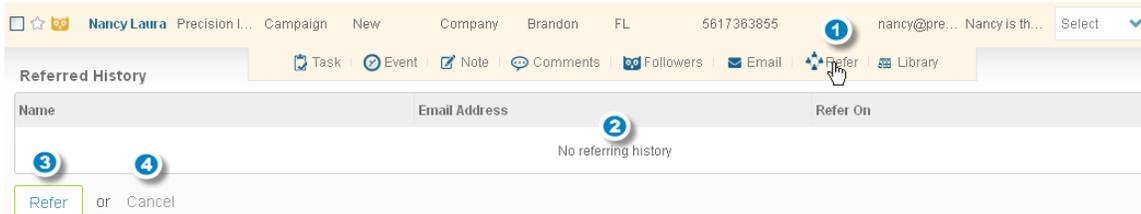


Partner's Network

ConvergeHub understands that sharing and collaboration of important leads, contacts and docs is a part and parcel of every business. And so, it has given this exclusive benefit to all its users. ConvergeHub clients do not have to separately share the information through an email. They can share their business leads, contacts and documents to external party clients (who may or may not be ConvergeHub users) through the CRM itself.

How to refer a lead/contact?



1

The option of refer pops up on placing the cursor on the concerned lead/contact.

2

Clicking on refer opens up an additional box showcasing the referring history of the lead/contact (if any).

3

The user needs to further click on  to complete the process of referring lead/contact to a 3rd party associate. On clicking



, a new section pops up containing the fields such as Refer To and Message (see the below screenshot). After filling in the

required data, the user needs to click on  for the last time.

Refer Nancy Laura

Refer To

Message

 Refer

or Cancel

4

In order to cancel the process of referring, the user needs to click upon

Cancel

Note: Documents can be shared with external party clients through Collaboration. Please check Collaboration section (under the Library module) to know the exact steps.

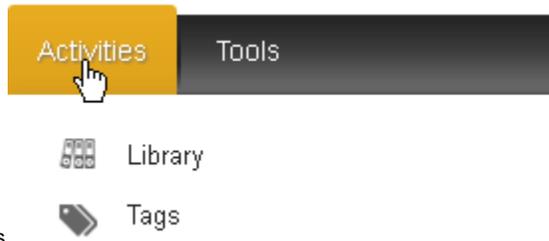
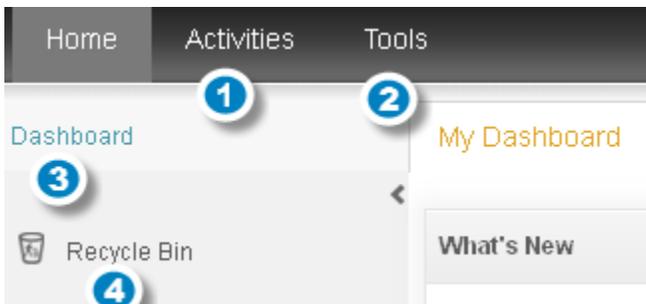
Accessing the Partner's Network

When the ConvergeHub user refers a lead/contact/business document, the invitee will receive an invitation e-mail. If the invitee is an existing ConvergeHub user, he/she can log into ConvergeHub and can view:

- Shared file/folder under the Library section
- Referred lead/contact under the Tools section.

If the invitee is not a user of ConvergeHub, he/she needs to register in ConvergeHub to access the referred information. (The registration is free.) Post the registration done, the invitee can access ConvergeHub with a similar user interface but with limited features. The ConvergeHub account accessed by a non-ConvergeHub user is referred to as **Partner's Network**.

Below mentioned is the screenshot depicting the modules that a non-ConvergeHub user will find in the Partner's Network.



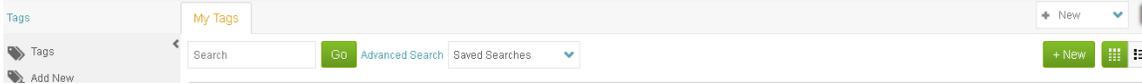
1

Activities has two sub-sections - Library and Tags

Library: The user can access the referred document under this section. He can also share other business documents through the CRM system, which again will be available under the Library module.



Tags: The user can tag leads/contacts/documents as important or unimportant, considering their value to the business.



2

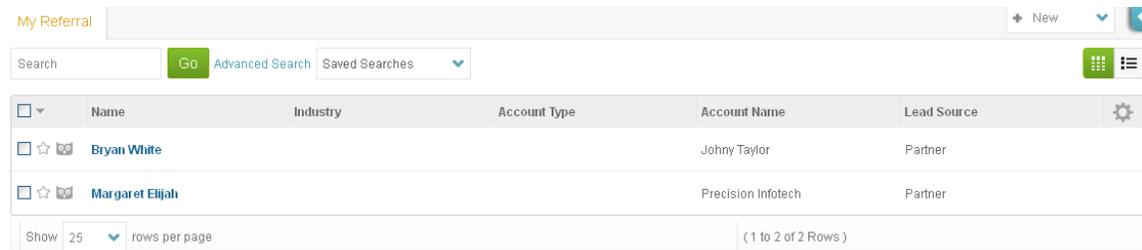
Tools has two sub-sections - Notifications and Referral



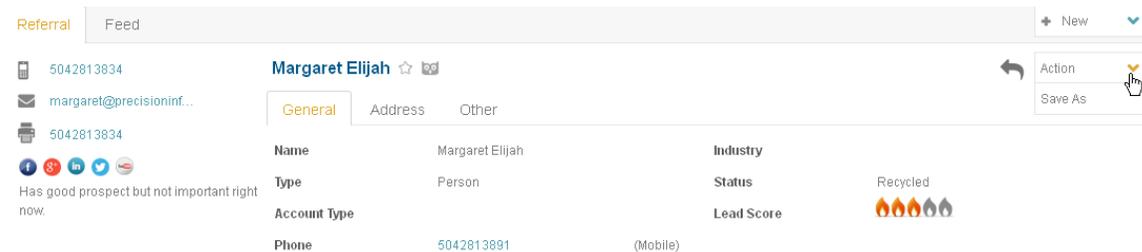
Notifications: The user can communicate important business-related updates among his team members through notifications. To send notifications, the user will have to opt for a paid version where he can add users to the CRM.



Referral: The user can access the referred leads/contacts in this section.



Clicking on the referred lead/contact, the user will be redirected to a separate page enlisting all the important details of the referred lead/contact. The user can convert the referred lead/contact to his own lead/contact by clicking on **Save As** option.



Note: To convert referred leads/contacts to one's own., the user will have to upgrade the CRM to a paid version first.

3

ConvergeHub dashboard will give a unified display of the available features of the CRM. It will help the user manage the activities from a single interactive screen.



Deleted lead/contact details or for that matter any deleted documents will be stored in the Recycle Bin. Information deleted from the Recycle Bin will be removed from the ConvergeHub database permanently.