GreenLink
PARTNER PORTAL

RELEASE NOTES DEC 2021

The new update includes multiple enhancements and bug fixes in order to enhance the current features of the portal, as well as to add more functionality.

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Enhancements

- Users with "Manager" access are now able to deactivate other users and transfer their Prospects and Opportunities from Settings.

- For deactivating, you can go into "Manage Users", click the action button next to the user and then hit "Deactivate".
- Please note that an user cannot have any associated prospects or opportunities at the moment of deactivation, so if that's the case, a popup will ask to transfer them first and it would redirect to the "Transfer Prospects" section.

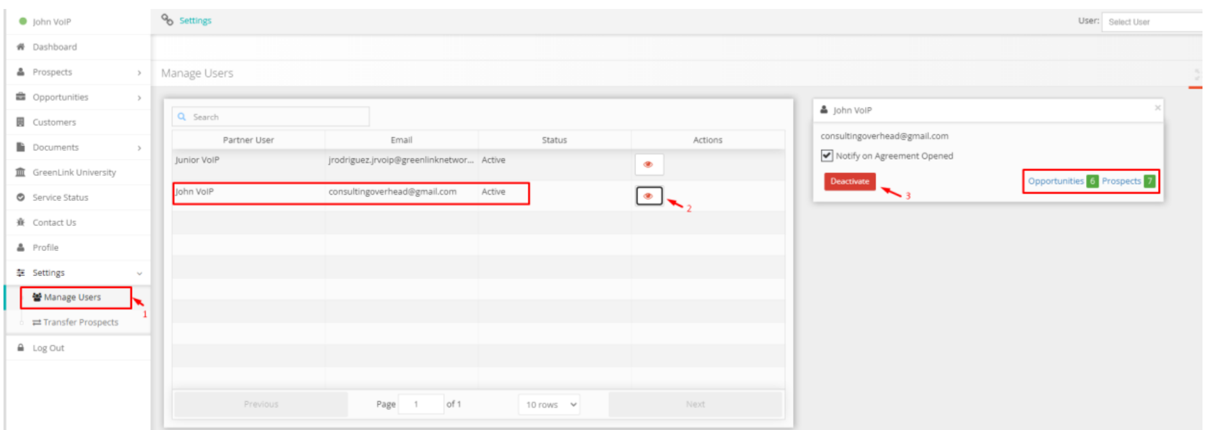

Image 1: Deactivating an user from Settings

- In the above example, "John VoIP" had 7 Prospects and 6 Opportunities so when clicking on deactivate for him the system will ask if you want to transfer those to another user. If "Yes" is selected, then it will redirect to the "Transfer Prospects" section, as image 2 shows.

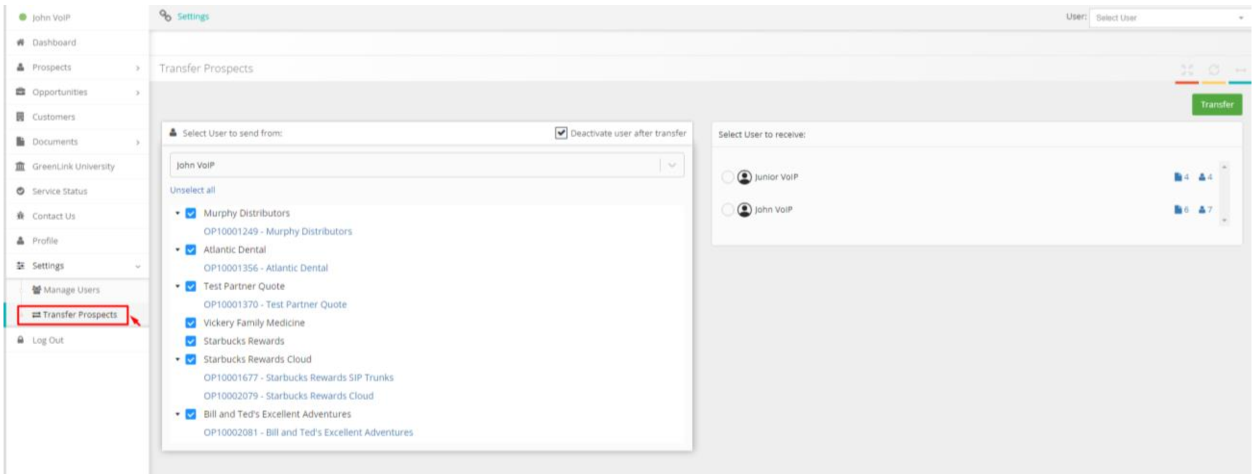

Image 2: Transferring Prospects and Opportunities

- The box on the left will show all prospects and opportunities. In this case, they will be already pre-selected and the "Deactivate user after transfer" option checked.
- The Partner would only need to select to whom they will be transferred to from the right box and then click "Transfer".
- Please note that this scenario is based on the original action that was to deactivate an user, but Partners are able to just transfer prospects/opportunities by coming directly into this section, without the need to deactivate the user at the end of the process.

- Partner Users are not able to copy themselves for the Prospect's Contact Information.

- A validation was added that would not allow a partner user to copy his/her own email address for contact types: POC, BPOC and Other; on the Prospect Contact Information box.
- There were cases in the past where Partners needed to copy themselves in order to forward the agreement to the prospect, but a new button has been added on the opportunity screen, which will provide this same functionality (explained in more detail below).

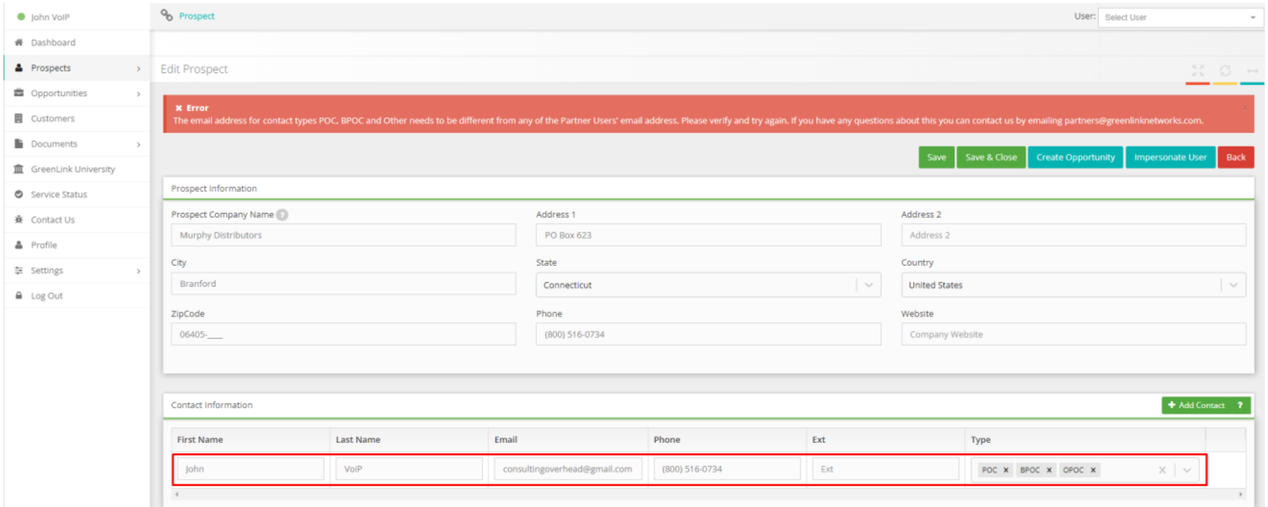

Image 3: Partner Users not able to copy themselves as Prospect Contacts.

- New option: Send Agreement to Partner

- Especially useful for the cases when the Partner needs to forward the opportunity to the prospect for any given reason.
- The option will become available when the Agreement Stage changes to “Sent”.
- This means that the default option will keep being “Send Agreement to Prospect”, but if the prospect reports any issues while getting the email, then Partners are able to send to themselves in order to fwd. to the prospect.

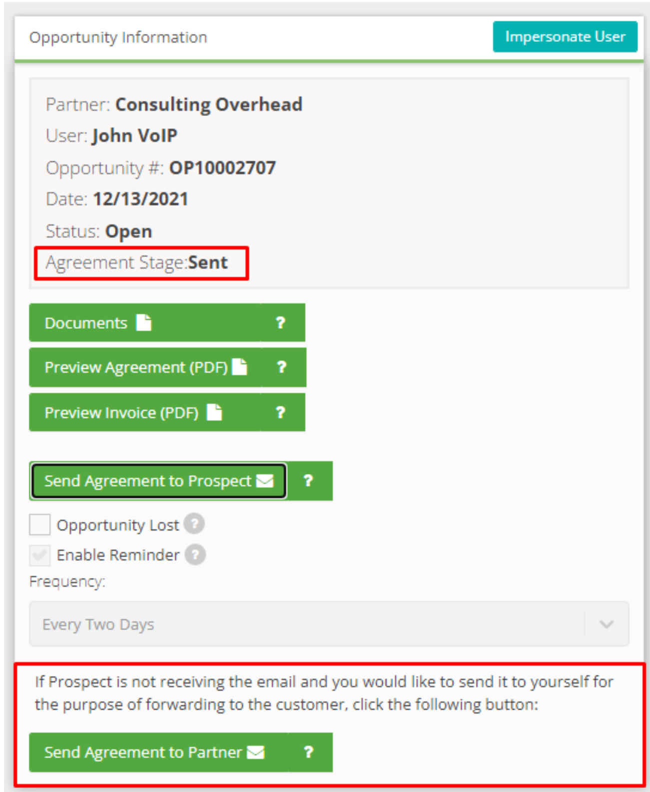

Image 4: Ability for Partners to send Agreement to themselves

- "Sample Agreement" and "Sample Invoice" are now "Preview Agreement" and "Preview Invoice".

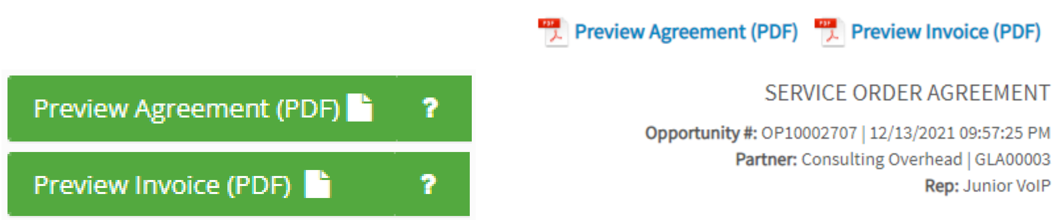

Image 5: Preview Agreement and Preview Invoice

- Checkbox for Prospects to indicate they have read the Terms and Conditions and the Privacy Policy.

- A checkbox was added on the agreement for prospects to specify that they have read the Terms and Conditions and the Privacy Policy.
- The “Approve” button will show grayed out until the checkbox is checked.

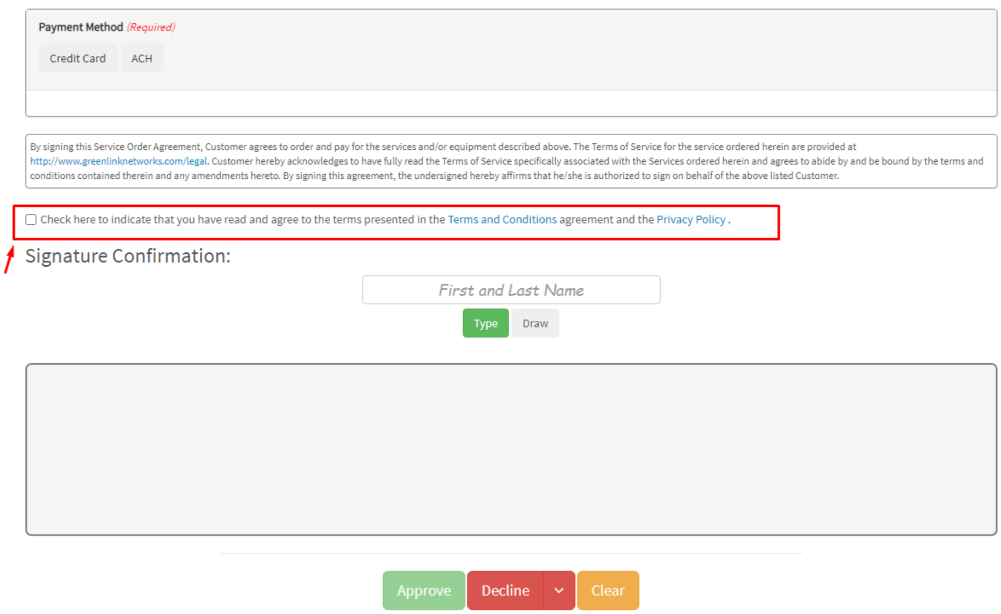

Image 6: New checkbox on the agreement

Let us know what you think

Please give us feedback on this update, so we can continue providing updates that are useful and helpful. Thanks!