Nintex Partner Central Guide

Your guide to a successful Partner Central experience | January 2017

TABLE OF CONTENTS

NAVIGATION ON EVERY PAGE

SEARCH AND BROWSE

If you want to explore a subject area of interest, you can browse different categories by clicking on the tabs on the top banner. However, if you know exactly what you're looking for, you can also use the search bar on the top right corner of the page.

As a Nintex reseller, you can access the online demo environment by clicking the "ONLINE DEMO" button.
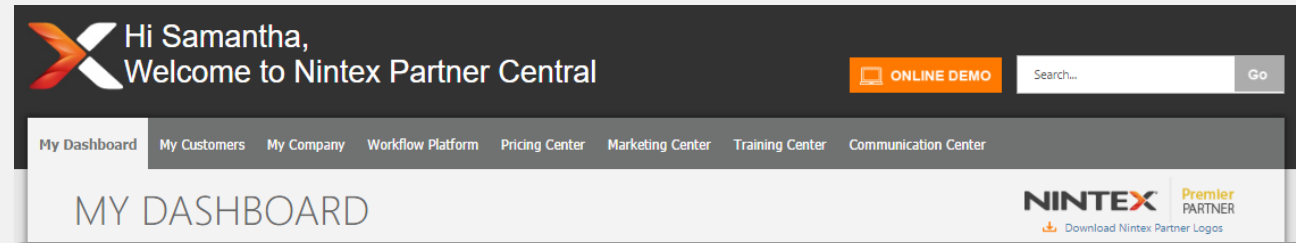
NINTEX CONTACTS

At the bottom of all Partner Central pages, you will find your Nintex representative's contact details as well as additional e-mail contacts for support.

PRICING INFORMATION

As a Nintex reseller, you will find a direct link to the Pricing Center at the bottom of all Partner Central pages, which details the different Nintex pricing models.

MY DASHBOARD

PIPELINE OVERVIEW

As a Nintex reseller, the first thing you'll see on the homepage is an overview of your lead pipeline data.

- **Submitted Leads:** leads being qualified by a Nintex representative
- **Open Opportunities**: total number of opportunities generated
- **Renewals:** total number of renewals set to expire within the fiscal year
- **Active Customers:** customers with an open renewal opportunity
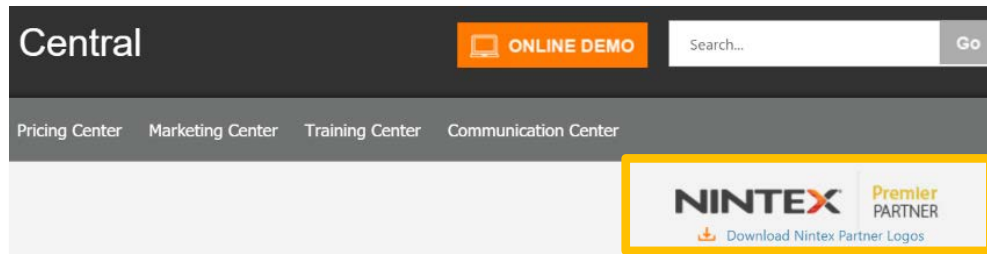
NINTEX LOGOS AND USAGE GUIDELINES

On the top right hand corner, you will also see your Nintex partner tier, with a link to "Download Nintex Partner Logos" and brand guidelines that correspond to your tier.

NOTIFICATIONS

This section informs you of the latest partner-related news, which could include items such as promotions, events, and product updates.

MY DASHBOARD

HELPFUL LINKS

Towards the bottom of the page, you will find links to popular pages within Partner Central. The first link listed will direct you to a **Submit a Lead/Generate Trial** form. You can also "PROVIDE FEEDBACK" to let us know how we can improve your portal experience.

PRODUCT RELEASES

In this section, you can check out the latest Nintex releases as well as upcoming products and features. Click "SEE OVERVIEW" to be directed to the Product Center for our latest product portfolio.

JOIN THE CONVERSATION

Finally, connect with the Nintex Partner Network and ask us questions directly on Yammer, Twitter, LinkedIn, and Facebook.

MY CUSTOMERS

MY CUSTOMERS

There are 3 sub-pages under the My Customers tab. The first page titled **My Customers** represents your current Nintex customer base, where you will see a total count of your Active Customers with an open renewal opportunity.

Note that on the right-hand side, there's a quick link for you to **Submit a lead or request a trial** for a prospective customer.

MY CUSTOMERS

My Customers | Open Opportunities | Registered Leads

Partner Portal > My Customers

1 ACTIVE CUSTOMERS
NINTEX GLOSSARY

RENEWALS
3 0 0 0
Overdue | 1-30 days | 31-60 days | 61-90 days

REGISTER A LEAD/TRIAL
Have a new lead? Great! Register your lead or customer trial request to ensure it is reflected on your dashboard.
REGISTER

Active Customers

Customer Name	Product(s)	Renewal Date
PDTCustomer1		August 9, 2015
PDTCustomer1		October 8, 2015
PDTCustomer1		March 15, 2016

ACTIVE CUSTOMERS

This is a list of all customers with an open renewal opportunity where you have been designated by Nintex as the primary partner on the renewal opportunity. By clicking on the customer name, you can access an account page with contact and financial details of the customer.

NINTEX

OPEN OPPORTUNITIES

The second sub-page titled **Open Opportunities** shows all your opportunities that have not yet been lost or won, but have been accepted by your Nintex representative. This page provides you with a dashboard view of all individual opportunities.

There is also a quick link to "VIEW PRICE LIST", for you to have immediate access to our pricing models when developing your opportunities.

OPPORTUNITY DETAILS

By clicking on the account name, you can access an additional page with more detail about the customer contacts and financial details. When appropriate, you may request a quote or submit a purchase order to a Nintex representative.

SUBMITTED LEADS

The last sub-page titled **Submitted Leads** shows a list of all the Nintex leads that have been registered by your organization. Accounts listed in Submitted Leads are awaiting qualification from a Nintex representative. Since leads do not have their own individual accounts, there are no details to view. As with the other sub-pages, you will still have the option to register more leads.

REGISTERED LEADS

Partner Portal > My Customers > Registered Leads

My Customers | Open Opportunities | Registered Leads

69 REGISTERED LEADS

NINTEX GLOSSARY

PRICE LISTS
The downloadable price list will help you familiarize yourself with Nintex product offerings and pricing.

VIEW PRICE LIST

REGISTER A LEAD/TRIAL
Have a new lead? Great! Register your lead or customer trial request to ensure it is reflected on your dashboard.

REGISTER

Company Name	First Name	Last Name	Product	Status
Petrobras Argentina	Alejandro	Sforza	Nintex Workflow 2013	Rejected

Submit a Lead or Trial

Your Details

First Name	Last Name
Samantha	Pugh
Email	Company Name
samantha.pugh@nintex.com	Crestan Global
Pre Sales Partner Contact	Sales Partner Contact
☐ Complete with my details	☐ Same as Pre Sales Partner Contact
First Name*	First Name*

HOW TO SUBMIT A LEAD

After you click on Submit a Lead/Trial, you will be asked to complete a form with information about the prospective customer. Depending on interest, you can also generate platform-specific trials for the prospective customer. Click on Submit Lead to send the lead to us for review. Once you submit, the lead will be routed to your Nintex representative for qualification.

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MY COMPANY

MY COMPANY DETAILS

Depending on your tier, there are 2 or 4 sub-pages under the **My Company** tab. The first page titled My Company is where you will see an overview of your account information and contact details.

As a Nintex reseller, the first thing you'll see under My Company is an overview of your pipeline data.

Registered Leads	Open Opportunities	Renewals (Fiscal Year)	Active Customers	ACTIVE PIPELINE $ 1,139,495.09
25	11	22	28	CLOSED DEALS (Fiscal Year) $ 137,014.82

NINTEX GLOSSARY

PREMIER PARTNER
Partner Since 2009

PRINCIPAL CONTACT
Johnny Danese

61 Company Contacts

SEE ALL

COMPANY DETAILS

COMPANY NAME
Neudesic - Irvine

PHONE
(800) 805-1805

WEBSITE
www.neudesic.com

ADDRESS
100 Spectrum Center Dr #1200
Irvine
CA
United States
92618

HOW CAN NINTEX HELP YOU:

TECHNICAL CONTACT:
support@nintex.com

MARKETING CONTACT:
marketing@nintex.com

SALES CONTACT:
sales@nintex.com

TERRITORY MANAGER:
Aaron Adsit

COMPANY INFORMATION

The My Company page will host important details about the contacts relevant to your partnership with Nintex. You can click "SEE ALL" to access all your company contacts that are registered with Nintex.

On the right-hand side, you will find useful Nintex contacts for Sales, Marketing and Technical assistance.

NINTEX

MY CONTACTS

The second sub-page of My Company is **My Contacts**. In this space you can modify your organization's contacts and identify your company's Primary Business Contact.

A **Primary Business Contact** has full rights within the portal to add/edit/delete existing contacts, manage internal-use licenses, and update partner directory profiles.

61 COMPANY CONTACTS
Primary Business Contact
Johnny Danese

SALES CONTACTS **20**

MARKETING CONTACTS **7**

EXECUTIVE CONTACTS **0**

TECHNICAL CONTACTS **18**

SUPPORT CONTACTS **0**

Samantha Pugh
Principal

My Contact Details

Email: samantha.pugh@nintex.com
Phone: +1 (425) 289-0412
Fax:
Linked In:

Address: 10800 NE 8th Street, Suite 400
Bellevue
WA
United States

EDIT

EDIT YOUR CONTACT DETAILS

Update your contact details by clicking the "EDIT" button. In the form, you can modify information and select your communication preferences by choosing topics and frequencies.

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ADD OR EDIT ANOTHER CONTACT

Anyone with Partner Central access can add another contact to Partner Central. Only the Primary Business Contact can edit and delete contacts. The Primary Business Contact can designate someone as a "Partner Central Administrator" which grants full portal access to additional contacts in the organization.

ADD CONTACT

👤 Partner Central Administrator

Name	Type	Address	Email	Phone	Edit	Delete
👤 Jaana Linsenmayer	Executive	10800 NE 8th Street Suite 400 Bellevue Washington 98004 UNITED STATES	jaana.linsenmayer@nintex.com	+1 (425) 289-0401	EDIT	✖
👤 Vishal Ramadasan		Washington United States	vishal.ramadasan@outlook.com		EDIT	✖
		undefined				

ADDING A PARTNER CENTRAL ADMINISTRATOR

Only a Primary Business Contact can grant admin rights to any contact under a company's account. Rights can be granted by checking the box on the form to "Give contact admin access" when adding or editing contacts.

First Name
Bruce

Last Name
Crestan

Phone
12345

Fax

Email
bruce.crestan@crestan123.com

Linked In

Contact Type
- ⚪ Sales
- ⚪ Technical
- 🔘 Marketing
- ⚪ Support
- ⚪ Executive

Give Contact Admin Access to Nintex Partner Central
☐

NINTEX®

MANAGE SERVERS

As a Nintex reseller, you will have the ability to add/assign servers to an environment for internal use of the Nintex platform via the **Manage Servers** page.

In the blue box you will see your current number of existing servers. In the yellow box, you will find information about unassigned servers that do not have Nintex demo licenses attached. Attach a demo license in the **Demo License Management** page.

Watch this video about setting up your demo environments through Partner Central.

MANAGE SERVERS

My Company | My Contacts | Manage Servers | Partner Profile

Partner Portal > My Company > Manage Servers

8 Existing Company Servers

2 Unassigned Servers

DELETE ALL UNASSIGNED   VIEW UNASSIGNED

Create a New Company Server

GENERATE NEW   **CREATE**

ADD A SERVER

Add a new company server in the box towards the bottom of the page and hit create. It will land in your unassigned servers. Then visit the Demo License Management page under the Workflow Platform tab to assign a demo license to your server.

NINTEX

PARTNER PROFILE LISTING

Get listed in the **partner directory** on Nintex.com so that customers can search and filter on your unique Nintex practice. As a Primary Business Contact or Partner Central Administrator, you can update or create a listing by clicking the "CREATE LISTING" button on the **Partner Profile** page.

After completing the form and attaching a 110x110px image of your logo, your listing will be reviewed and added to the Nintex website within 5 business days.

PARTNER PROFILE
Partner Portal > My Company > Partner Profile

My Company | My Contacts | Manage Servers | Partner Profile

Partner Listing

Crestan Global

CREATE LISTING

NINTEX Premier PARTNER

PARTNER LISTINGS

A **Partner Listing** is a brief overview of your company that includes your areas of specialization and unique selling proposition. It should highlight the benefits prospective customers would expect from working with you and the solutions you provide based on Nintex technologies.

ADD OFFERING

ADD OFFERING

Published offerings

Offering title	Status	Actions
Showing 0 of 0		< PREV 1 NEXT >

Drafts and pending offerings

Offering title	Status	Actions
Showing 0 of 0		< PREV 1 NEXT >

PARTNER OFFERINGS

A **Partner Offering** is a specific Nintex-related product or service that you offer, and is what prospective customers would be looking to acquire from you. Whereas your Partner listing provides general company-level information, and offering provides more specific details on each product or service that you provide.

You may have several offerings associated to your listing.

ADD AN OFFERING

Once you have a published listing, you can begin adding Partner Offerings which are specific Nintex-related solutions or services that you offer. Consider offering your **Nintex Xchange** Assets.

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WORKFLOW PLATFORM

PLATFORM OVERVIEW

There are 4 sub-pages under the **Workflow Platform** tab. The first page serves as an overview and landing page for all information related to the Nintex Workflow platform.

Nintex Workflow

Automate processes with clicks, not code.

PLATFORM: **SharePoint** | **Office 365** | **Nintex Workflow Cloud**

Nintex Forms

Forms as fast as point, click, done.

PLATFORM: **SharePoint** | **Office 365** | **Nintex Workflow Cloud**

PLATFORM CAPABILITIES

Get specific details about the capabilities of Nintex on different platforms by clicking on the orange links to the right of the blue icons. You will be directed to pages with additional details, videos, information, and resources that will help you deliver platform-specific automation technologies to your customers.

BUILD YOUR OWN SOLUTIONS

The second sub-page under the Workflow Platform tab will be where you can download the latest versions of all Nintex products with license keys. You will find release notes, installation guides, and license keys for downloading Nintex products.

Please note that Office 365 products are distributed from Microsoft.

PRODUCTS

Platform	Product	Release Notes	Install Guide	Install English Product	Install International Product
SharePoint 2016	Nintex Workflow	View notes	View guide	DOWNLOAD	DOWNLOAD
SharePoint 2016	Nintex Forms	View notes	View guide	DOWNLOAD	DOWNLOAD
Office O365	Nintex Workflow	View notes	View guide	VISIT APP STORE	
Office O365	Nintex Forms	View notes	View guide	VISIT APP STORE	
SharePoint 2013	Nintex Workflow	View notes	View guide	DOWNLOAD	DOWNLOAD
SharePoint 2013	Nintex Forms	View notes	View guide	DOWNLOAD	DOWNLOAD
SharePoint 2013	Nintex Workflow for P...	View notes	View guide	DOWNLOAD	DOWNLOAD
SharePoint 2010	Nintex Workflow	View notes	View guide	DOWNLOAD	DOWNLOAD

3 Demo Licenses
Product licenses (valid for one year) enabling the use of Nintex products for demonstration purposes
ADD LICENSE

8 Company Servers
Servers in use within your organization for which you can generate demo licenses for Nintex products
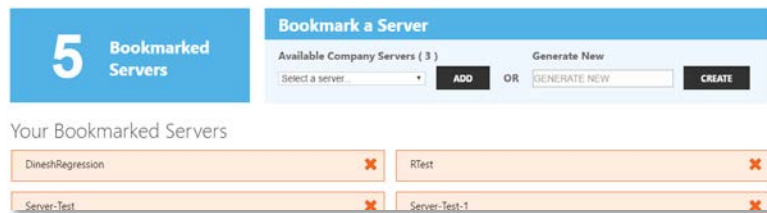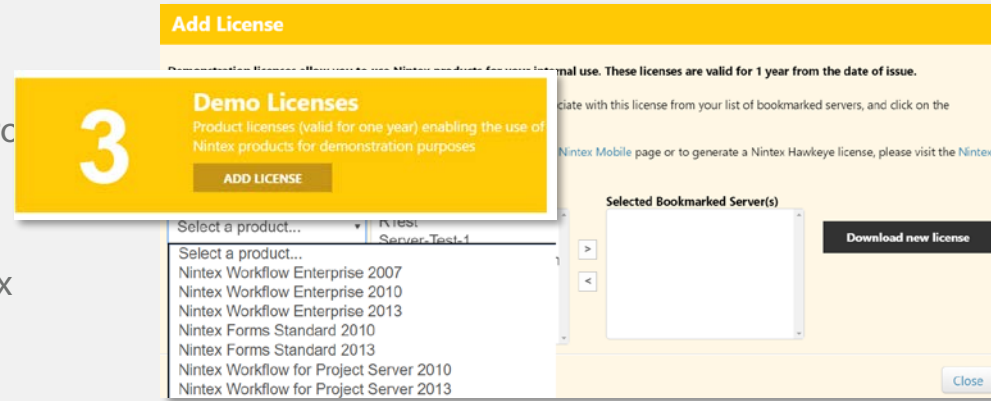MANAGE SERVERS

PLATFORM CAPABILITIES

As a Certified and Premier Partner, the downloads page will also provide links to the Demo License and the Company Servers page to manage your partner internal-use licenses.

Please note: these licenses are not for resale, and are for demonstration, testing, and production purposes only.

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ADD A LICENSE

To generate a license, click the "ADD LICENSE" button and select a product from the demo license management page. Then choose the servers you want to associate with this license from your list of bookmarked servers, and click on the "Download new license" button.

Please note: To generate a Nintex App Studio license, please visit the **App Studio** page. To generate a Nintex Hawkeye license, please visit the **Nintex Hawkeye** page. To access a Nintex Workflow Cloud tenant, please visit the **Nintex Workflow Cloud** page.

BOOKMARK A SERVER

To bookmark a server, select from a list of existing servers you have added to your organization's account and hit the "ADD" button.

CURRENT LICENSES

On the **Demo License Management** page, you may view a list of your current demo licenses and their expiration date underneath the option to manage servers and add licenses.

Your Current Demo Licenses

License Key	Server Name	Product	Edit & Download	Expiry
ⓘ 0 license(s) due to expire in the next 60 days				
UYSLSXULKVKB	Server-Test-1	Nintex Forms 2013	EDIT	Jun 21, 2017
NF: AHNDWERQFDLB // NW: AKUJTFRQFDLB	Server-Test-1	Nintex Combined 2016	EDIT	Aug 9, 2017
NF: UHADCPBURELB // NW: TWQBZPBURELB	Testing-for-Partner-Revamp	Nintex Combined 2016	EDIT	Aug 18, 2017

Showing 3 of 3

< PREV   1   NEXT >

NINTEX TECHNOLOGY PARTNERS

Our technology partners consist of organizations that integrate with or extend the current Nintex Platform. On this page, you'll find a list of all **Technology Partners** and read a brief overview of their Nintex solution.

PRICING CENTER

HOW PRICING WORKS

Nintex has two pricing models:
- Subscription (cloud)
- Perpetual (on-premises)

Pricing Center will provide you with necessary information on pricing Nintex Workflow Platform solutions for your customers.

STEP 2: SALES GUIDANCE

Deployment Path	Cloud only	Hybrid	On-Premise
New Customers	Sell on Subscription	Sell on Subscription	Lead with Subscription Sell Perpetual Licensing if necessary
Existing Customers	Sell on Subscription	Review and analyze workflow needs with Know Your Workflow Tool Lead with subscription pricing Continue with perpetual licensing if necessary. Sell subscription for Cloud	Maintain/Renew Perpetual Licensing, SA, and PS Review and analyze workflow needs with Know Your Workflow Discuss Subscription Options for Cloud, Hybrid, and On Premise

Subscription Everywhere Pricing

Refer to this guide to learn about Nintex product offerings and pricing under the subscription pricing model for available gl...

VIEW PRICING

STEP 1	STEP 2	STEP 3
Watch the subscription pricing overview videos	Review subscription sales guidance reference guide	Review do's and don'ts and contact your local Nintex representative to get started.

SUBSCRIPTION PRICING

Nintex subscription pricing makes it easy to make the most of the Nintex Workflow Platform because annual subscription expenses will align with platform usage. By giving customers choice and flexibility, they can determine a workflow plan to match evolving needs and priorities.

PERPETUAL PRICING

Pricing Center will have perpetual price lists for on-premises customers with SharePoint environments.

Please note: do not share price lists with your customers.

Perpetual Pricing

The downloadable price list will help you familiarize yourself with Nintex Product offerings and pricing.

DOWNLOAD PRICE LIST

Nintex Partner Price List

NINTEX

MARKETING CENTER

COLLATERAL RESOURCES

Marketing Center is where you'll find resources to help you market or sell the Nintex platform. Use the search function to filter on materials you're looking for.

COLLATERAL CATALOGUE

130 ITEMS

SEARCH COLLATERAL

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7 CAMPAIGNS
7 are Webinar based

VIEW MORE CAMPAIGNS

SUGGEST A CAMPAIGN

FEATURED CAMPAIGN

HR Campaign in a Box
Customize this campaign to address efficiency challenges in HR departments

VIEW CAMPAIGN
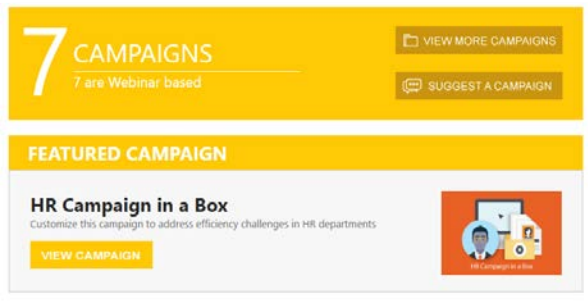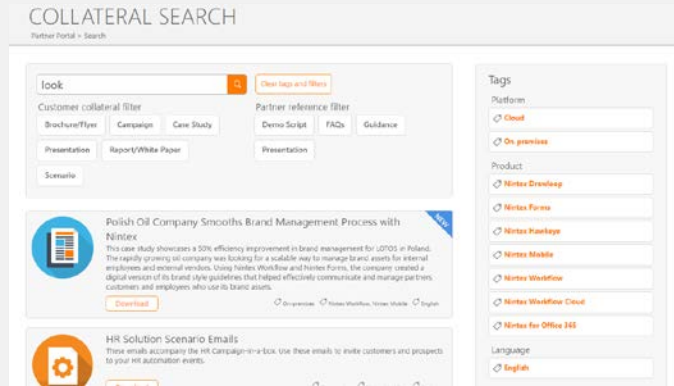
CAMPAIGN-IN-A-BOX

The **Campaign-in-a-Box** section contains our best marketing materials in a package that you can quickly custom-brand and use in your go-to-market efforts.

CASE STUDIES

The **Case Study** section contains real-life scenarios of business challenges solved by the Nintex Workflow Platform. Use Case Studies to make your Nintex solution relevant to your customers.

12 CASE STUDIES

VIEW MORE CASE STUDIES

SUGGEST A CASE STUDY

FEATURED CASE STUDY

Industry Funds Services (IFS)
To retain its competitive edge, Industry Funds Services (IFS) needed to increase staff and customer engagement. The company decided to extend their SharePoint investment by purchasing Nintex.

VIEW CASE STUDY
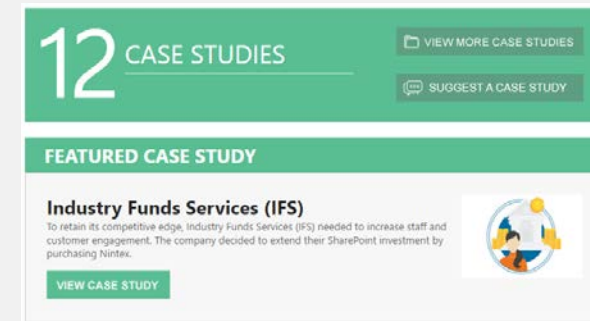
NINTEX

MARKETING CENTER

JOINT LEAD GENERATION

We help our partners with their marketing activities to drive demand for Nintex solutions. On this page, you can request co-marketing funds and other resources by completing the **Joint Lead Generation** form. Once your request has been reviewed, you will receive further information regarding next steps.

ACTIVITY DETAILS

Activity Type *
- [ ] Event
- [ ] Webinar
- [ ] Email Promotion
- [ ] Social Media Promotion
- [ ] Other

Activity Description *

Activity Name *

Activity Address *

MARKETING REQUESTS

JOINT LEAD GENERATION

EVENT PROMOTION

PROMOTE MY EVENT

Event Name

Start Date

[ ] Online Event

End Date

Registration URL

Event Contact Email

Description

LOCATION

Venue

EVENT PROMOTION

Hosting a Nintex event? Promote the event on the Nintex website by completing the **Event Promotion** form in Partner Central.

AFFILIATE OF
SIRM
SOCIETY FOR HUMAN RESOURCE MANAGEMENT

Use Workflow Optimization to 'Connect the Dots' for Best-in-Class Engagement
Date: Thursday, Nov. 3 Time: 2:00pm ET / 11:00am PT
Register now >

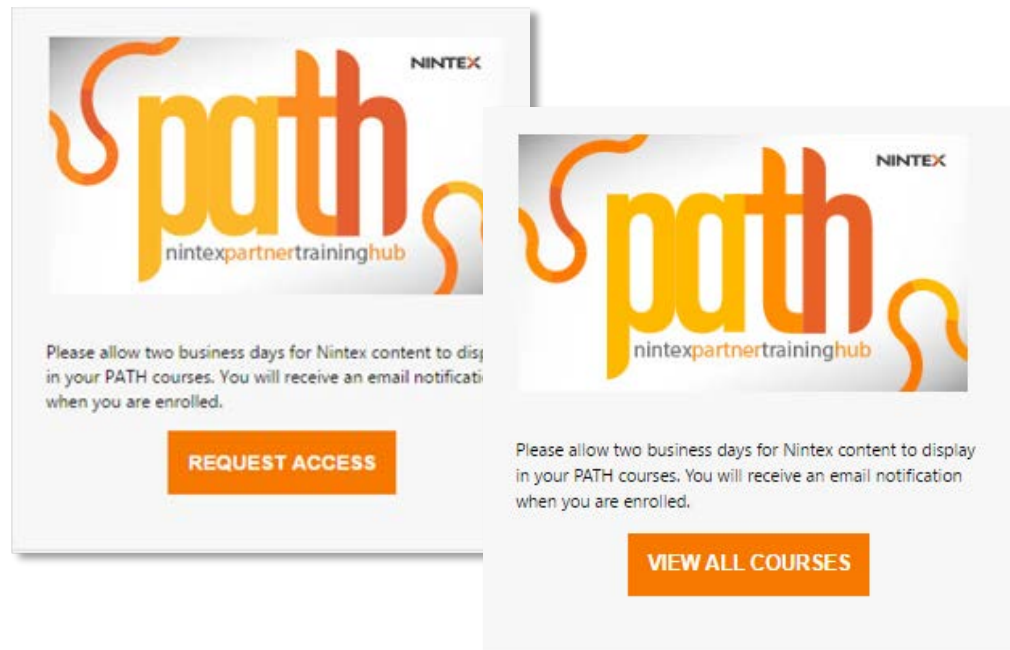NINTEX

TRAINING CENTER

NINTEX PARTNER TRAINING HUB

We partnered with TekDog University to offer training content to our partner ecosystem. The Nintex Partner Training Hub will provide you with access to a range of technical and sales learning content to prepare you for the certifications required for your next partnership level.

Nintex Complete	01. Using TekDog University - (20:39) Online Course	Launch
Nintex Complete	02. Introduction to Nintex Forms - (2:26:53) Online Course	Launch
Nintex Complete	03. Intermediate Nintex Forms - (2:13:00) Online Course	Launch
Nintex Complete	04. Advanced Forms HR - (1:58:54) Online Course	Launch

ACCESSING PATH

If it's your first time accessing the Nintex Partner Training Hub, you will need to click a button in the top right of the Training Center page that says "REQUEST ACCESS."

After requesting access, please allow up to 2 business days for your account credentials to populate in the PATH environment.

path
nintexpartnertraininghub

Please allow two business days for Nintex content to display in your PATH courses. You will receive an email notification when you are enrolled.

REQUEST ACCESS

path
nintexpartnertraininghub

Please allow two business days for Nintex content to display in your PATH courses. You will receive an email notification when you are enrolled.

VIEW ALL COURSES

NINTEX

COMMUNICATION CENTER

PARTNER UPDATES

The **Communication Center** page will provide all partner-related information globally. Posts will populate in chronological order. Find content such as sales guidance, marketing resources, technical training, and video recordings.

POSTS

Bring people, data, and process together with NWC

We created a resource that highlights how Nintex Workflow Cloud can solve productivity challenges by bringing people, data, process, and things together. Download the document to learn how Nintex can bring workers and field data together to reduce service disruptions, improve operational effectiveness and mitigate risk.

Download

◇ Product Collateral   ◇ English

REFINE VIEW

One Year Ago   Today

All

Expand
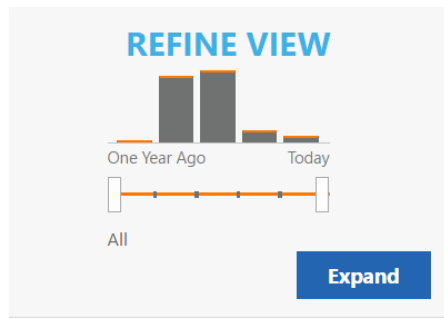
REFINE RESULTS

Filter content to display results that are relevant to you. You can filter this page on language, subject matter, and region.

MANAGE COMMUNICATION PREFERENCES

Define your communication preferences by clicking the "Manage" button so that you can personalize communications from the Nintex Partner Network based on your region and specialty. As a default, Nintex Partners are subscribed to weekly emails from Communication Center.

Communication Preferences

Update your Nintex Partner Network communication preferences and so that we know:

- What topics to notify you about
- How often to notify you
- How you'd like to be notified

Manage

NINTEX