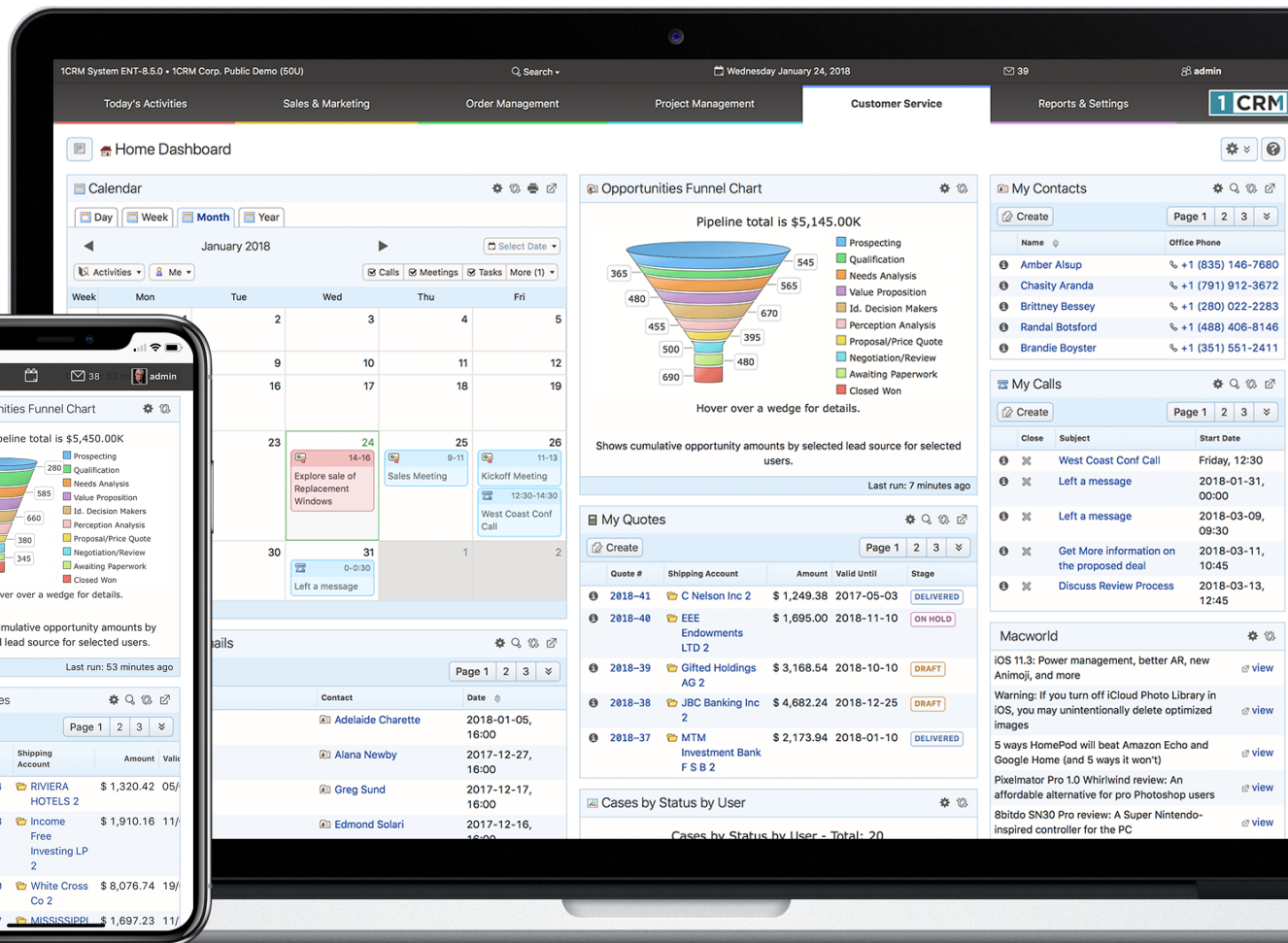


1CRM PARTNER GUIDE

A Complete Guide to Creating and Managing 1CRM Subscription Sales



1CRM System ENT-8.5.0 • 1CRM Corp. Public Demo (60U)

Search

Wednesday January 24, 2018

39

admin

Today's Activities

Sales & Marketing

Order Management

Project Management

Customer Service

Reports & Settings



Home Dashboard

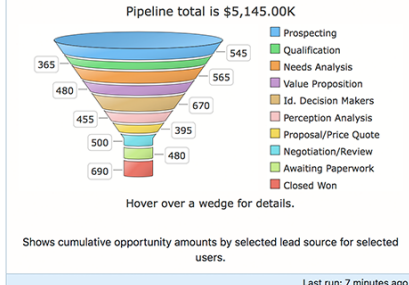
Calendar

January 2018

Week	Mon	Tue	Wed	Thu	Fri
		2	3	4	5
	9	10	11	12	13
	16	17	18	19	20
	23	24	25	26	27
	30	31	1	2	3

Events: Explore sale of Replacement Windows (14-16), Sales Meeting (9-11), Kickoff Meeting (11-13), West Coast Conf Call (12-30-14:30), Left a message (0-0:30).

Opportunities Funnel Chart



My Contacts

Name	Office Phone
Amber Alsop	+1 (835) 146-7680
Chasity Aranda	+1 (791) 912-3672
Brittney Bessey	+1 (280) 022-2283
Randal Botsford	+1 (488) 406-8146
Brandie Boyster	+1 (351) 551-2411

My Calls

Close	Subject	Start Date
	West Coast Conf Call	Friday, 12:30
	Left a message	2018-01-31, 00:00
	Left a message	2018-03-09, 09:30
	Get More information on the proposed deal	2018-03-11, 10:45
	Discuss Review Process	2018-03-13, 12:45

My Quotes

Quote #	Shipping Account	Amount	Valid Until	Stage
2018-41	C Nelson Inc 2	\$ 1,249.38	2017-05-03	DELIVERED
2018-40	EEE Endowments LTD 2	\$ 1,695.00	2018-11-10	ON HOLD
2018-39	Gifted Holdings AG 2	\$ 3,168.54	2018-10-10	DRAFT
2018-38	JBC Banking Inc 2	\$ 4,682.24	2018-12-25	DRAFT
2018-37	MTM Investment Bank F S B 2	\$ 2,173.94	2018-01-10	DELIVERED

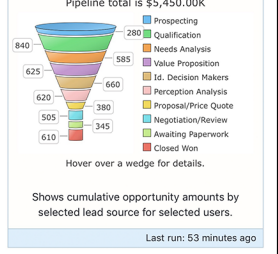
Cases by Status by User

Cases by Status by User - Total: 20

12:26

admin

Opportunities Funnel Chart



My Quotes

Quote #	Shipping Account	Amount	Valid
2017-44	RIVIERA HOTELS 2	\$ 1,320.42	05/
2017-38	Income Free Investing LP 2	\$ 1,910.16	11/
2017-40	White Cross Co 2	\$ 8,076.74	19/
2017-37	MISSISSIPPI	\$ 1,697.23	11/

Macworld

iOS 11.3: Power management, better AR, new Animoji, and more
Warning: If you turn off iCloud Photo Library in iOS, you may unintentionally delete optimized images
5 ways HomePod will beat Amazon Echo and Google Home (and 5 ways it won't)
Pixelmator Pro 1.0 Whirlwind review: An affordable alternative for pro Photoshop users
8bitdo SN30 Pro review: A Super Nintendo-inspired controller for the PC

Navigating This Guide:

This Guide has been designed to be helpful both as a printed document, and as an electronic document accessed on your computer screen. If you are accessing it via a PDF viewer such as Acrobat Reader or Mac Preview, please notice:

1. The Table of Contents entries are all live hyperlinked to the pages to which they refer.
2. At the top of each page there is a link back to the start of the Table of Contents.
3. Be sure to use the search feature of your PDF reader.

Version 1.2, March, 2018. This document is subject to change without notice.

Disclaimer

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688 Falkland Road
Victoria, British Columbia, Canada V8S 4L5

www.1crm.com

1CRM is a trademark of 1CRM Corp.

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1.0 Introduction

Thank you for being a part of the 1CRM Partner Program!

The 1CRM solution is available in four Editions:

- **Startup Edition:** Free for use On Premise. Request a license key and download link, and you can install Startup Edition on your own server at no charge. It offers all the features of 1CRM Professional Edition, but is limited to 3 Users, 300 Accounts, 750 Leads, 750 Contacts, and 750 Targets. Although it only offers Community support, and no updates, the Startup Edition is a great way for an early stage business to get itself organized and productive while operating on a shoestring budget!
Startup Edition is offered by 1CRM Corp. as an entry-level Cloud Service. Partners may also use Startup Edition free of charge to offer an entry level Cloud service.
- **Startup+ Edition:** Similar to the Startup Edition, but for somewhat larger firms, with capacity limits of 10 users, 600 Accounts, 1,500 Contacts, 1,500 Leads and 1,500 Targets. Unlike the Startup Edition, this is a commercial product, available on the 1CRM Cloud or for On Premise software installation.
- **Professional Edition:** Formerly known as **info@hand**, 1CRM Professional is our mainstream small business CRM product offering, available on the 1CRM Cloud or for On Premise software installation.
- **Enterprise Edition:** Our premium product. It offers all the features of 1CRM Professional Edition, plus a number of additional features of particular interest to larger, more sophisticated businesses. Administrators can use the Module Designer and PDF Form Designer to create more advanced customizations. Price Books let you establish pricing for multiple client levels. The iOS client (coming soon) will provide optimized system access from an iPhone. And Advanced Reporting offers more sophisticated reporting capabilities.

Unlike most CRM solutions, 1CRM offers comprehensive Order Management. It includes a Product Catalog, plus the ability to create Quotations, Sales Orders and Invoices using products from the Catalog. Incoming Payments may be received and allocated against invoices, and the system can produce PDF documents for Quotes, Sales Orders, Invoices, Receipts, and Statements. Purchase Orders may also be created, and Outgoing Payments recorded against them.

1CRM also offers extensive features for Project Management, Service Management, and general office administration (including Expense Reports, Timesheets, Vacation scheduling and tracking, and HR). Most importantly, the 1CRM system seamlessly blends all of these capabilities into an intuitive and friendly interface.

The information in this document will show you how, as one of our partners, you can use the webpage at <http://www.1crm.com/partner-program/> to order new 1CRM subscriptions for your clients, and how to manage those subscriptions over time.

1.1 Additional Documentation

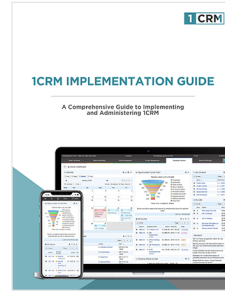
The 1CRM Customer Relationship and Business Management (CRBM) system offers extensive documentation for the installation and use of its various components. Click on any image to download that document:



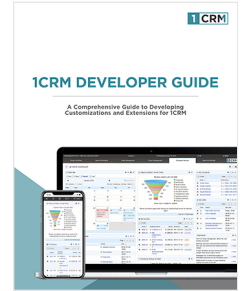
User Guide



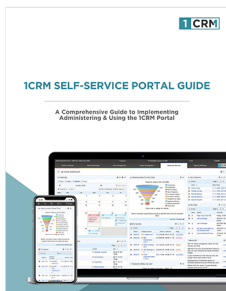
Mobile User Guide



Implementation Guide



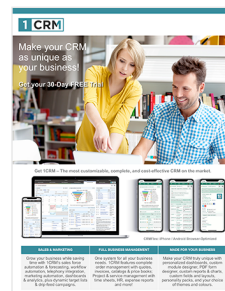
Developer Guide



Portal Guide



QuickBooks Sync



1CRM Brochure

 A table cover for "1CRM Editions & Pricing". The title is "Editions & Pricing" and the subtitle is "1 CRM". The cover features a grid of product images and a table with pricing information.

Editions & Pricing

2 Creating New Subscriptions

2.1 Login to the 1CRM Partner Portal

Whenever you need to work with 1CRM subscriptions in any way, go to this URL:

1CRM Partner Portal: <http://www.1crm.com/partner-portal/>

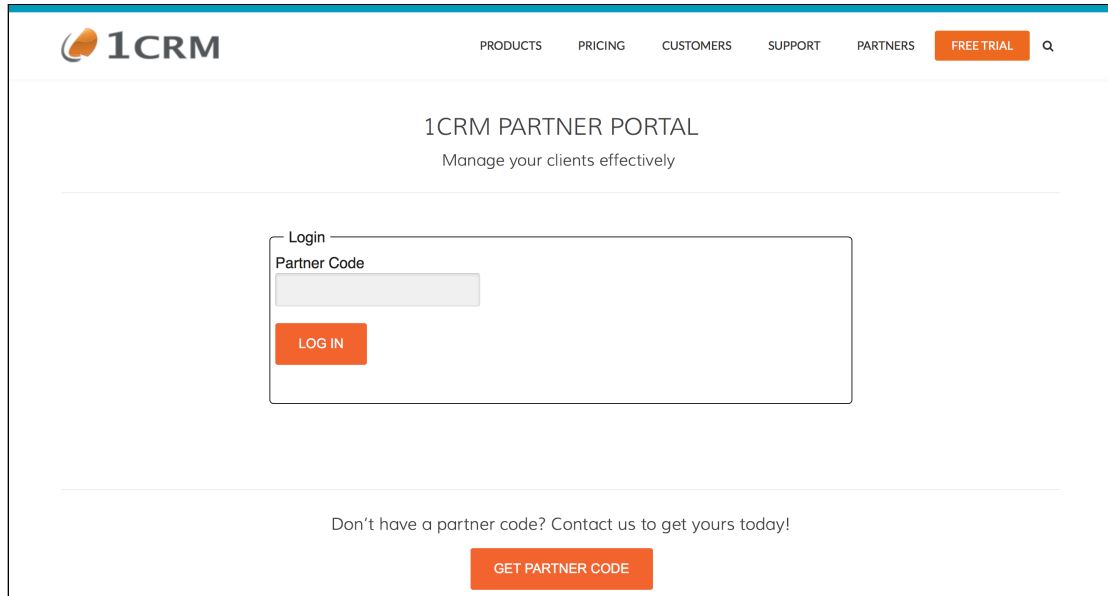


Figure 1: 1CRM Partner Portal Login - <http://www.1crm.com/partner-portal/>

Now just enter your partner code (ask us if you don't seem to have one) and you will see a screen similar to the one below:

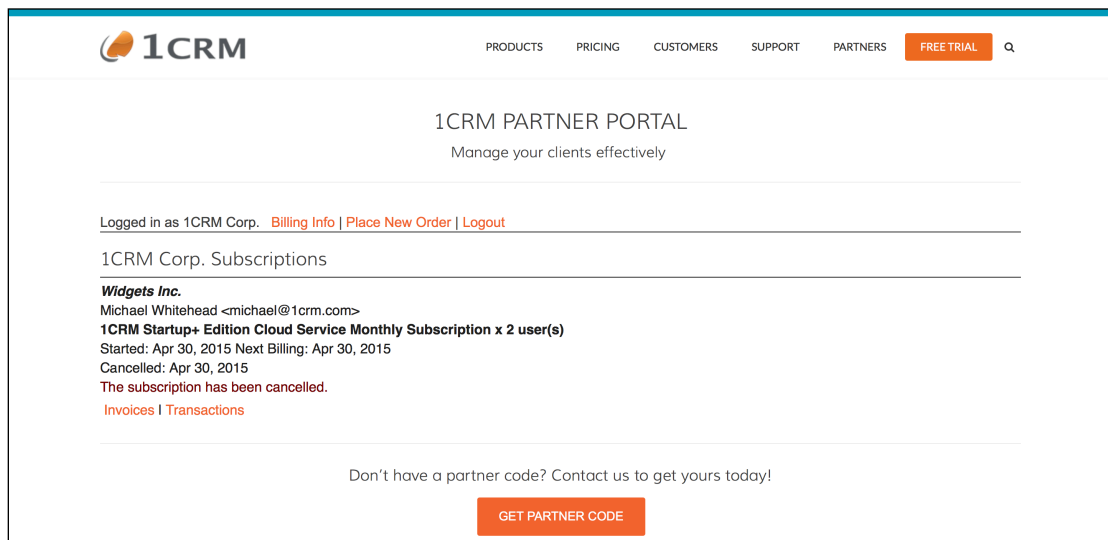
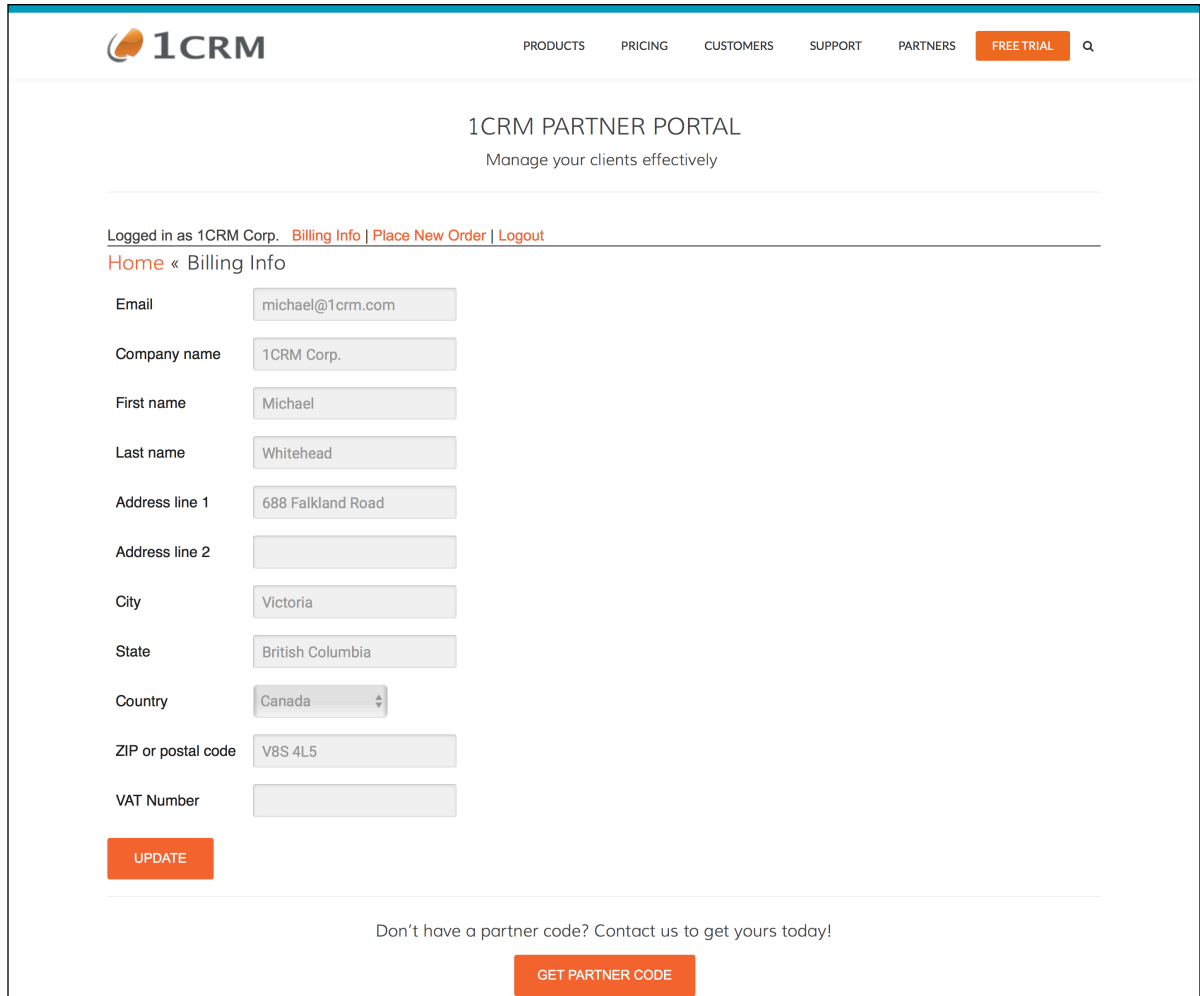


Figure 2: Partner Portal Main Screen

2.2 First - Set Your Billing Info

Click on the text link *Billing Info*, and you see the screen shown below. Then fill in the details of the business contact information you would like to be used on all Invoices created and sent to you by the 1CRM Partner Portal. Just click on *Update* to save the information.

This will be a once-only task, unless at a later date you wish to alter this billing information.



The screenshot shows the 1CRM Partner Portal interface. At the top, there is a navigation bar with links for PRODUCTS, PRICING, CUSTOMERS, SUPPORT, PARTNERS, and a FREE TRIAL button. The main heading is "1CRM PARTNER PORTAL" with the tagline "Manage your clients effectively". Below this, it indicates the user is logged in as "1CRM Corp." and provides links for "Billing Info", "Place New Order", and "Logout". The current page is "Billing Info". The form contains the following fields:

Email	<input type="text" value="michael@1crm.com"/>
Company name	<input type="text" value="1CRM Corp."/>
First name	<input type="text" value="Michael"/>
Last name	<input type="text" value="Whitehead"/>
Address line 1	<input type="text" value="688 Falkland Road"/>
Address line 2	<input type="text"/>
City	<input type="text" value="Victoria"/>
State	<input type="text" value="British Columbia"/>
Country	<input type="text" value="Canada"/>
ZIP or postal code	<input type="text" value="V8S 4L5"/>
VAT Number	<input type="text"/>

Below the form is an orange "UPDATE" button. At the bottom of the page, there is a message: "Don't have a partner code? Contact us to get yours today!" with a "GET PARTNER CODE" button.

Figure 3: Entering Your Billing Contact Information

Note: The VAT Number field may be used to enter your own company's tax information number (VAT# in Europe) if you would like it shown on the Invoice PDF's generated by ChargeBee.

2.3 1CRM Partner Portal Order Screen

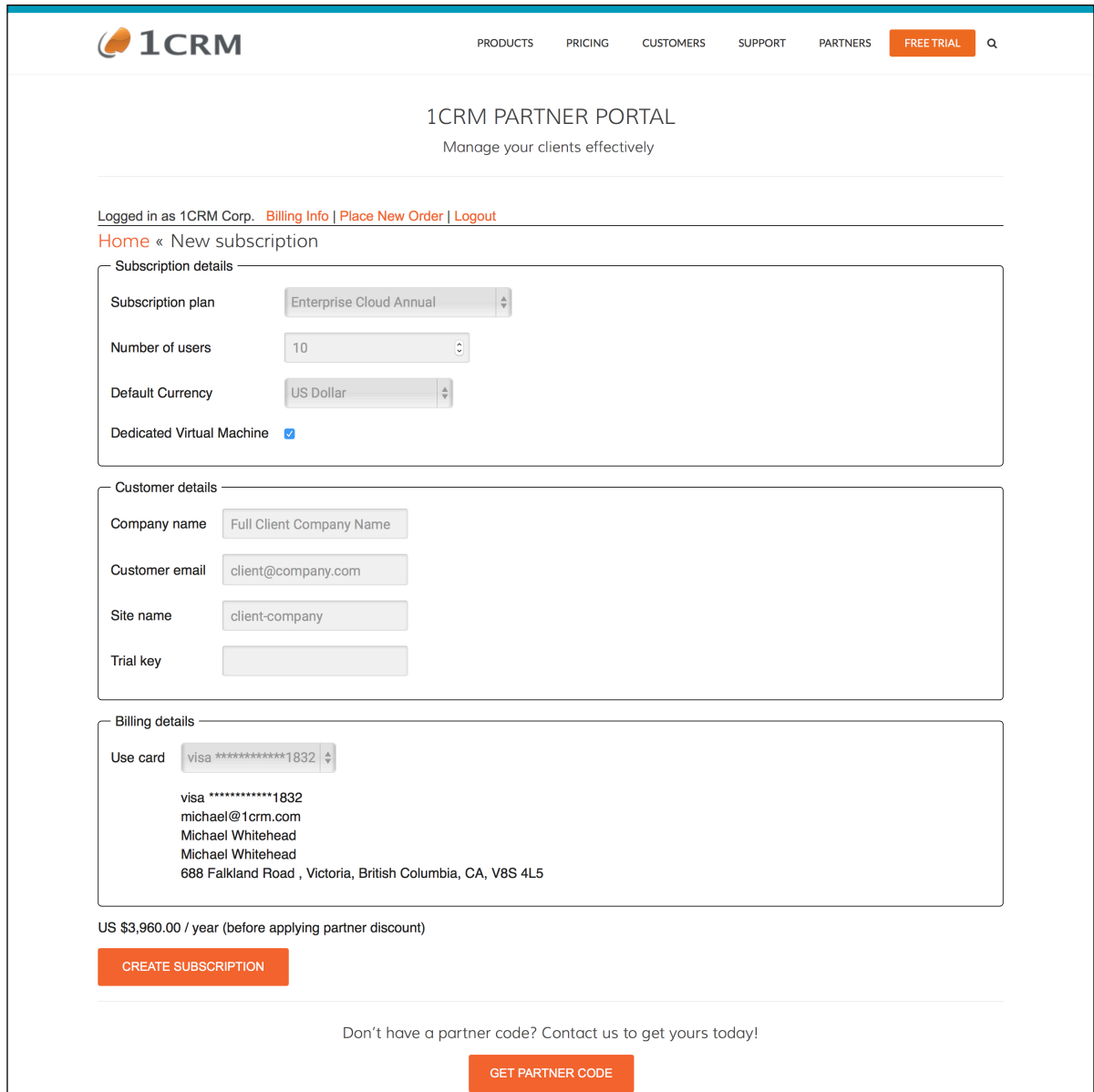
Next, click on the text link *Place New Order*, and you see the screen shown below. Then select the *1CRM Subscription Plan* desired and the *Number of Users*. The Subscription plan options are:

Startup: *Cloud Monthly / Cloud Annual*

Startup+: *Cloud Monthly / Cloud Annual / On Premise Monthly / On Premise Annual*

Professional: *Cloud Monthly / Cloud Annual / On Premise Monthly / On Premise Annual*

Enterprise: *Cloud Monthly / Cloud Annual / On Premise Monthly / On Premise Annual*



1CRM PARTNER PORTAL
Manage your clients effectively

Logged in as 1CRM Corp. [Billing Info](#) | [Place New Order](#) | [Logout](#)

[Home](#) « New subscription

Subscription details

Subscription plan: Enterprise Cloud Annual

Number of users: 10

Default Currency: US Dollar

Dedicated Virtual Machine:

Customer details

Company name: Full Client Company Name

Customer email: client@company.com

Site name: client-company

Trial key:

Billing details

Use card: visa *****1832

visa *****1832
michael@1crm.com
Michael Whitehead
Michael Whitehead
688 Falkland Road , Victoria, British Columbia, CA, V8S 4L5

US \$3,960.00 / year (before applying partner discount)

[CREATE SUBSCRIPTION](#)

Don't have a partner code? [Contact us to get yours today!](#)

[GET PARTNER CODE](#)

Figure 4: Completing New Subscription Info

If you have selected a Cloud subscription, you will see a dropdown selector for *Default Currency*, and a checkbox for *Dedicated Virtual Machine*. For On Premise subscriptions

these do not apply, and are not displayed. The *Default Currency* is the currency to be used as the base currency for the client's 1CRM Cloud instance. Select *Dedicated Virtual Machine* if you or the client will want ssh / ftp access to the system for customization or integration purposes. (You'll need to ask us for the credentials for ssh or ftp access.)

The order screen will now be showing the final cost of your order at retail price, as seen above.

Next, enter the Customer details beginning with *Company Name and Customer Email* address. Enter the full legal name of the business that is subscribing to 1CRM. For their email address, note that this is intended to be the email address of the actual end-user client. It will be used to send access information for the new instance, if it is a 1CRM Cloud instance. If you don't want the client to be emailed, leave this field blank. The system will then instead use the email address linked to your partner account.

If your subscription is for a 1CRM Cloud plan, then you will also need to enter the following information:

- *Site name (the URL prefix for the client's site URL - http://site-name.1crmlcloud.com)*
- *Trial key (you enter this if you wish to convert a client's trial site into a live Cloud subscription - reference the trial key shown on their Trial Welcome Email)*

If this is not your first subscription, you will be offered the ability to use the same credit card you have used before as shown above, or choose from other credit cards on file, or select *Add new card*. Otherwise the system will only show the *Add new card* option, and all the fields for billing contact information to be linked to the new card. Your billing contact details should be already filled in if you have already used the *Billing Info* option to set them.

And now you're done with this screen - just click on the *Create Subscription* button.

If you need to add information for a new Credit Card, you will now be directed to a Chargebee screen to do that. Otherwise you are done, and your order has been placed.

Note: A key aspect of the 1CRM Partner Program is that Partners manage these subscriptions themselves. Because you pay us at partner price for these subscriptions, and you invoice your client directly at retail prices for these subscriptions, you are assured of retaining your partner margin on this client for the entire lifespan of their use of 1CRM.

3 Managing Subscriptions

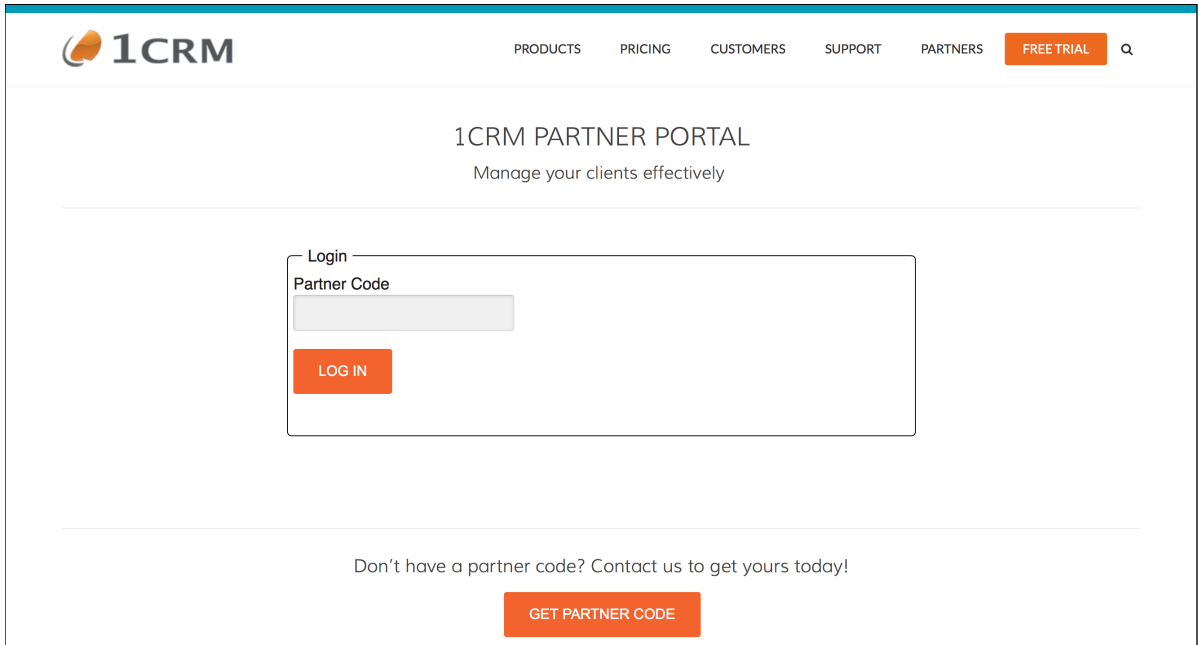


Figure 5: Login to the 1CRM Partner Portal

Here comes the fun part! Well, as fun as administration can be... Again, you will want to start by going to the 1CRM Partner Portal: <http://www.1crm.com/partner-portal/>. You will see the screen above. Login, using your partner code, and you see a list of your 1CRM subscriptions, as shown here.

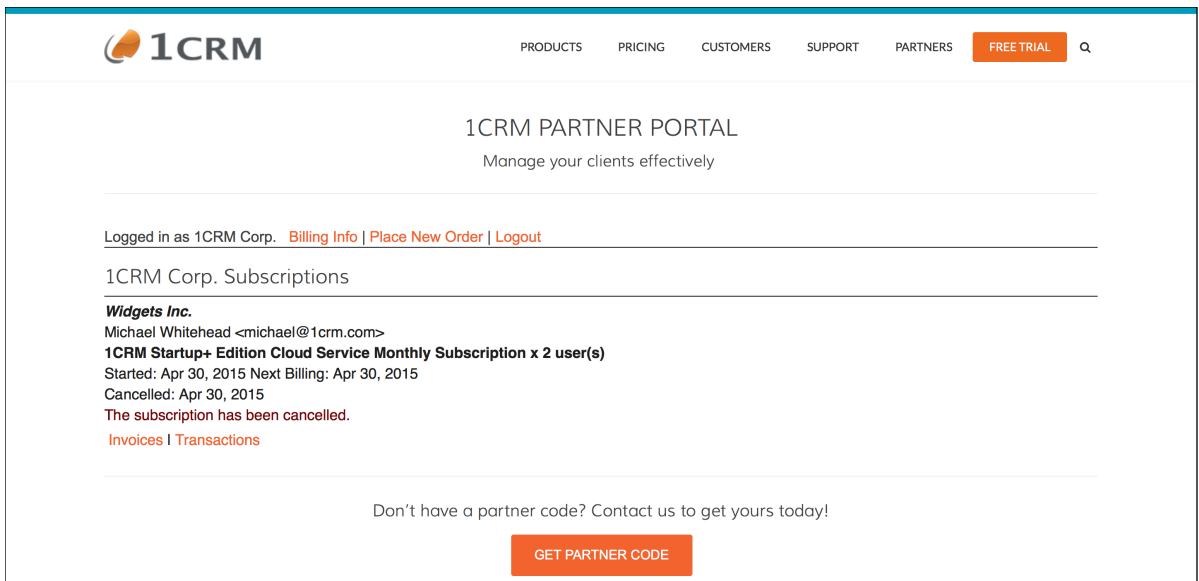


Figure 6: Listing of Partner Subscriptions

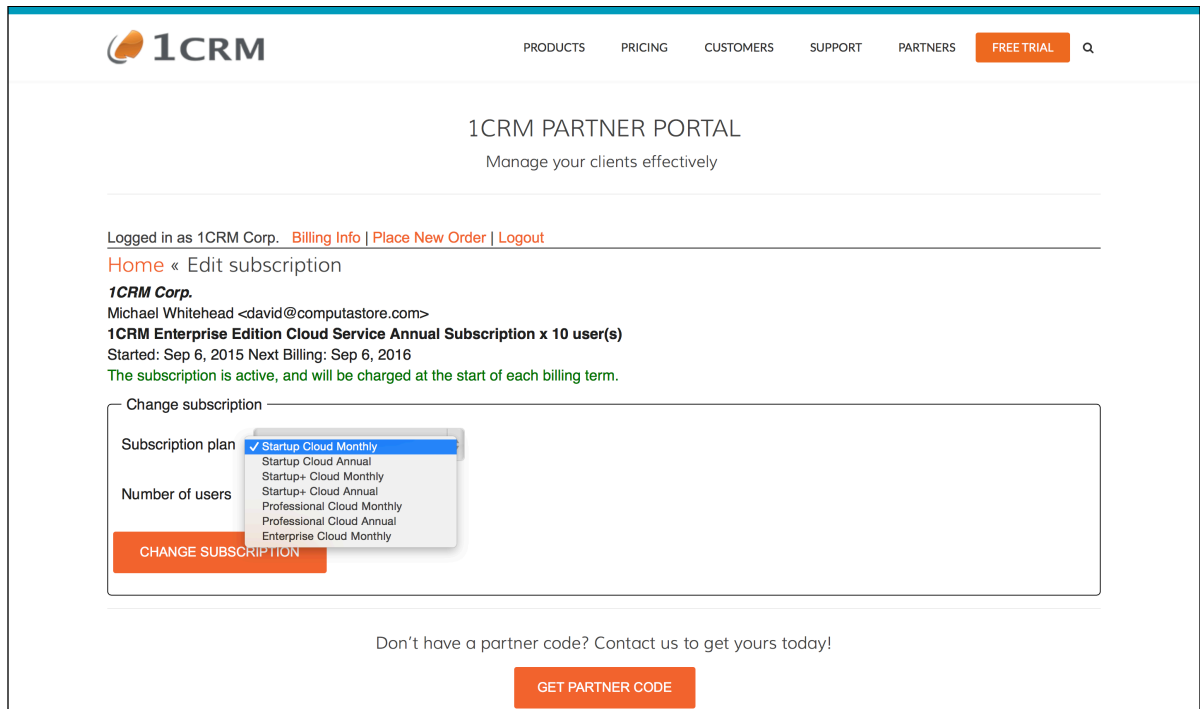
At the top of the list, you see your company name, and a link to Logout. The Logout link will take you back to the screen in Figure 5. Each subscription shown includes the company name and email for the client, details of the subscription they have, when it began, its next billing date, and its status. Then there are a series of links to perform a number of actions, as described in the following sections.

3.1 Changing Subscriptions

Clicking on *Change Subscription* leads to a screen such as shown below. You can change the existing selection to any other combination of Edition and *Subscription Period*. You can also change the *Number of users*. Then just click on the *Change Subscription* button at the bottom.

Note: If the new subscription requires additional payment for the current subscription period an invoice will be generated immediately.

Note: It is not possible to change from On Premise to 1CRM Cloud, or vice versa - if you need to do that, please contact us.



The screenshot displays the 1CRM Partner Portal interface. At the top, the 1CRM logo is on the left, and navigation links for PRODUCTS, PRICING, CUSTOMERS, SUPPORT, PARTNERS, and a FREE TRIAL button are on the right. The main heading is '1CRM PARTNER PORTAL' with the tagline 'Manage your clients effectively'. Below this, it shows the user is logged in as '1CRM Corp.' with links for 'Billing Info', 'Place New Order', and 'Logout'. The current page is 'Home' and the user is editing a subscription. The subscription details are: '1CRM Corp.', user 'Michael Whitehead <david@computastore.com>', '1CRM Enterprise Edition Cloud Service Annual Subscription x 10 user(s)', started on Sep 6, 2015, and next billing on Sep 6, 2016. A note states 'The subscription is active, and will be charged at the start of each billing term.' The 'Change subscription' form is the central focus, featuring a 'Subscription plan' dropdown menu with options: Startup Cloud Monthly (selected), Startup Cloud Annual, Startup+ Cloud Monthly, Startup+ Cloud Annual, Professional Cloud Monthly, Professional Cloud Annual, and Enterprise Cloud Monthly. There is also a field for 'Number of users' and a prominent orange 'CHANGE SUBSCRIPTION' button. At the bottom of the form area, there is a link: 'Don't have a partner code? Contact us to get yours today!' and a 'GET PARTNER CODE' button.

Figure 7: Changing a Subscription

3.2 Cancelling Subscriptions

Clicking on *Cancel Subscription* leads to a screen like the one below. You can choose to *Cancel the subscription at the end of current term* (the normal option). Or in special circumstances, you may opt to choose *Cancel subscription immediately*.

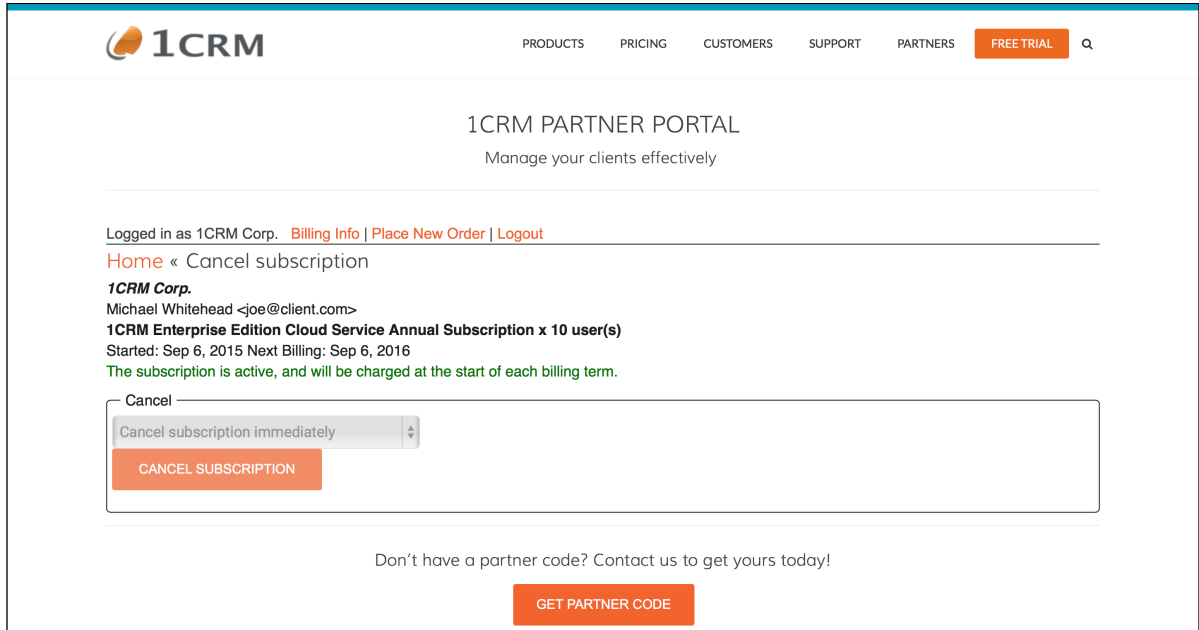


Figure 8: Canceling a Subscription

3.3 Update Your Payment Method

Clicking on *Update Card* leads to this screen, which displays some information about your existing credit card on file for this subscription, and lets you enter the details of a different card. Once the new details are in, click on *Update Payment Method* to commit the change.

Your Existing Payment Method Details

Card Number	Ends with 1832
Expiry	05 / 2018

Payment Method Information

First Name *

Last Name *

Card Number *

Expiry * /


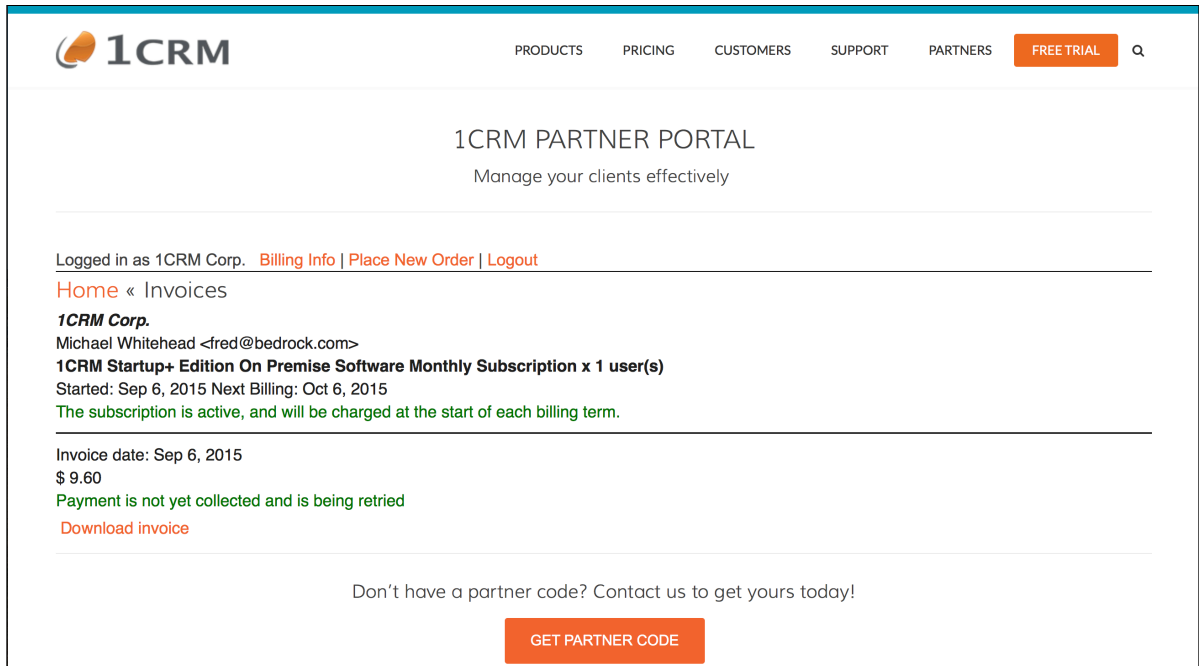
CVV *  (Last 3-4 digits)

Figure 9: Updating Your Payment Method

3.4 View Invoices

Clicking on *Invoices* leads to this screen, which displays a list of invoices for this subscription. Each invoice shows the invoice date, amount and payment status, and offers a link to download the invoice.



The screenshot shows the 1CRM Partner Portal interface. At the top, there is a navigation bar with the 1CRM logo on the left and links for PRODUCTS, PRICING, CUSTOMERS, SUPPORT, PARTNERS, and a FREE TRIAL button with a search icon. Below the navigation bar, the main heading reads "1CRM PARTNER PORTAL" with the tagline "Manage your clients effectively".

The user is logged in as "1CRM Corp." with links for "Billing Info", "Place New Order", and "Logout". The current page is "Home « Invoices".

The invoice details for "1CRM Corp." are as follows:

- Michael Whitehead <fred@bedrock.com>
- 1CRM Startup+ Edition On Premise Software Monthly Subscription x 1 user(s)**
- Started: Sep 6, 2015 Next Billing: Oct 6, 2015
- The subscription is active, and will be charged at the start of each billing term.

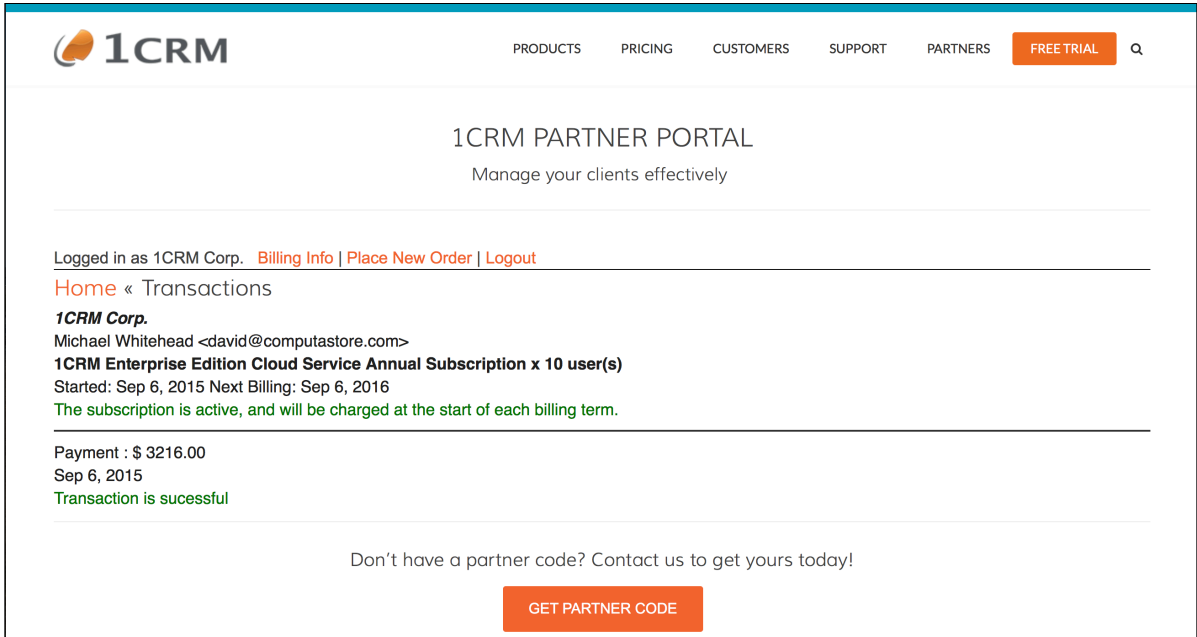
The invoice date is Sep 6, 2015, and the amount is \$ 9.60. A message states "Payment is not yet collected and is being retried". A "Download invoice" link is provided.

At the bottom, there is a prompt: "Don't have a partner code? Contact us to get yours today!" with a "GET PARTNER CODE" button.

Figure 10: Viewing Invoices for a Subscription

3.5 View Transactions

Clicking on *Transactions* leads to this screen, which displays a list of credit card transactions for this subscription. Each transaction shows its success or failure, the date and the amount.



The screenshot shows the 1CRM Partner Portal interface. At the top left is the 1CRM logo. The top navigation bar includes links for PRODUCTS, PRICING, CUSTOMERS, SUPPORT, PARTNERS, and a FREE TRIAL button with a search icon. The main heading is "1CRM PARTNER PORTAL" with the tagline "Manage your clients effectively". Below this, it shows the user is logged in as "1CRM Corp." with links for "Billing Info", "Place New Order", and "Logout". The breadcrumb trail is "Home « Transactions". The transaction details for "1CRM Corp." are as follows:

- User: Michael Whitehead <david@computastore.com>
- Subscription: 1CRM Enterprise Edition Cloud Service Annual Subscription x 10 user(s)
- Started: Sep 6, 2015 Next Billing: Sep 6, 2016
- Status: The subscription is active, and will be charged at the start of each billing term.

The transaction summary shows:

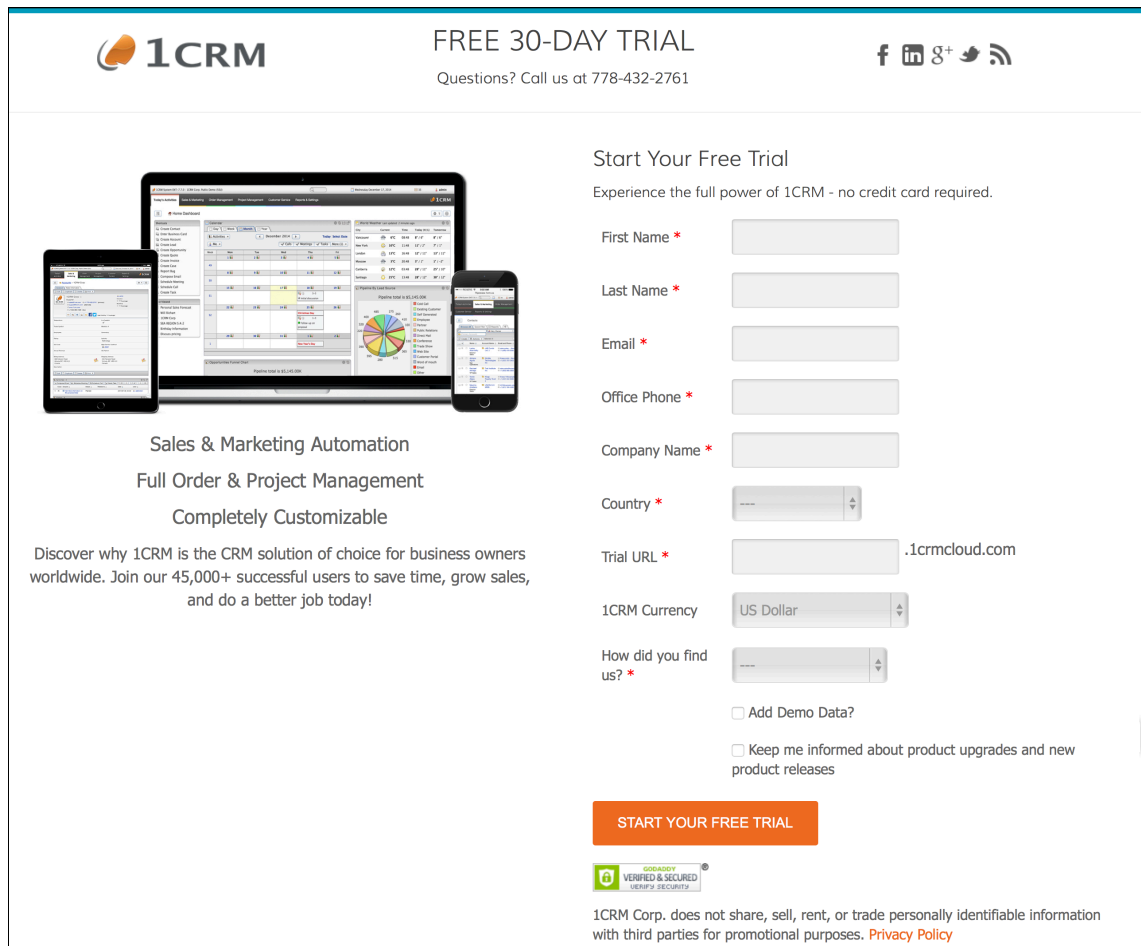
- Payment: \$ 3216.00
- Date: Sep 6, 2015
- Status: Transaction is successful

At the bottom, there is a prompt: "Don't have a partner code? Contact us to get yours today!" with a "GET PARTNER CODE" button.

Figure 11: Viewing Transactions for a Subscription

4.0 30-Day Free Trials

1CRM partners will frequently find it convenient to use the 1CRM 30-Day Free Trial service for their own clients. By using the form at <http://www.1crm.com/free-trial/> partners can make a 30-day free trial for their clients with or without demonstration data in it. And at the same time, they make a lead in the CRM at 1CRM Corp. and can register that this is their client.



1CRM FREE 30-DAY TRIAL
Questions? Call us at 778-432-2761

Start Your Free Trial
Experience the full power of 1CRM - no credit card required.

First Name *

Last Name *

Email *

Office Phone *

Company Name *

Country *

Trial URL * .1crcloud.com

1CRM Currency US Dollar

How did you find us? *

Add Demo Data?

Keep me informed about product upgrades and new product releases

START YOUR FREE TRIAL

1CRM Corp. does not share, sell, rent, or trade personally identifiable information with third parties for promotional purposes. [Privacy Policy](#)

Figure 12: Making a 30-Day Free Trial Site

A very handy feature of a 1CRM Free Trial site is that it may easily be converted into a production 1CRM Cloud instance, as we saw in Figure 4 above.

Just fill in the form above as if you were your client. When filling in the Company Name, we suggest you enter the client's company name, followed by a short reference to your own company name - for example *Reefer Madness Hydroponics by PartnerCo*.

When making the free trial, be careful to choose the correct 1CRM Currency to use as the default currency in the trial, and to select demo data only if that is what the client wants.

5.0 Lead Forms, Tracking & Affiliates

Tracking your lead sources is an important part of business. It provides insight into where you should focus your efforts, lets you track your ROI, or it can allow you to run an affiliate program. 1CRM provides a special feature for custom lead source URLs that allows you to easily see where your leads are coming from, and who to give credit for them.

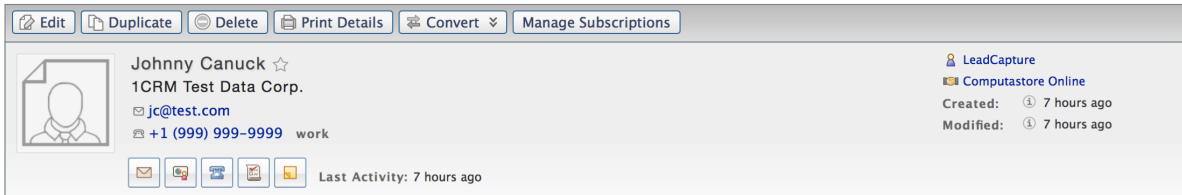
As a specific illustration of what can be done, let's show you how to create a link from your site to the 1crm.com website, which will email you back with the lead info if your visitor fills in a form on the 1crm.com site!

Potential clients of any business will typically be directed to their lead capture form pages by a link that is attached to some text, or perhaps an image, which tries to entice them to see what is available.

Let's say you are Computastore Online, an affiliate of 1CRM Corp., with partner code 17. You place an image on your web page:



You want to send visitors that click on this button to the 1crm.com web site - specifically to their signup form at 1crm.com/free-trial/. But you want to get credit for every lead you help 1CRM generate. So when you code up your web page, you put the link <http://1crm.com/free-trial/?17> on this Free Trial button image - and now when a visitor follows your link to the free trial page and submits the lead form, it generates a lead for 1CRM Corp. that looks like:



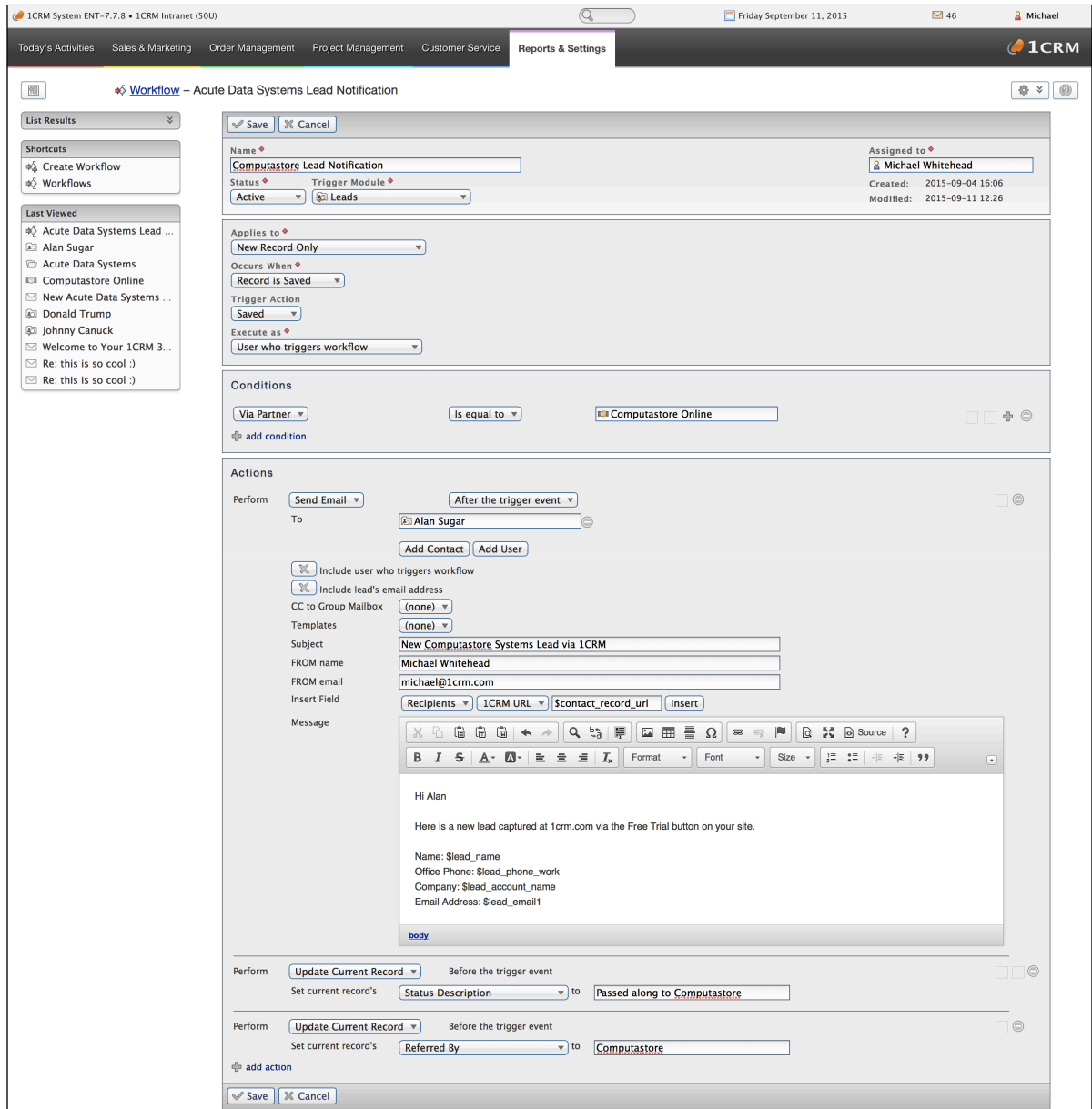
Lead record details for Johnny Canuck:

- Name: Johnny Canuck
- Company: 1CRM Test Data Corp.
- Email: jc@test.com
- Phone: +1 (999) 999-9999 (work)
- Source: LeadCapture
- Partner: Computastore Online
- Created: 7 hours ago
- Modified: 7 hours ago
- Last Activity: 7 hours ago

We see the Johnny Canuck lead has been captured, but in the top right corner we also see that Computastore Online is recognized as the related partner on this lead.

Now let's further say that every time 1CRM gets a lead generated from a visitor you sent to them via this Free Trial button on your site, you'd like to get an email yourself with that lead information for your own records. A Workflow definition (in 1CRM Corp's instance of 1CRM, where they register their leads) like this will do that:

Now we really have something! You can refer your visitors to the 1CRM website, and if the visitor submits a free trial request when they are there you will get an email with their information. Additionally 1CRM will know you sent them that lead, and that they owe you commission if that lead evolves into a 1CRM sale.



The screenshot shows the 1CRM System interface for configuring a workflow. The workflow is named "Computastore Lead Notification" and is assigned to Michael Whitehead. It is currently active and triggers when a new record is saved in the Leads module. The workflow is configured to send an email to Alan Sugar and update the current record's status to "Passed along to Computastore" and referred by "Computastore".

Workflow Configuration Details:

- Name:** Computastore Lead Notification
- Assigned to:** Michael Whitehead
- Status:** Active
- Trigger Module:** Leads
- Applies to:** New Record Only
- Occurs When:** Record is Saved
- Trigger Action:** Saved
- Execute as:** User who triggers workflow
- Conditions:** Via Partner is equal to Computastore Online
- Actions:**
 - Perform:** Send Email (After the trigger event)
 - To: Alan Sugar
 - Include user who triggers workflow:
 - Include lead's email address:
 - CC to Group Mailbox: (none)
 - Templates: (none)
 - Subject: New Computastore Systems Lead via 1CRM
 - FROM name: Michael Whitehead
 - FROM email: michael@1crm.com
 - Recipients: 1CRM URL, \$contact_record_url
 - Message body: Hi Alan. Here is a new lead captured at 1crm.com via the Free Trial button on your site. Name: \$lead_name, Office Phone: \$lead_phone_work, Company: \$lead_account_name, Email Address: \$lead_email1
 - Perform:** Update Current Record (Before the trigger event)
 - Set current record's Status Description to Passed along to Computastore
 - Perform:** Update Current Record (Before the trigger event)
 - Set current record's Referred By to Computastore

How did this work? There are two options available for you to use when linking to **lead capture forms created by the 1CRM WordPress plugin**, which you can enable by appending special options to the link to that lead form page.

Example 1. 1crm.com/leadpage.html?17

Example 2. 1crm.com/leadpage.html?_3

Example 3. 1crm.com/leadpage.html?17_3

Let's assume the dropdown list of Lead Source values in your 1CRM system look like this:

1. Cold Call
2. Existing Customer
3. Self Generated

- 4. Employee
- 5. Email
- 6. Other

Example 1 above links to your lead capture page, and sets an associated Partner code to 17 (in our case, Computastore Online) for any lead that is captured.

Example 2 will link to that page and will set the lead source value to option 3 (Self Generated).

Example 3 combines both usages, and sets Partner code to 17, and a Lead Source of Self Generated.

Using this feature you can create an affiliate program, and provide your partners with unique URLs, which include their Partner codes to use as links to your lead capture pages.

Any Leads, Opportunities, Accounts, and Invoices that result will be automatically linked to that Partner, who will presumably be credited with an affiliate commission. Similarly, that partner can set a Lead Source value with their URL as well.

If you don't already have one, now you can start your affiliate program today! Enjoy.

6.0 Partner Web FAQs

Q: Is there a logo I can add to my website to show us as an 'Official 1CRM Partner'?

A: Yes there is - please just ask us for it.

Q: Can I use art from the 1crm.com website on our own site?

A: Yes - as long as you remain a partner of 1CRM in good standing. The copyright of such art of course remains always with 1CRM Corp.

Q: Do I need to have one or more links back to 1crm.com on our own website?

A: Yes you do - it is important for raising the profile of 1CRM as a whole for web searches worldwide.

Q: What about listing us as a partner in the Partner Directory on 1crm.com?

A: We are happy to list any partner there that would like to be listed, but it is not mandatory. Some partners have issues with other vendors to consider.

Q: Can I put a web form on my own site for Free Startup Downloads?

A: Yes - and its a great lead generator! Ask us how to do it, as there is a specific technique you need to follow.

7.0 Sales Collateral

While you remain a partner of 1CRM Corp. with an active partner agreement, you can use art and text from the 1crm.com website for promotional purposes for the 1CRM product on your own website.

As well, the following document files may be helpful for making your own custom collateral for customer hand-outs, web downloads, and for various tradeshow:

1CRM Logo

- [Adobe Illustrator File](#)
- [Large PNG File](#)

1CRM Core Product Brochure (Letter size, double sided)

- [Mac Pages 5.5 File \(Zipped\)](#)
- [Print Resolution PDF File](#)

1CRM Editions & Pricing Handout (Letter size, double sided)

- [Mac Pages 5.5 File \(Zipped\)](#)
- [Print Resolution PDF File](#)

1CRM QuickStart Services Brochure (Letter size, double sided)

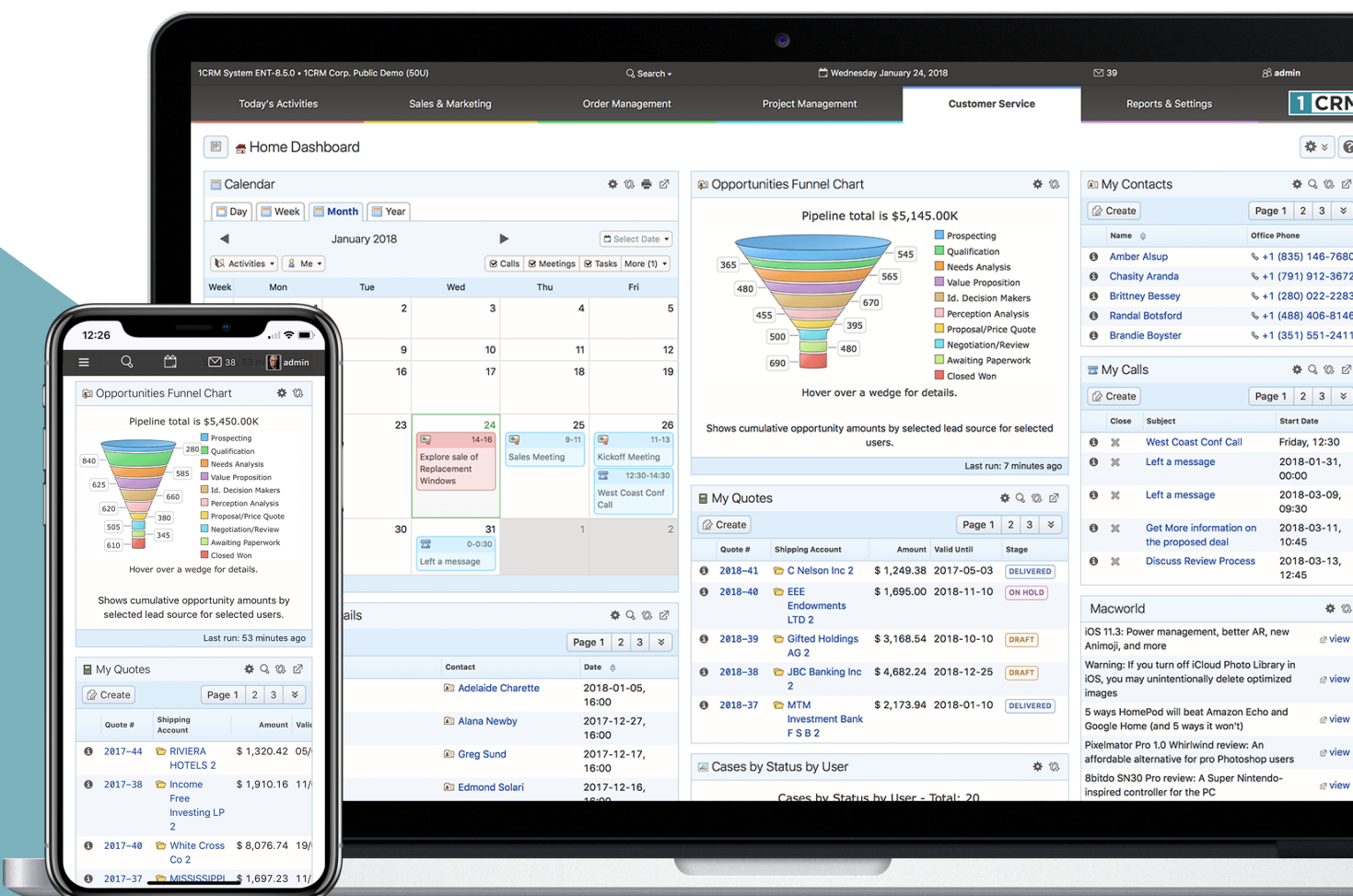
- [Mac Pages 4.3 File](#)
- [Print Resolution PDF File](#)

1CRM QuickStart Check List (Letter size, single sided)

- [Mac Pages 5.5 File \(Zipped\)](#)
- [Print Resolution PDF File](#)

1CRM PARTNER GUIDE

A Complete Guide to Creating and Managing 1CRM Subscription Sales



1CRM System ENT-8.5.0 • 1CRM Corp. Public Demo (50U)

Search

Wednesday January 24, 2018

39

admin

Today's Activities Sales & Marketing Order Management Project Management Customer Service Reports & Settings

1CRM

Home Dashboard

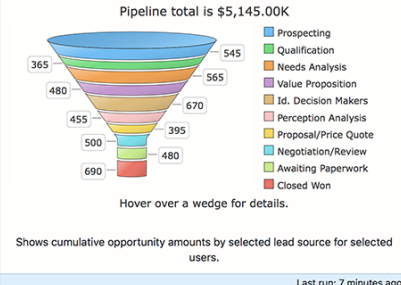
Calendar

January 2018

Week	Mon	Tue	Wed	Thu	Fri
	2	3	4	5	6
	9	10	11	12	13
	16	17	18	19	20
	23	24	25	26	27
	30	31	1	2	3

Events: Explore sale of Replacement Windows (14-16), Sales Meeting (9-11), Kickoff Meeting (12:30-14:30), West Coast Conf Call (11-13), Left a message (0-0:30).

Opportunities Funnel Chart



My Contacts

Name	Office Phone
Amber Alsop	+1 (835) 146-7680
Chasity Aranda	+1 (791) 912-3672
Brittney Bessey	+1 (280) 022-2283
Randal Botsford	+1 (488) 406-8146
Brandie Boyster	+1 (351) 551-2411

My Calls

Close	Subject	Start Date
✕	West Coast Conf Call	Friday, 12:30
✕	Left a message	2018-01-31, 00:00
✕	Left a message	2018-03-09, 09:30
✕	Get More information on the proposed deal	2018-03-11, 10:45
✕	Discuss Review Process	2018-03-13, 12:45

My Quotes

Quote #	Shipping Account	Amount	Valid Until	Stage
2018-41	C Nelson Inc 2	\$ 1,249.38	2017-05-03	DELIVERED
2018-46	EEE Endowments LTD 2	\$ 1,695.00	2018-11-10	ON HOLD
2018-39	Gifted Holdings AG 2	\$ 3,168.54	2018-10-10	DRAFT
2018-38	JBC Banking Inc 2	\$ 4,682.24	2018-12-25	DRAFT
2018-37	MTM Investment Bank F S B 2	\$ 2,173.94	2018-01-10	DELIVERED

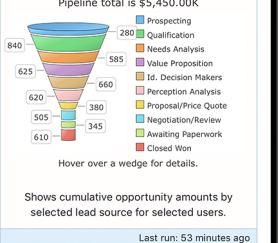
Cases by Status by User

Cases by Status by User - Total: 20

12:26

Search 38 admin

Opportunities Funnel Chart



My Quotes

Quote #	Shipping Account	Amount	Valid
2017-44	RIVIERA HOTELS 2	\$ 1,320.42	05/11/18
2017-38	Income Free Investing LP 2	\$ 1,910.16	11/15/18
2017-40	White Cross Co 2	\$ 8,076.74	19/01/18
2017-37	MISSISSIPPI	\$ 1,697.23	11/15/18

Macworld

iOS 11.3: Power management, better AR, new Animoji, and more
Warning: if you turn off iCloud Photo Library in iOS, you may unintentionally delete optimized images
5 ways HomePod will beat Amazon Echo and Google Home (and 5 ways it won't)
Pixelmator Pro 1.0 Whirlwind review: An affordable alternative for pro Photoshop users
8bitdo SN30 Pro review: A Super Nintendo-inspired controller for the PC