



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

What you need to do first

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

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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.

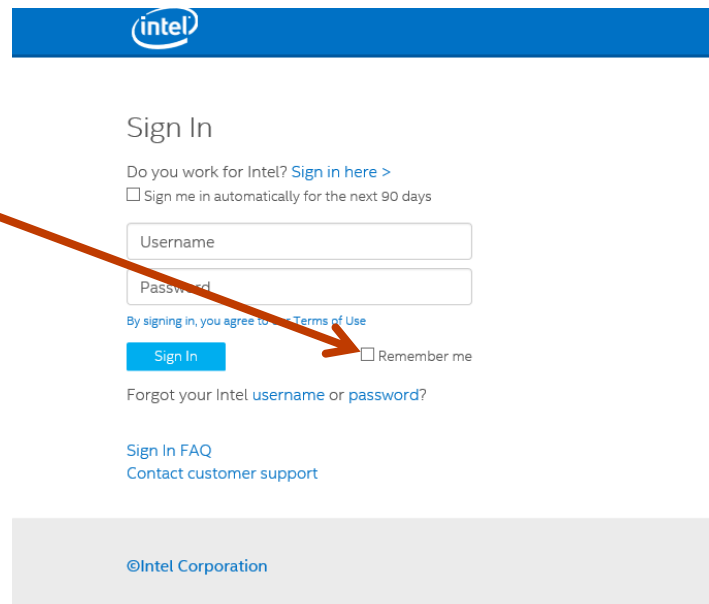
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**Intel is not responsible for content of sites outside our intranet sites.

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 the Intel logo in a blue bar. Below it, the text 'Sign In' is displayed. There are two links: 'Do you work for Intel? [Sign in here >](#)' and a checkbox for 'Sign me in automatically for the next 90 days'. Below these are two input fields for 'Username' and 'Password'. A blue 'Sign In' button is positioned to the left of a 'Remember me' checkbox. A red arrow points from the second bullet point in the text on the left to the 'Remember me' checkbox. At the bottom of the page, there is a copyright notice: '©Intel Corporation'.

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 Villa 9
Mornago, 21020
Italy

Project Timeframe:

Project Size:

Project Phase:

Please click [here](#) for support.

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Sample Lead

The screenshot shows a web application interface for Intel. At the top, there is a blue header with the Intel logo on the left and the text 'Sandbo' and 'partner2_user1' on the right. Below the header, there are navigation tabs for 'Home', 'Leads', and 'Reports'. On the left side, there is a sidebar with a 'Search' section containing a search box and a 'Go!' button, and a 'Links' section with 'My Profile' and 'Intel Support'. The main content area displays a lead detail for 'lead200 lead200'. At the top of this section is a green person icon and the text 'Lead lead200 lead200'. Below this, there are links for 'Open Activities (0)' and 'Activity History (0)'. A 'Lead Detail' section contains three buttons: 'Edit', 'Accept Lead', and 'Reject Lead'. The lead information is organized into two main sections: 'Contact Information' and 'Business Information'. The 'Contact Information' section includes fields for Name, Title, Job Function, Partner Lead Owner, Email, Phone, Mobile, Alternate Email, and Fax. The 'Business Information' section includes fields for Company, Address, Company Size, and Industry.

Search

Search All

Go!

Advanced Search...

Links

My Profile

Intel Support

Lead lead200 lead200

Open Activities (0) | Activity History (0)

Back to List: Leads

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		

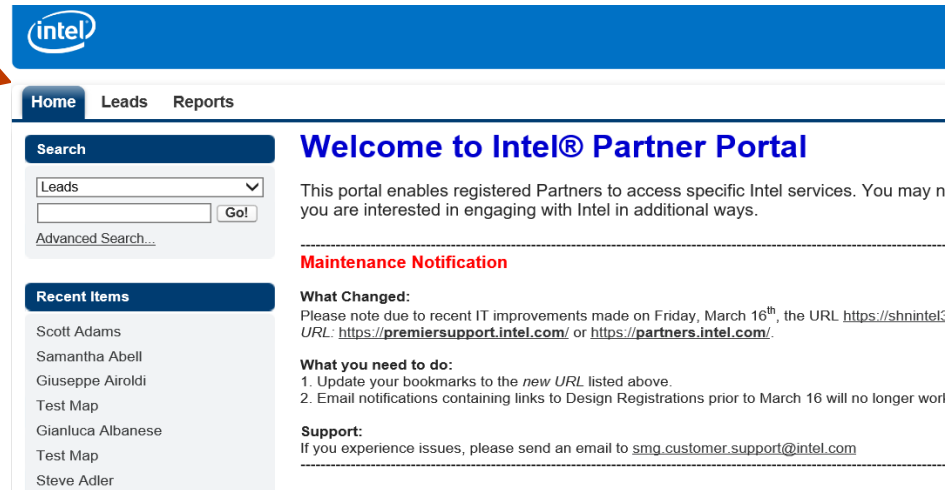
This is how a lead appears when you use the “click here” link in the email.

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



The screenshot displays the Intel Partner Portal interface. At the top, there is a blue header with the Intel logo. Below the header, there are three navigation tabs: "Home", "Leads", and "Reports". An orange arrow points to the "Home" tab. The main content area is divided into two columns. The left column contains a search bar with a dropdown menu set to "Leads", a "Go!" button, and a link to "Advanced Search...". Below the search bar is a "Recent Items" section listing several names: Scott Adams, Samantha Abell, Giuseppe Airoldi, Test Map, Gianluca Albanese, Test Map, and Steve Adler. The right column features a "Welcome to Intel® Partner Portal" heading, followed by a paragraph explaining the portal's purpose. Below this is a "Maintenance Notification" section with a "What Changed:" subsection and a "What you need to do:" list. The list includes two items: "1. Update your bookmarks to the new URL listed above." and "2. Email notifications containing links to Design Registrations prior to March 16 will no longer work." A "Support:" subsection follows, providing an email address: smg_customer_support@intel.com.

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

Home Page View

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

Search

Leads

[Advanced Search...](#)

Recent Items

- Scott Adams
- Samantha Abell
- Giuseppe Airoidi
- Test Map
- Gianluca Albanese
- Test Map
- Steve Adler

Welcome to Intel® Partner Portal

This portal enables registered Partners to access specific Intel services. You may n you are interested in engaging with Intel in additional ways.

Maintenance Notification

What Changed:

Please note due to recent IT improvements made on Friday, March 16th, the URL <https://shnintel.com> URL: <https://premiersupport.intel.com/> or <https://partners.intel.com/>.

What you need to do:

1. Update your bookmarks to the *new URL* listed above.
2. Email notifications containing links to Design Registrations prior to March 16 will no longer work.

Support:

If you experience issues, please send an email to smg_customer_support@intel.com

Search

[Advanced Search...](#)

Recent Items

Scott Adams
Samantha Abell
Giuseppe Airoldi
Test Map
Gianluca Albanese
Test Map
Steve Adler

Other Links

My Intel Business Applications &
Tools

Welcome to Intel® Partner Portal

This portal enables registered Partners to access specific Intel services. You may not be registered to use every service, so please speak to your Intel Account Manager if you are interested in engaging with Intel in additional ways.

Maintenance Notification

What Changed:

Please note due to recent IT improvements made on Friday, March 16th, the URL <https://shnintel31crm.intel.myshn.net> will no longer work. It has changed to *new URL*: <https://premier-support.intel.com/> or <https://partners.intel.com/>.

What you need to do:

1. Update your bookmarks to the *new URL* listed above.
2. Email notifications containing links to Design Registrations prior to March 16 will no longer work. You will need to access these from the Partner Portal.

Support:

If you experience issues, please send an email to smg_customer_support@intel.com

Intel® Premier Support

Enables Partners registered for Intel® Premier Support to submit and monitor support cases

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

Design Registration

Enables eligible Partners to register and manage designs

[Design Registration Training](#)
[Eligible Products](#)
[Bulk Upload References](#)
[Design Registration Support](#)

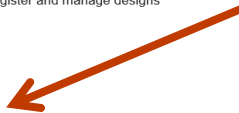
Lead Management

Enables Intel® PSG Partner, Intel® IoT Solutions Alliance and Intel® Partner Advantage Program members to receive and manage Leads and Referrals

[Lead Management Support](#)

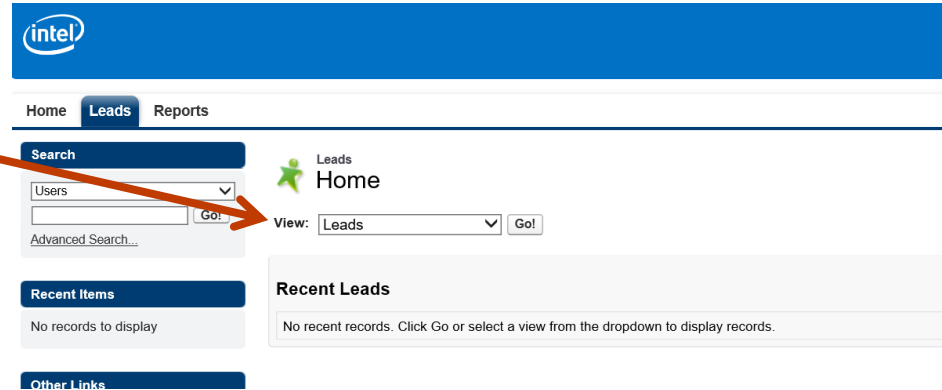
Home Page View

- 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 Leaded – 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

intel

Home Leads Reports

Search

Leads

Go!

Advanced Search...

Recent Items

- Scott Adams
- Samantha Abell
- Giuseppe Airoidi
- Test Map
- Gianluca Albanese
- Test Map
- Steve Adler

All Leads

Accept Leads

Action	Name	Email	Phone	State/Province
<input type="checkbox"/> Edit	Abella, Devon	devon.abella@tr.com	6462234823	
<input type="checkbox"/> Edit	Abella, Devon	devon.abella@tr.com	6462234823	
<input type="checkbox"/> Edit	Abella, Devon	devon.abella@thomsonreuters.com	6462234823	
<input type="checkbox"/> Edit	Abell, Samantha	sabell@ouffrescott.gov	unknown	
<input type="checkbox"/> Edit	Abell, Samantha	sabell@ouffrescott.gov	unknown	
<input type="checkbox"/> Edit	Abell, Samantha	sabell@ouffrescott.gov	unknown	
<input type="checkbox"/> Edit	Abu, Catherine	cathy.abu@beds.ac.uk	unknown	
<input type="checkbox"/> Edit	Abell, Devon	devon.abella@thomsonreuters.com	unknown	

Sample Lead

The screenshot shows the Intel CRM interface. At the top, there is a blue header with the Intel logo on the left and 'Sandbo' and 'partner2_user1' on the right. Below the header is a navigation bar with 'Home', 'Leads', and 'Reports' tabs. On the left side, there is a 'Search' section with a dropdown menu set to 'Search All', an input field, and a 'Go!' button. Below that is a 'Links' section with 'My Profile' and 'Intel Support' options. The main content area displays the lead details for 'lead200 lead200'. It includes a green person icon, a 'Lead' label, and a 'Back to List: Leads' link. There are also links for 'Open Activities [0]' and 'Activity History [0]'. Below this is a 'Lead Detail' section with buttons for 'Edit', 'Accept Lead', and 'Reject Lead'. The lead information is organized into two sections: 'Contact Information' and 'Business Information'. The 'Contact Information' section includes fields for Name, Title, Job Function, Partner Lead Owner, Email, Phone, Mobile, Alternate Email, and Fax. The 'Business Information' section includes fields for Company, Address, Company Size, and Industry.

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 open it.

DISPOSITIONING A LEAD

“Mass Accepting” Leads

- Click the box of the leads to accept
- Hit the “Accept Leads” button to mass accept

The screenshot shows the Intel CRM interface. At the top is the Intel logo. Below it are navigation tabs for Home, Leads, and Reports. A search bar is present with a dropdown menu set to 'Leads' and a 'Go!' button. To the right, there is a green person icon and a dropdown menu set to 'All Leads'. Below these is an 'Accept Leads' button with a refresh icon. A table of leads is displayed with columns for Action, Name, and Email. The first row of the table has a checkbox in the Action column. Two orange arrows originate from the text on the left: one points to the 'Accept Leads' button, and the other points to the checkbox in the first row of the table.

<input type="checkbox"/>	Action	Name ↑	Email
<input type="checkbox"/>	Edit	Abella, Devyn	devyn.a...
<input type="checkbox"/>	Edit	Abella, Devyn	devyn.a...
<input type="checkbox"/>	Edit	Abella, Devyn	devyn.a...

- Clicking the the top box will put a check in all lead check boxes !!

“Mass Accepting” Leads

- Clicking the top box will put a check in all lead check boxes !!

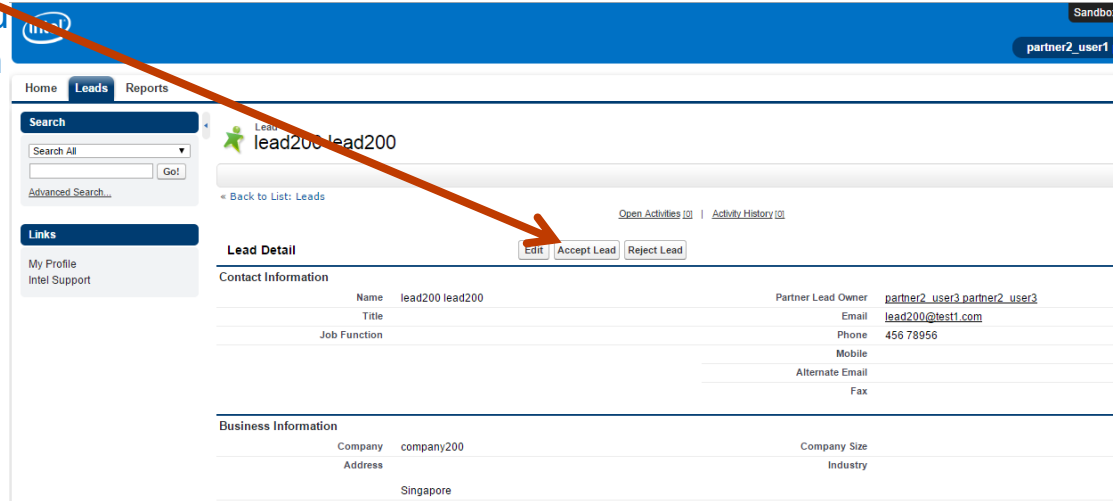
The screenshot shows the Intel Leads management interface. At the top, there are navigation tabs for Home, Leads, and Reports. Below the navigation, there is a search bar with a dropdown menu set to 'Leads' and a 'Go!' button. To the right of the search bar is a dropdown menu for 'All Leads'. Below the search bar is a section for 'Recent Items' listing names like Scott Adams, Samantha Abell, Giuseppe Airoidi, Test Map, Gianluca Albanese, Test Map, and Steve Adler. Below that is a section for 'Other Links' with a link to 'My Intel Business Applications & Tools'. The main content area is a table of leads. The table has columns for 'Action', 'Name', and 'Email'. The 'Action' column contains a checkmark and the word 'Edit'. The 'Name' column contains names like 'Abella, Devon', 'Abell, Samantha', 'Abu, Catherine', 'Adams, Aaron', 'Adams, Scott', 'Adhi, Sreenivas', and 'Adkins, Scott'. The 'Email' column contains email addresses like 'devon.a...', 'sabel@q...', 'cathy.a...', 'aaron.a...', 'scot@q...', 'sreeniv...', and 'scot@q...'. Above the table is a button labeled 'Accept Leads' with a refresh icon. Two orange arrows point from the text in the first block to the 'Accept Leads' button and the 'Edit' buttons in the table.

<input checked="" type="checkbox"/>	Action	Name ↑	Email
<input checked="" type="checkbox"/>	Edit	Abella, Devon	devon.a...
<input checked="" type="checkbox"/>	Edit	Abella, Devon	devon.a...
<input checked="" type="checkbox"/>	Edit	Abella, Devon	devon.a...
<input checked="" type="checkbox"/>	Edit	Abell, Samantha	sabel@q...
<input checked="" type="checkbox"/>	Edit	Abell, Samantha	sabel@q...
<input checked="" type="checkbox"/>	Edit	Abell, Samantha	sabel@q...
<input checked="" type="checkbox"/>	Edit	Abu, Catherine	cathy.a...
<input checked="" type="checkbox"/>	Edit	Adams, Aaron	aaron.a...
<input checked="" type="checkbox"/>	Edit	Adams, Scott	scot@q...
<input checked="" type="checkbox"/>	Edit	Adams, Scott	scot@q...
<input checked="" type="checkbox"/>	Edit	Adams, Scott	scot@q...
<input checked="" type="checkbox"/>	Edit	Adhi, Sreenivas	sreeniv...
<input checked="" type="checkbox"/>	Edit	Adkins, Scott	scot@q...

Dispositioning an Individual Lead

- If you click on an individual lead, you may accept or reject that lead within the lead details.
- Select the “Accept” or “Reject” button above the lead details to disposition a lead

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



The screenshot displays the Intel CRM interface for a lead named 'lead200'. The interface includes a search bar, navigation tabs (Home, Leads, Reports), and a sidebar with links to 'My Profile' and 'Intel Support'. The main content area shows the lead's contact information and business information. The 'Contact Information' section includes fields for Name, Title, Job Function, Partner Lead Owner, Email, Phone, Mobile, Alternate Email, and Fax. The 'Business Information' section includes fields for Company, Address, Company Size, and Industry. An orange arrow points from the text in the first bullet point to the 'Accept Lead' button located above the 'Lead Detail' section.

Contact Information	
Name	lead200 lead200
Title	
Job Function	
Partner Lead Owner	partner2_user3 partner2_user3
Email	lead200@lest1.com
Phone	456 78956
Mobile	
Alternate Email	
Fax	

Business Information	
Company	company200
Address	Singapore
Company Size	
Industry	

Rejecting a specific Lead

intel

Home Leads Reports

Links
My Profile
Intel Support

Please Enter The Rejection Reason

Rejection reasons: Unable To Contact

Rejection Comments: 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.
- Note: You cannot mass reject leads.

Please Enter The Rejection Reason

Rejection reasons: Unable To Contact

Rejection Comments: Rejection Comments go here!

- Unable To Contact
- Unable To Contact
- Incorrect or Incomplete information
- Not Relevant Contact
- Not a Relevant Opportunity
- Lead is from Competitor
- Duplicate
- Test lead

intel

test_ims_user1 L...

Home Leads Reports

Links
My Profile
Intel Support

Please Enter The Rejection Reason

Rejection reasons: Not Relevant Contact

Rejection Comments: Rejection Comments go here!

Next

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

Accepting a Lead

Lead Detail Edit Accept Lead Reject Lead

Contact Information

Name	Aaron Moman	Partner Lead Owner	test_lms_user1 test_lms_user1
Title	Title	Email	austinat@emal.com
Job Function		Phone	(818) 456-6100
		Mobile	
		State Email	
		Fax	

To accept an individual 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.

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

Company Size
Industry

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!

The screenshot shows the Intel CRM interface. At the top, there is a blue header with the Intel logo. Below the header, there is a navigation bar with tabs for 'Home', 'Leads', and 'Reports'. The 'Reports' tab is selected. Below the navigation bar, the main content area is titled 'Reports & Dashboards'. On the left side, there is a 'Folders' sidebar with a search box labeled 'Find a folder...'. Below the search box, there is a list of folders: 'All Folders' (highlighted) and 'Partner Reports'. On the right side, there is an 'All Folders' table with columns for 'Action', 'Name', 'Folder', and 'Created By'. The table contains one row: 'Lead Report' (Name), 'Partner Reports' (Folder), and 'Karumuru, Venu' (Created By). A red arrow points from the 'Partner Reports' folder in the sidebar to the 'Lead Report' in the table. Another red arrow points from the 'Lead Report' in the table to the 'Partner Reports' folder in the sidebar.

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.

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	jstatest@gmail.com	818-416-7800	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 7800	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 6700	Malaysia	test_company3	Open	5/20/2016		Another Test Le
test_partner1_lead2	test_partner1_lead2	test_partner1_lead2@test.com	416 7800	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	887 6423	Poland	company2	Open	5/21/2016		Lead for Test P
Partner First	Partner Last	partner_lead_test@intel.com	88888888	Australia	Intel	Open	5/20/2016		Lead Received

Grand Totals (6 records)

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tribute

_user1 5/2

