

Steps to Approve a Partner Application

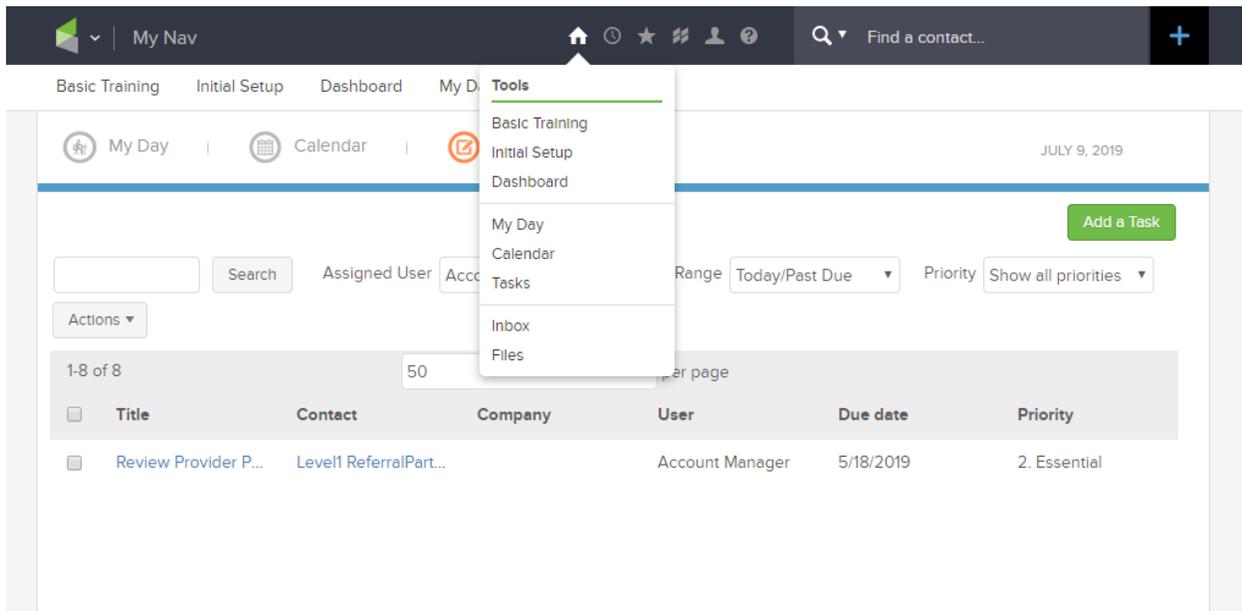
Overview

After a Prospective Partners applies to become a Nutrition Factors Provider Partner (Coach) the onboarding process creates a task for the Account Manager. The application process is automatically stopped pending the decision to approve or deny the application. The manager reviews the application and determines whether the application should continue or not.

Do the following:

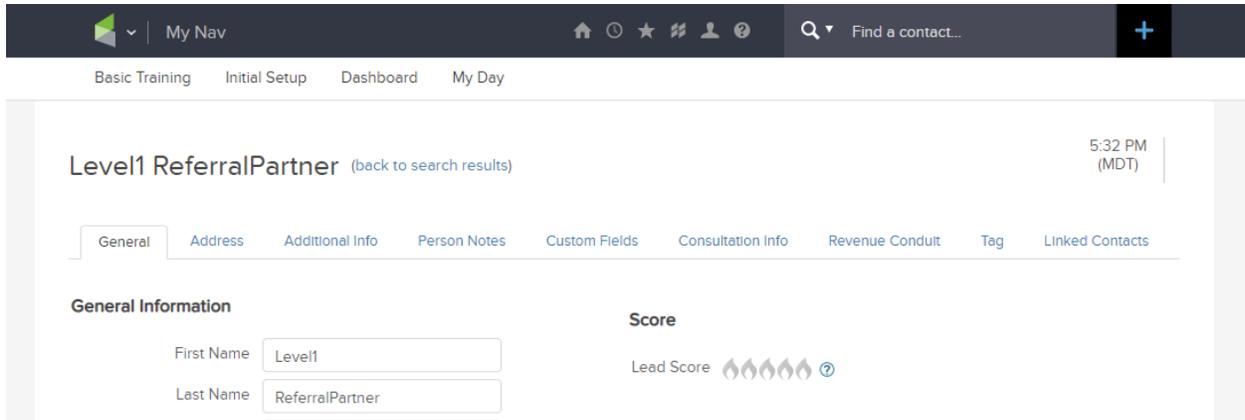
Step 1: Login to Infusionsoft as the Account Manager

Step 2: Place the cursor over the Home Icon and select tasks from the dropdown list



In the Title column a task “Review Provider Partner Application” is created for each new application submitted for review.

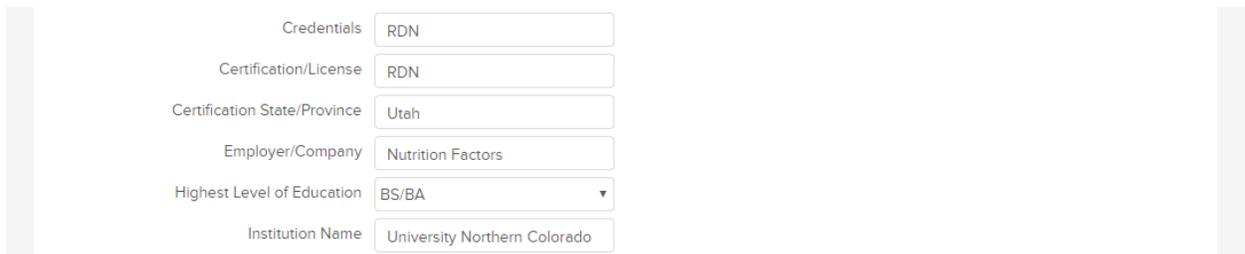
Step 3: Click the name link in the Contact column and review the contact record.



The screenshot shows a user interface for a contact record. At the top, there is a navigation bar with 'My Nav' and a search bar. Below the navigation bar, there are tabs for 'Basic Training', 'Initial Setup', 'Dashboard', and 'My Day'. The main content area displays the contact record for 'Level1 ReferralPartner'. The record is titled 'Level1 ReferralPartner' with a link to '(back to search results)'. The time is shown as '5:32 PM (MDT)'. Below the title, there are tabs for 'General', 'Address', 'Additional Info', 'Person Notes', 'Custom Fields', 'Consultation Info', 'Revenue Conduit', 'Tag', and 'Linked Contacts'. The 'General Information' section shows 'First Name' as 'Level1' and 'Last Name' as 'ReferralPartner'. The 'Score' section shows 'Lead Score' with five flame icons and a question mark.

Review the contact record. The most important information for determining approval is found in the Custom Fields section of the Contact Record.

Step 4: Click on the Custom Fields link

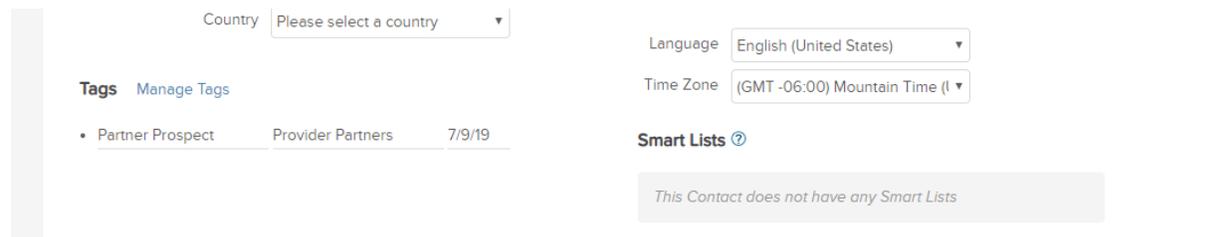


The screenshot shows the 'Custom Fields' section of the contact record. It contains several input fields with the following values: 'Credentials' is 'RDN', 'Certification/License' is 'RDN', 'Certification State/Province' is 'Utah', 'Employer/Company' is 'Nutrition Factors', 'Highest Level of Education' is 'BS/BA', and 'Institution Name' is 'University Northern Colorado'.

Review the information in the Custom Fields. Determine whether credentials, licensure and education are support approving the application.

Step 5: Approve or Deny the application

- Scroll to the top of the page and click on the **General** Link (this returns you back to the Contact's general information).
- Scroll down until you see the **Tags** section. Note that the contact is tagged as a Partner Prospect. A prospective partner application is approved by changing the tag to Partner Candidate. Similarly, the application is denied by changing the tag to Partner TBD (short for To Be Determined). Step 6 shows how to do this.



Country

Language

Time Zone

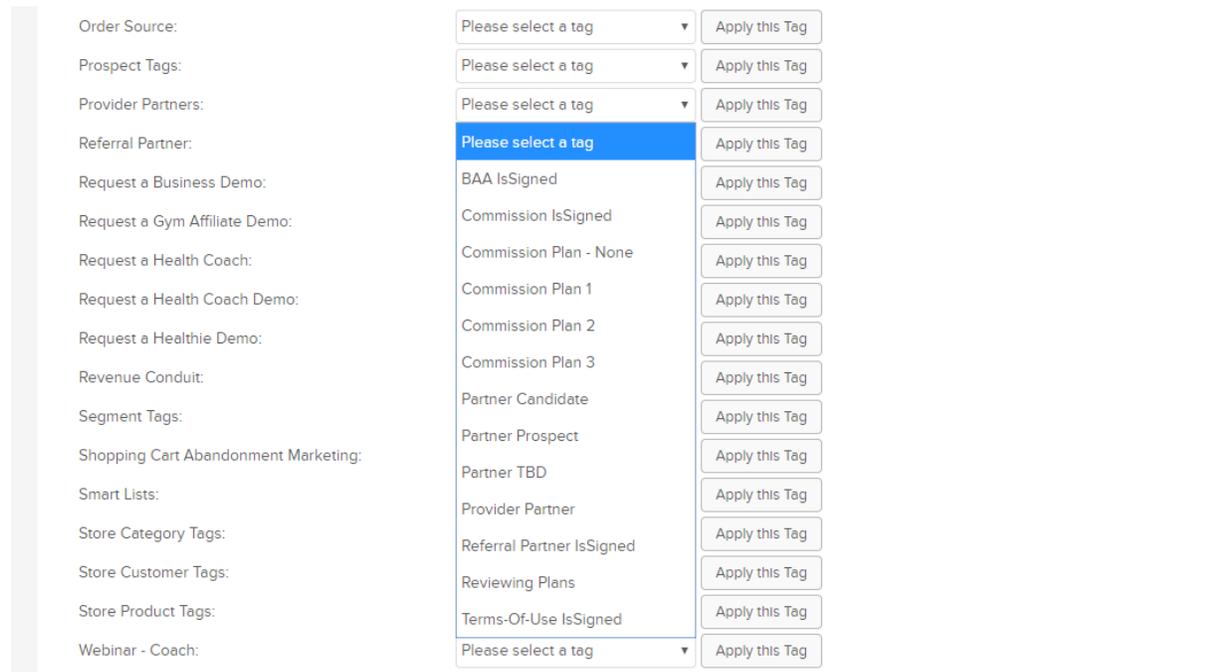
Tags [Manage Tags](#)

- Partner Prospect Provider Partners 7/9/19

Smart Lists [?](#)

This Contact does not have any Smart Lists

Step 6: Click the Manage Tags link



Order Source:	<input type="text" value="Please select a tag"/>	<input type="button" value="Apply this Tag"/>
Prospect Tags:	<input type="text" value="Please select a tag"/>	<input type="button" value="Apply this Tag"/>
Provider Partners:	<input type="text" value="Please select a tag"/>	<input type="button" value="Apply this Tag"/>
Referral Partner:	<input type="text" value="Please select a tag"/>	<input type="button" value="Apply this Tag"/>
Request a Business Demo:	BAA IsSigned	<input type="button" value="Apply this Tag"/>
Request a Gym Affiliate Demo:	Commission IsSigned	<input type="button" value="Apply this Tag"/>
Request a Health Coach:	Commission Plan - None	<input type="button" value="Apply this Tag"/>
Request a Health Coach Demo:	Commission Plan 1	<input type="button" value="Apply this Tag"/>
Request a Healthier Demo:	Commission Plan 2	<input type="button" value="Apply this Tag"/>
Revenue Conduit:	Commission Plan 3	<input type="button" value="Apply this Tag"/>
Segment Tags:	Partner Candidate	<input type="button" value="Apply this Tag"/>
Shopping Cart Abandonment Marketing:	Partner Prospect	<input type="button" value="Apply this Tag"/>
Smart Lists:	Partner TBD	<input type="button" value="Apply this Tag"/>
Store Category Tags:	Provider Partner	<input type="button" value="Apply this Tag"/>
Store Customer Tags:	Referral Partner IsSigned	<input type="button" value="Apply this Tag"/>
Store Product Tags:	Reviewing Plans	<input type="button" value="Apply this Tag"/>
Webinar - Coach:	Terms-Of-Use IsSigned	<input type="button" value="Apply this Tag"/>
	<input type="text" value="Please select a tag"/>	<input type="button" value="Apply this Tag"/>

A list of the current tags applied to this prospect are shown. Scroll down to the Apply a Tag section. Find the category for **Provider Partners**, and click the dropdown box. Select **Partner Candidate** to approve the application or **Partner TBD** to deny the application. Click the Apply this Tag button.

Step 7: Remove the Partner Prospect Tag

Scroll up until you see the **Current Tags** list. Click the **X** associated with the Partner Prospect Tag to remove it.

Current Tags			
Applied	Tag	Category	Remove
7/9/19	Partner Prospect	Provider Partners	X
5/18/19	Partner Candidate	Provider Partners	X

You have just changed the status of the Provider Partner. Partner Candidates move forward in the process while Partners TBD is put on permanent hold. Step 8 shows you how to start the automated process again.

Step 8: Navigate to the task

- Click on the **General** Link at the top of the page.
- Scroll down to the **Tasks and Appointment** section.
- Click on the **Review Provider Partner Application** link

Tasks & Appointments				Add Appointment	Add Task
Due	Type	Assigned User	Description		
5/18/2019 12:00 AM	✓	Account Manager	Review Provider Partner Application Approve Application > Set Candidate Tag Disapprove Application > Set TBD Tag		

Step 9: Complete the task by setting the completion date

Click on the calendar icon to open the calendar. If you want to immediately start the onboarding process, select the day before the current date and click save. If starting the process “soon” is okay, select the current date.

Task Information

Creator: System

Action Description: Review Provider Partner Applic

Action Date: 05-18-2019 02:00 AM

Completion Date:

Creation Notes:

Priority: 2. Essential

Start Date: 05-18-2019

Send a Notification To

Contact's owner: Account Manager

Pop Up Reminder: Please select a pop up remind before due date

JULY 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Created: System Saturday, May 18, 2019 8:07:37 PM
 Last Updated: System Saturday, May 18, 2019 8:07:37 PM

When the task record is saved with a completion date a system trigger automatically restarts the onboarding process. An email is sent to the applicant informing them of the approve or deny decision with “Next Steps” instructions.