



## Partner Onboarding

### Getting Started - Operations

#### Introduction:

This Getting Started playbook is for use by Partner Operations associates to quickly become enabled with the operational aspects of selling, designing, and servicing Avaya products and solutions in 8 easy steps. Along with the formal Avaya Professional Credential Program and associated training located on Avaya Learning (<http://avaya-learning.com>), The **Partner Onboarding - Getting Started - Operations Curriculum** will review the tools, policies, processes and support resources available and how to access them. It can also serve as a reference tool that can be utilized throughout the sales and service support life cycle. The playbook consists of core getting started materials, a summary and certificate of completion.

#### Prerequisites:

1. **You must be online** (connected to the internet) to be able to access the materials in this Getting Started playbook.
2. Because this information is located behind the Avaya firewall, you will be prompted to enter your Secure Sign-On (SSO) Login ID when viewing content on the links in this document. If you have not done so already, create your Secure Sign-On (SSO) ID to get started by following the instructions below. (NOTE: If you have already created your SSO ID and downloaded this document from the Avaya Partner Portal, then you are all set to begin. You may find it helpful to use your default browser to log into the Avaya Partner Portal at <https://avaya.com/partnerportal> so the links work immediately and you are not prompted to enter your SSO ID as often.)

Click here to view a video on how to create your SSO login <https://weconnect.avaya.com/e9x00286o>

Create your SSO login now by clicking: <https://sso.avaya.com>  
(Be sure to have your Company Link ID handy).

Once you have created your SSO login, contact the Avaya Connect Partner Helpdesk at 1-720-444-5800 or [partnerhelp@avaya.com](mailto:partnerhelp@avaya.com) and request them to "Federate your SSO Login" making sure you specify the email address and Link ID that you used when creating the ID.

#### CONTENTS:

##### Getting Started Steps:

###### Step 1:

Getting Set Up In Avaya Systems

###### Step 2:

How To Engage With Avaya

###### Step 3:

Understanding The Avaya Connect Partner Program And Channel Policies

###### Step 4:

How To Create And Manage Opportunities In The Avaya Partner Relationship Management (PRM) System

###### Step 5:

How To Design, Quote And Place And Order

###### Step 6:

How To Create An Avaya Proposal

###### Step 7:

How Do I Download Software License Files & Register Products

###### Step 8:

Getting Started - Operations Summary & Certificate

###### Step 9 (Optional):

Services Enablement

## Step 1:

### *Getting Set Up In Avaya Systems (After SSO ID):*

At the conclusion of this section - and after completing the required steps - you will be set up in Avaya systems (Avaya Learning, PRM and Partner Newsflash)

- a. Avaya Learning is the Learning Management System (LMS) where the formal Avaya Professional Credential Program is located along with the course curriculums, content, credential testing and information. Click here <https://weconnect.avaya.com/e9x00280o> to view an overview of the Avaya Competency model, Avaya Learning and how to create a login.

(NOTE: Avaya Learning is where all the formal training and credential curriculums are located.)

Click here to create Avaya Learning login <http://avaya-learning.com>

- b. Partner Relationship Management (PRM) is Avaya's Partner management and collaboration system. Click here <https://weconnect.avaya.com/e9x00287o> to view an overview of PRM and how to get a login and contact the Partner Helpdesk to set you up.
- c. Partner Newsflash - click here <https://weconnect.avaya.com/e9x00288o> to view a video overview of Partner Newsflash - Avaya's bi-weekly electronic newsletter and primary communication vehicle.

Click here to subscribe to Partner Newsflash. (Note: If your Company name does not yet appear in the Company drop down box, go to the Other field below it and type in your Company name .) <https://secure.avaya-news.com/ats/show.aspx?cr=122&fm=23>

## Step 2:

### *How Do I With Engage Avaya?*

At the conclusion of this section you will understand the various Avaya organizations that support Partner Sales and Service.

- a. Avaya Connect Partner Helpdesk is available during business hours to help answer simple questions on the Avaya Connect Partner Program and assist with basic system access and processes. Simply explain to the agent what you are trying to accomplish and they can help you or get you in touch with the right resource to assist. To view an overview of the Avaya Connect Partner Help Desk click here <https://weconnect.avaya.com/e9x00289o>.

Contact: [partnerhelp@avaya.com](mailto:partnerhelp@avaya.com) or 1-720-444-5800.

- b. Sales Engagement Principles provide guidelines for interaction and collaboration that focus partner efforts where they have the greatest chance of growth and success - click here to view the Sales Engagement Principles page on the Partner Portal; any updates will always appear on this page. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L8sOAAS&ld=a3j30000000LBzWAAW](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L8sOAAS&ld=a3j30000000LBzWAAW)

Click here to download a copy of the Sales Engagement Principles. <https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001z81HAAQ>

- c. Avaya Sales & Specialist Sales Teams - click here <https://weconnect.avaya.com/e9x00295oa> to view overview of how to engage with the Avaya Sales teams.
- d. Avaya Technicenter (Avaya Design & Proposal Support) - click here <https://weconnect.avaya.com/e9x00291o> to view an overview and how to engage with the Avaya Technicenter.

Click here to register for Avaya Technicenter access. [https://atac.avaya.com/BP\\_Reg.asp](https://atac.avaya.com/BP_Reg.asp)

- e. Avaya Services - click here <https://weconnect.avaya.com/e9x00296o> to view overview of how to engage with Avaya Services.
- f. Avaya Marketing - click here <https://weconnect.avaya.com/e9x00297o> to view overview of how to engage with Avaya Marketing.
- g. Partner Portal - is the place to find all sales and marketing and program information you will need. There several ways to learn about how to use the Partner Portal effectively and efficiently - review the User Guide, view mp4 videos, and use the Partner Portal - we recommend all three.

The Partner Portal User Guide can be downloaded here <https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zbInAAA>

To view the Partner Portal Navigation video, download the mp4 file and open to view now, plus you can save for later reference as well <https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zZBpAAM>

Useful “How to” short videos on how to customize your “view” or navigate efficiently in the Partner Portal can be downloaded in mp4 format for viewing or saving for reference. Here are some key examples:

1. How to customize your home page view (download MP4)  
<https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zZIRAA2>
2. How to set content category filters (download MP4)  
<https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zZEeAAM>
3. How to find product A-Z information (mp4 download)  
<https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zZHxAAM>
4. How to navigate between Partner Portal and PRM Portal (mp4 download)  
<https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zZL6AAM>

There are several more “How To” videos and the content is being updated continuously as we add functionality and content to the Partner Portal. Click here to view the page on the Partner Portal where these videos are posted (under HELP bottom left>How to Use the Partner Portal>Useful Tips ). Be sure to scroll down [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3da0000000LH3WAAW&Id=a3j30000000LBpeAAG](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3da0000000LH3WAAW&Id=a3j30000000LBpeAAG)

To access the Partner Portal click here <http://www.avaya.com/partnerportal> (must have your SSO ID)

- h. Avaya Support Site - click here to review an overview of the Avaya Support site  
<http://support.avaya.com/helpcenter/getGenericDetails?detailId=C2012331182154562073>

Click here to access the site <https://support.avaya.com>

Note: you will need your SSO ID (also called Avaya Access) to access this site.

## Step 3:

### *Understanding The Avaya Connect Partner Program & Channel Policies:*

At the conclusion of this section you will understand the Avaya Connect Program and where to locate the most current program information on the Avaya Partner Portal.

- a. Avaya Connect is the name of Avaya's Partner Program. The Avaya Connect pages on the Partner portal contain the most current version of the Avaya Connect Program Guide, Program Requirements, Competency Model & Credentials, Program Benefits (Financial, Marketing, Technical), and more. It is very important to take the time to understand the Avaya Connect program and to stay up date on the Program requirements via the quarterly updates.

Click here to view an overview video of the Avaya Connect program.

[https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3da0000000LInPAAW&Id=a3j30000000L7m5AAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3da0000000LInPAAW&Id=a3j30000000L7m5AAC)

Click here to view the Avaya Connect pages on the Partner Portal. Be sure to visit the individual pages that contain the Program Requirements, Competency Model & Credentials, and the Program Benefits. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?Id=a3j30000000L7m5AAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L7m5AAC)

- b. The Avaya Partner Handbook consists of web based pages (not a physical book) located on the Avaya Partner Portal where you can find the channel policies that partners to need to understand and abide by. Click here to view the Partner Handbook main page. [https://avaya.my.salesforce.com/apex/sp\\_GeneralDetailHome?Id=a3j30000000L7mPAAS](https://avaya.my.salesforce.com/apex/sp_GeneralDetailHome?Id=a3j30000000L7mPAAS)

It is very important to view and understand the Channel Policies page which includes information on program policies, pricing policies, gray market policies, product and service policies and more. Click here to review the Channel Policies page. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L8wpAAC&Id=a3j30000000LBzRAAW](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L8wpAAC&Id=a3j30000000LBzRAAW)

## Step 4:

### *How To Create And Manage Opportunities In Avaya's Partner Relationship Management (PRM) System:*

At the conclusion of this section you will understand how to manage opportunities in the Avaya Partner Relationship Management (PRM) system and how to request a Special Bid.

- a. Working in PRM: Avaya Deal/Opportunity Registration Program - All Avaya opportunities should be entered and managed in Avaya's Partner Relationship Management (PRM) System. Avaya's Deal Registration program is also known as Opportunity Registration. Click here to view an overview of the program and how to perform Opportunity Registration in the PRM system. <https://weconnect.avaya.com/e9z00876o>

Ready to Register a Deal? Login to the PRM portal by clicking the link below.  
(NOTE: you must have established your PRM login as detailed in Step 1.)  
<https://www.avaya.com/prmportal>

The Opportunity Registration information and Job Aids can be found on both the PRM Portal and the Partner Portal or click here to view the page. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L8rfAAC&Id=a3j30000000LBzvAAG](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L8rfAAC&Id=a3j30000000LBzvAAG)

For details of all of the Avaya Connect Financial Benefits and to download a copy of the Summary Guide (which includes Deal Registration) click here to go to the Partner Portal. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L5jEAAS&Id=a3j30000000L7m5AAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L5jEAAS&Id=a3j30000000L7m5AAC)

- b. Working in PRM: Avaya Generated Leads. Avaya generates leads in its marketing campaigns and distributes these leads via the PRM system to the person designated/administered as your Sales Lead contact in your partner Account Record. When an Avaya generated lead is distributed to the partner Sales Lead, per policy, the partner Sales Lead contact has 24 hours to either accept or reject the lead in the PRM system. (Note: To review who is designated as the Sales Lead for your company, review your Account Record in PRM or contact the Avaya Connect Partner Helpdesk [partnerhelp@avaya.com](mailto:partnerhelp@avaya.com) or 1-720-444-5800).

Click here to review the Job Aid for the step by step overview on how to work with Avaya generated leads in the PRM system. <https://avaya.my.salesforce.com/sfc/#version?selectedDocumentId=06930000001Mnjr>

- c. The Special Bids Process is a way to request non-standard pricing for a customer Opportunity if you are in a competitive situation. All requests for Special Bids are done in the Avaya PRM system via a Sale Support Request (SSR) and the Opportunity must be entered in the PRM system as a first step. Click here to view the most current Special Bids process on the Partner portal (be sure to scroll all the way to the bottom of the page). [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L4pZAAS&Id=a3j30000000L6pJAAS](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L4pZAAS&Id=a3j30000000L6pJAAS)

Click here to download the Special Bids Job Aid which has the step by step review on how to perform a Special Bid request in PRM. <https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001yPcWAAU>

- d. Sales Support Requests and Service Support Request (also called SSRs) are additional functions that are performed in the PRM system. A common Sales Support Request is done to request Avaya to create an end user customer location ID called a “Sold To” (in the US) to facilitate warranty and maintenance. A Service Support Request is typically done to request pricing for Avaya Service Support or Professional Services Support to include with your proposal/solution to an end user customer.

To view the Job Aid on how to perform a Sales Support Request in the PRM system click here <https://avaya.my.salesforce.com/sfc/#version?selectedDocumentId=06930000001y8vm>

To view the Job Aid on how to perform Service Support Request in the PRM system click here <https://avaya.my.salesforce.com/sfc/#version?selectedDocumentId=06930000000rO2t>

- e. Avaya offers live training on the Avaya PRM system - including live training on all the topics covered above - and the schedule is posted on both the PRM Portal and the Partner Portal. Additionally, your Value Added Distributor is also able to walk you through these processes. To view the latest Avaya PRM training schedule, topics and “dial in” information click here.  
[https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000LAWXAA4&Id=a3j30000000L6jFAAS](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000LAWXAA4&Id=a3j30000000L6jFAAS)

## Step 5: *How To Design, Quote And Place An Order*

At the conclusion of this section you will understand the benefits of engaging your Value Added Distributor in the solution design process along with the Avaya tools, resources, and promotions available to support you.

Click here to view a short overview <https://weconnect.avaya.com/e9x00293o>

- a. Click here to view the Avaya eBusiness Tools page on the Partner Portal (under Business Tools, Policies, & Processes) which details all of the Design/Quoting Tools available from Avaya. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?Id=a3j30000000L6q7AAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L6q7AAC)

Be sure to download the “Quick Start Guide” from the site and follow the directions on this page to register for access to the eBusiness Tools. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L4RaAAK&Id=a3j30000000LE7sAAG](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L4RaAAK&Id=a3j30000000LE7sAAG)

- b. Review the Avaya Technicenter pages on the Partner Portal. Be sure to review the “Support provided by the Technicenter”

page by clicking here. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000LBAXAA4&Id=a3j30000000LEyNAAW](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000LBAXAA4&Id=a3j30000000LEyNAAW)

Click here to register to access Design Support from the Avaya Technicenter. [https://atac.avaya.com/BP\\_Reg.asp](https://atac.avaya.com/BP_Reg.asp)

- c. Avaya Promotions: It is always a good practice to review the current Avaya Promotions available to you and your end user customers, which will enable you to design, propose and order the most competitive and cost effective solutions. Click here to review the Promotions page on the Partner Portal for the most current list of information on current promotions. [https://avaya.my.salesforce.com/apex/sp\\_GeneralDetailHome?Id=a3j30000000L40IAAS](https://avaya.my.salesforce.com/apex/sp_GeneralDetailHome?Id=a3j30000000L40IAAS)
- d. Sales Support Request for Customer “Sold To”: Avaya requires that you request creation of an end user customer location ID called a “Sold To”, in Avaya systems, to facilitate Warranty and Maintenance support. This process takes place when you are getting ready to place the order from your Distributor and is performed in the Avaya PRM system. This is also described in Step 4d. To view the Job Aid on how to perform the Sales Support Request in PRM click here. <https://avaya.my.salesforce.com/sfc/#version?selectedDocumentId=06930000001y8vm>

## Step 6:

### *How To Create An Avaya Proposal:*

At the conclusion of this section you will understand the proposal and Request For Proposal (RFP) support and tools available to you and how to utilize them.

- a. Avaya Proposal Suite is Avaya’s proposal creation tool. To view an overview and learn how to gain access to the tool click here. <https://weconnect.avaya.com/e9x00283o/>

To view and learn how to use the Proposal tool to create a proposal click here. <https://weconnect.avaya.com/e9x00282o>

To view and learn how to “Search” the RFP/RFI data base click here. <https://weconnect.avaya.com/e9x00285o>

The Avaya Proposal Suite is one of the Global eBusiness Tools and you must register for access if you have not done so already. Go to the link below and fill out the registration page (have your Link ID handy), follow the instructions making sure you click the radio button to select Avaya Proposal Suite. <https://avaya.com/UAE/>



To view the Proposal Suite page (under the eBusiness Tools) on the Partner Portal go to the link below and be sure to review the PC requirements.

[https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?Id=a3j30000000L6oVAAS](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L6oVAAS)

- b. RFP support and the Avaya Techcenter - click here <https://weconnect.avaya.com/e9x00291o> to see the overview that was also covered in Step 2.

Note: link to register for Techcenter access is found in Step 2: d. or click here.

[https://atac.avaya.com/BP\\_Reg.asp](https://atac.avaya.com/BP_Reg.asp)

- c. To view the Proposal Support page on the Partner Portal, which contains information on RFP/RFI support, sample RFP/RFI documents and how to use and access the Proposal Suite, click here. [https://avaya.my.salesforce.com/apex/sp\\_GeneralDetailHome?Id=a3j30000000L3s9AAC](https://avaya.my.salesforce.com/apex/sp_GeneralDetailHome?Id=a3j30000000L3s9AAC)

## Step 7:

### *How Do I Download Software Licenses And Register Products*

At the conclusion of this section you will understand the purpose and how to access the Product Licensing & Delivery System and the Global Registration Tool.

At the time of installation of certain Avaya products, your technicians or project managers will need to Download Software Licenses as well as Register these products for warranty and maintenance support per Avaya policy.

- a. GAI Admin and Tech IDs: The first step is to set up an Administrator for your technicians to access the software license systems. This person is called the GAI Admin and acts as the “traffic cop” in providing access to your technicians.

To establish your GAI Admin contact the Avaya Connect Partner Helpdesk [partnerhelp@avaya.com](mailto:partnerhelp@avaya.com) or 1-720-444-5800 with the person’s name and email address, along with your company name and Link ID.

Additionally, your technicians should register for support by Avaya Global Service Support (GSS) by creating Technician IDs. <https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/069a0000002i76RAAQ>

- b. Product Licensing & Delivery System (PLDS) is Avaya’s software licensing system. An overview and detailed documentation on the PLDS system, how to use it, and how to access it can be found on the PLDS page on the Partner Portal here. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?Id=a3j30000000L6ouAAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L6ouAAC)

Be sure to download and review the PLDS Overview document here. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?Id=a3j30000000L6ouAAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L6ouAAC)

The PLDS Navigation Reference Guide (an narrated training demo) can be downloaded from here (scroll down). [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?Id=a3j30000000L6ouAAC](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L6ouAAC)

There are also Reference Guides (narrated training demos) for each of the main functions in PLDS on this Partner Portal page at the very bottom (scroll down).

- c. Global Registration Tool (GRT) is where you build customer product records and access for warranty and maintenance support purposes. An overview of the Global Registration tool, including policy information - including which products are required to be Registered - can be found on the tool page on the Partner Portal here. [https://avaya.my.salesforce.com/apex/sp\\_ViewDetailPage?c=a3d30000000L4OyAAK&Id=a3j30000000L6jUAAS](https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?c=a3d30000000L4OyAAK&Id=a3j30000000L6jUAAS)

Additionally, how to access the GRT tool and training videos are also located on the Avaya Support site at <https://support.avaya.com/helpcenter/getGenericDetails?detailId=C2009101293650506080>

To access the GRT tool go to <https://grt.avaya.com/grtWebProject/grtPortal.portal>

## Step 8:

### *Getting Started - Operations Summary & Certificate:*

This section tests the knowledge of the key core steps and upon completion, allows downloading of the Getting Started - Operations Completion Certificate. Click here to begin <https://secure.avaya-news.com/ats/show.aspx?cr=122&fm=894>

## Step 9 (Optional):

### *Services Enablement:*

In some Partner Operations Roles, in-depth knowledge of the Service Delivery policies and processes may be necessary. This can be accomplished by either reviewing the Getting Started - Service Delivery playbook or reviewing this optional step 9, Avaya Service Enablement. The Services Enablement online training consists of 4 modules of content. Session 1 is a 15 minute Overview of the Avaya Warranty. Session 2 is a 45 minute Overview of Avaya Core Services. Session 3 is a 60 minute Overview of How to Engage Avaya Services. Session 4 is a 30 minute Overview on Delivering Outstanding Customer Satisfaction.

Click here to view the Services Enablement training. <https://weconnect.avaya.com/e9z02710o/>