

Partner Locator How To Guide

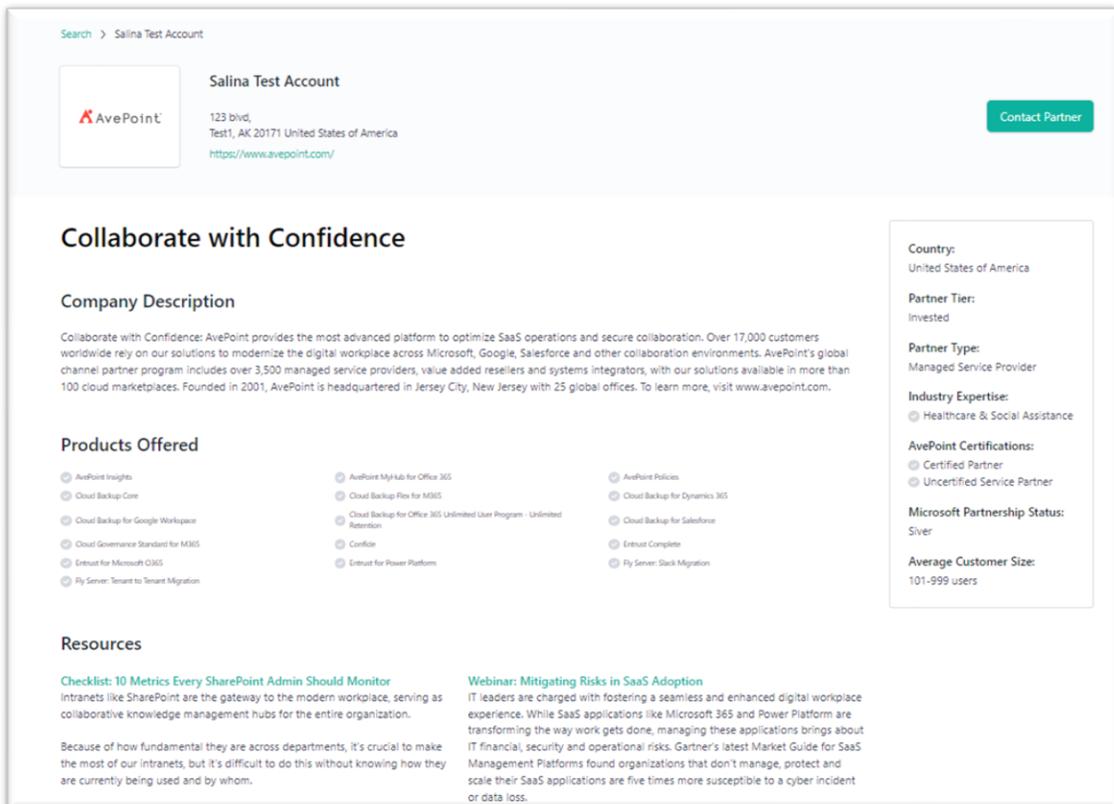
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What is Partner Locator

AvePoint is introducing a Partner Locator that will let end users find AvePoint partners categorized by a variety of parameters to assist them in deciding which specialists to get assistance from.

Link: <https://www.avepoint.com/partners/locator>



The screenshot shows a partner profile for 'Salina Test Account'. At the top, there is a search bar and the account name. Below this is the AvePoint logo and contact information: '123 Blvd, Test1, AK 20171 United States of America' and the website 'https://www.avepoint.com/'. A green 'Contact Partner' button is visible in the top right.

The main content area is titled 'Collaborate with Confidence' and includes a 'Company Description' section. Below this is a 'Products Offered' section with a grid of 12 items, each with a small circular icon and text. The products listed are: AvePoint Insights, Cloud Backup Core, Cloud Backup for Google Workspace, Cloud Governance Standard for M365, Entrust for Microsoft O365, Fly Server: Tenant to Tenant Migration, AvePoint My Hub for Office 365, Cloud Backup Plan for M365, Cloud Backup for Office 365 Unlimited User Program - Unlimited Retention, Conflic, Entrust for Power Platform, AvePoint Policies, Cloud Backup for Dynamics 365, Cloud Backup for Salesforce, Entrust Complete, and Fly Server: Stack Migration.

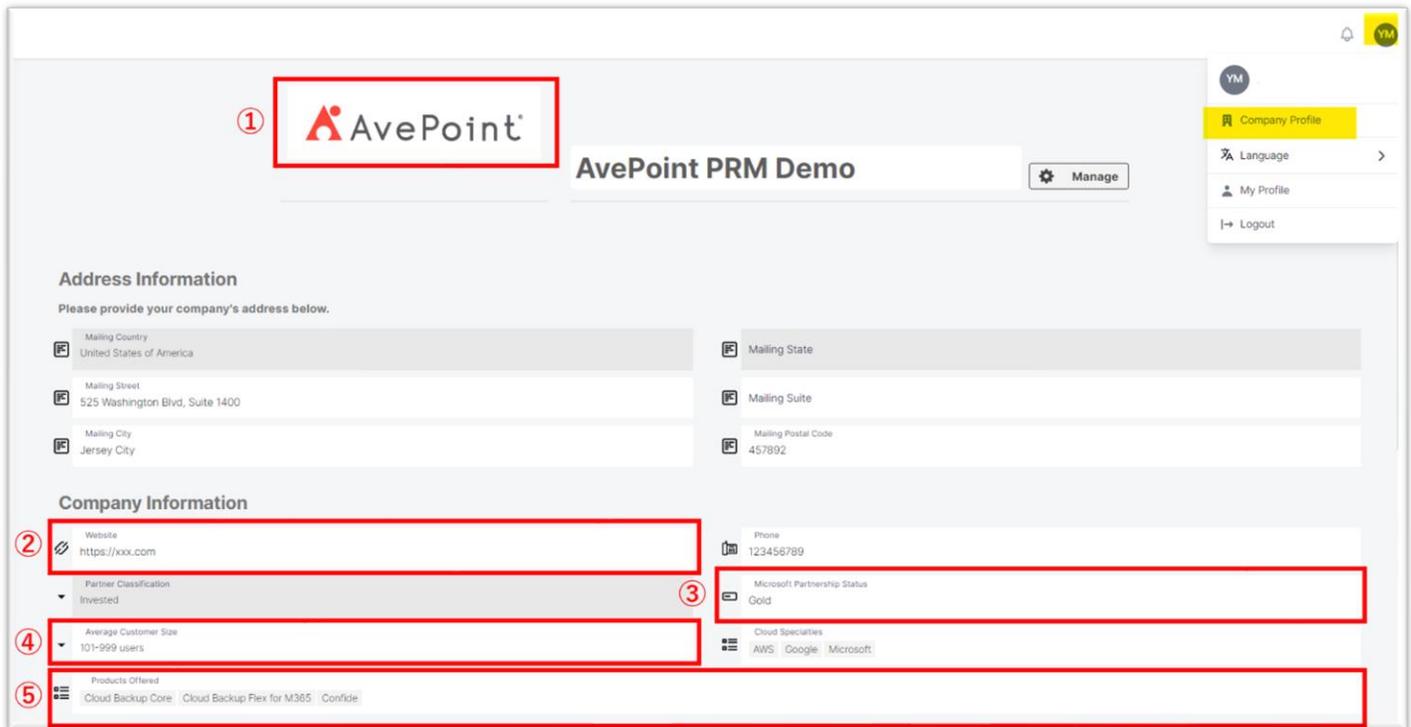
On the right side, there is a sidebar with various filters and details:

- Country:** United States of America
- Partner Tier:** Invested
- Partner Type:** Managed Service Provider
- Industry Expertise:** Healthcare & Social Assistance
- AvePoint Certifications:** Certified Partner, Uncertified Service Partner
- Microsoft Partnership Status:** Silver
- Average Customer Size:** 101-999 users

At the bottom, there is a 'Resources' section with two links: 'Checklist: 10 Metrics Every SharePoint Admin Should Monitor' and 'Webinar: Mitigating Risks in SaaS Adoption'. The webinar link includes a short paragraph of text.

How to Submit the Listing Information

1. Log in to the [AvePoint Partner Portal](#).
2. Click on your icon , then click "Company Profile".
3. Start filling in the company information as numbered in the screenshot below.
 ***Please note that these fields 1 – 5 will auto save changes as you update.



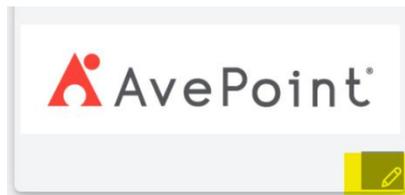
Address Information
Please provide your company's address below.

Mailing Country: United States of America
 Mailing Street: 525 Washington Blvd, Suite 1400
 Mailing City: Jersey City
 Mailing State: [Field]
 Mailing Suite: [Field]
 Mailing Postal Code: 457892

Company Information

Website: <https://xxx.com>
 Phone: 123456789
 Partner Classification: Invested
 Microsoft Partnership Status: Gold
 Average Customer Size: 101-999 users
 Cloud Specialties: AWS, Google, Microsoft
 Products Offered: Cloud Backup Core, Cloud Backup Flex for M365, Confide

1) Logo



- a. Click on the pencil icon.
- b. Upload the company logo. File type can be jpeg or png (Maximize file size: 10MB).
- c. Click "SAVE".



- 2) Website
 - a. Insert a URL to the corporate website or call to action website.
- 3) Microsoft Partnership Status
 - a. Type all the qualified Microsoft Partnership Status.
- 4) Average Customer (End User) Size
 - a. Select from the options.
- 5) Products Offered
 - a. Select all the AvePoint products you can offer to customers.

Marketplace Profile

Please fill out the following items to complete your profile for the Partner Marketplace listing. Note: Company logo and demographics are managed on your Company Profile page.

⚠ You have made changes since you last requested review.

Listing Status 📌 : Draft
Date Accepted: 05/09/2023 3:25 PM
Displayed on Marketplace?: Yes (View Published Listing)
 Last updated on 06/15/2023 10:23 PM.

Preview Listing
Request Review

Headline

Collaborate with Confidence

Max 150 characters.

Company Description

Collaborate with Confidence: AvePoint provides the most advanced platform to optimize SaaS operations and secure collaboration. Over 17,000 customers worldwide rely on our solutions to modernize the digital workplace across Microsoft, Google, Salesforce and other collaboration environments. AvePoint's global enhanced customer experience program includes over 2,500 managed service...

Max 5000 characters.

Resources Add

TITLE	LINK	DESCRIPTION	
Mitigating Risks in SaaS Adoption	www.avepoint.com/events/webinar/mitigating-risks-in-saas-adoption	IT leaders are charg...	🗑
10 Metrics Every SharePoint Admin Should Monitor	www.avepoint.com/ebook/checklist-10-metrics-every-sharepoint-admin-should-monitor	Intranets like Share...	🗑

*Please scroll down to view the "Marketplace Profile" section.

- 6) Headline
 - a. Type the company's headline message
(This field will be shown in a bigger font as a headline message. Please refer to the P0above.)
- 7) Company Description
 - a. Type the company description. Max 5000 characters.
- 8) Resources
 - a. Add resources such as case studies, co-hosted webinars, ebooks etc. by clicking "Add".
 - b. Resources must have a link to the resource, title, and a description.

Add Listing ✕

Link
To make title clickable on your marketplace listing, please enter a URL here

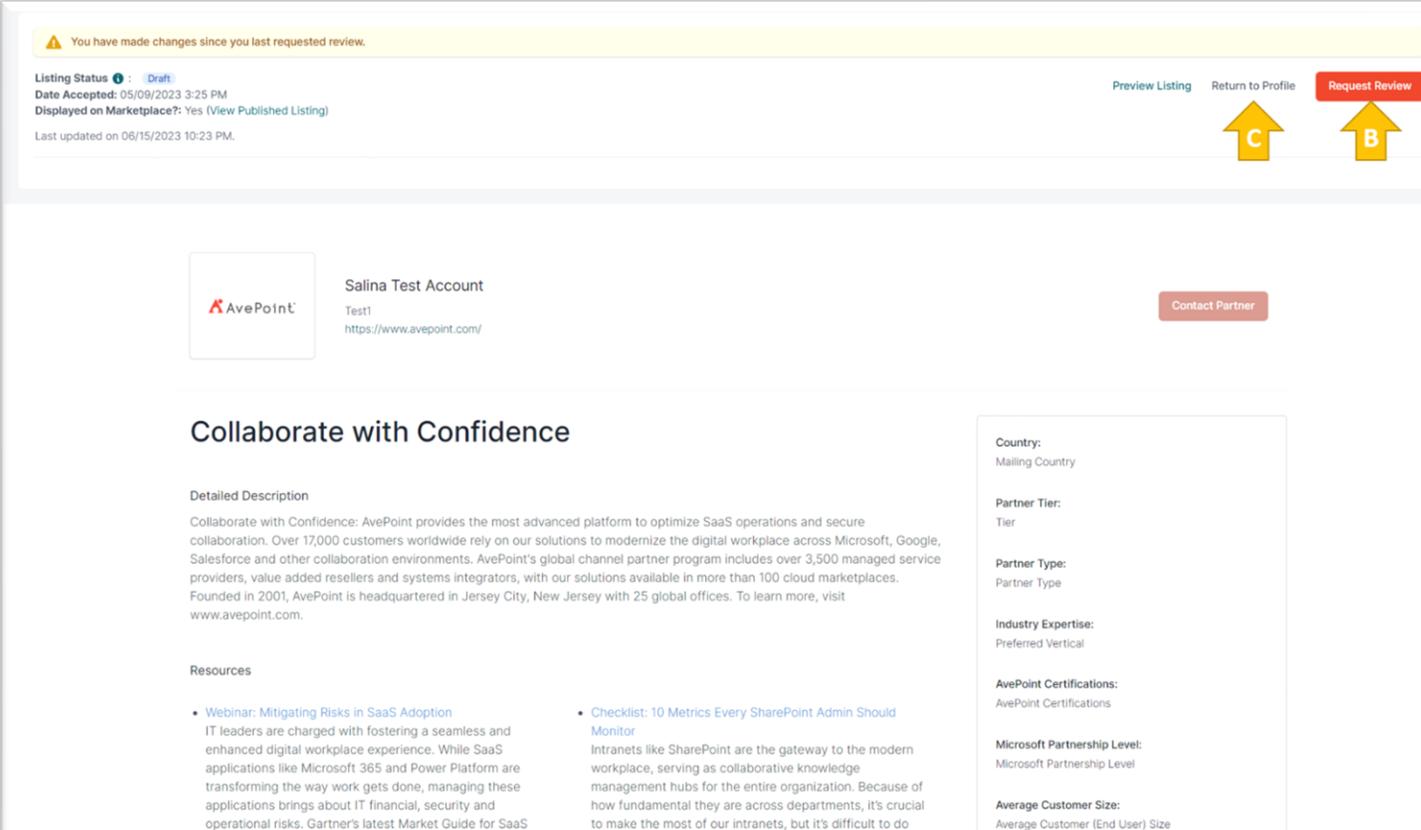
https://

Title

Description

Cancel
Submit

4. Click "Preview Listing" () to preview your listing before submission.



You have made changes since you last requested review.

Listing Status  : Draft
 Date Accepted: 05/09/2023 3:25 PM
 Displayed on Marketplace?: Yes (View Published Listing)
 Last updated on 06/15/2023 10:23 PM.

Preview Listing Return to Profile Request Review

 Salina Test Account
 Test1
 https://www.avepoint.com/ Contact Partner

Collaborate with Confidence

Detailed Description

Collaborate with Confidence: AvePoint provides the most advanced platform to optimize SaaS operations and secure collaboration. Over 17,000 customers worldwide rely on our solutions to modernize the digital workplace across Microsoft, Google, Salesforce and other collaboration environments. AvePoint's global channel partner program includes over 3,500 managed service providers, value added resellers and systems integrators, with our solutions available in more than 100 cloud marketplaces. Founded in 2001, AvePoint is headquartered in Jersey City, New Jersey with 25 global offices. To learn more, visit www.avepoint.com.

Resources

- **Webinar: Mitigating Risks in SaaS Adoption**
IT leaders are charged with fostering a seamless and enhanced digital workplace experience. While SaaS applications like Microsoft 365 and Power Platform are transforming the way work gets done, managing these applications brings about IT financial, security and operational risks. Gartner's latest Market Guide for SaaS Management Platforms found organizations that do not have a strategy in place for SaaS management are at risk of being left behind.
- **Checklist: 10 Metrics Every SharePoint Admin Should Monitor**
Intranets like SharePoint are the gateway to the modern workplace, serving as collaborative knowledge management hubs for the entire organization. Because of how fundamental they are across departments, it's crucial to make the most of our intranets, but it's difficult to do so without knowing how to use them correctly.

Country:
Mailing Country

Partner Tier:
Tier

Partner Type:
Partner Type

Industry Expertise:
Preferred Vertical

AvePoint Certifications:
AvePoint Certifications

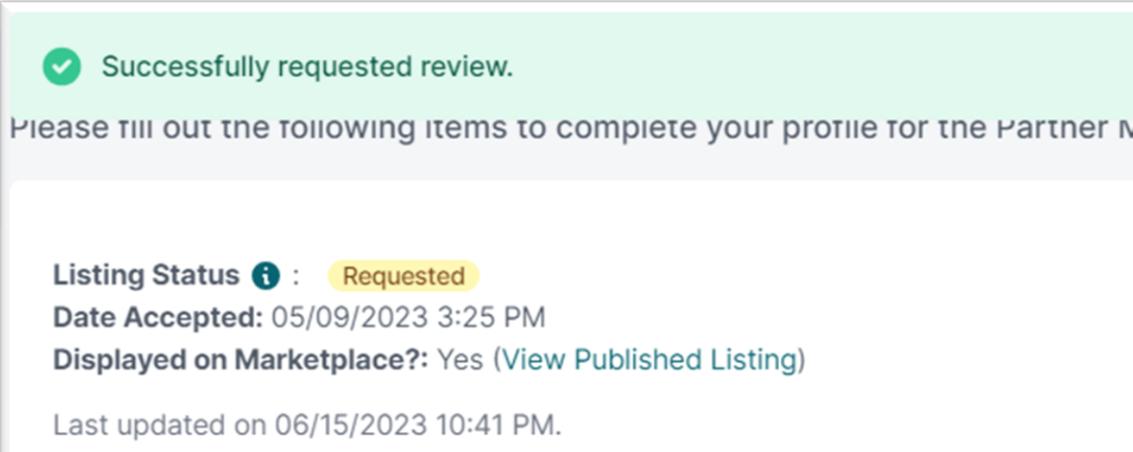
Microsoft Partnership Level:
Microsoft Partnership Level

Average Customer Size:
Average Customer (End User) Size

If you'd like to correct any information, click "Return to Profile" () to edit information.

If you are ready to submit the information, click "request Review" () .

When you successfully submit the information, the listing status will change to "Requested". Additionally, you will see a green pop-up banner to notify you of a successful request submission.

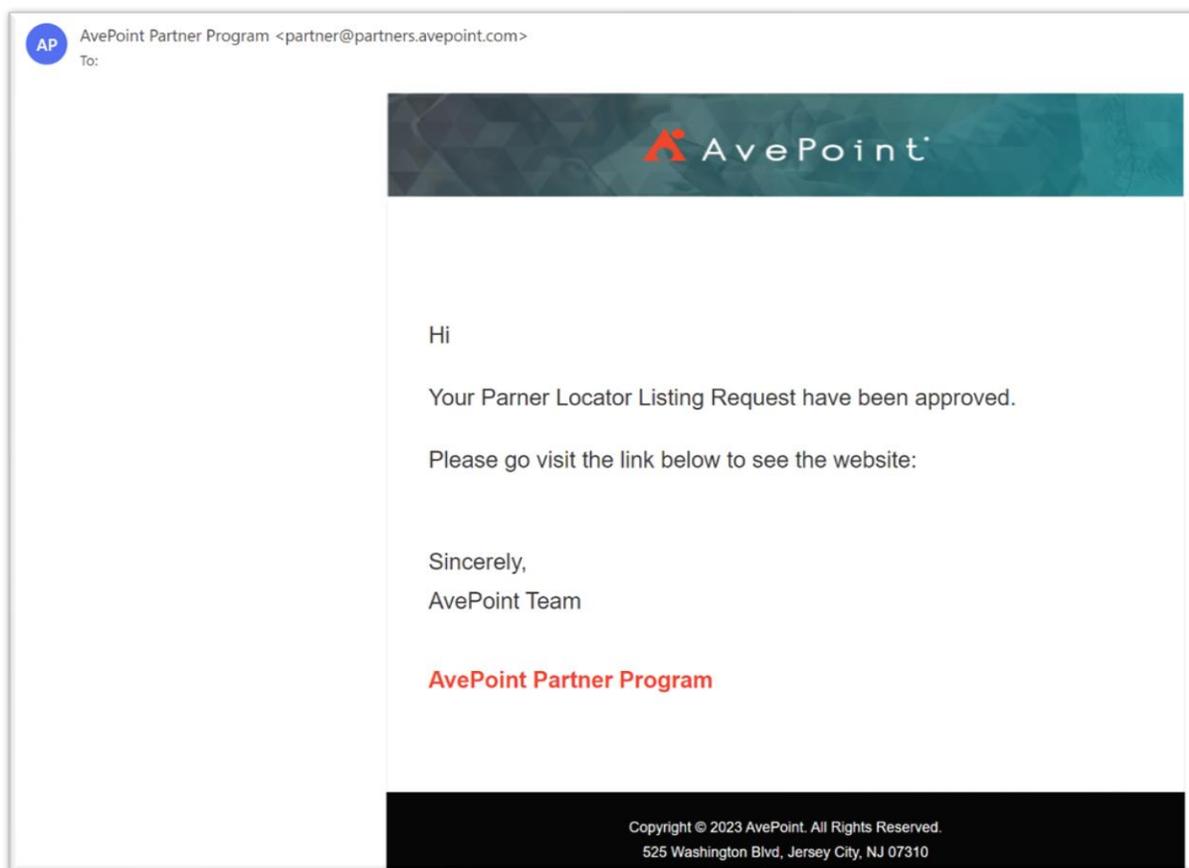


 **Successfully requested review.**

Please fill out the following items to complete your profile for the Partner Marketplace:

Listing Status  : Requested
 Date Accepted: 05/09/2023 3:25 PM
 Displayed on Marketplace?: Yes (View Published Listing)
 Last updated on 06/15/2023 10:41 PM.

5. Once you are approved, you will receive an email notification from partner@partners.avepoint.com. If your listing request is returned to you for modification, please click the link on the email to modify necessarily contents and re-submit for review.

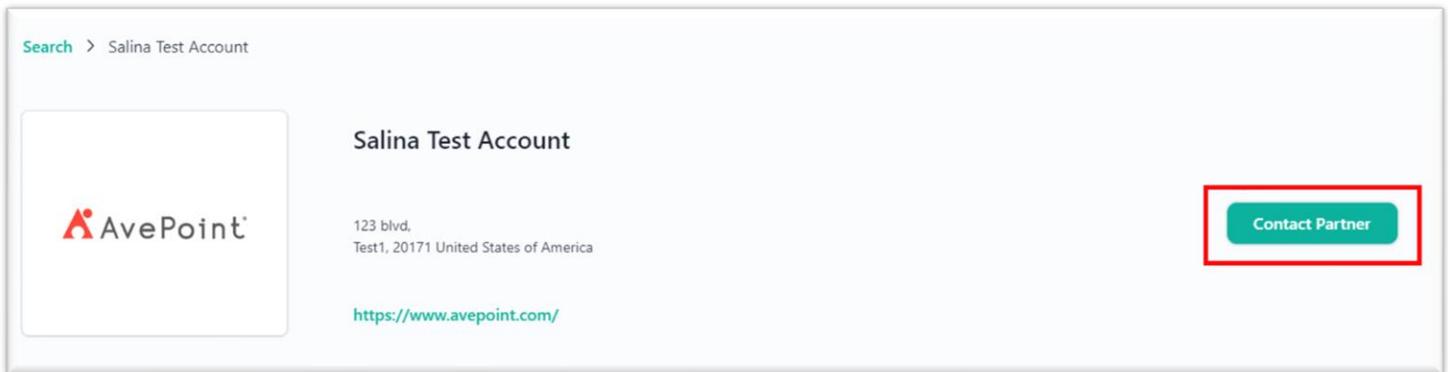


How to Edit the Listing Information

1. Click on any fields you'd like to edit.
2. Edit the fields with updated contents.
3. Click "Request Review" at the bottom.
4. Your partner account owner will be notified via email to review your updated listing information request.
5. You will be notified via email after the approval.

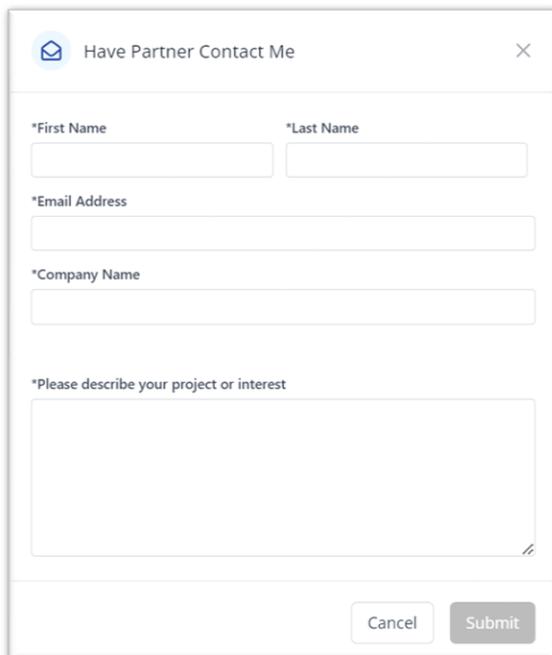
Contact Form

The end user can request you to contact them directly from the AvePoint Partner Locator. Please see the instruction below to learn how to receive leads and how to convert them into opportunities.



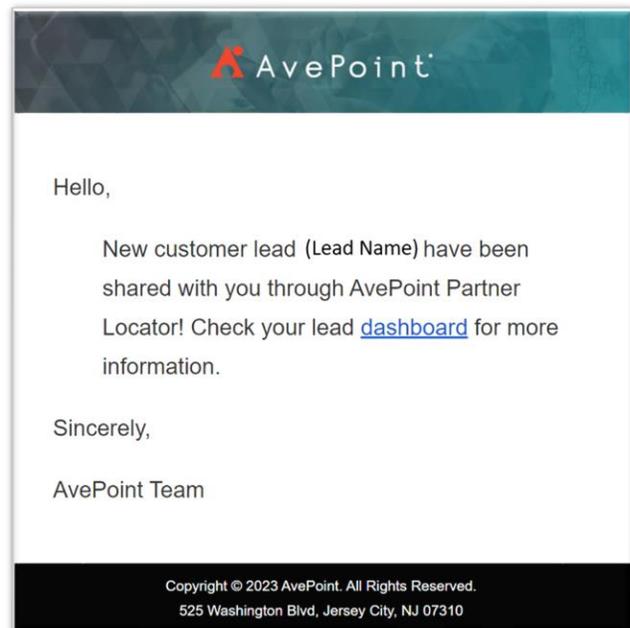
How to Receive Leads

1. The end user fills out the "Contact Partner" form (Image 1) to request contact from the partner.
2. The user with Opportunity Administrator privileges and Primary User will receive a lead notification.



The form is titled 'Have Partner Contact Me' and includes the following fields: *First Name, *Last Name, *Email Address, *Company Name, and a text area for *Please describe your project or interest. There are 'Cancel' and 'Submit' buttons at the bottom.

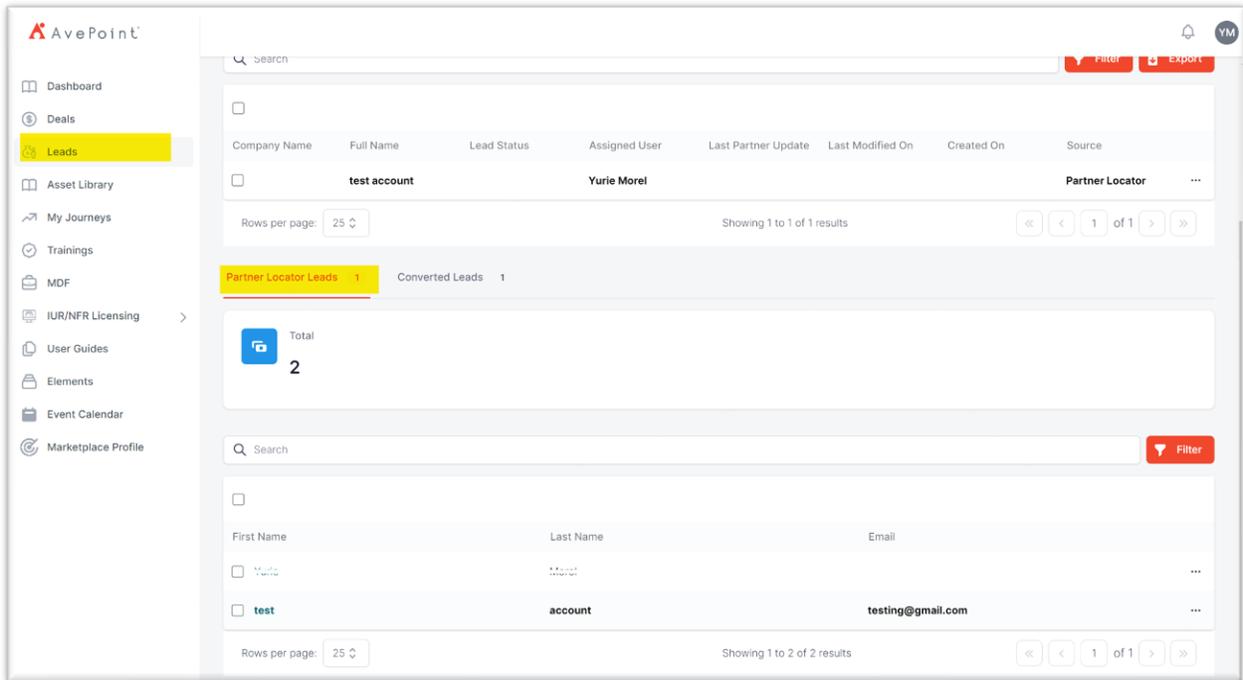
(Image 1)



(Image 2)

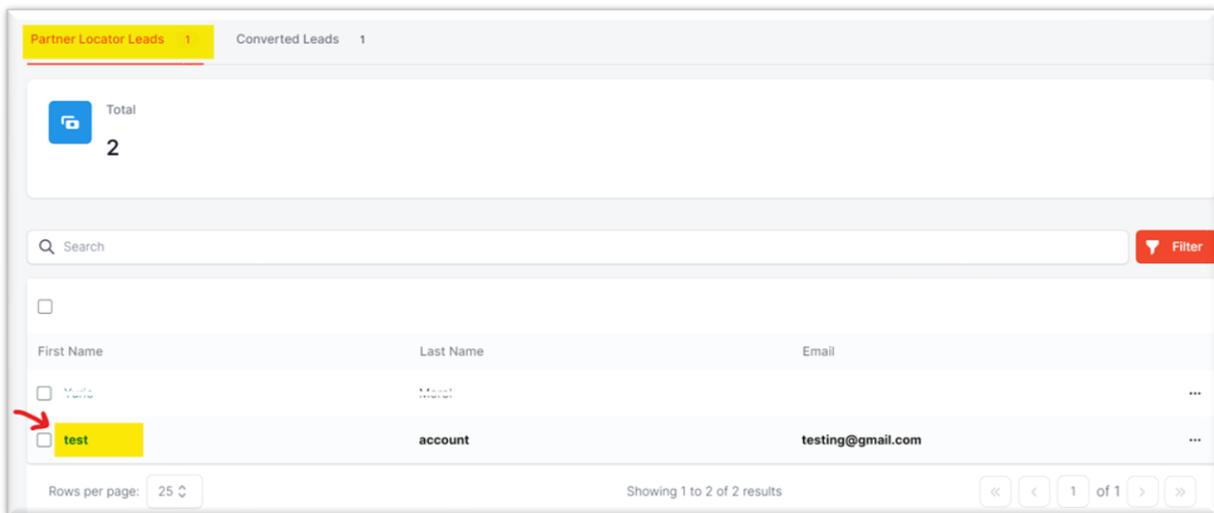
3. Click on the link in the email, or you can login to the Partner Portal and click on the Leads tab and scroll down to see the "Partner Locator Leads" dashboard.

4. You can view the assigned partner locator lead under the "Partner Locator Leads" dashboard.

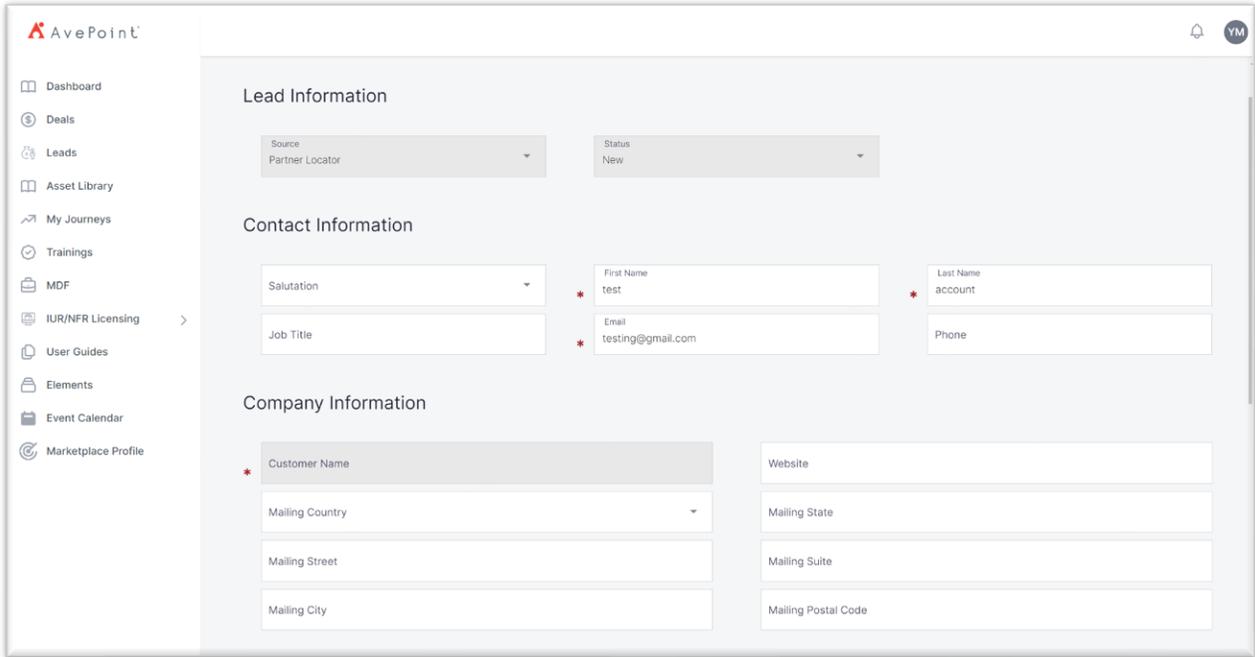


How to Convert the leads to an opportunity

1. Click on the lead.



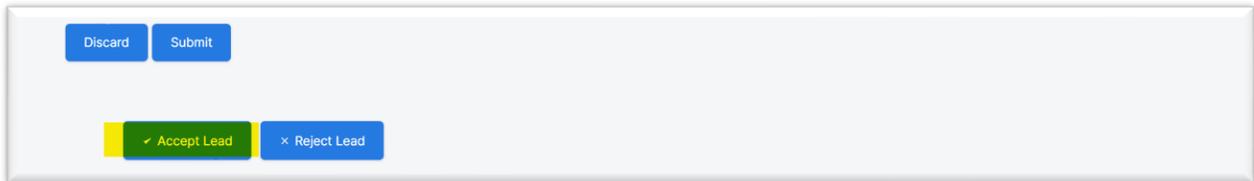
2. Review the information and contact the end customer.



The screenshot shows the AvePoint CRM interface. On the left is a navigation menu with items: Dashboard, Deals, Leads, Asset Library, My Journeys, Trainings, MDF, IUR/NFR Licensing, User Guides, Elements, Event Calendar, and Marketplace Profile. The main content area is titled 'Lead Information' and contains three sections:

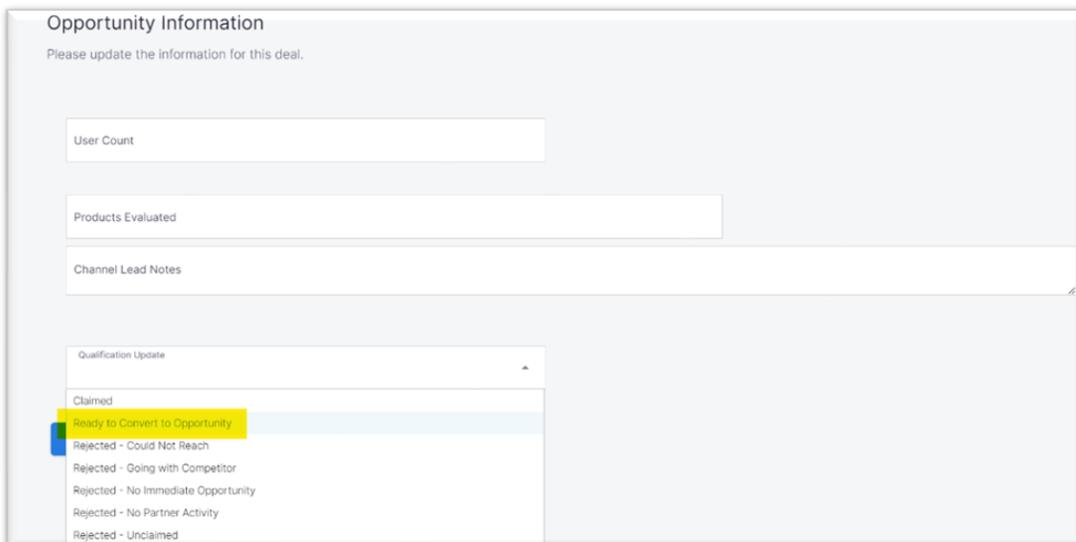
- Lead Information:** Source (Partner Locator), Status (New).
- Contact Information:** Salutation, First Name (test), Last Name (account), Job Title, Email (testing@gmail.com), Phone.
- Company Information:** Customer Name, Website, Mailing Country, Mailing State, Mailing Street, Mailing Suite, Mailing City, Mailing Postal Code.

3. Accept or reject the lead.



This screenshot shows a set of action buttons for a lead. At the top are 'Discard' and 'Submit'. Below them are 'Accept Lead' (highlighted in green) and 'Reject Lead' (highlighted in blue).

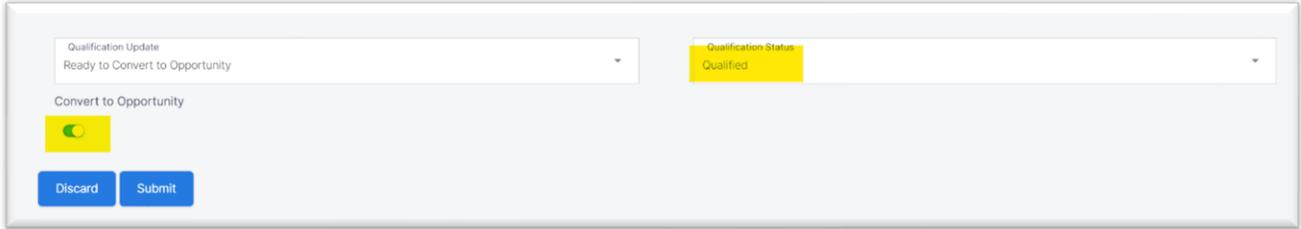
When the lead is ready to be converted to an opportunity, select "Ready to Convert to Opportunity" under "Qualification Update".



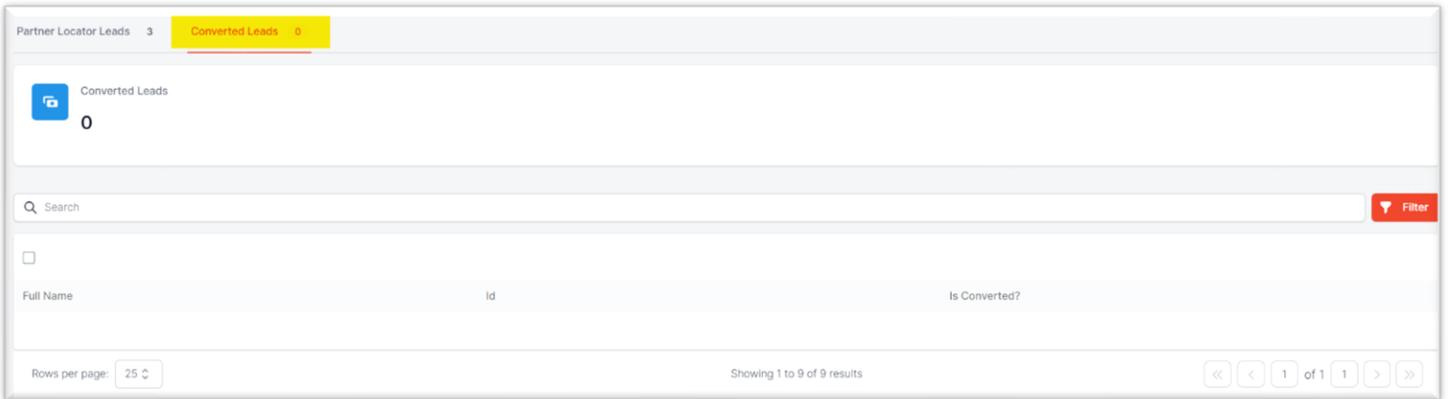
The screenshot shows the 'Opportunity Information' form. It includes fields for 'User Count', 'Products Evaluated', and 'Channel Lead Notes'. A 'Qualification Update' dropdown menu is open, showing several options. The option 'Ready to Convert to Opportunity' is highlighted in yellow.

- Claimed
- Ready to Convert to Opportunity
- Rejected - Could Not Reach
- Rejected - Going with Competitor
- Rejected - No Immediate Opportunity
- Rejected - No Partner Activity
- Rejected - Unclaimed

- Please select "Qualified" under Qualification Status and click "Convert to Opportunity" button to the right until you see the button's color change to blue.



- You can see the converted opportunity from the tab called "Converted Leads".
***Please note that the opportunities that are converted from the Partner Locator Source will not count as a deal registration.



Partner Locator Leads 3 **Converted Leads 0**

Converted Leads
0

Search Filter

Full Name	Id	Is Converted?
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Rows per page: 25 Showing 1 to 9 of 9 results