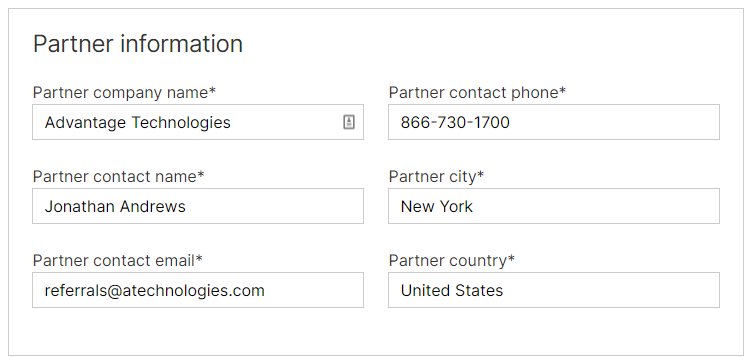
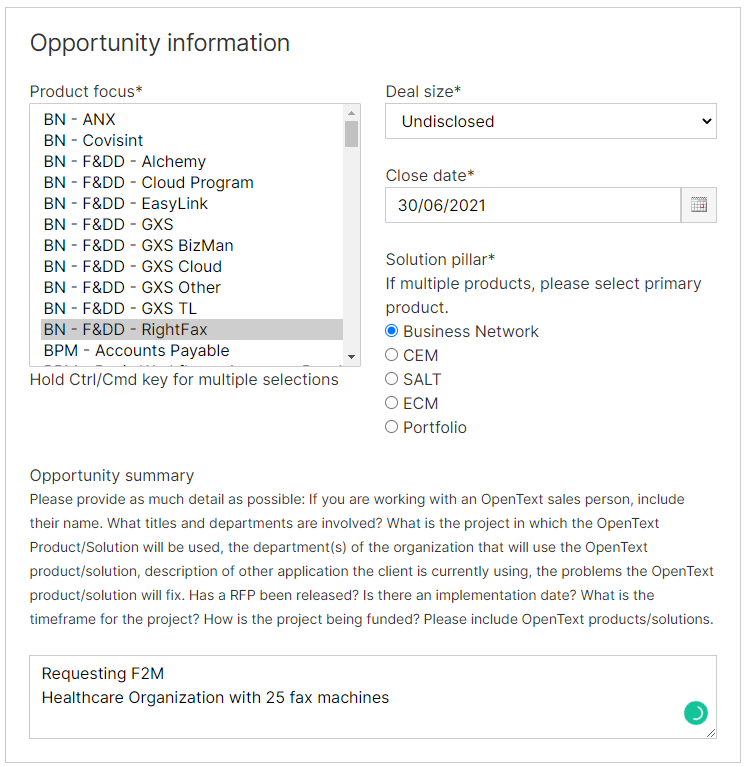
**SOP - Referring a Lead to OT**

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](mailto: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\_International\_Advantage
           2. E.g.: 20210304\_SK\_International\_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: RightFax International – Company Name
     2. TO: [bryttanj@opentext.com](mailto:bryttanj@opentext.com)
     3. CC: [referrals@atechnologies.com](mailto:referrals@atechnologies.com), [dciccone@opentext.com](mailto:dciccone@opentext.com), and [fcalabre@opentext.com](mailto: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.