Creating a New Partner

A Partner is created in the Partner Portal. Partners can administer their customers and, if enabled, can create child Partners to further extend their sales channels.

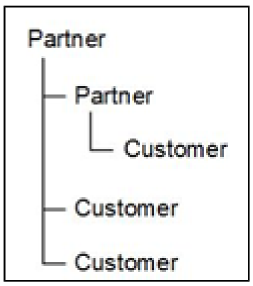
For each Partner, a Partner Portal Admin user is created. Once created, the Admin users can log in to the Partner Portal to manage and monitor their Partners and Customers. In addition, the definitions of what the partner can sell and what are his entitlements are defined in the Contract created between the two partners.

A Partner is added to the system by using the Create Partner Wizard in the Partner Portal. This involves the following:

- Creating an account
- Defining contract data

Partners can create both Partners and Customers under their licenses. The creating Partner can pass on only those licenses that are active in their own account.

When a Partner logs on the home page a list of all their sub-partners and customers can be seen. A Partner tree might look as follows:



The work space on the home page has 4 tabs:

- **Overview** – shows reports of License adoption; Licenses; and Top Customers .
- **Account** – details of Partner or Customer including support and sales reps, and administrators.
- **Contract** – Provides Product Catalog and Permissions list with check boxes indicating active products and permissions.
- **Reports** – Displays standard reports.

To create a new Partner

1. In the **Partners & Customers** pane, select the level to create the new Partner and click **Add Partner**.
   A Partner can be created under a Partner but not under a Customer.
2. The workspace displays the **Add New Partner** window.
3. Under the **Account Information** pane, enter the **Partner's Name** and **Region**.The Partner's **Parent Name** is automatically displayed.
4. Under the **Administrator's pane,** enter the email address of the local administrator. The Parent's administrator is automatically displayed.
5. Click Next in the lower right corner of the workspace.
6. Click the **Contract** tab, which has two sections:
   - **Product Catalog** – displays all available products. Active products are shown as selected.
   - **Permissions** – displays all available permissions. Active permissions are shown as selected.
7. Select or unselect products and permissions as required by the contract.
8. Click **Create**.The workspace displays a successful creation notice.
9. Select the new Partner in the Pages list to continue configuring the Partner's parameters. Refer to Configuring New Partner/Customer Settings.

Related Topics

- Defining New Partner Details
- Contract Data Page
- Building a Reseller Network
- Customer Data Access Permissions