




# Teradici Deal Registration Step by Step User Guide

Home Getting Started Content Events Deal Registration 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 Opportunity >>](#) [Manage My Existing Opportunities >>](#)

**NEW RESOURCES**

- [Competitive Positioning >](#)
- [Zero Client Marketing Toolkit >](#)
- [Brand Package >](#)
- [HP t310 Marketing Toolkit >](#)

Teradici Corporation  
#101-4621 Canada Way, Burnaby, BC V5G 4X8 Canada  
p +1 604 451 5800 f +1 604 451 5818  
[www.teradici.com](http://www.teradici.com)

© 2004-2015 Teradici Corporation. All rights reserved. The PCoIP protocol is developed by Teradici Corporation. Teradici, PCoIP, PC-over-IP, and APEX are trademarks of Teradici Corporation and may be registered in the United States and/or other countries. All other trademarks are property of their respective owners.



## Contents

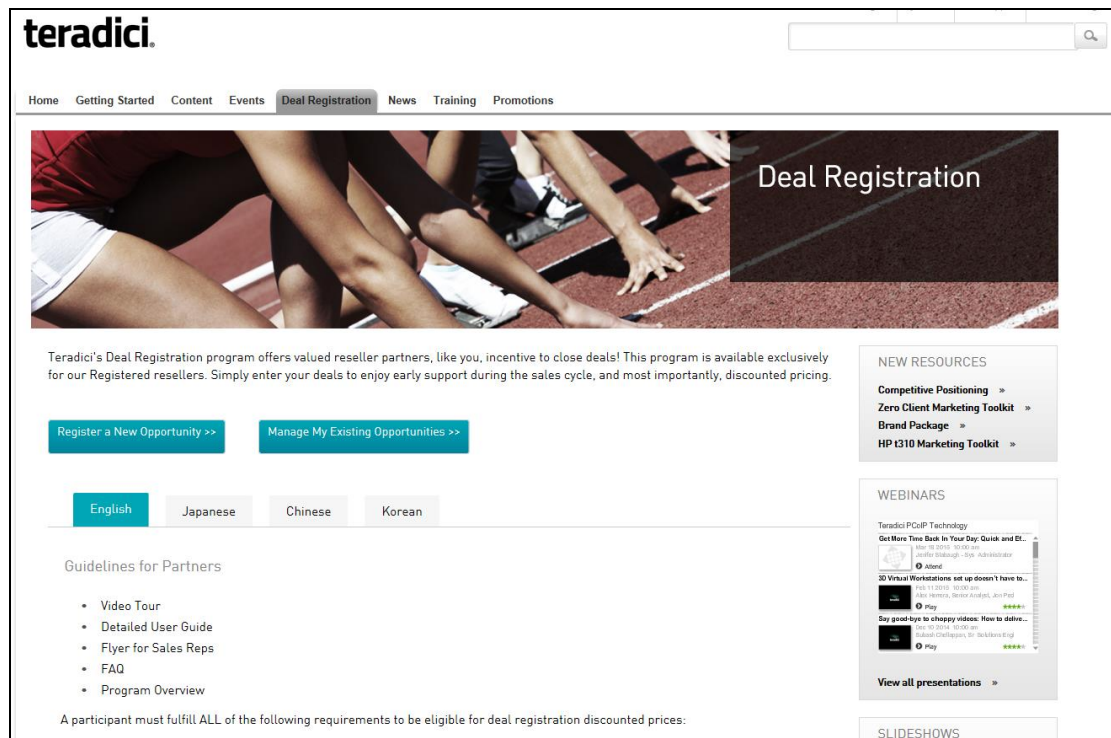
Sign-on.....	3
Enter a new deal .....	4
Review an existing deal .....	6
Expiration notifications .....	8
Sign-off.....	9
Program terms and conditions .....	9
Questions .....	9

## 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 [channelmarketing@teradici.com](mailto:channelmarketing@teradici.com).

## Sign-on

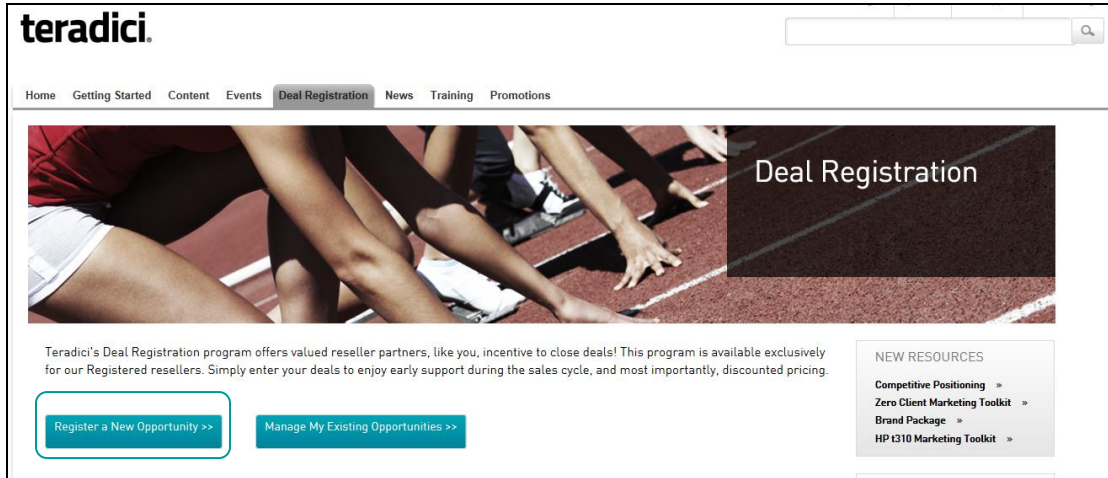
To register a deal, sign on to the Partner Portal (<https://teradicicommunity.force.com/partner/login>) and click on the 'Deal Registration' tab to navigate to the Deal Registration Program page.



The screenshot shows the Teradici Deal Registration program page. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Content, Events, Deal Registration (highlighted), News, Training, and Promotions. Below the navigation is a large banner image of a runner starting a race, with the text "Deal Registration" overlaid on the right side. Underneath the banner, a paragraph explains the program: "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 Opportunity >>" and "Manage My Existing Opportunities >>". There are also language selection tabs for English, Japanese, Chinese, and Korean. The "English" tab is selected. Below the language tabs is a section titled "Guidelines for Partners" with a list of links: Video Tour, Detailed User Guide, Flyer for Sales Reps, FAQ, and Program Overview. At the bottom of this section, it states: "A participant must fulfill ALL of the following requirements to be eligible for deal registration discounted prices:". On the right side of the page, there are two sections: "NEW RESOURCES" with links for Competitive Positioning, Zero Client Marketing Toolkit, Brand Package, and HP i310 Marketing Toolkit; and "WEBINARS" with a list of recent webinars including "Get More Time Back in Your Day: Quick and Easy...", "3D Virtual Workstations set up doesn't have to...", and "Say good-bye to choppy videos: How to Deliver...". There is also a "View all presentations" link and a "SLIDESHOWS" section at the bottom right.

## Enter a new deal

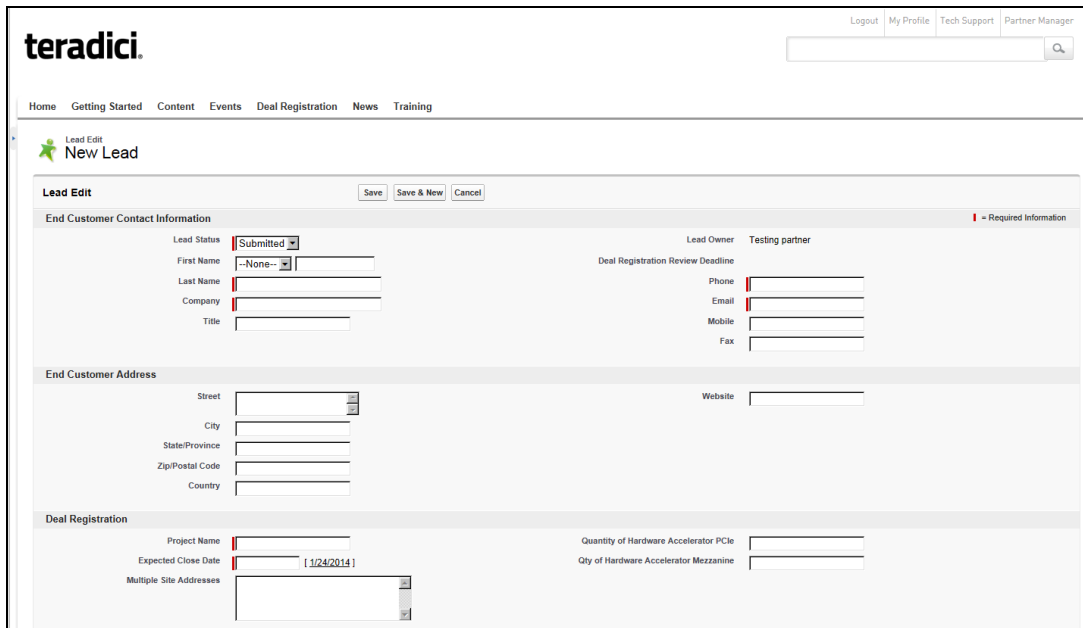
To enter a new deal, navigate to the Deal Registration form by clicking **'Register a New Opportunity'** and fill out all of the fields.



The screenshot shows the Teradici website's Deal Registration page. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Content, Events, Deal Registration (highlighted), News, Training, and Promotions. Below the navigation is a large banner image of a runner starting a race, with the text "Deal Registration" overlaid. Underneath the banner, a paragraph explains the program: "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." Two buttons are present: "Register a New Opportunity >>" and "Manage My Existing Opportunities >>". On the right side, there is a "NEW RESOURCES" section with links to "Competitive Positioning", "Zero Client Marketing Toolkit", "Brand Package", and "HP I310 Marketing Toolkit".

### 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.



The screenshot shows the "Lead Edit" form in the Teradici system. At the top, there are links for Logout, My Profile, Tech Support, and Partner Manager, along with a search bar. The navigation menu includes Home, Getting Started, Content, Events, Deal Registration (highlighted), News, and Training. The form title is "Lead Edit" with a "New Lead" icon. Below the title are "Save", "Save & New", and "Cancel" buttons. The form is divided into several sections:
 

- End Customer Contact Information:** Includes fields for Lead Status (set to "Submitted"), First Name (dropdown set to "--None--"), Last Name, Company, Title, Lead Owner (set to "Testing partner"), and Deal Registration Review Deadline. Contact fields include Phone, Email, Mobile, and Fax.
- End Customer Address:** Includes fields for Street, City, State/Province, Zip/Postal Code, Country, and Website.
- Deal Registration:** Includes fields for Project Name, Expected Close Date (set to "1/24/2014"), Multiple Site Addresses (text area), Quantity of Hardware Accelerator PCIe, and Qty of Hardware Accelerator Mezzanine.

 A red exclamation mark icon indicates required information.



**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:

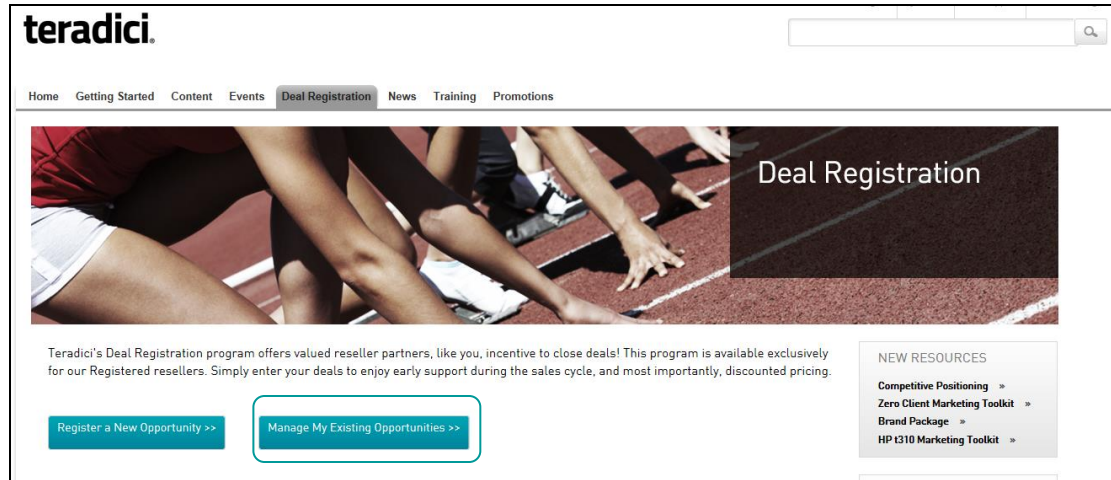
**If your deal registration is approved, you will receive an email with a deal confirmation number which you must provide to one of our distribution partners to attain discounted pricing.**

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 **‘View & Manage My Existing Opportunities’** button.

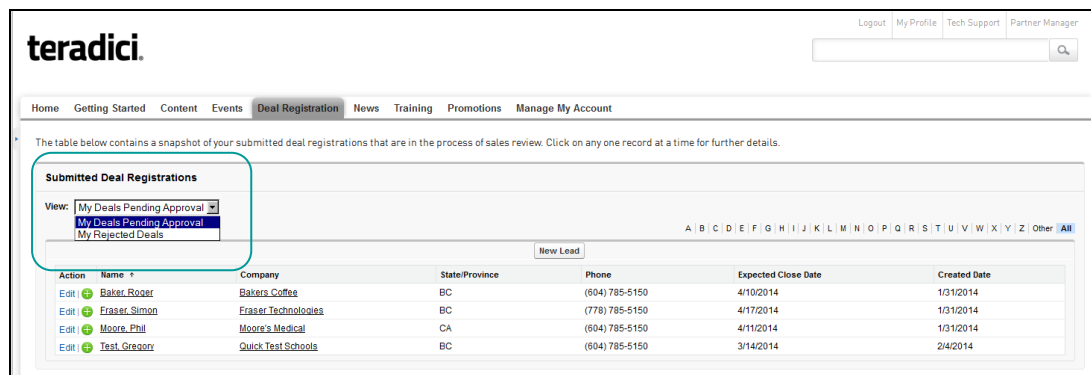


The screenshot shows the Teradici website's Deal Registration section. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Content, Events, Deal Registration (highlighted), News, Training, and Promotions. Below the navigation is a banner image of runners at a starting line with the text "Deal Registration". A paragraph of text explains the program's benefits for reseller partners. Two buttons are visible: "Register a New Opportunity >>" and "Manage My Existing Opportunities >>". On the right side, there is a "NEW RESOURCES" section with links to "Competitive Positioning", "Zero Client Marketing Toolkit", "Brand Package", and "HP I310 Marketing Toolkit".

Deals are divided into two tables: **Submitted Deal Registrations** and **Approved Deal Registrations**.

Under Submitted Deal Registrations you can use the drop down View menu to review Deals Pending Approval and Rejected Deals. 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.

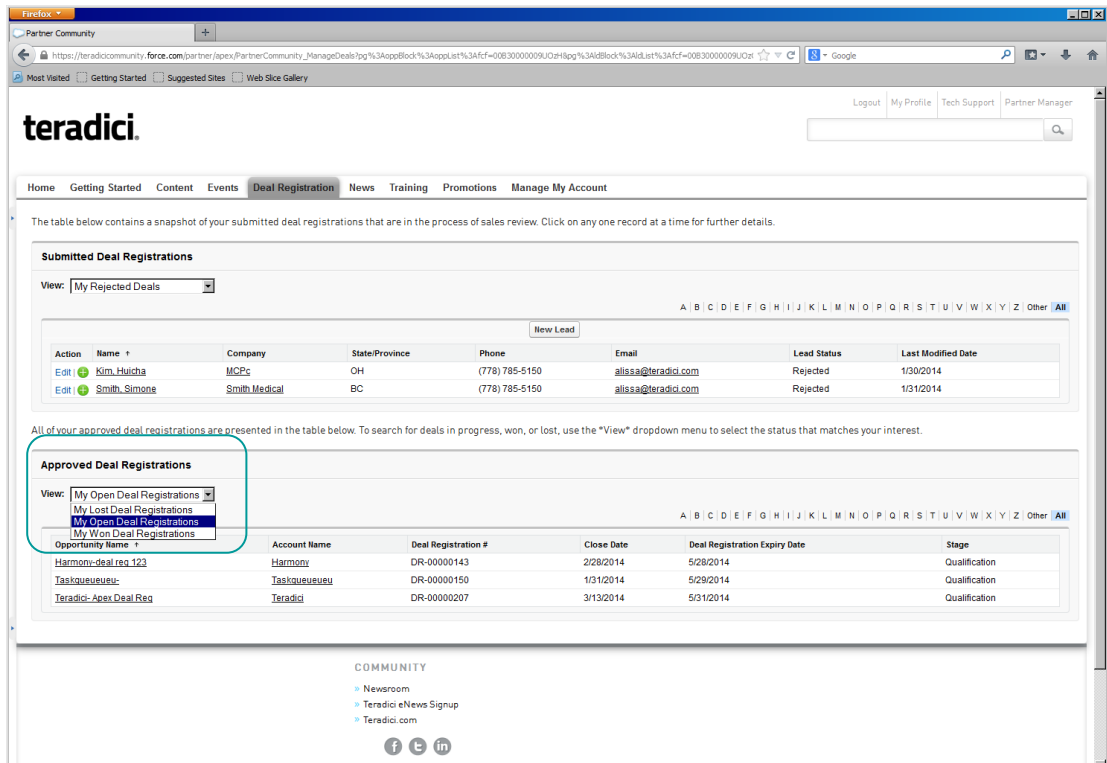


The screenshot shows the "Submitted Deal Registrations" table in the Teradici portal. The table has a "View:" dropdown menu with options: "My Deals Pending Approval" (selected), "My Deals Pending Approval", and "My Rejected Deals". Below the dropdown is a table with columns: Action, Name, Company, State/Province, Phone, Expected Close Date, and Created Date. The table contains four rows of data. A "New Lead" button is located above the table.

Action	Name	Company	State/Province	Phone	Expected Close Date	Created Date
Edit	Baker, Roger	Bakers Coffee	BC	(604) 785-5150	4/10/2014	1/31/2014
Edit	Fraser, Simon	Fraser Technologies	BC	(778) 785-5150	4/17/2014	1/31/2014
Edit	Moore, Phil	Moore's Medical	CA	(604) 785-5150	4/11/2014	1/31/2014
Edit	Test, Gregory	Quick Test Schools	BC	(604) 785-5150	3/14/2014	2/4/2014

Under Approved Deal Registrations you can use the drop down View menu to review Open, Lost, 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. At the top, there is a navigation menu with options like Home, Getting Started, Content, Events, Deal Registration, News, Training, Promotions, and Manage My Account. Below this, a section titled "Submitted Deal Registrations" is visible, with a "View" dropdown menu set to "My Rejected Deals". A table below shows two rejected deals with columns for Action, Name, Company, State/Province, Phone, Email, Lead Status, and Last Modified Date.

Below the rejected deals section, a note states: "All of your approved deal registrations are presented in the table below. To search for deals in progress, won, or lost, use the 'View' dropdown menu to select the status that matches your interest." This is followed by the "Approved Deal Registrations" section, where the "View" dropdown menu is highlighted with a red box and set to "My Open Deal Registrations". Below this, another table displays approved deals with columns for Opportunity Name, Account Name, Deal Registration #, Close Date, Deal Registration Expiry Date, and Stage.

Action	Name	Company	State/Province	Phone	Email	Lead Status	Last Modified Date
Edit	Kim, Huicha	MCPc	OH	(778) 785-5150	alissa@teradici.com	Rejected	1/30/2014
Edit	Smith, Simone	Smith Medical	BC	(778) 785-5150	alissa@teradici.com	Rejected	1/31/2014

Opportunity Name	Account Name	Deal Registration #	Close Date	Deal Registration Expiry Date	Stage
<a href="#">Harmon-deal req 123</a>	Harmon	DR-00000143	2/28/2014	5/28/2014	Qualification
<a href="#">Taskqueueueu-</a>	Taskqueueueu	DR-00000150	1/31/2014	5/29/2014	Qualification
<a href="#">Teradici- Apex Deal Req</a>	Teradici	DR-00000207	3/13/2014	5/31/2014	Qualification

## 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

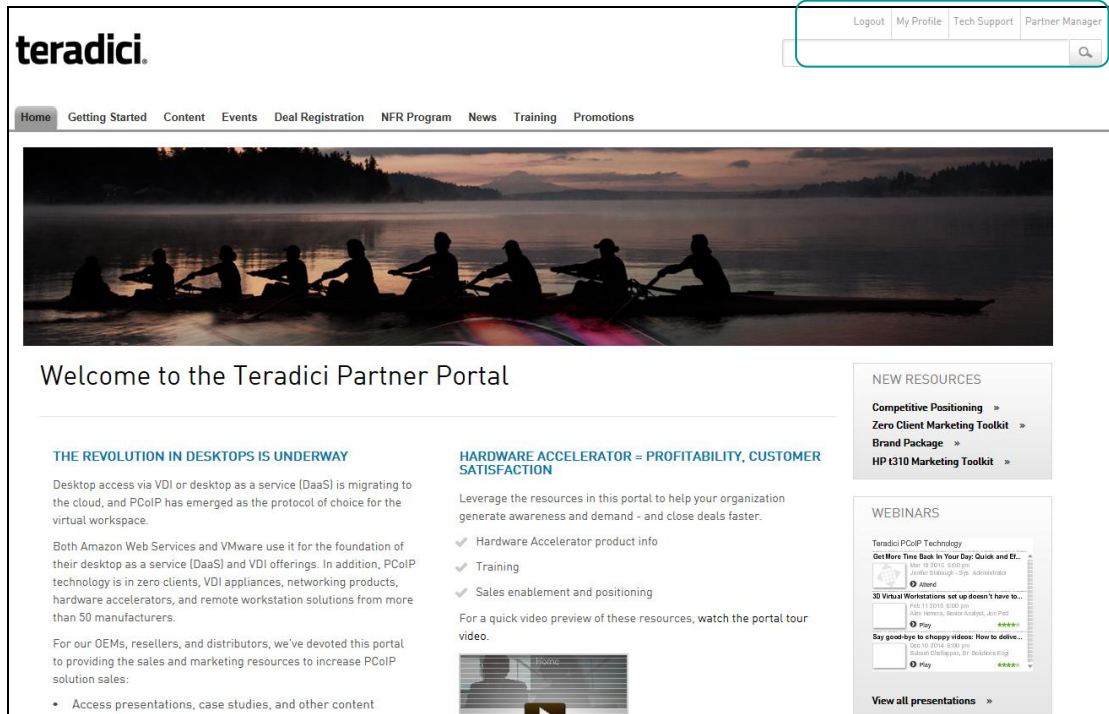
Our records indicate you have registered a deal with Teradici that is expired. The deal confirmation number is DR-000147-00.

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 are navigation links for 'Logout', 'My Profile', 'Tech Support', and 'Partner Manager'. Below the Teradici logo is a search bar and a navigation menu with items like 'Home', 'Getting Started', 'Content', 'Events', 'Deal Registration', 'NFR Program', 'News', 'Training', and 'Promotions'. The main content area features a large banner image of people in a boat on a lake at sunset. Below the banner, the text reads 'Welcome to the Teradici Partner Portal'. There are three main content blocks: 'THE REVOLUTION IN DESKTOPS IS UNDERWAY', 'HARDWARE ACCELERATOR = PROFITABILITY, CUSTOMER SATISFACTION', and 'NEW RESOURCES'. The 'NEW RESOURCES' block lists 'Competitive Positioning', 'Zero Client Marketing Toolkit', 'Brand Package', and 'HP i310 Marketing Toolkit'. The 'WEBINARS' section lists several videos with play buttons and ratings.

## 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 PCoIP Hardware Accelerator, PCoIP Remote Workstation Card, PCoIP Workstation Access Software, and PCoIP Management Console.
5. Minimum purchase orders apply:
  - > PCoIP Hardware Accelerator: 3 units
  - > PCoIP Remote Workstation Card: 10 units
  - > PCoIP Workstation Access Software: 30 licenses
  - > PCoIP Management Console: 800 licenses
6. Deal registration discounts are not applicable to Teradici Support & Maintenance or software renewals.



7. 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.
  - > PCoIP Hardware Accelerator: 75 units
  - > PCoIP Remote Workstation Card: 200 units
  - > PCoIP Access Software: 500 licenses
  - > PCoIP Management Console: 10,000 licenses
8. Authorized distributors will offer a discount of up to 15% off list price on eligible hardware and up to 10% off list price on eligible software.
9. Deals must have been submitted through the Teradici Partner Portal, and assigned a valid registration number to be eligible.
10. 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 3 business days from submission.
11. 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.
12. Teradici reserves the right to contact the end customer to verify any of the information submitted and to decline any Deal Registration submission in its sole and absolute discretion.
13. Deals cannot be registered outside of 120 days and expire 120 days after approval if not closed.
14. Only one 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. Deals must be registered and approved before close to be eligible.
16. This offer may not be combined with any other discount or reward program.

By submitting a Deal Registration, Channel Partner agrees to all terms & conditions.

## Questions

For any questions, please contact your Teradici Sales contact or email [ChannelMarketing@teradici.com](mailto:ChannelMarketing@teradici.com).