

Power Advantage Partner Program



Powering Business Worldwide

POWER*ADVANTAGE*[®]
Partner Program



Welcome to the PRM Advantage User Guide

At Eaton, we value the crucial contribution that partners like you make to building our business. This guide will help you manage Deal Registrations and MDF requests to unlock all the benefits of these programs and power your margins with Eaton.





Set Language and User Preferences



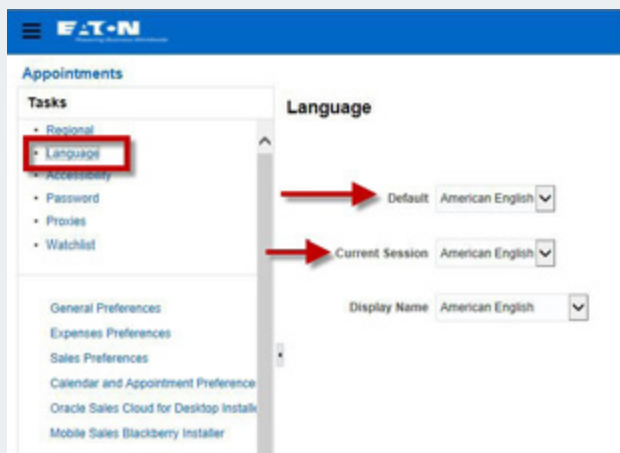
All users of the Eaton PRM Advantage Portal can make changes to the ways that the tool functions for them. This includes setting a language, date format, time zone, and some notification preferences.

Change the Display Language

1. After logging into the Eaton PRM Advantage Portal, click on your username in the top-right of the screen.



2. On the menu that appears, click **Set Preferences**, under the Personalization section.
3. On the main User Preferences screen, click on **Language** on the left side.



4. Use the drop-down boxes in the center of the screen to select from the supported languages.

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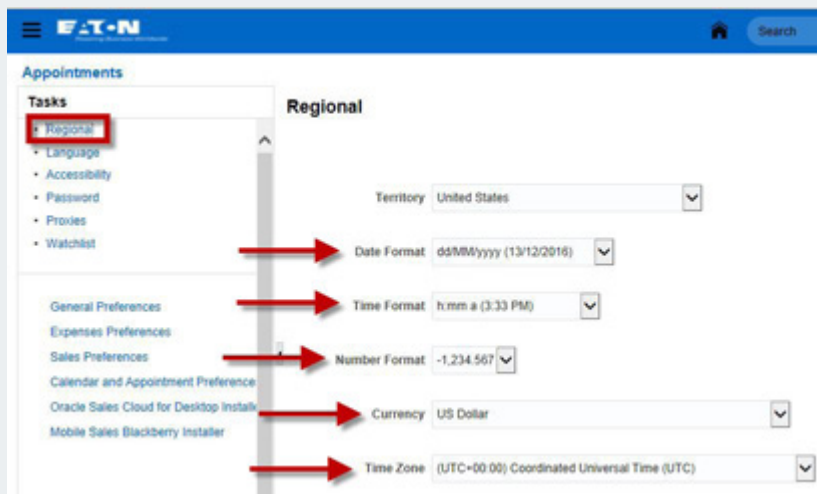


Change Date/Time Format and Currency

1. After logging into the Eaton PRM Advantage Portal, click on your username in the top-right of the screen.



2. On the menu that appears, click **Set Preferences**, under the Personalization section.
3. On the main User Preferences screen, click **Regional** on the left side.



4. Use the drop-down menus to set the times and number displays to your regional preference.




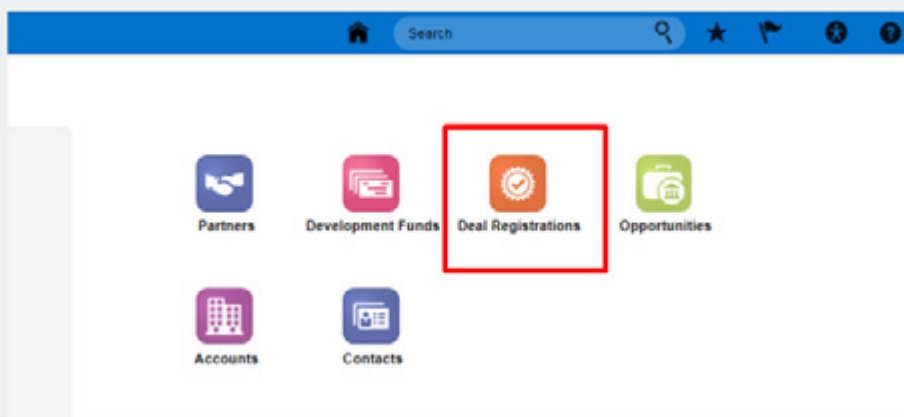
Request a Deal Registration



Eaton PAP Authorized and Premium resellers can submit deal registration requests by providing few information on their new opportunity.

Create a new Deal Registration Request

1. After logging into the Eaton PRM Advantage Portal, click the Home  icon at the top of the screen to go to your dashboard.
2. From the dashboard, click the **Deal Registrations** icon.



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3. You will see a list of all submitted deal registrations, whether approved or failed. To create a new Deal Registration, click the button on the right side of the screen.



4. On the form that appears, follow the asterisks to fill out the required fields.

Field	Description
Registration Number	The system will automatically assign this request a number. It cannot be changed by the user.
Account	This is the targeted customer for the requested deal. Once you select them from the window that appears, the rest of their information will automatically populate on the form.
Contact	Use this field to select the key point of contact. Once you select them from the window that appears, the rest of their information will automatically populate on the form.
Preferred Distributor	Please enter the name of the Eaton IT distributor associated to this request.
Products	This table will display all selected products in the requested deal. Use the Add button to add more line items.

5. Once you have filled out all fields on this form, click the **Save and Continue** button.

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6. A summary will appear, displaying the information that you have just entered. If necessary, use the **Attachments** field to add any supporting documentation.



Edit Deal Registration: 4343: Summary

Actions Save Save and Close Cancel

Registration Number: 4343

Account: Test Account 11 X

*Contact: Ben Zimmerman X

Job Title:

Contact Phone:

*Contact E-mail: test@test.com

Channel Manager: David ODDIE

Status: Draft

Expiration Date:

Currency: USD

Opportunity:

Partner: EATON PARTNER UK PRE

Owner: Eaton Partner 10 Eaton Partner

Attachments: None

Preferred Distributor: Hammer

Products Add

Type	Name	Quantity	Amount
Group	UNINTERRUPTABLE POWER SUPPLY - 1	5	25,000

7. After confirming the information, click the **Actions** drop-down, and select "Submit" to submit the request to an approver. You will receive a confirmation message once submission is complete.

✓ Confirmation The deal registration has been submitted for approval.



Create an Account and a Contact

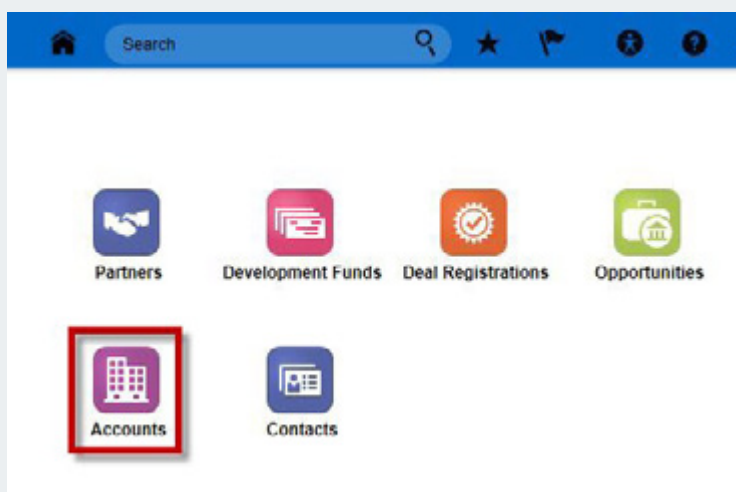


When requesting a deal registration you must indicate your intended end customer in the form of an Account. All that is necessary to create an Account is a name and address for the business. When completing the end-user Account information you should also indicate the key point of contact with whom you will be working.

In this section we will review how to create an Account and a Contact.

Create an Account

1. After logging into the Eaton PRM Advantage Portal, click the **Accounts** icon from the dashboard.



[▶ Continues](#)



2. You will see a list of all Accounts that have been created by your business. To create a new Account, click the **Create Account** button on the right side of the screen.



3. On the form that appears, follow the asterisks to fill out the required fields.

NOTE: When a Country is selected, the other required address fields will adjust to reflect that Country's address conventions.

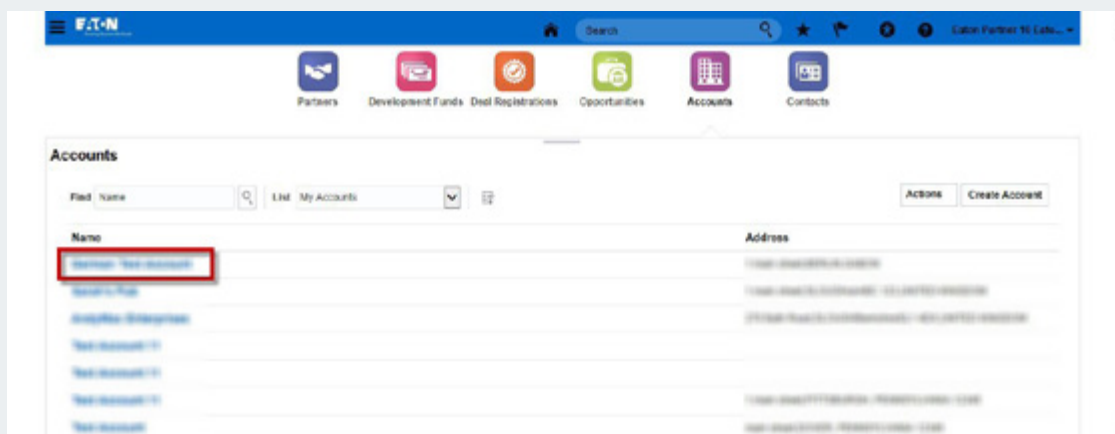
4. Once you have filled out all fields on this form, click the **Save and Close** button to complete the Account. Alternatively, you can click on the **Save and Continue** button to create Contacts for this Account.

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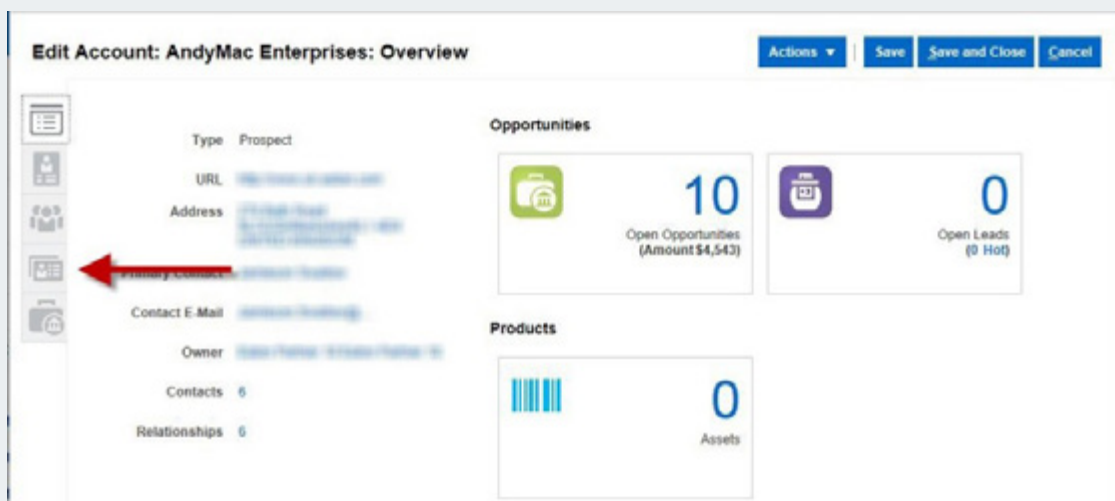


Create a Contact

1. To create a Contact, begin from the detailed view of an Account. This can be accessed immediately after creating an Account (see above in this document), or by clicking on the blue, hyperlinked name of an Account in the Accounts list view.



2. A summary will appear, displaying the information about the Account, including the number of open Opportunities. Click on the Contacts tab on the left side of the window.



▶ *Continues*





3. From the Contacts tab, click the **Add Contacts** button to create new Contacts.



Edit Account: AndyMac Enterprises: Contacts Actions Save Save and Close Cancel

IM ch Add Contacts

Primary	Name	Job Title	Phone	E-Mail	
<input checked="" type="checkbox"/>	John Doe				×
<input checked="" type="checkbox"/>	John Doe			john.doe@company.com	×
<input checked="" type="checkbox"/>	John Doe			john.doe@company.com	×
<input checked="" type="checkbox"/>	John Doe			john.doe@company.com	×
<input checked="" type="checkbox"/>	John Doe			john.doe@company.com	×
<input checked="" type="checkbox"/>	John Doe			john.doe@company.com	×

NOTE: You may change the primary Contact for a given Account at any time by clicking on the blue check next to their name on the Contacts list. Only one primary Contact may be designated at any time.

4. From this screen, you can search for other Contacts which have already been created, in order to add them to this Account. For a new Contact who is not already in the system, click the **Create Contact** button, and fill out all required fields.

Add: Contacts Apply OK Cancel

Enter a search term in at least one field.

First Name Account

Last Name Job Title

Phone Owner

E-Mail Favorite Contact

Search

Search Results Create Contact

<input type="checkbox"/>	Favorite	Name	Account	Job Title	Phone	E-Mail	Owner
No search conducted.							

5. Once all required fields are filled out, click **Save and Close**.



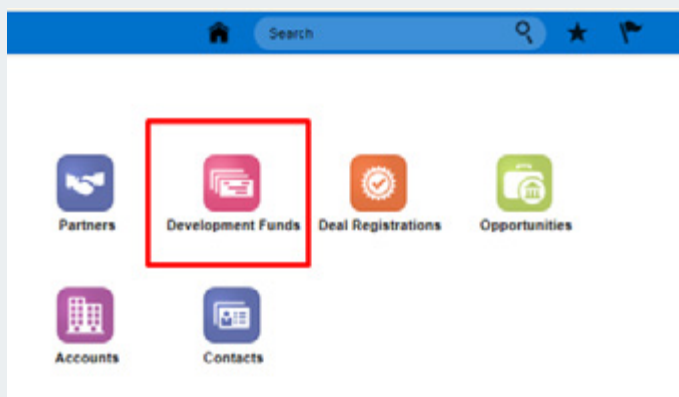
Request Marketing Development Funds



Eaton's PAP Premium partners can benefit from the MDF program by submitting their requests via the Eaton PRM Advantage Portal.

Create a New Marketing Development Funds (MDF) Request

1. After logging into the Eaton PRM Advantage Portal, click the **Development Funds** icon on the Home screen.



[▶ Continues](#)



- You will see a list of all current pending requests. On the right side of the screen, click the **Create Request Button**.



The screenshot shows a web application interface for 'Development Fund Requests'. At the top, there's a navigation bar with icons for Partners, Development Funds, Deal Registrations, Opportunities, Accounts, and Contacts. Below this, the 'Development Fund Requests' section has a search bar and a table. The table has columns: Name, Submitted Date, Requested Amount, Approved Amount, Partner, Status, and Fund Request ID. A row is visible with 'EATON MDF 360'. To the right of the table, there's an 'Export' button and a 'Create Development Fund Request' button, which is highlighted with a red rectangle.

A new form will display, asking you to provide details about the request. Fields marked with a blue star are required.

The screenshot shows the 'Create Development Fund Request' form. It has several input fields: 'Name' (required), 'Target Audience' (dropdown), 'Specify' (text area), 'Business Goals' (dropdown), 'Type' (dropdown), 'KPI Estimated Value' (required), 'MDF Campaign Title' (dropdown), '*Start Date' (calendar icon), '*End Date' (calendar icon), and '*Partner' (dropdown, pre-filled with 'EATON PARTNER 222'). At the top right, there are three buttons: 'Save and Continue', 'Save and Close', and 'Cancel'.

Field	Description
Name	What you would like to call this marketing activity.
Target Audience	Who will be the target audience for this marketing activity.
Business Goals	The business goals that you would like to achieve
Type	The marketing activity that will support your business goals. NOTE: If "Other" is selected, you will be asked to clarify in the Specify box below.
Requested Amount	The amount of funds that you are requesting. Please submit using English formatting #,###.00
KPIs	The performance indicators that you have set to evaluate the success of the marketing activity.
Start Date / End Date	The time frame for the marketing activity.
Partner	The name of your company. This field should auto-populate based on your user profile.
Status	The current state of your request. New requests will default to "Draft" status.
Owner	The individual person at your company who is responsible for this request. This field will default to you as the requester, though you can identify someone else if necessary.

- Once you have filled out all fields on this form, click the **Save and Continue** button.

[▶ Continues](#)



4. A summary will appear, displaying the information that you have just entered. Use the **Justification** field to explain the purpose of this request.



Edit MDF Request: [Redacted] : Summary

Actions Save Save and Close Cancel

Name [Redacted]
*** Currency** USD
*** Requested Amount** 1,000
Approved Percent (%) 100
Approved Amount 0
Target Audience IT Directors
Business Goals Reputation
Type Media Buying
Specify

Justification [Redacted]

KPIs Lead
Start Date 11/14/16
End Date 11/18/16
Status Draft
Partner EATON PARTNER UK PRE
*** Owner** Eaton Partner 10 Eaton Part...
Channel Manager [Redacted]
Attachments None

5. After providing the justification, click the **Actions** drop-down, and select **Submit** to send the request to an approver. You will receive a confirmation message and an email notification once submission is complete.

✓ Confirmation Your MDF request [Redacted] has been submitted. The approvers will be notified.

