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PARTNER DEAL PORTAL HOW TO USE GUIDE

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HOW TO USE GUIDE

TYPES OF USERS

There are two kinds of users of the Partner Deals Portal:

1. Company Users
2. Partner Users

The Company is the only user who needs an active HubSpot account. Partners do not need HubSpot accounts. Partner users can add their deals through the Partner Deal Portal to the Company's HubSpot account without Sales Hub seats or logins.

SETTING UP

As a Company, install the Partner Deals Portal App directly into your HubSpot account at any Sales Hub level. Any user of your HubSpot portal with app permissions will have the ability to access the Partner Deal Portal.



FOR COMPANY ADMINISTRATORS

Once the app is installed, the assigned Company Administrator will see their portal with the following options:

- Deals
- Properties
- Partners
- Users
- Documents

DEALS

In the Deals section, Company Administrators will be able to see all deals that have been registered by Partners in the HubSpot Deals. The dashboard loads directly from HubSpot and has the same navigation and functionality.

PROPERTIES

In the Properties section Company Administrators can select which deal properties will populate in the Deal entry form for Partners. Search the list of properties and click on each property to add to the form. Click the checkbox next to the property to make it a required field. Click the “x” to remove a property, and hit “Submit” to save your changes.

PARTNERS

This feature is for Enterprise/Custom Object users only and is for displaying your Partner custom object records from within HubSpot. The dashboard loads directly from HubSpot and has the same navigation and functionality.



FOR COMPANY ADMINISTRATORS

USERS

In the Users section Company Administrators will be able to manage existing Partners. Search through Partners with the search bar option or the numbered pages at the bottom of the page. Click “Delete” to remove the partner from the portal. Click “+Add” to add a new contact or “Edit” to pull up the partner options. Within the partner options you will be able to add or edit:

- The Partner Name property, to have multiple users for the same Partner use the same name here
- First name and last name are included in order to create and associate a new contact for this Partner/User if one does not already exist. Contacts in HubSpot are defined by email address, so if there is already a contact a new one will not be added but instead the existing contact will be used for associations
- The Pipeline where you want the Partner’s deals to be registered
- Custom Objects associated with the Partner
- Whether or not the Partner is marked as “Active”

Click “Submit” to save changes made to Partner Users.

DOCUMENTS

In the Documents section the Company Administrators can add Documents either from their HubSpot files or from an external link. Use the search bar or the numbered pages to look through documents. Click “Delete” to delete a document from the portal and “Edit” to edit the name or file link of a document. To add a new document, click the “+Add” button and add the Name and URL Link, or search through your Company HubSpot documents. Click “Submit” to add the document to the portal. These links will be available to all of your Partners from within the portal.



FOR PARTNER USERS

When your Company Administrator has created your account you will be sent a login. Once inside the portal you will notice a sidebar and homepage with the following options:

- Deals
- Contact
- Documents
- Log Out

DEALS

To register new deals, click the “Deals” box on the homescreen or from the left sidebar menu. You will be taken to the Deals page, which will show a dashboard of any previous deals you have entered. To search through past deals, use the Search bar at the top of the dashboard or the numbered pages at the bottom. To create a new deal, click the “+Add” button at the top of the dashboard.

Fill out the deal registration form and make sure to include the fields the Company Administrators have marked as required. Once you have filled the form, click “Submit”. The deal will register with the Company’s HubSpot account and will show up on your deals dashboard.

CONTACT

If you run into troubleshooting issues or have general questions for your Company Administrators, click the “Contact” button on the home page or from the left sidebar menu. On the Contact page you will find a form to fill that will send a message to the Company Administrator. Complete the form and click “Submit” to send your message.



FOR PARTNER USERS

DOCUMENTS

To access documents that have been shared in your portal by the Company Administrators, click “Documents” on the home page or from the left sidebar menu. Once on the Documents page you will find all documents that have been shared from the Company Administrator. To search through documents, use the Search bar at the top of the page or the numbered pages at the bottom.

LOG OUT

To log out of your account, click “Log Out” on the homepage or click the “Log Out” button under your name at the top right hand corner of the screen.

