



# Teradici Deal Registration Step by Step User Guide

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Getting Started Hardware Accelerator Remote Workstation Management Console Content **Deal Registration** Sales Referrals NFR Program News Training Promotions

## 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 >>](#)

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**NEW RESOURCES**

- [Management Console is Now Available! »](#)
- [New Teradici Reseller Incentives »](#)
- [Deal Registration - New Products! »](#)
- [New Subscription Model for Workstation Access Software »](#)

**WEBINARS & EVENTS**

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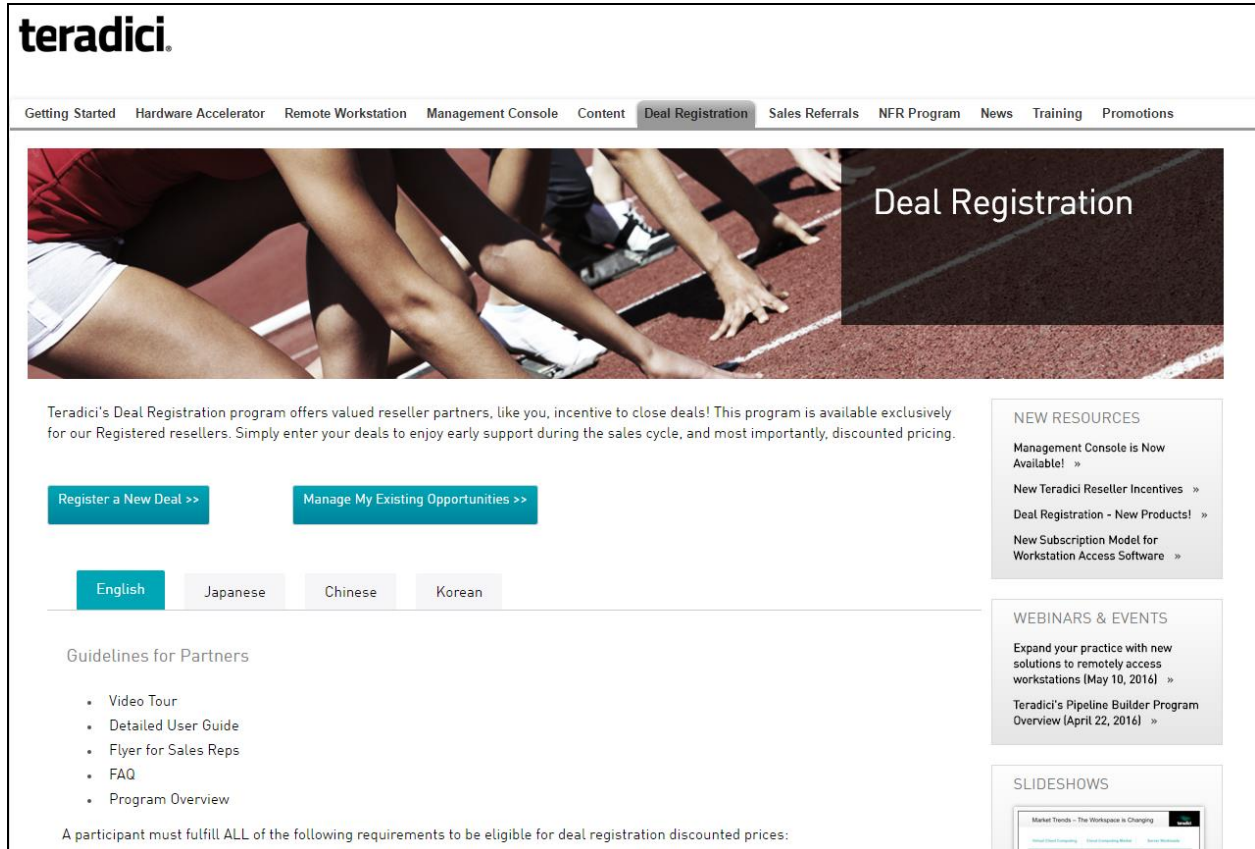
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## Welcome to the Teradici Deal Registration Program

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](mailto:partners@teradici.com).

## Sign-on

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



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### Guidelines for Partners

- Video Tour
- Detailed User Guide
- Flyer for Sales Reps
- FAQ
- Program Overview

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

#### NEW RESOURCES

- Management Console is Now Available! »
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#### WEBINARS & EVENTS

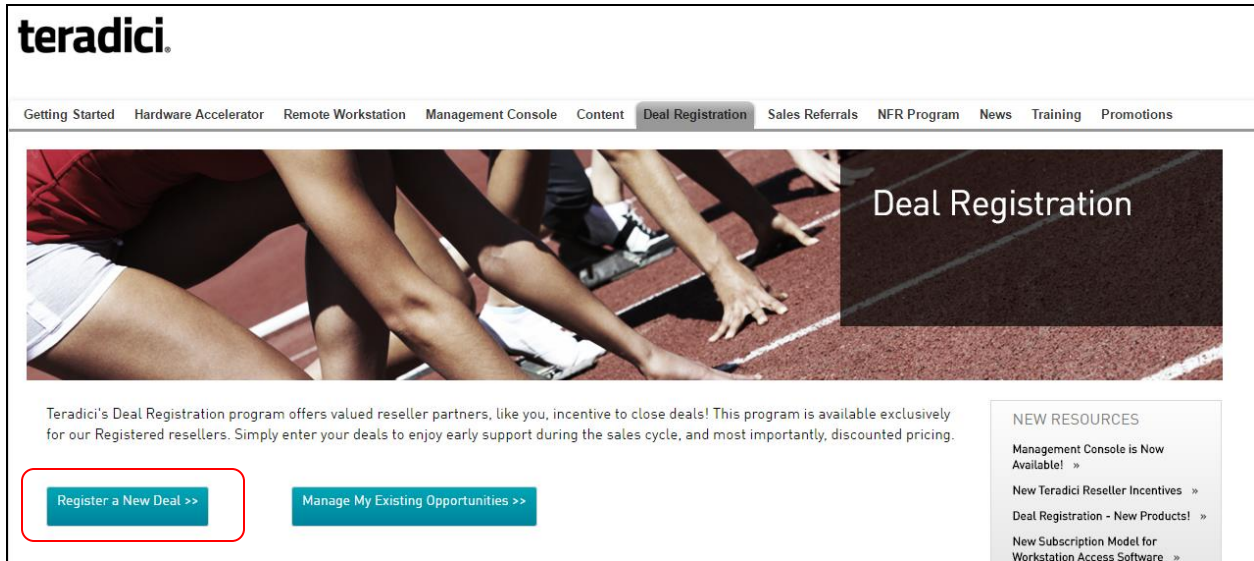
- Expand your practice with new solutions to remotely access workstations (May 10, 2016) »
- Teradici's Pipeline Builder Program Overview (April 22, 2016) »

#### SLIDESHOWS

- Market Trends - The Workspace is Changing

## Enter a new deal

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



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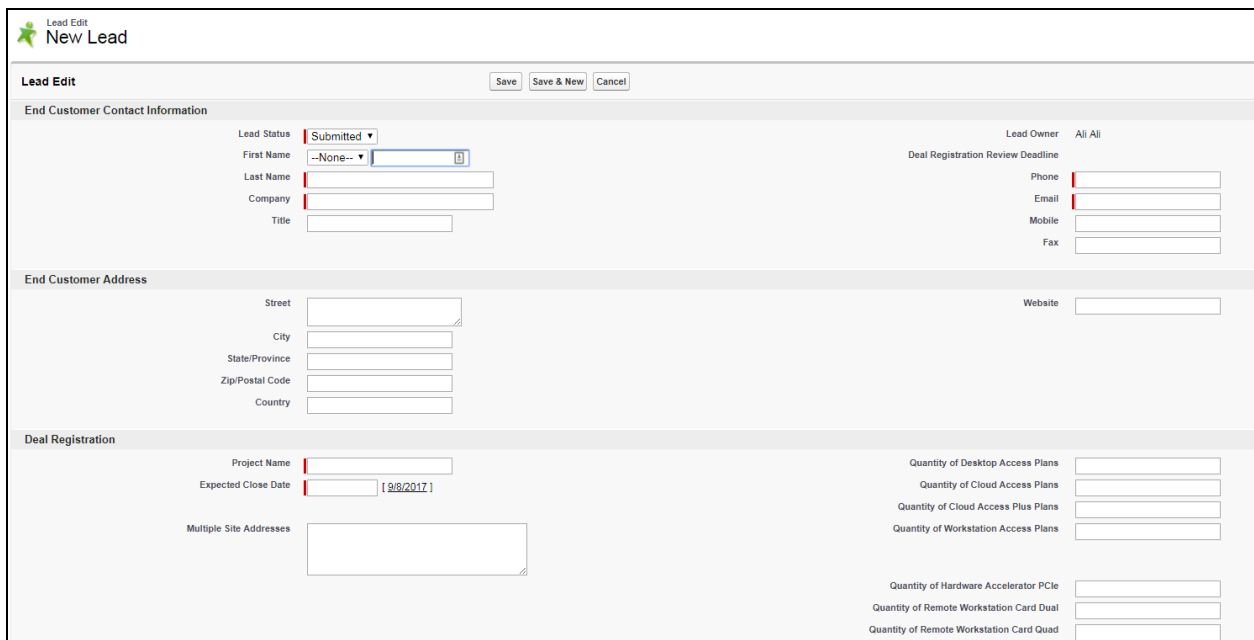
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### Complete the end customer install information in the Lead form:

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



**Lead Edit** Save Save & New Cancel

**End Customer Contact Information**

Lead Status: Submitted

First Name: --None--

Last Name:

Company:

Title:

Lead Owner: Ali Ali

Deal Registration Review Deadline:

Phone:

Email:

Mobile:

Fax:

**End Customer Address**

Street:

City:

State/Province:

Zip/Postal Code:

Country:

Website:

**Deal Registration**

Project Name:

Expected Close Date:

Multiple Site Addresses:

Quantity of Desktop Access Plans:

Quantity of Cloud Access Plans:

Quantity of Cloud Access Plus Plans:

Quantity of Workstation Access Plans:

Quantity of Hardware Accelerator PCIe:

Quantity of Remote Workstation Card Dual:

Quantity of Remote Workstation Card Quad:

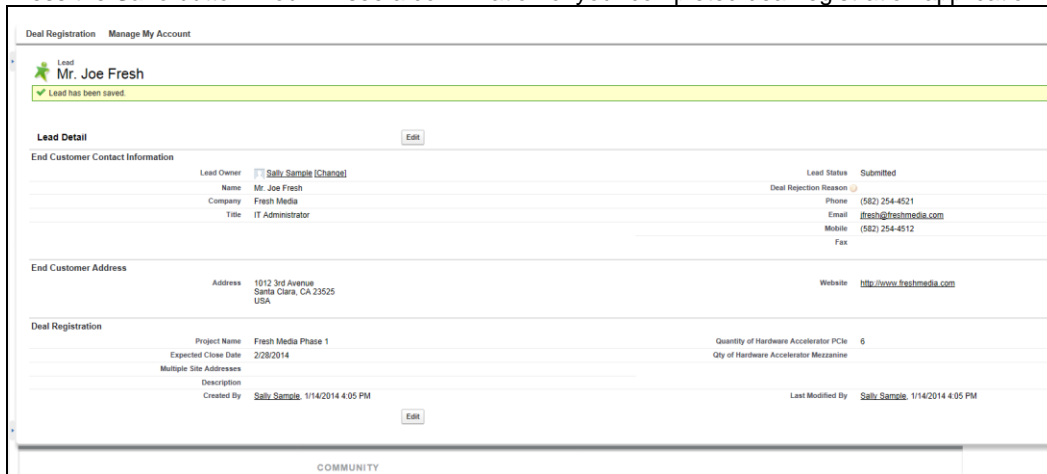
**Continue to complete the lead form by completing the fields in the Deal Registration section:**

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.



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



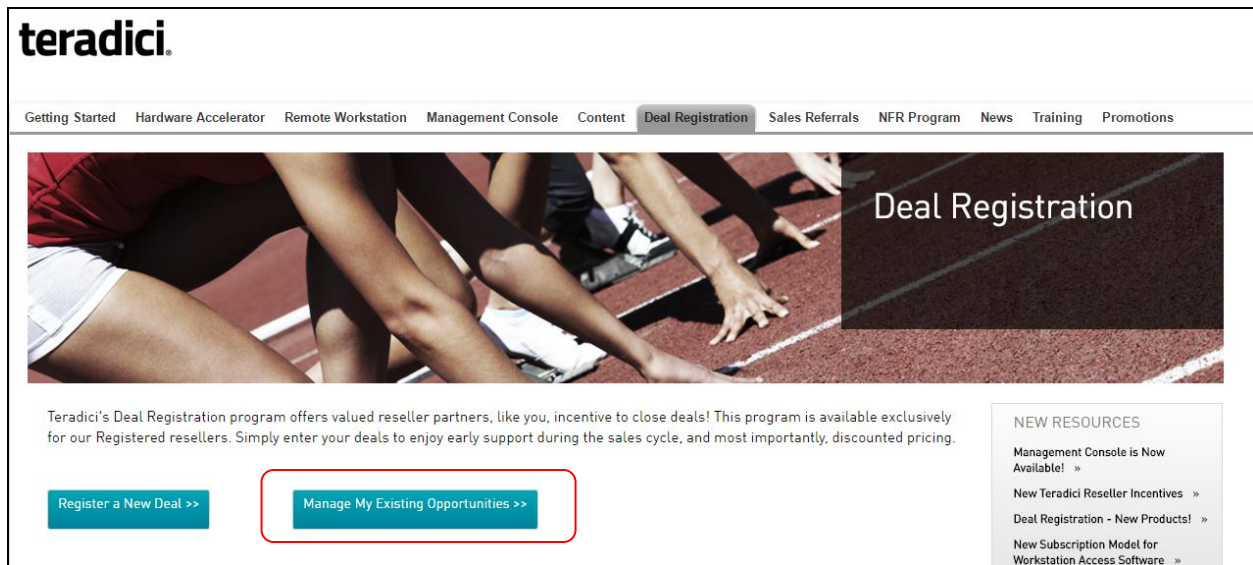
**If your deal registration is approved, you will receive an email with a deal confirmation number which you must provide to one of our distribution partners to attain discounted pricing.**

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.



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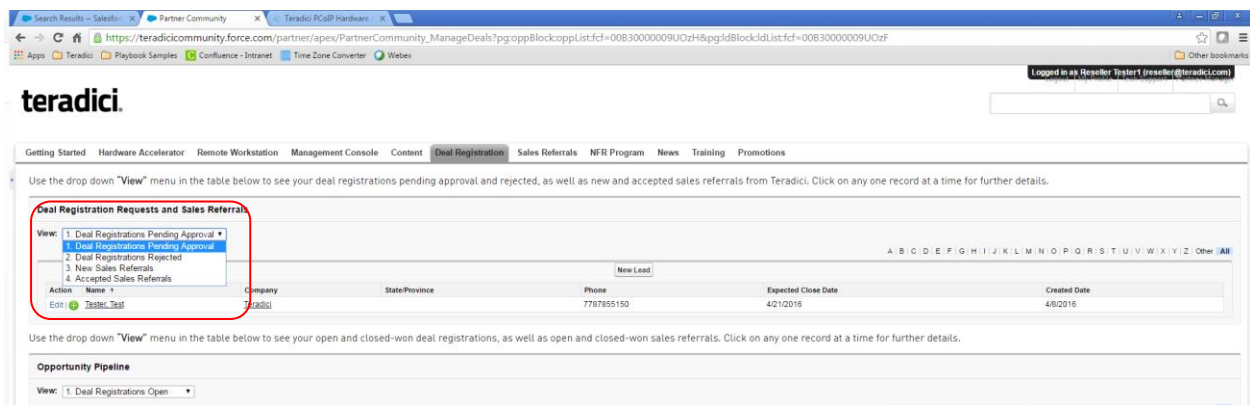
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Deals are divided into two tables: **Deal Registration Requests and Sales Referrals** and **Opportunity Pipeline**.

Under Deal Registration Requests and Sales Referrals, you can use the drop down View menu to review Deals Pending Approval, Rejected Deals, and customer leads/referrals. No deal registration number has been assigned yet to deal pending approval.

If you need to update information in a deal that is still pending approval, you can do so by clicking on the edit button.



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Use the drop down "View" menu in the table below to see your deal registrations pending approval and rejected, as well as new and accepted sales referrals from Teradici. Click on any one record at a time for further details.

**Deal Registration Requests and Sales Referrals**

View: 1 Deal Registrations Pending Approval 2 Deal Registrations Rejected 3 New Sales Referrals 4 Accepted Sales Referrals

Action	Name	Company	State/Province	Phone	Expected Close Date	Created Date
Edit	Tester_Test	Teradici		7787855150	4/21/2016	4/8/2016

Use the drop down "View" menu in the table below to see your open and closed-won deal registrations, as well as open and closed-won sales referrals. Click on any one record at a time for further details.

**Opportunity Pipeline**

View: 1 Deal Registrations Open



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**.

The screenshot shows the Teradici Partner Community interface. The top navigation bar includes links for Getting Started, Hardware Accelerator, Remote Workstation, Management Console, Content, Deal Registration, Sales Referrals, NFR Program, News, Training, and Promotions. The main content area is divided into two sections. The first section, "Deal Registration Requests and Sales Referrals", has a "View" dropdown set to "Deal Registrations Rejected". It displays a table with columns for Action, Name, Company, State/Province, Phone, Email, Lead Status, and Last Modified Date. The second section, "Opportunity Pipeline", has a "View" dropdown set to "Deal Registrations Open". It displays a table with columns for Account Name, Registration #, Close Date, and Deal Registration Expiry Date. A red box highlights the "View" dropdown menu in the Opportunity Pipeline section.

Action	Name	Company	State/Province	Phone	Email	Lead Status	Last Modified Date
Edit	Jacobson, Serena	Southern School District of San Diego	CA	(656) 265-3322	sjacobson@sandiegoschools.com	Rejected	4/29/2015
Edit	Rogers, Michael	Rogers Medical	CA	77878551510	mrogers@rogersm.com	Rejected	4/29/2015
Edit	Williams, Michelle	Williams Storage	CA	77878551505	msoars@opersmedical.com	Rejected	9/12/2014

Account Name	Registration #	Close Date	Deal Registration Expiry Date	
Eric Kamin	DR-00010596	5/31/2016	9/23/2016	
Teradici	DR-00010145	2/25/2016	6/11/2016	
Test Notifications	DR-00009920	1/29/2016	5/6/2016	
USSTRATCOM-Oltw Air Force Base- Dell-184 APEX carts	USSTRATCOM	DR-00010590	7/29/2016	9/22/2016

## 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

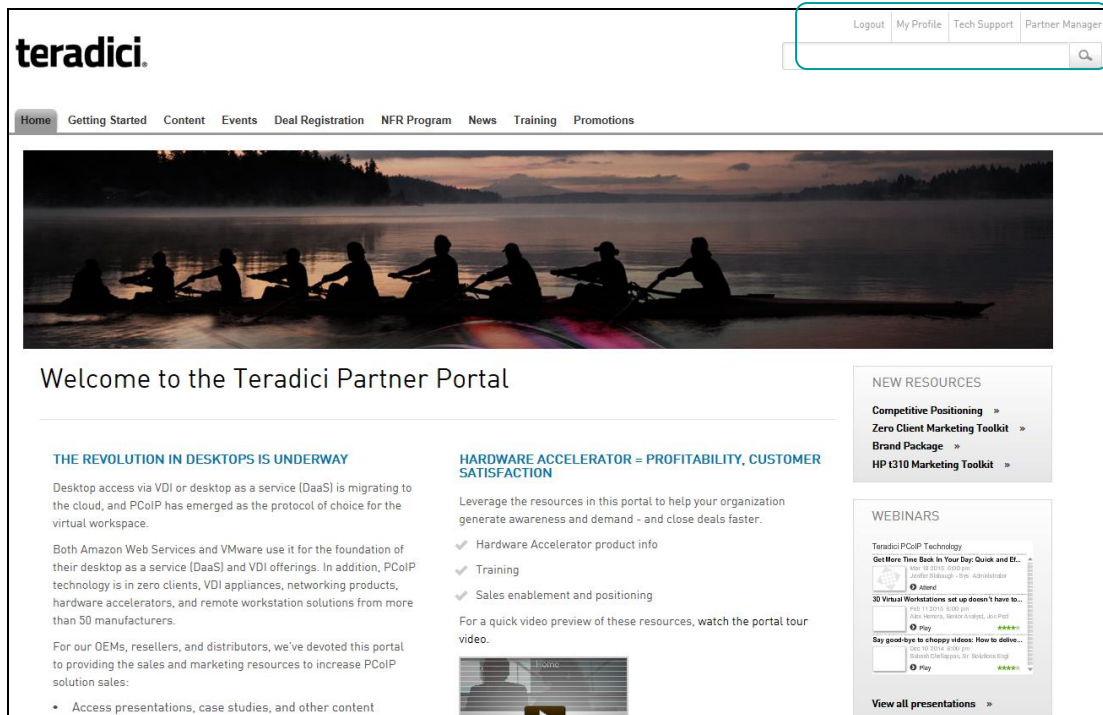
Our records indicate you have registered a deal with Teradici that is expired. The deal confirmation number is DR-000147-00.

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 right, there is a navigation bar with links for 'Logout', 'My Profile', 'Tech Support', and 'Partner Manager'. Below this is a search bar. The main navigation menu includes 'Home', 'Getting Started', 'Content', 'Events', 'Deal Registration', 'NFR Program', 'News', 'Training', and 'Promotions'. The main content area features a large image of people in a boat on a lake. Below the image, there is a welcome message: 'Welcome to the Teradici Partner Portal'. The page is divided into several sections: 'THE REVOLUTION IN DESKTOPS IS UNDERWAY', 'HARDWARE ACCELERATOR = PROFITABILITY, CUSTOMER SATISFACTION', 'NEW RESOURCES', and 'WEBINARS'. The 'NEW RESOURCES' section lists 'Competitive Positioning', 'Zero Client Marketing Toolkit', 'Brand Package', and 'HP E310 Marketing Toolkit'. The 'WEBINARS' section lists 'Teradici PCoIP Technology: Get More Time Back in Your Day, Quick and Easy', '30 Virtual Workstations set up doesn't have to...', and 'Say goodbye to choppy videos: How to deliver...'. A 'View all presentations' link is also visible.

## 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, Cloud Access Plus plan, Workstation Access plan and PCoIP Hardware Accelerator.
5. Minimum purchase orders apply:
  - a. Desktop Access: 500 devices
  - b. Cloud Access and Cloud Access Plus: 50 users, any combination
  - c. Workstation Access: 10 units
  - d. Hardware Accelerator: 3 units
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
  - c. Workstation Access: 200 units
  - d. Hardware Accelerator: 75 units
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.
  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. Deal registration discounts are NOT applicable to Teradici Support and Maintenance SKUs SMSA003 and SMSA003-R.
  10. 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.
  11. Deals must have been submitted through the Teradici Partner Portal, and assigned a valid registration number to be eligible.
  12. 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.
  13. 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.
  14. 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.
  15. 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.
  16. Teradici reserves the right to contact the end customer to verify any of the information submitted and to decline any deal registration submission.
  17. This offer may not be combined with any other discount or reward program.
  18. 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](mailto:partners@teradici.com).