

Requesting a New Account

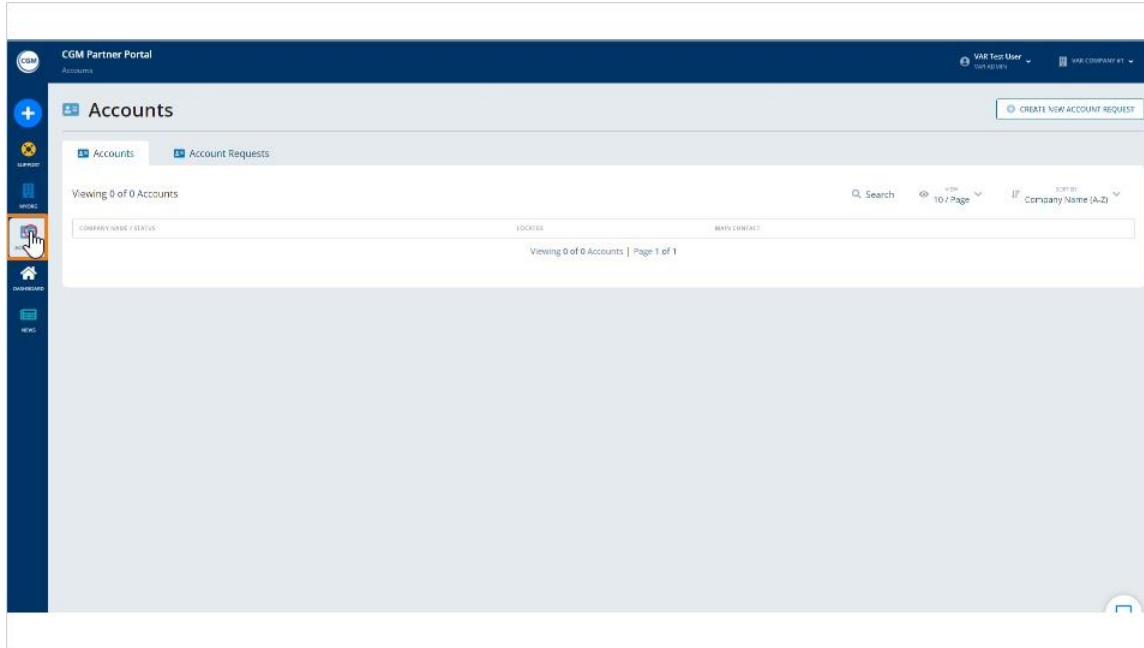
1.1 Requesting a New Account



Notes:

Requesting a New Account

1.2 Accounts

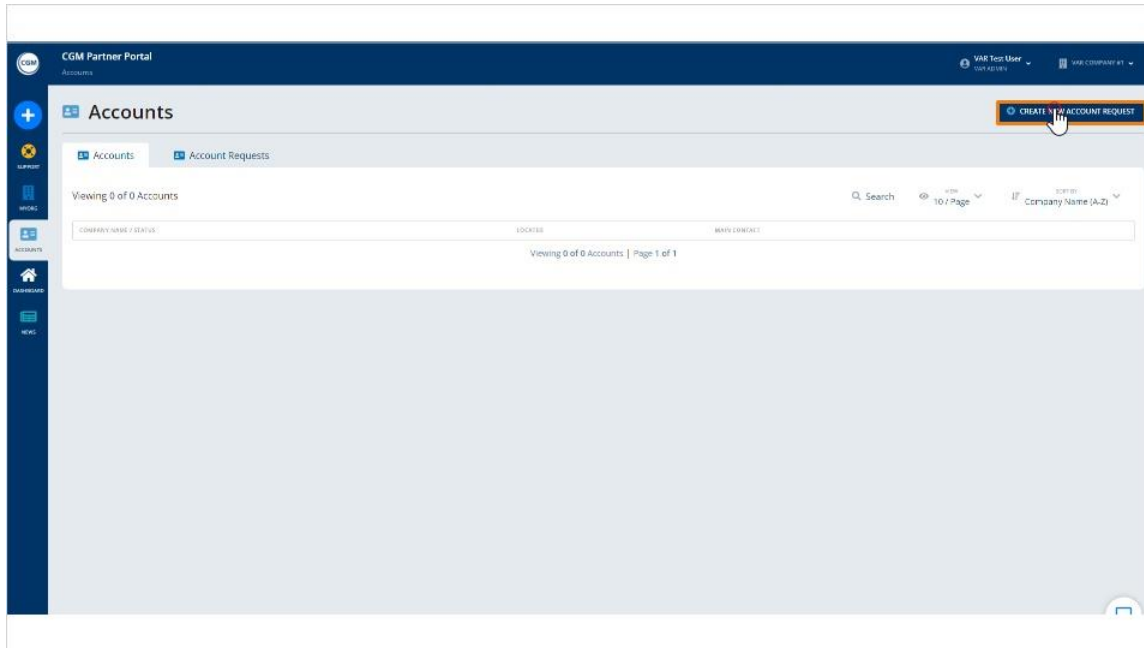


Notes:

A new account request is used when a VAR needs an account created for one of their existing customers (typically Medisoft or Lytec) OR for a prospect account you are working with (typically a new APRIMA deal). To request a new account, select the Accounts tab in the navigation panel on the left side of the window.

Requesting a New Account

1.3 Create New Account Request

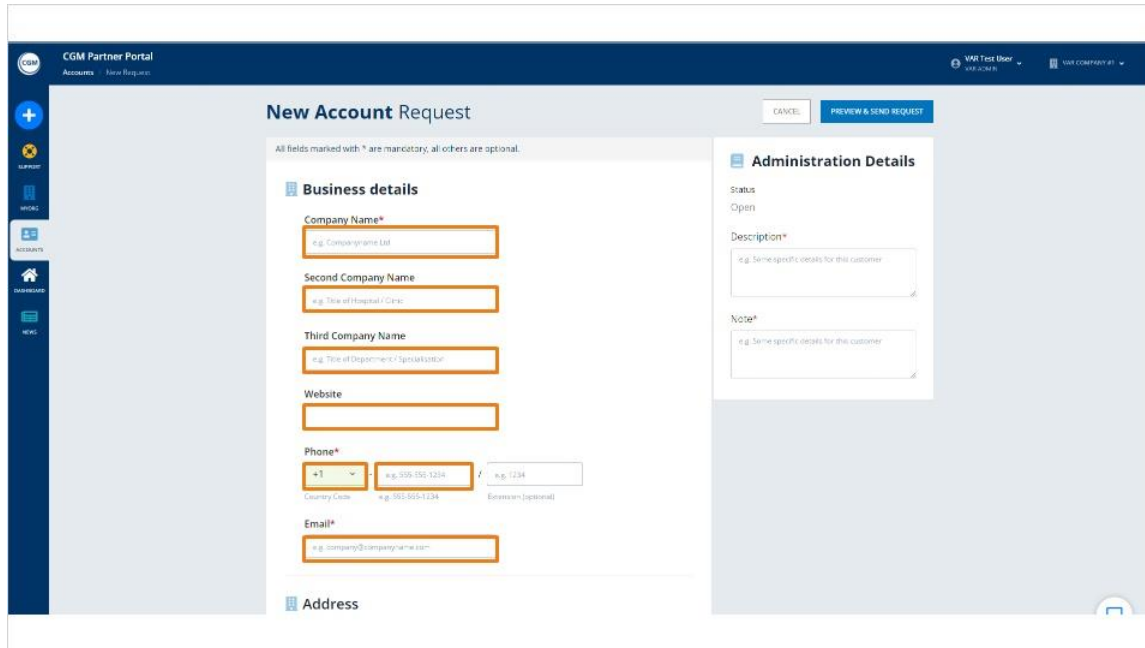


Notes:

Now select the Create New Account Request button on the right side of the window.

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1.4 Business details



CGM Partner Portal
Accounts New Request

WAG Test User
WAG-12345

WAG COMPANY #1

New Account Request

CANCEL PREVIEW & SEND REQUEST

All fields marked with * are mandatory, all others are optional.

Business details

Company Name*
e.g. Companyname Ltd

Second Company Name
e.g. Title of Hospital / Clinic

Third Company Name
e.g. Title of Department / Specialization

Website

Phone*
+1 e.g. 555-555-1234 / e.g. 1234
Country Code e.g. 555-555-1234 Extension (optional)

Email*
e.g. company@companyname.com

Administration Details

Status
Open

Description*
e.g. Some specific details for this customer

Notes*
e.g. Some specific details for this customer

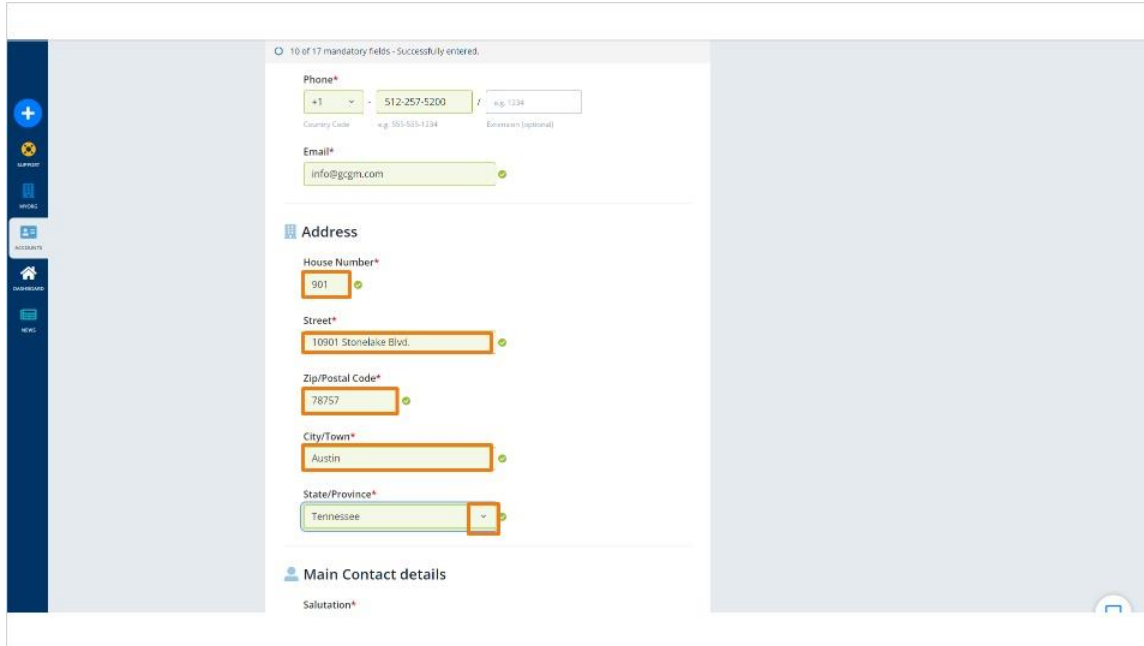
Address

Notes:

Enter the company name and website. The Second and Third Company Name fields can be used for subsidiary offices or for a DBA, if applicable. Next enter the Phone number beginning with the Country Code. This will be one if located in the US then tab to enter the area code and seven digit telephone number. Last, enter the email address used for the Company.

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1.5 Address



10 of 17 mandatory fields - Successfully entered.

Phone*
+1 - 512-257-5200 / e.g. 1234
Country Code e.g. 985-555-1234 Extension (optional)

Email*
info@gcm.com

Address

House Number*
901

Street*
10901 Stonelake Blvd.

Zip/Postal Code*
78757

City/Town*
Austin

State/Province*
Tennessee

Main Contact details

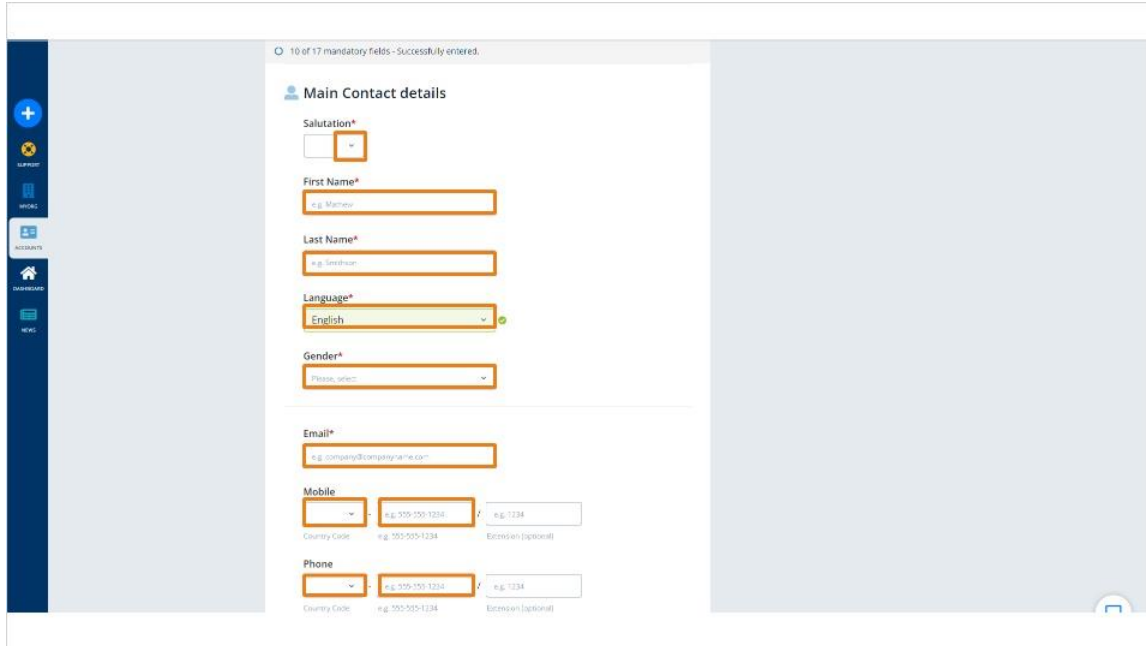
Salutation*

Notes:

In the Address section, enter the house number, Street, Zip Code, City and State.

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1.6 Main Contact Details



10 of 17 mandatory fields - Successfully entered.

Main Contact details

Salutation*

First Name*

Last Name*

Language*

Gender*

Email*

Mobile

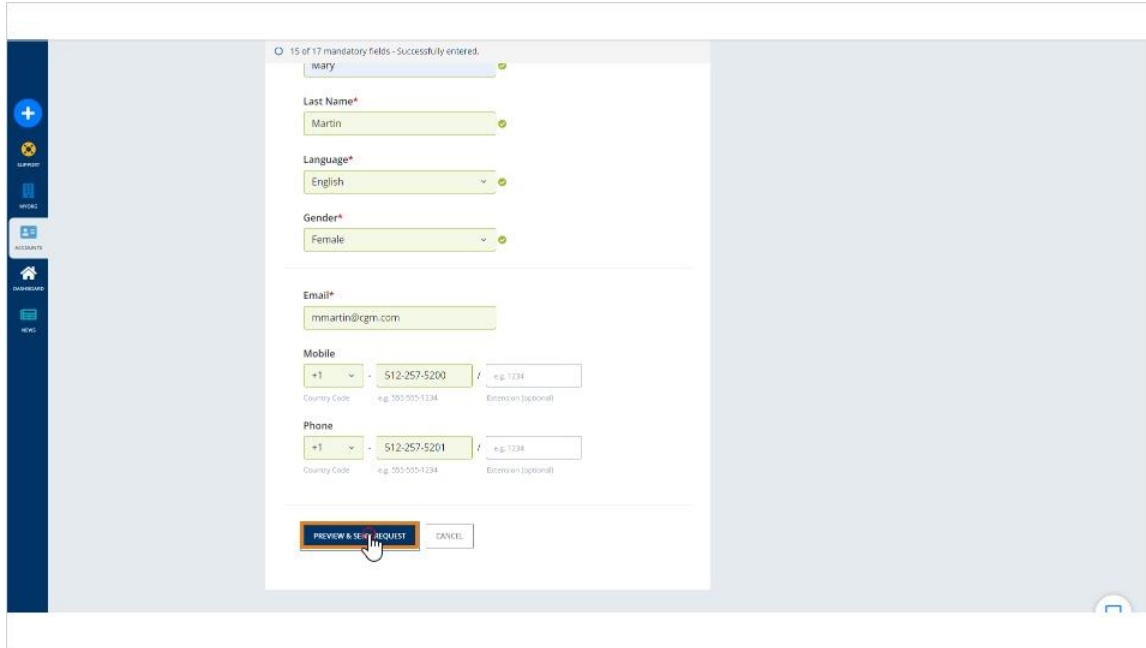
Phone

Notes:

In the Main Contact details section, enter the Salutation, First Name, Last Name, Language, Gender, Email, Mobile number beginning with the country code, then tab to enter the area code and seven digit mobile number. Last, enter the phone number of the main contact beginning with the country code, then tab to enter the area code and seven digit phone number. Required fields are marked with a red asterisk*.

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1.7 Preview & Send



The screenshot displays a web form for requesting a new account. At the top, a status message reads "15 of 17 mandatory fields - Successfully entered." The form fields are as follows:

- First Name:** mary
- Last Name*:** Martin
- Language*:** English
- Gender*:** Female
- Email*:** mmartin@cgm.com
- Mobile:** +1 512-257-5200 (Country Code: +1, Area Code: 512-257-5200, Extension: 1234)
- Phone:** +1 512-257-5201 (Country Code: +1, Area Code: 512-257-5201, Extension: 1234)

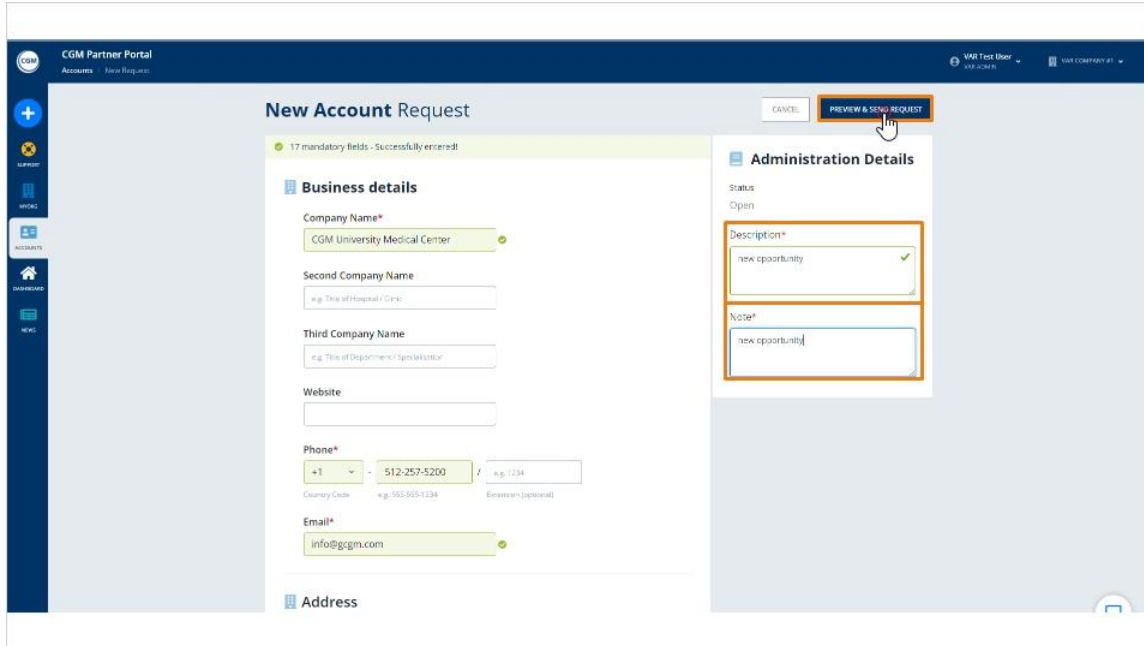
At the bottom of the form, there are two buttons: "PREVIEW & SEND REQUEST" (highlighted with a mouse cursor) and "CANCEL".

Notes:

If a required field is not completed, an error message will display indicating which required field is missing. If accurate main contact user and/or account information is not submitted, the lead will be rejected. To preview the main contact data entered, select the Preview & Send button at the bottom of the window.

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1.8 Preview & Send New Account Request



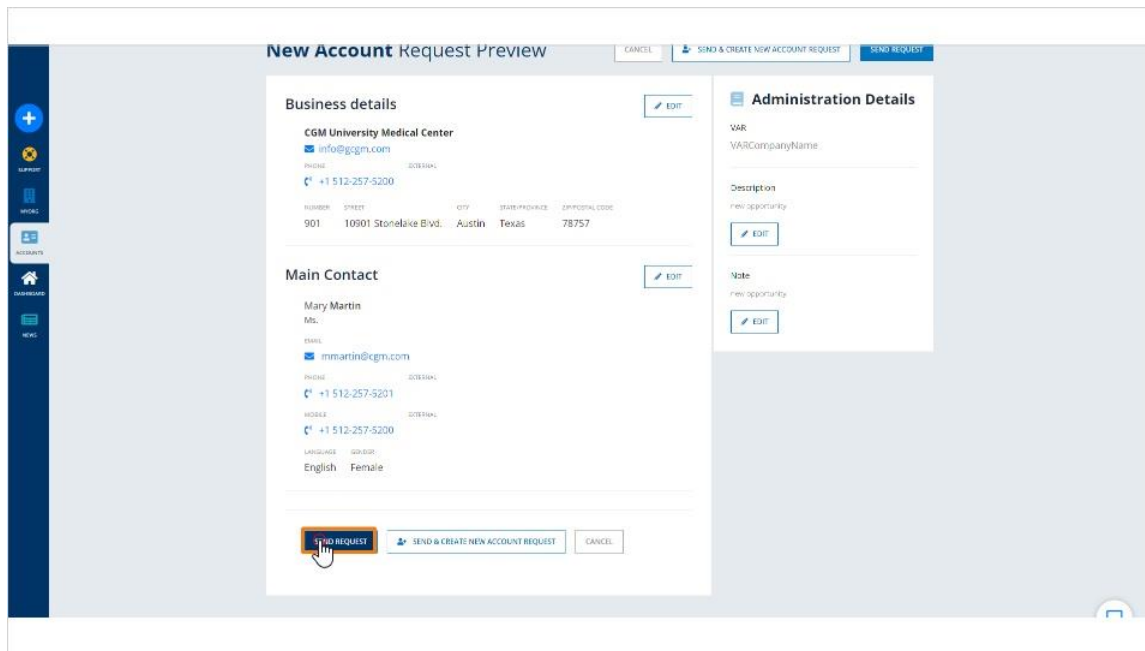
The screenshot shows the 'New Account Request' form in the CGM Partner Portal. The form is titled 'New Account Request' and has a status of '17 mandatory fields - Successfully entered!'. The form is divided into two main sections: 'Business details' and 'Administration Details'. The 'Business details' section includes fields for 'Company Name*' (CGM University Medical Center), 'Second Company Name', 'Third Company Name', 'Website', 'Phone*' (+1 512-257-5200), and 'Email*' (info@gcm.com). The 'Administration Details' section includes 'Status' (Open), 'Description*' (new opportunity), and 'Note*' (new opportunity). A 'PREVIEW & SEND REQUEST' button is highlighted at the top right of the form.

Notes:

The Description field can be used to describe the lead, for example 2 doctor practice interested in Aprima. The Note field can be used for additional instructions, for example, FYI notes for the VAR Sales Executive or others on the team. To preview all sections of the New Account Request before sending, select the Preview & Send Request button at the top right of the window.

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1.9 Send Request



New Account Request Preview CANCEL SEND & CREATE NEW ACCOUNT REQUEST SEND REQUEST

Business details EDIT

CGM University Medical Center
info@cgm.com
PHONE +1 512-257-5200

NUMBER STREET CITY STATE/PROVINCE ZIP/POSTAL CODE
901 10901 StoneLake Blvd. Austin Texas 78757

Main Contact EDIT

Mary Martin
ML
EMAIL mmartin@cgm.com
PHONE +1 512-257-5201
PHONE +1 512-257-5200
LANGUAGE GENDER
English Female

Administration Details

VAR
VARCompany Name

Description
New opportunity
EDIT

Note
New opportunity
EDIT

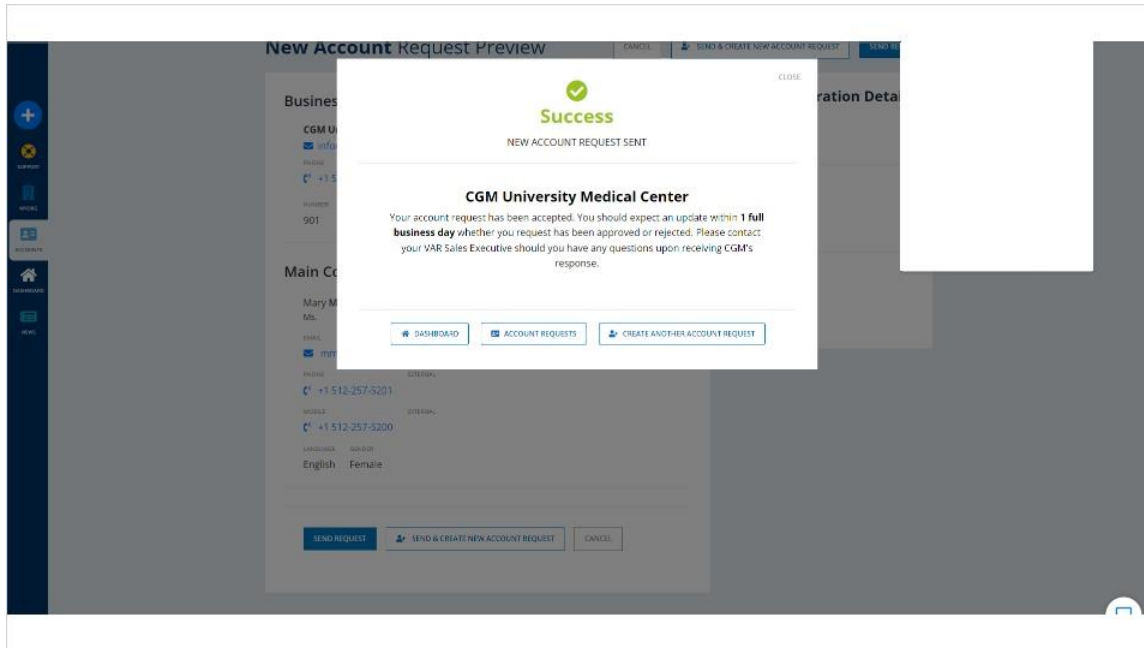
SEND REQUEST SEND & CREATE NEW ACCOUNT REQUEST CANCEL

Notes:

If the information entered is correct, select Send Request.

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1.10 Success

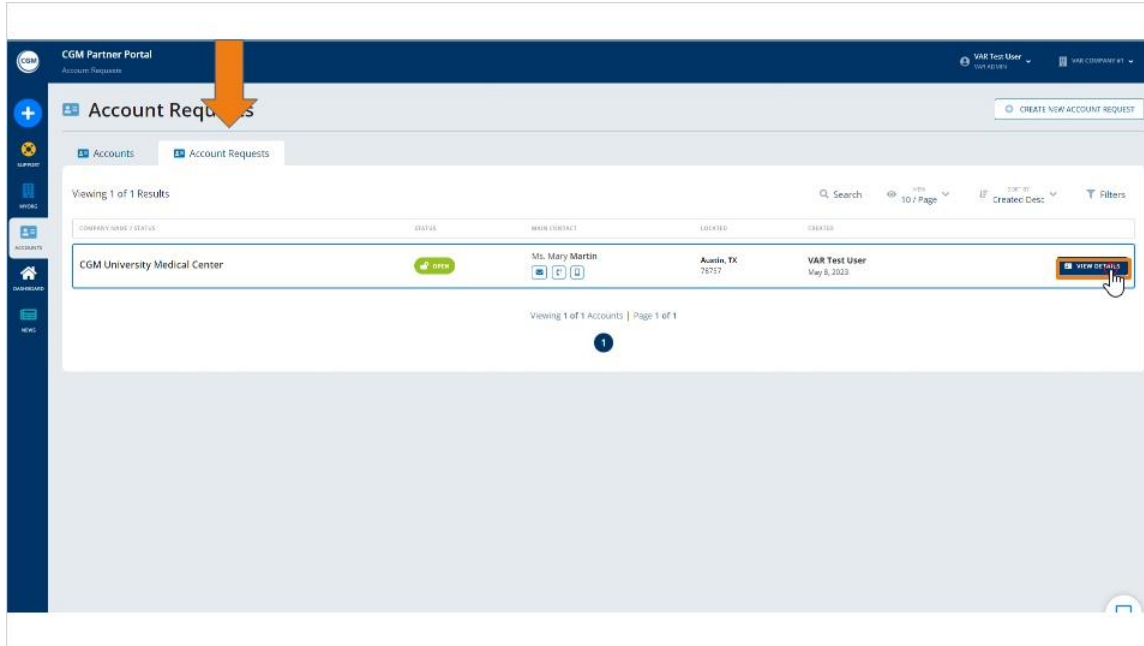


Notes:

When this message displays, your request has been successfully created and sent.

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1.11 View Details

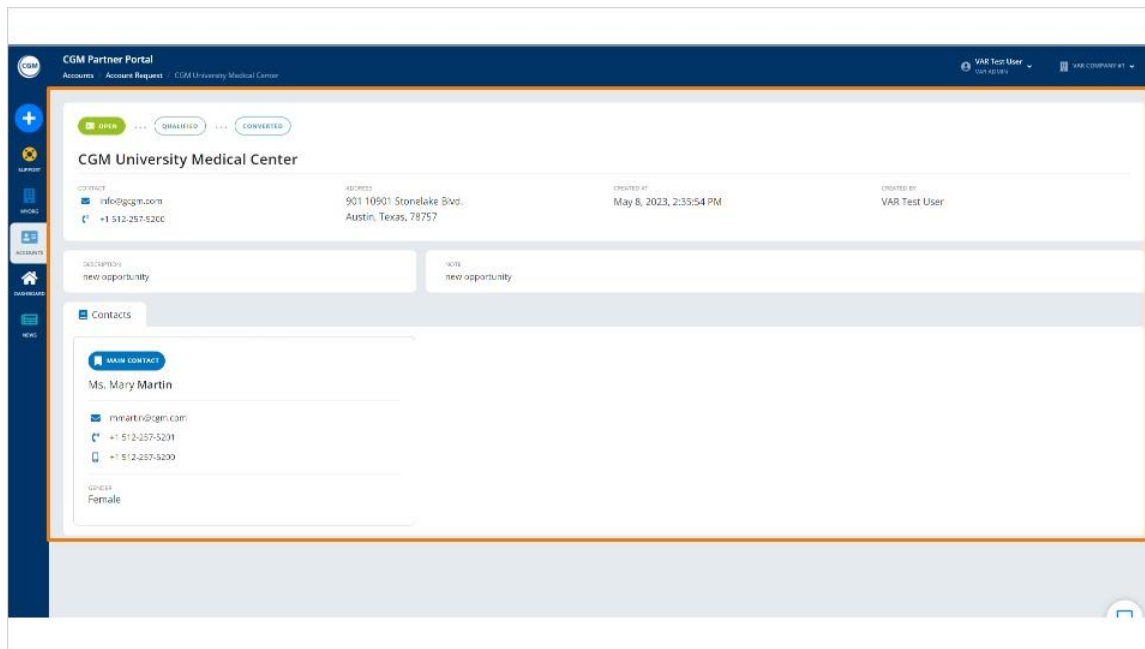


Notes:

Previous Account Requests can be viewed in the Account Requests tab until the requested account is created. Use the View Details button to view more information. When the account has been created, the request will no longer appear here, but will appear in the VAR's accounts list.

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1.12 Details



The screenshot displays the 'CGM Partner Portal' interface. At the top, the header shows 'CGM Partner Portal' and 'Account Request' for 'CGM University Medical Center'. The user is identified as 'VAR Test User'. The main content area features a sidebar with navigation icons and a central panel with the following details:

- Account Name:** CGM University Medical Center
- CONTACT:** info@cgmt.com, +1 512-257-5200
- ADDRESS:** 901 10901 Stonelake Blvd, Austin, Texas, 78757
- CREATED AT:** May 8, 2023, 2:35:54 PM
- CREATED BY:** VAR Test User
- DESCRIPTION:** new opportunity
- NOTES:** new opportunity
- CONTACTS:**
 - MAIN CONTACT:** Ms. Mary Martin
 - EMAIL:** mmartin@cgmt.com
 - PHONE:** +1 512-257-5201, +1 512-257-5200
 - GENDER:** Female

Notes:

Details including the name, address, telephone numbers, date created, created by and main contact information will display here.

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1.13 More Resources

More Resources

We have created a library of short videos and documents to assist you in learning how to perform all of the tasks you need to do in the new CGM Support Portal. More content will be added as new features are made available so check back using the links in your Dashboard!

[Click here to access more videos and documents about using the new CGM Portal!](#)



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OR [Click here to access more CGM Portal videos and documents!](#)