



## Partner Profile

# User Guide

V2.0

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## 1.0 Module Overview

Partner Profile is one of the many online business solutions offered by Teczo.com. Partner Profile is a web-based partner profile management solution for small, medium and large organizations. It is intended to improve an organization's partner information management through efficient partner profiling and organization of data.

Using Partner Profile eliminates time-consuming procedures and unnecessary administrative and IT costs associated with manual, redundant and tedious processes. Partner Profile thus increases the reliability and accuracy of partner profile record management, thus boosting the efficiency in the relationship management of your organizations partners and affiliates.

## 2.0 Using the Module

### 2.1 Partner Profile Summary Page

Upon clicking on the Partner Profile link in the Teczo home page, the user will be directed to the Partner Profile Summary Page which is composed mainly of Filter and Summary Table.

The screenshot displays the Teczo.com interface for the Partner Profile Summary Page. At the top, there is a navigation menu with options: Home, General, Product Development, Sales & Marketing, and Time & Attendance. The user is logged in as Mary Williams on 04Mar2011. Below the navigation is a search bar with a 'Go' button and a 'Quick Search' field. The search filters include State, Importance, Partnership Type, Country, Industry Segment, Date, and Person. The main table shows a list of partner profiles with columns: Updated On, Updated By, PP ID, Partner Name, Partnership Type, Industry Segment, Ctry, Importance, and Our Rep. The table is filtered to show 'Open' status profiles. The table contains 22 rows of data, including entries for Joseph Johnson, Juan Carlos Hernandez, Daniel Brown, Narayan Bisht, Lucas Müller, David Jones, Shunde Li, Joshua Garcia, David Jones, Shunde Li, Oliver Smith, Daniel Brown, Shunde Li, Chris Jackson, Hannah Schmidt, Joshua Garcia, Daniel Brown, Juan Carlos Hernandez, Shunde Li, and Juan Carlos Hernandez. The page footer shows 'Page 1 of 2, items 1 to 20 of 22'.

Figure 1: Partner Profile Summary Page

#### 2.1.1 Partner Profile Filter and Search

The table contains the description of terms used in the Partner Profile filter:

TERM	DESCRIPTION
PP	Partner Profile ID A unique partner profile number
Any Field Contains	Allows the user to enter keywords of any character string, except date type.
State	Indicates the state of the partner profile. Values: (Default Value: All) <ul style="list-style-type: none"> <li>All</li> <li>Open</li> <li>On-hold</li> <li>Closed</li> <li>Archived</li> </ul>

TERM	DESCRIPTION
Importance	Indicates the level of importance of the contact. <i>(Default Value: All)</i>  The options of the Importance field should be customized by the administrators of the user's company in the System Administration module.
Partnership Type	Shows partnership types in selection. <i>(Default Value: All)</i>  The options of the Partnership Profile field should be customized by the administrators of the user's company in the System Administration module.
Country	Shows the country of the contact for selection. <i>(Default value: All)</i>
Industry Segment	Indicates the industry of the partner's involvement.
Status	Indicates the current status of the partner profile. Values: <i>(Default Values: All checked)</i> <ul style="list-style-type: none"> <li>• Read</li> <li>• Unread</li> <li>• Flagged</li> </ul>
Date	Allows users to search for partner profiles within a specific date range. Values: <i>(Default Value: All)</i> <ul style="list-style-type: none"> <li>• All (instances)</li> <li>• Initiated On</li> <li>• Updated On</li> <li>• Closed On</li> <li>• All (days)</li> <li>• Today</li> <li>• Last 7 days</li> <li>• Last 30 days</li> <li>• Last 90 days</li> <li>• Last 360 days</li> </ul>
Person	Allows user to search for partner profiles involving specific persons. Values: <i>(Default Value: All)</i> <ul style="list-style-type: none"> <li>• All (roles)</li> <li>• Closed By</li> <li>• Immediate Respondent</li> <li>• Initiated By</li> <li>• Our Rep</li> <li>• Partner Member</li> <li>• Updated By</li> </ul>

**Table 1:** Definition of terms used in the Partner Profile Filter

## 2.1.2 Partner Profile Summary Table

Partner Profile summary page will allow the users to view all the partner profiles they have rights to access.

All (22) Open (19) On-Hold (1) Closed (2) Archived (0) Action More Actions Add Partner									
Updated On	Updated By	PP ID	Partner Name	Partnership Type	Industry Segment	Ctry	Importance	Our Rep	
<b>Open</b>									
<input type="checkbox"/>	03Feb2010	Joseph Johnson	PP000011	Liaoma Dianqi (梁馬電器)	Customers	Retailer	CN	High Importance	Shunde Li
<input type="checkbox"/>	03Feb2010	Juan Carlos Hernandez	PP000008	Yonge Electronics	Potential Customer	Retailer	CA	Low Importance	Juan Carlos Hernandez
<input type="checkbox"/>	02Feb2010	Daniel Brown	PP000020	AU79 Batteries	Supplier	Manufacturer	GB	High Importance	Olivia Jones
<input type="checkbox"/>	02Feb2010	Narayan Bisht	PP000019	Desert Appliances	Potential Customer	Retailer	EG	Medium Importance	Lucas Müller
<input type="checkbox"/>	02Feb2010	Lucas Müller	PP000018	ZHKQ2 Baterii	Supplier	Manufacturer	PL	High Importance	Lucas Müller
<input type="checkbox"/>	02Feb2010	David Jones	PP000017	IT Circuitry	Contract Manufacturers	Manufacturer	IN	Medium Importance	Shunde Li
<input type="checkbox"/>	02Feb2010	Shunde Li	PP000016	Department of Electronics (Gov)	Potential Investors		IN	Medium Importance	Karan Basha
<input type="checkbox"/>	02Feb2010	Joshua Garcia	PP000003	HA Home Appliances	Customers	Retailer	US	High Importance	Joshua Garcia
<input type="checkbox"/>	02Feb2010	David Jones	PP000015	Surresh's Goods	Customers	Wholesaler	IN	Medium Importance	Shunde Li
<input type="checkbox"/>	02Feb2010	Shunde Li	PP000014	buycheap.in	Customers	Retailer	IN	High Importance	Shunde Li
<input type="checkbox"/>	02Feb2010	Oliver Smith	PP000013	château électronique	Potential Customer	Retailer	FR	Medium Importance	Oliver Smith
<input type="checkbox"/>	02Feb2010	Daniel Brown	PP000012	Z Elektronik GmbH	Supplier	Retailer	DE	Medium Importance	Daniel Brown
<input type="checkbox"/>	02Feb2010	Shunde Li	PP000009	WW Appliances (威威家電)	Customers	Retailer	HK	Low Importance	Shunde Li
<input type="checkbox"/>	02Feb2010	Chris Jackson	PP000007	Redford Solicitors	.Others		US	Medium Importance	Chris Jackson
<input type="checkbox"/>	30Jan2010	Hannah Schmidt	PP000006	Tag and Bag	.Others		US	Low Importance	Joshua Garcia
<input type="checkbox"/>	30Jan2010	Joshua Garcia	PP000005	Lewis and co	Outsourcing Partners		US	Medium Importance	Joshua Garcia
<input type="checkbox"/>	22Jan2010	Daniel Brown	PP000001	ELE Electronics	Outsourcing Partners	Manufacturer	US	High Importance	Daniel Brown
<b>On-Hold</b>									
<input type="checkbox"/>	02Feb2010	Juan Carlos Hernandez	PP000021	RJ Eletrônica	Customers	Retailer	BR	Medium Importance	Juan Carlos Hernandez
<b>Closed</b>									
<input type="checkbox"/>	03Feb2010	Shunde Li	PP000010	Liaoma Dianqi (梁馬電器)	Customers	Retailer	CN	High Importance	Shunde Li
<input type="checkbox"/>	02Feb2010	Juan Carlos Hernandez	PP000022	Técnica Accesorios	Potential Customer	Retailer	MX	Low Importance	Juan Carlos Hernandez

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Figure 2: Default Summary Table

### A. Terminology

The table contains the description of terms used in the Partner Profile summary table:

TERM	DESCRIPTION
Default Shown Fields	
Updated On	Indicates the date when the partner profile was last updated
Updated By	Indicates the name of the last user who updates the partner profile.
PP ID	Partner Profile ID A unique partner profile number.
Partner Name	Indicates the name of the partner. (combination of given name and family name)
Partnership Type	Displays the kind of partnership applied to the user
Industry Segment	Indicates the industry of the partner's involvement

TERM	DESCRIPTION
Ctry	Indicates the country where the partner is located
Importance	Indicates the level of Importance

**Table 2:** Summary Table Terminology

## B. Summary Table

A user is only allowed to view all the partner profiles they have rights to access. By default, the user can view the summary table with the following fields:

- Updated On
- Updated By
- PP ID
- Partner Name
- Partnership Type
- Industry Segment
- Ctry
- Importance
- Our Rep

**Note:** Other general features of the Partner Profile summary table are documented in Section 3.0 of the Essential Features User's Guide.

## 2.2 Partner Profile Details

The table contains the description of terms used in the Partner Profile details:

TERMS	DESCRIPTION
Partner Profile ID	Partner Profile ID A unique partner profile number.
Customer Code	This code is a provision for a special control number.
Immediate Respondents	Indicates the name of the users who are asked to respond immediately.
Importance	Indicates the level of Importance.
Description	Description of the partner profile.
Attachments	Displays the file names of any file which have been uploaded as attachments to the forum topic.

Country	Indicates the country where the partner is located.
Submitted By	Indicates the name of the user who submitted a topic.
Submitted On	Indicates the date when the topic was submitted.
Initiated By	Indicates the name of the user who initiates the Forum topic
Initiated On	Indicates the date when the forum topic was initiated.
Updated By	Indicates the name of the last user who updates the partner profile.
Updated On	Indicates the date when the partner profile was last updates.
Closed By	Indicates the name of the user who closed the forum topic.
Closed On	Indicates the date when the partner account was closed.
State	Indicates the state of the partner profile.
Keywords	Keywords concerning the partner profile.
Our Rep	Representative of the user's company to the partner.
Source	Indicates the source or website of partner profile.
Year Est.	Represents the year the partner's company was founded
Org. Size	Displays the size of the partner
Org. Details	Displays additional partner organization information.
Key Persons	Displays contact person from partner organization.
Partnership Type	Displays the kind of partnership relationship.
Industry Segment	Indicates the industry of the partner's involvement.
Business Details	Shows additional business details.



Strengths	Displays strengths of the partner organization.
Weaknesses	Displays weaknesses of the partner organization.
Our Strategy	Indicates the plan of action by the user.
Business Potential	Indicates the potential business profit.
Other Info.	Shows additional information.
Update History	Indicates the recent changes of the forum topic details. <ul style="list-style-type: none"> <li>• Last Update – Date and time when the details were last updated or edited.</li> <li>• Fields – edited or changed fields in the forum topic details from the last update.</li> </ul>
Update History List	Shows the link to view update history list of all the changes made in the forum topic details
Comments	Shows comments added by the users that have access rights to the partner profile
Quote	Quoted statements taken from a user's particular comment
Access Rights	Names of the users that are allowed to access the partner profile

**Table 3:** *Partner Profile Details Terminology*

**Note:** Other general features on the Partner Profile Details are documented in Section 4.0 of the **Essential Features User's Guide**.

## 2.3 Add/Edit Partner Profile and Comments

The System Administrator, Partner Profile Creator and Users that have Edit rights can edit all the fields indicated in the Edit details page of a partner.

The full features of Add/Edit Partner Profiles and Comments are documented in the **Essential Features User's Guide**, parts A and B of Section 5.0 respectively.

The screenshot displays the 'Add Partner' page, which is divided into two main sections: a form for entering partner details and a sidebar for managing access rights.

**Add Partner Form:**

- General Information:** Includes fields for Customer Code, Partner Name, Partnership Type (dropdown), Industry Segment (dropdown), Country (dropdown), Year Est., and Org. Size.
- Business Details:** A large text area for entering business details.
- Org. Details:** A large text area for entering organizational details.
- Strengths:** A large text area for entering strengths.
- Weaknesses:** A large text area for entering weaknesses.

**Access Rights Sidebar:**

- USA - San Francisco:** Human Resources and Admin (Barbara Miller), Management (Daniel Brown, David Jones, Joseph Johnson, Mary Williams, Michael Smith).
- USA - New York:** Finance (Matthew Davis), Sales (Joshua Garcia).
- USA - Washington DC:** External (Richard Taylor), Legal (Chris Jackson).
- CHINA - Shanghai:** Logistics (Meimei Wang), Marketing (He Zhang), Sales (Shunde Li).
- GERMANY - Munich:** Logistics (Hannah Schmidt), Product Marketing (Nancy Hobbs), Sales (Lucas Muller).
- INDIA - Bangalore:** Information Technology (Suresh Singh), Research and Development (Aditya Poojary, Arpita Kapoor, Hriday Guha, Jowar Verma, Karan Basha, Narayan Bisht).
- MEXICO - Mexico City:** Customer Service (Fernando Martinez), Sales.

Figure 3: Add Partner Page

## 2.4 View related Contact Management and Customer Project

Each Partner Profile is always linked to one or multiple contacts or customer projects. To view all the related information, users can just click "Related Contacts" and "Related Projects" Tabs which are next to the "Comments" Tab.

Click directly on the **Contact Name** and **Project Name** to display the full description of a particular Contact and Project information in a new window.

To add new contact or project, click on **Add New Contact** or **Add New Projects**. To add from an existing Contact, click on **Add From Existing**. Users can use choose the contacts from the pop up list.

The screenshot displays a 'Partner Profile' page. On the left is a 'Details' panel for 'PP000111 - China Gas Company'. On the right is a 'Related Contacts' tab showing a table of contacts. Two buttons, 'Add New Contact' and 'Add From Existing', are circled in red.

Contact Name	Company Name	Primary Ph	Ctry	Our Rep
<input type="checkbox"/> Alice Miller	SunGard Data Systems	MOB	PH	Paul Chen
<input type="checkbox"/> Denny Pong	Delta Air Lines	HOM	BR	Alan Shen
<input type="checkbox"/> Eva Tse	P & G	MOB	HK	Harry Thompson

Figure 4 : Viewing related Contacts and Projects (Add Contact Buttons Circled)