

How To Guide

Deal Registration



+ What you'll learn

This Deal Registration Quick Step Guide will provide you with a step-by-step guided tour through our **Deal Registration Tool** and will cover the following areas:

- 1 How to access the Deal Registration Tool
- 2 How the Deal Registration Tool is structured
- 3 How to register your first Opportunity
- 4 How to update / reassign your Opportunities

1 How to Access the Deal Registration Tool

- 1. Go to the **Partner Portal homepage**.
- 2. Select the drop-down menu "**MANAGE OPPORTUNITIES**".
- 3. Click "**View Opportunities**".

OR

- 1. Go to the **Partner Portal homepage**.
- 2. Click on "**DEAL REG**" on the black ribbon under the main banner.

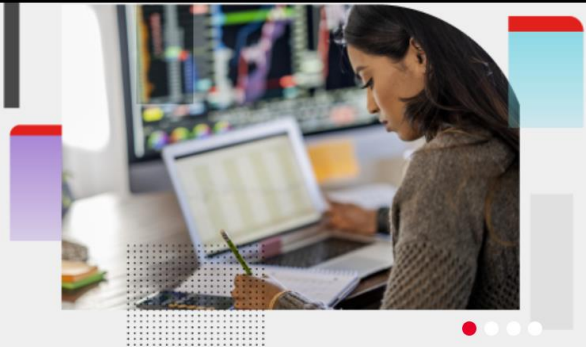
View Opportunities

View Leads

Now Available

Effective from
Monday 1st November 2021

Learn More



FortiGuard Outbreak Alerts: What You Need To Know About The Latest Cybersecurity Attacks

2 Deal Registration tool

Welcome to the new Fortinet Partner Deal Registration and Lead Distribution tool. This tool is designed to streamline the process to register deals, and distribute leads. To learn more about the new process, download documentation here:

- Deal Registration Training Guide for Resellers
- Deal Registration FAQ
- Deal Registration - Partner Training Video
- Deal Registration Terms and Conditions
- Lead Distribution Training Guide

If you have any questions about the new tool/process that aren't answered in the documents above, please contact your Channel Account Manager (CAM). If you do not know who your CAM is, email emea_partners@fortinet.com.

Deal Registration Dashboard

Your pending and approved opportunities are listed in the dashboards below.

Open Opportunities

0

YTD Closed Won

0

+REGISTER NEW OPPORTUNITY

Opportunity Registrations Pending Approval

Below are the opportunity registrations you have submitted that are awaiting approval from a Channel Manager.

Search [] [] Last Updated [] Last 90 Days [] []

Company	Contact	Status	Last Updated*	Date Created*	Your Last Update*	Fortinet Contact Email
No pending opportunities were found						

EXPORT [] Items to Display: 50

Approved Open Opportunity Registrations

Below are the approved opportunity registrations you have submitted that have an open status.

Search [] [] Last Updated [] Last 90 Days [] []

Company	Stage	Last Updated*	Estimated Close Date*	Expiration Date*	Deal Id	Fortinet Contact Email
No approved opportunities were found						

EXPORT [] Items to Display: 50

Closed Won Opportunity Registrations

These are your opportunities that have been closed won.

Search [] [] Last Updated [] Last 90 Days [] []

Deal Name	Customer Company	Closed*	Deal Id	Fortinet Contact Email
No closed won opportunities were found				

EXPORT [] Items to Display: 50

Closed Lost Opportunity Registrations

These are your opportunities that have been closed lost.

Search [] [] Last Updated [] Last 90 Days [] []

Deal Name	Customer Company	Closed*	Deal Id	Fortinet Contact Email
No closed lost opportunities were found				

EXPORT [] Items to Display: 50

Denied Opportunity Registrations

These are your opportunities that have been denied.

Search [] [] Last Updated [] Last 90 Days [] []

Company	Contact	Status	Date Created*	Last Updated*	Your Last Update*	Fortinet Contact Email
No denied opportunities were found						

EXPORT [] Items to Display: 50



- You can find all Deal Registration useful assets: **Training Guide, FAQ, T&C**, etc



- Number of open and closed won opportunities



- Register **New Opportunities**



- List of **Submitted Deal Registrations**



- List of your **Opportunities Approved** by Fortinet



- List of your **Closed Won Opportunities**



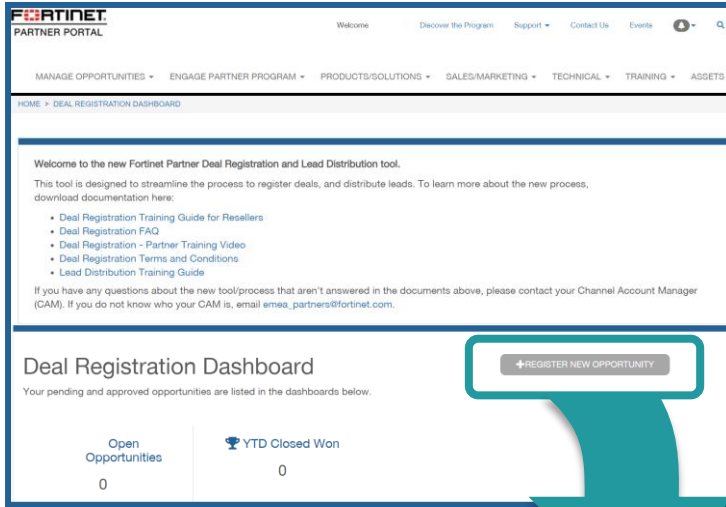
- List of your **Closed Lost Opportunities**



- List of your Opportunities **Denied** by Fortinet

3 How to Register New Opportunities

From the Deal Registration Dashboard, click the **+REGISTER NEW OPPORTUNITY** button.



Deal Registration - Form

Register New Opportunity

To register a new opportunity, fill out the form below. Fields with an asterisk (*) are required.

End User Contact Information

Please enter the contact's information for this opportunity.

* First Name	* Last Name
* E-mail Address	* Title
* Phone	

End User Company Information

Please enter the contact's company information for this opportunity.

* Company

* Address

* Country	* State / Province
* City	* Postal Code
* Website	* Industry

Opportunity Information

Please enter the information for this opportunity.

* Is this a new business or a renewal opportunity?	* Estimated Close Date (mm/dd/yyyy)
* Estimated Value (New business under \$K USD or Partners under 10K USD - or their equivalent in local currency are not eligible)	

1 Complete the form with information regarding your Opportunity.

2 Accept the Terms & Conditions.

Tick here to confirm you accept the Fortinet Deal Registration Terms and Conditions

[REVIEW TERMS](#)

3 Submit your Deal Reg for approval.

[SUBMIT](#)

*Please allow up to **5 business days** for your request to be processed by Fortinet*

4 How to update / reassign your Opportunities

From the Deal Registration Dashboard, you can update and reassign Opportunities that are **pending approval** or **approved** by Fortinet by clicking on the relevant opportunity.

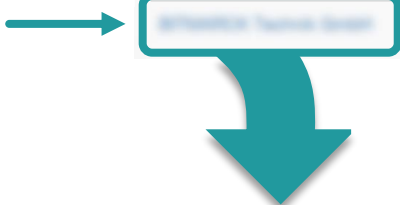
Opportunity Registrations Pending Approval

Below are the opportunity registrations you have submitted that are awaiting approval from a Channel Manager.

Search

Last Updated Last 90 Days

Company ▲	Contact	Status	Team Member	Last Updated*	Date Created*	Team Member Updated*	Fortinet Contact Email
Fortinet Service Desk	Thomas Brett	Pending Approval	Steve Brett	11/16/2021	11/16/2021	11/16/2021	stbrett@fortinet.com



Add another Note:

Note Title:

Note Comments:

1.

Partner Information

Partner Account Partner Member

2.

1. **Update** your Deal Registration form by filling in both “Note Title” and “Note Comments”.
2. **Reassign** opportunities to another member of your organization (can be done by Lead Administrator only). If you need this option, please contact us.

Any questions regarding the Deal Registration Program?

Please contact:

- emea_partners@fortinet.com
- Your Fortinet Channel Account Manager