Deal Registration
Agenda

- Deal Registration Lifecycle
- Deal Registration Overview
- Deal Registration Origination
- How to Submit a Deal Registration
- Review Process
- Working an Opportunity
- Close Opportunity
Deal Registration Lifecycle

Submit Deal Registration
- Partner fills out Deal Registration form on the Leads tab or registers an existing Lead.

RSA Reviews Deal Registration
- RSA approves or rejects Deal Registration.
- If rejected, Partner can work Lead or update and resubmit Deal Registration.

Partner Works Opportunity
- Partner works Opportunity.
- Partner requests Opportunity closure.
- Channel Manager closes Opportunity and documents win/loss details.
Deal Registration Overview

Deal Registrations originate as Leads
- Deal Registrations are a type of Lead in the PRM Connect Tool
- Approved Deal Registrations are converted to Opportunities upon approval. Channel Managers will own Partner Opportunities
- If the Deal Registration is not approved, Partners can continue working it as a Lead or update and resubmit for approval

Improvements to Deal Registration
- Ability to register existing Leads
- Quickly clone a Deal Registration Lead
- Easy navigation to Deal Registrations
- Emails notify Partners when RSA has reviewed a Deal Registration
- Streamlined Deal Registration Form with improved validation
Deal Registration List Views

Deal Registration list views are available on the Leads and Opportunities tabs. They provide a quick and easy way to view Deal Registrations. Possible views are:

**Leads Tab:**
- All Deal Registrations: displays all open, pending and rejected Deal Registrations for the Partner Account (based on visibility setup)
- My Deal Registrations – Partners: displays all your open, pending and rejected Deal Registrations
- My Pending Deal Registrations: displays all pending Deal Registrations
- My Rejected Deal Registrations: displays all rejected Deal Registrations

**Opportunities Tab:**
- My Deal Registrations – Partners: displays all approved Deal Registrations
Searching for Deal Registrations

Quickly search for your Deal Registrations using the *Advanced Search* on the Sidebar

**System Actions to Search for a Deal Registration:**
1. Click on the **Advanced Search**...link on the *Search* section of the Sidebar
2. Check the checkbox next to:
   - *Leads* - to search for Deal Registrations that have not yet been approved
   - *Opportunities* - to search for approved Deal Registrations
3. Enter search criteria into the *Search* field
4. Click on the **Search** button
There are 3 ways to create a Deal Registration:

1. Create a Deal Registration Lead from the Create Deal Registration link on the Sidebar

2. Create a Deal Registration using the New button on the Leads tab

3. Register an existing Lead
1. Quickly create a Deal Registration using the link on the Sidebar

System Actions to Create a Deal Registration from the Sidebar:
1. Click on the **Home** tab
2. In the **Useful Links** section of the Sidebar, click on the **Create Deal Registration** link
2. Create a Deal Registration from the Leads tab

System Actions to Create a Deal Registration from the Leads Tab:
1. Click on the Leads tab
2. Click on the New button
3. Select Deal Registration from the Record Type of new record picklist
4. Click on the Continue button
3. Create a Deal Registration by registering an existing Lead

**Note:** RSA Generated Opportunities may not be eligible for Incremental Deal Registration benefits

**System Actions to Register an Existing Lead:**
1. Click on the **Leads** tab
2. Click on the Lead name you want to register
3. Click on the **Register Deal** button at the top of the Lead page
Submit Deal Registration

Filling out the Deal Registration Form

- Submit Deal Registration
- RSA Reviews Deal Registration
- Partner Works Opportunity

The Deal Registration form has been streamlined to capture key information.

Information captured on the Deal Registration form is carried over to the Opportunity.

Required Fields are marked with a red bar.
Products entered on the Deal Registration will be locked when the Deal Registration is approved.

The Add – On fields allow you to select relevant Add – Ons to the products you selected on the left. Use the arrows to select an Add – On.
An individual Deal Registration should be submitted for DLP, enVision and PII bundles

**Tip:** Use the *Clone* button to create Deal Registrations for multiple products.
Submit Deal Registration

*Filling out the Deal Registration Form*

**Submit Deal Registration**

**RSA Reviews Deal Registration**

**Partner Works Opportunity**

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If the Deal Registration is approved, the Projected Value and Expected Close Date values will carry over to the Opportunity.

When you are the Primary Contact, check the *Same asSubmitter* checkbox to automatically populate your user information into this section of the form. Your user information will populate when you click on the *Save* button.

If RSA has made programs available to you, the Deal Registration can be associated with a program using the magnifying glass icon. Please note that the program association cannot be changed once selected.

If you are not the Primary Contact, enter your name.
Deal Registrations must be saved before they can be submitted. Upon saving, the PRM Connect Tool will perform validations to confirm the Deal Registration meets program rules and guidelines.
Submit Deal Registration

Cloning

After saving, the *Clone* button appears. To quickly copy a Lead, use the clone feature:

- **Why:** When a new Lead is available at the same client
- **When:** When two Deal Registrations are needed to include separate products

**Tip:** Use the Clone button to create Deal Registrations for multiple products

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**System Actions to Clone a Deal Registration:**

1. Create and save a Deal Registration
2. Click on the **Clone** button to copy the entered fields
3. Click on the **Edit** button to edit the products on each Deal Registration
4. Click on the **Save** button
After saving, you can add a Distributor to your Deal Registration

- **Why:** To automatically notify the Distributor if your deal is approved
- **When:** Before you submit the Deal registration. You cannot add a Distributor to the Deal Registration after it is submitted.

Upon clicking the **Add Distributor** button, Distributors will display based on the coverage country of the Distributor.

In North America, if a Partner has nominated a Distributor and the Deal Registration contains DLP or enVision products, only the Nominated Distributor will be available to select.
When the Deal Registration form is ready for RSA review, click on the **Submit for Approval** button.
After submitting a Deal Registration, view the status of the submitted Deal Registration in the Approval History related list at the bottom of the Deal Registration.

Possible status values:

- Pending – RSA is reviewing Deal Registration submission
- Approved – RSA approved the Deal Registration. Deal Registration will be converted to an Opportunity
- Rejected – RSA rejected Deal Registration. Deal Registration can be worked as Lead or Partner can edit the original submission and resubmit (based on rejection reason)
When a Deal Registration is approved, the Lead is converted to an Opportunity.

Deal Registration Opportunities can be viewed using the My Deal Registrations – Partners list view on the Opportunities tab. A link to the Opportunity will display.

On the Opportunity, Partners can view the Deal Reg Type and Deal Registration Code.

**Note:** It is possible to search by Deal Registration Code in the PRM Connect Tool.
When a Deal Registration is rejected, the rejection reason is captured on the Deal Registration. Possible rejections reasons are:

- Already on the RSA Forecast
- Already registered by another partner
- Already registered by the same partner
- Criteria Not Met
- Ineligible Product
- Insufficient License Quantity
- Partner Not Authorized
- Public Sector Rejection
- Reject – Other

Refer to the *Deal Reg Rejection Comments* field for additional context about the rejection.
System Actions to View Rejection Reason:

1. Click on the Leads tab
2. From the View drop-down, select the My Deal Registrations view
3. Click on the Deal Registration you want to view the status for
4. Scroll down to the Deal Status section on the record page
When a Deal Registration is rejected, Partners can:

- Continue to work the deal as a Lead in the PRM Connect Tool
- Edit and re-submit the original submission for approval

Deal Rejections with one of the below rejection reasons can be edited and resubmitted:

- Criteria Not Met
- Ineligible Product
- Partner Not Authorized
- Public Sector Rejection
- Insufficient License Quantity
- Reject – Other
System Actions to Resubmit a Rejected Deal Registration:

1. Click on the Leads tab
2. From the View drop-down, select the My Deal Registrations view
3. Click on the Deal Registration you want to view the status for
4. Click on the Edit button at the top of the page
5. Make necessary edits. Click on the Save button
6. Click on the Submit for Approval button
When an Opportunity is within 45 days of expiration, a **Request Deal Extension** link will appear on the Opportunity.

Partners will also receive an email notifying them of the upcoming expiration.

If approved, the expiration date on the Opportunity will automatically update.

![Diagram showing the process of RSA Reviews Deal Registration and Requesting an Extension.](image-url)
Upon clicking the **Request Deal Extension** link, the Partner enters a request justification (required field).

When the Partner saves the information entered, the form automatically populates the remaining information from the Opportunity.
When the expiration date has passed, the Opportunity will be marked as expired

The Partner will receive an email notifying them of the expiration
When a Deal Registration has passed its expiration date, a **Request Deal Re-Registration** link appears on the Opportunity

- The original submitter can click on the **Re-Registration** link to create a new registration for the expired deal
- Clicking the link will take the user back to the Deal Registration page with basic information from the original Deal Registration pre-populated
When the Deal Registration is converted to an Opportunity, a select set of fields are editable:

- Opportunity Name
- Partner Projected Amount
- Expected Close Date
Click on the **Closed – Won** button to request that the Opportunity be marked as Closed – Won. The Channel Manager will be notified when the **Closed – Won** button is selected.

The Channel Manager will close the Opportunity on behalf of the Partner.
If an Opportunity should be set to Closed – Lost, Partners should talk with their Channel Manager and communicate the status or create a Task on the Opportunity and assign it to the Channel Manager.

The Channel Manager will close the Opportunity on behalf of the Partner.
Support Resources

 RSA Training Materials

- All training materials will be posted to RSA Partner Central at:  
  [http://powerlink.emc.com/km/appmanager/km/secureDesktop?internalId=0b0140668049097f](http://powerlink.emc.com/km/appmanager/km/secureDesktop?internalId=0b0140668049097f)
  - Click on link to your region
  - Click on **PRM Connect Training** in the Channel Operations section

 Cases

- Submit a Case in **PRM Connect**
  1. Log into the PRM Connect Tool
  2. Click on the **Cases** tab
  3. Click on the **New Case** button