	Email	Phone	Country	Company / Account	Lead State	Create Date	Partner Lead Owner	Lead Notes
Aaron	Moman	jvstatest@gmail.com	810-410-1030	United States	Fusion Media	Accepted	5/20/2016	test_lms_user1 test_lms_user1	Second test
test_partner1_lead1	test_partner1_lead1	test_partner1_lead1@test.com	416 7990	United States	test_company1	Accepted	5/20/2016	test_lms_user2 test_lms_user2	Testing123
test_partner1_lead3	test_partner1_lead3	test_partner1_lead3@abc.com	416 6789	Malaysia	test_company3	Open	5/20/2016		Another Test Le
test_partner1_lead2	test_partner1_lead2	test_partner1_lead2@test.com	416 7990	United States	test_company1	Rejected	5/20/2016	test_lms_user1 test_lms_user1	Testing123
test_partner1_lead4	test_partner1_lead4	test_partner1_lead4@abc.com	8107 6423	Poland	company2	Open	5/21/2016		Lead for Test P
PartnerFirst	PartnerLast	partner_lead_test@intel.com	80000000	Australia	Intel	Open	5/20/2016		Lead Received

Grand Totals (6 records)

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tribute

_user1 5/2





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