**SOP - Referring a Lead to OT**

The lead referral process has been updated as of February 2021:

1. Open the OpenText Partner Referral Form (<https://www.opentext.com/products-and-solutions/partners-and-alliances/partner-referral>)
	1. Fill out the Partner Information section:
		1. Company Name: Advantage Technologies
		2. Contac Name: Jonathan Andrews
		3. Contact Email: referrals@atechnologies.com
		4. Contact Phone: 866-730-1700
		5. Partner City: New York
		6. Partner Country: United States



* 1. Fill out Prospect Information
	2. Fill out Opportunity Information
		1. Product Focus: BN – F&DD – RightFax
		2. Deal Size: Undisclosed
		3. Close Date: 3 months from current date (End of Month)
		4. Solution Pillar: Business Network
		5. Opportunity Summary: Relevant Lead Information

 

* 1. Before submitting page, take screen shots of each section, including:
		1. Partner Information
		2. Prospect Information
		3. Opportunity Information
		4. Terms & Conditions
			1. With Acknowledgement & Terms / Conditions checked
	2. After submitting page, take a screenshot of the confirmation page.
	3. Save these screenshots in a new folder under ATI Sales > General > Sales Processes > Cloud Deal Tracking > New Folder
		1. The New Folder Naming Structure should be:
			1. YYYYMMDD\_ACCOUNTREP\_REQUESTTYPE\_COMPANYNAME
				1. E.g.: 20210304\_House\_F2M\_Advantage
				2. E.g.: 20210304\_SK\_RFC\_Terra\_Universal
				3. E.g.: 20210304\_House\_International\_HausBaus
1. Next, you will need to send an email. Please follow the following instructions:
	* 1. Subject Line: REFERRAL: [Referral Type] – [Organization Name]
			1. E.g. REFERRAL: F2M – Smithtown Hospital
			2. E.g. REFERRAL: RFC – Jane Doe Insurance
		2. TO: bryttanj@opentext.com
		3. CC: referrals@atechnologies.com, dciccone@opentext.com, and fcalabre@opentext.com
		4. Email Body:

Hello,

We just registered the following lead through the Partner Referral form on the OpenText website:

**Prospect Information**

Company Name

Contact Name

Contact Email

Contact Phone

Regards,

[Signature]

* + 1. ATTACHMENTS: All Screenshots from OT Partner Referral
1. Send Email
2. Next, head to ATI Sales > General > Sales Processes > OT Cloud Deal Referrals
3. Create a new record for the new lead:



1. When OT returns with the Assigned Rep information, update the record to include the Assigned Sales Rep.
	1. If more than 48 hours have passed without receiving rep information, send an email to Bryttani (bryttanj@opentext.com) to confirm rep assignment.