**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\_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
		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.