




Teradici Deal Registration Step by Step User Guide



Teradici's Deal Registration program offers valued reseller partners, like you, incentive to close deals! This program is available exclusively for our Registered resellers. Simply enter your deals to enjoy early support during the sales cycle, and most importantly, discounted pricing.

 [Register a New Deal](#)

 [Manage My Existing Opportunities](#)

English

Japanese

Korean

Chinese

French

Guidelines for Partners

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A participant must fulfill ALL of the following requirements to be eligible for deal registration discounted prices:

- Valid for transactions through authorized Distributors only.
- Channel Partner must be registered in the [Teradici Channel Partner Program](#).

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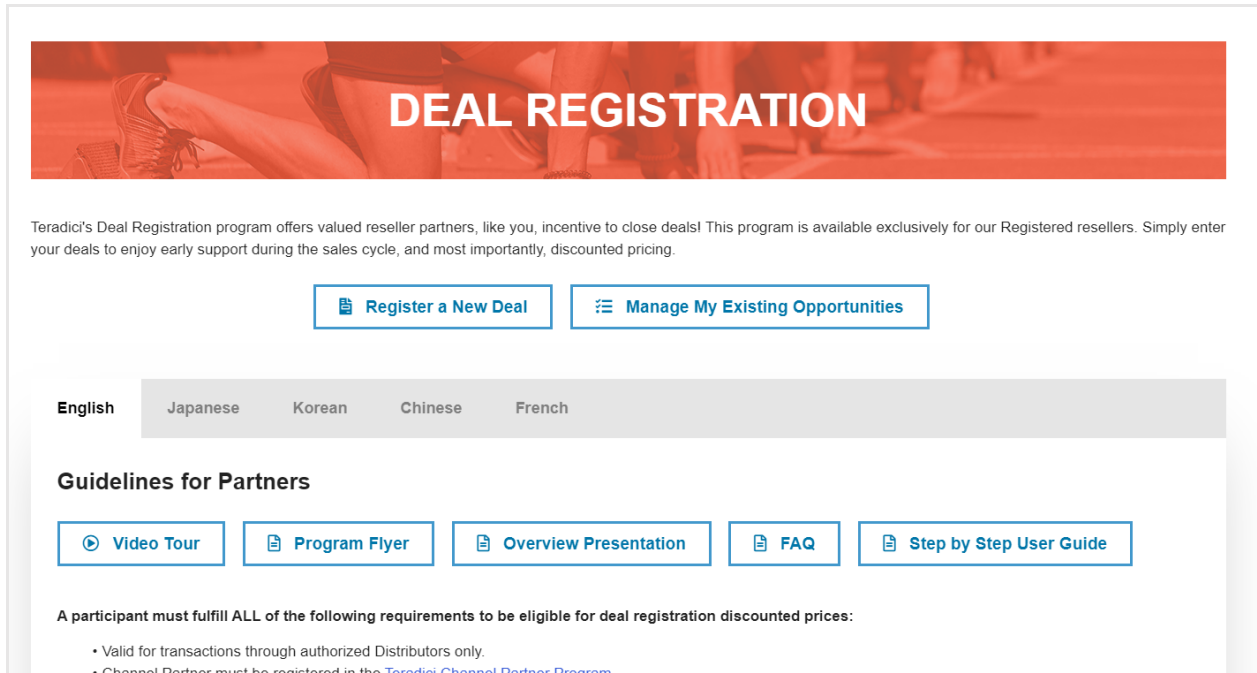
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Welcome to the Teradici Deal Registration Program

This Step by Step User Guide has been created as a resource to help you enter and manage Teradici solution deals. It's a how-to for every step in the process but if you need additional help, don't hesitate to reach out to your Teradici Sales contact or partners@teradici.com.

Sign-on

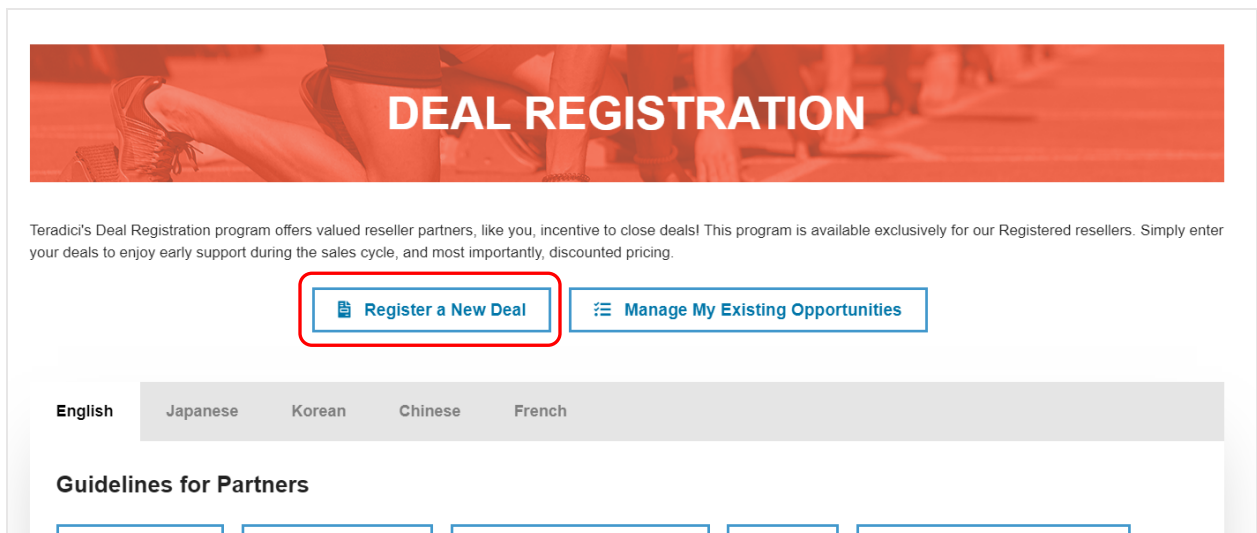
To register a deal, sign on to the Partner Portal (<https://teradicicommunity.force.com/partner/login>) and click on **'Programs'** and select **'Deal Registration'** to navigate to the Deal Registration Program page.



The screenshot shows the 'DEAL REGISTRATION' page. At the top, there is a red banner with the text 'DEAL REGISTRATION'. Below the banner, there is a paragraph of text: 'Teradici's Deal Registration program offers valued reseller partners, like you, incentive to close deals! This program is available exclusively for our Registered resellers. Simply enter your deals to enjoy early support during the sales cycle, and most importantly, discounted pricing.' Below this text are two buttons: 'Register a New Deal' and 'Manage My Existing Opportunities'. Below the buttons is a language selection bar with 'English' selected, and options for 'Japanese', 'Korean', 'Chinese', and 'French'. Below the language bar is a section titled 'Guidelines for Partners' with five buttons: 'Video Tour', 'Program Flyer', 'Overview Presentation', 'FAQ', and 'Step by Step User Guide'. Below the buttons is a paragraph of text: 'A participant must fulfill ALL of the following requirements to be eligible for deal registration discounted prices:' followed by two bullet points: 'Valid for transactions through authorized Distributors only.' and 'Channel Partner must be registered in the Teradici Channel Partner Program.'

Enter a new deal

To enter a new deal, navigate to the Deal Registration form by clicking **'Register a New Deal'** and fill out all of the fields.



This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Register a New Deal' button.



1) Complete the end customer install information in the Lead form:

Enter in the end customer's name, address and contact information. All fields are required.

End Customer Contact Information

First Name Email

* Last Name Phone

* Company

End Customer Address Information

Country Code

Street

City State/Province Code

Zip/Postal Code

Zip/Postal Code

2) Continue to complete the lead form by completing the fields in the Deal Registration section:

1. Create a Project Name to help identify the opportunity in your list of deals.
2. Select an expected close date. Please note that Teradici accepts deal registrations for deals that will close within 120 days of approval.
3. Note additional site addresses if relevant.
4. Enter in the quantity of PCoIP product in the deal.

An optional description field is provided should you have additional details you want noted in the deal registration.

Deal Registration

* Project Name * Expected Close Date

Quantity of Desktop Access Plans Quantity of Cloud Access Plans

Quantity of Cloud Access Plus Plans

Description Information

Description

3) Press the **Save** button. You will see a confirmation of your completed deal registration application.

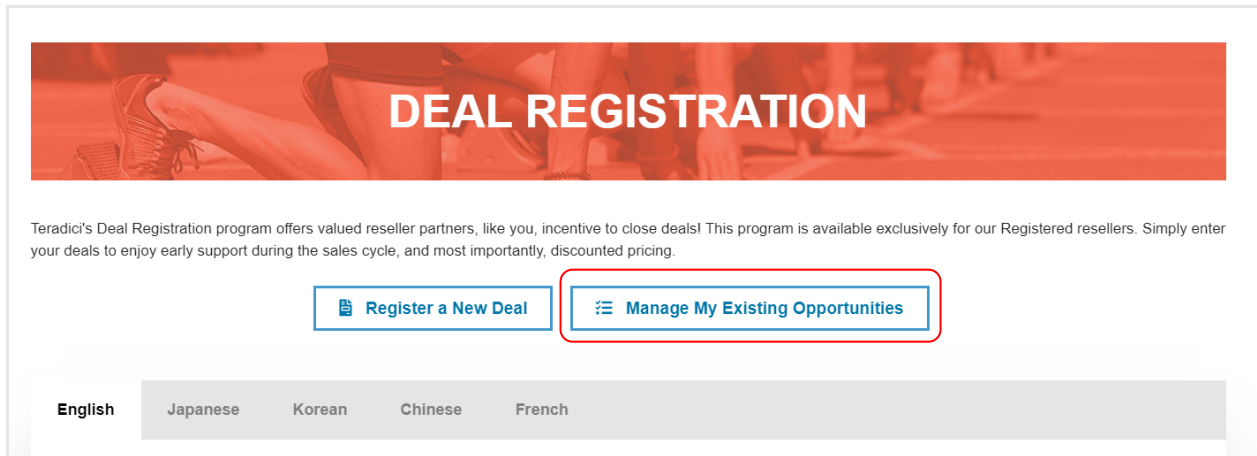
If your deal registration is approved, you will receive an email with a deal confirmation number which you must provide to one of our distribution partners to attain discounted pricing.

Deals that are not approved will not receive a confirmation number.

A deal can be expected to be approved if all of the Program terms and conditions are met.

Review an existing deal

All deals are archived in the portal & can be viewed by clicking on the **'Manage My Existing Opportunities'** button.



DEAL REGISTRATION

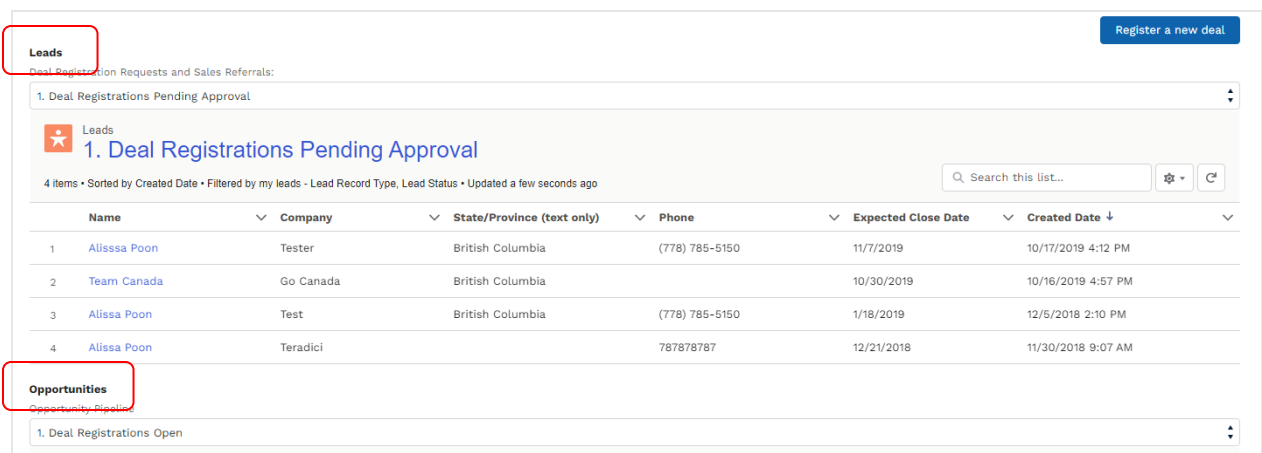
Teradici's Deal Registration program offers valued reseller partners, like you, incentive to close deals! This program is available exclusively for our Registered resellers. Simply enter your deals to enjoy early support during the sales cycle, and most importantly, discounted pricing.

[Register a New Deal](#) [Manage My Existing Opportunities](#)

English Japanese Korean Chinese French

Deals are divided into two sections: **Leads** and **Opportunities**.

Under **Leads**, you can view **deal registrations pending approval** sorted 'Created Date' by default. Click the header titles (ie. Name, Company, etc) to sort according to your preference. No deal registration number is assigned yet to deals pending approval.



Leads

Deal Registration Requests and Sales Referrals:

1. Deal Registrations Pending Approval

Leads

1. Deal Registrations Pending Approval


4 Items • Sorted by Created Date • Filtered by my leads - Lead Record Type, Lead Status • Updated a few seconds ago

	Name	Company	State/Province (text only)	Phone	Expected Close Date	Created Date ↓
1	Alisssa Poon	Tester	British Columbia	(778) 785-5150	11/7/2019	10/17/2019 4:12 PM
2	Team Canada	Go Canada	British Columbia		10/30/2019	10/16/2019 4:57 PM
3	Alisssa Poon	Test	British Columbia	(778) 785-5150	1/18/2019	12/5/2018 2:10 PM
4	Alisssa Poon	Teradici		787878787	12/21/2018	11/30/2018 9:07 AM


Opportunities

1. Deal Registrations Open












If you need to update information in a deal that is still pending approval, you can do so by clicking on the deal in the **Name** column. On the next page, left-click the 'pencil icon' beside the detail you need to edit.



Lead
Barry Doe

Company	Title	Phone (2) ▼	Email	Website	Lead Owner
Tester		(123) 456-7890	info@company.com		 Reseller Tester

∨ End Customer Contact Information

Lead Status		Lead Owner
Submitted		 Reseller Tester
Name		Deal Rejection Reason ⓘ
Alisssa Poon		
Company		Phone
Tester		(123) 456-7890 
Title		Email
		info@company.com 
		Mobile 
		Fax 
		Website 

Under **Opportunity Pipeline**, you can use the drop-down View menu to review Open and Won Deal Registrations. Deal registrations numbers are visible in the table for all approved deals.

To view the details of each deal, click on the **Opportunity Name**.

#	Opportunity Name	Company	Email/Phone	Created	Last Modified
2	Team Canada	Go Canada	British Columbia (123) 456-7890	10/30/2019	10/16/2019 4:57 PM
3	Stu Dent	Company XYZ	British Columbia (987) 123-4560	1/18/2019	12/5/2018 2:10 PM
4	Anita D Esktop	Company 123	British Columbia 787878787	12/21/2018	11/30/2018 9:07 AM

Opportunities

Opportunity Pipeline

1. Deal Registrations Open

1. Deal Registrations Open

2. Deal Registrations Won

3. Open Referrals

4. Closed-won Referrals

Opportunity Pipeline

All My Opportunities



Making Changes to Deals

Once a deal has been entered and submitted for review, it can be edited. Once approved and a deal registration number has been assigned, no further changes can be made. Contact your Teradici Sales contact with any concerns.

Expiration notifications

When a deal approaches expiration, an email notification will be sent 10 days before the deal is set to expire.

From: Teradici Deal Registration Team
Sent: June-17-13 12:03 AM
To: John Doe
Subject: Teradici 10-day deal expiry advisory

Dear John Doe

Our records indicate you have registered a deal with Teradici that is set to expire within 10 days. If you would like to request an extension, please contact your Teradici sales contact. The deal confirmation number is DR-000147-00.

Sincerely,
Teradici Deal Registration Team

Please note: deals are automatically set to expire 120 days from approval.

A final email notification will be sent on the day the deal expires if the deal is not closed. No further action is required.

From: Teradici Deal Registration Team
Sent: June-14-13 12:03 AM
To: John Doe
Subject: Teradici deal expiration advisory

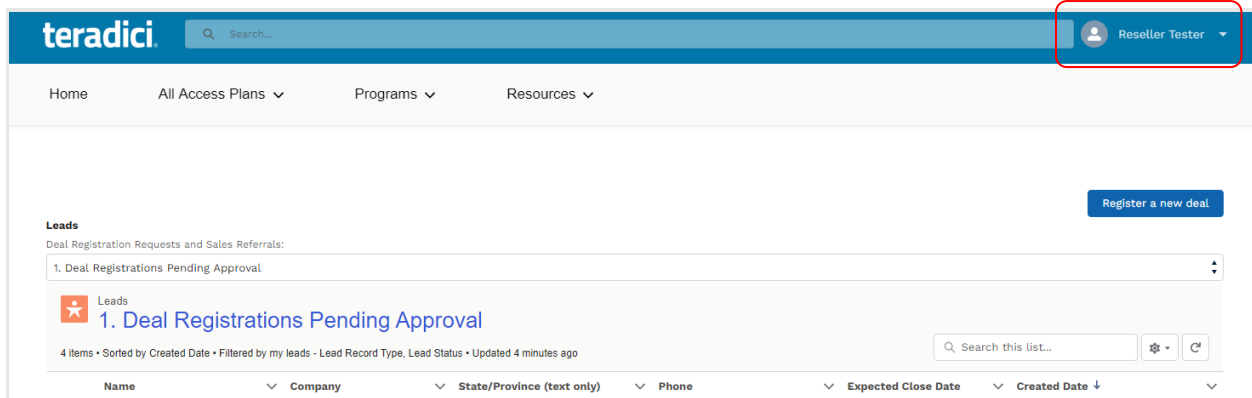
Dear John Doe

Our records indicate you have registered a deal with Teradici that is expired. The deal confirmation number is DR-000147-00.

Sincerely,
Teradici Deal Registration Team

Sign-off

To exit the deal registration process, use the **'Logout'** function in the top right corner to end your session securely.



The screenshot shows the Teradici Partner Portal interface. At the top, there is a blue header with the Teradici logo and a search bar. On the right side of the header, the user profile 'Reseller Tester' is displayed, highlighted with a red box. Below the header, there are navigation links for 'Home', 'All Access Plans', 'Programs', and 'Resources'. The main content area is titled 'Leads' and contains a section for 'Deal Registration Requests and Sales Referrals'. A table titled '1. Deal Registrations Pending Approval' is visible, with a search bar and filters. The table has columns for Name, Company, State/Province (text only), Phone, Expected Close Date, and Created Date.

Program terms and conditions

A participant must fulfill ALL of the following requirements to be eligible for Deal Registration discounted prices:

1. Valid for transactions through authorized distributors only.
2. Channel Partner must be registered in the Teradici Channel Partner Program.
3. Applicable to commercial products only. Not applicable to Not for Resale or Trial Demonstration products.
4. Eligible products include the Desktop Access plan, Cloud Access plan, and Cloud Access Plus plan.
5. Minimum purchase orders apply:
 - a. Desktop Access: 500 devices
 - b. Cloud Access and Cloud Access Plus: 50 users, any combination
6. Deal registration pricing is applicable only up to the following maximums for any one end customer deployment. Contact your Teradici Account Manager for opportunities of larger quantities.
 - a. Desktop Access: 10,000 devices
 - b. Cloud Access and Cloud Access Plus: 500 users, any combination
7. Deal Registration is available for upgrades and expansions of existing accounts but not renewals. Expansion and upgrade quantities must meet the minimum quantity thresholds on a single purchase order. Migration from Management Console Enterprise Edition or Teradici Workstation Access Software to a Teradici All Access subscription is a renewal and not eligible for deal registration discounts.
8. In the event a subscription expires, and the customer wishes to purchase a subscription for the same product at a later date, the opportunity will not be eligible for deal registration unless more than 12 months has passed since the original subscription expired.
9. Authorized distributors will offer a discount of up to 15% off MSRP or final discounted price on eligible hardware and up to 10% off MSRP or final discounted price on All Access plans.
10. Deals must have been submitted through the Teradici Partner Portal, and assigned a valid registration number to be eligible.



11. Deal submissions will be reviewed by a Teradici Sales contact and approved or rejected. The Channel Partner will receive notice of their submission status within three (3) business days from submission.
12. A deal registration number is valid for a single transaction between Distributor and Reseller. An exception may be made, in Teradici's sole and absolute discretion, if there is an inventory shortage preventing fulfillment of an order in a single shipment.
13. Deals must be registered at least 14 days prior to closure of the deal, cannot be registered outside of 120 days and will expire 120 days after approval if not closed.
14. Only one (1) Channel Partner will be approved for each unique deal. The approved Channel Partner must be first to register the deal with complete and valid information. If any of the criteria are not met, another Channel Partner may be eligible. Any disputes will be settled by Teradici in its sole and absolute discretion.
15. Teradici reserves the right to contact the end customer to verify any of the information submitted and to decline any deal registration submission.
16. This offer may not be combined with any other discount or reward program.
17. By submitting a Deal Registration, Channel Partner agrees to all terms and conditions.

Questions

For any questions, please contact your Teradici Sales contact or email partners@teradici.com.