Partner Onboarding
## Product Introduction

1   Introduction

Thank you for your request for information regarding our **partnerCRM** product. This document is for use by developers of Unified Communication Desktop solutions to provide information related to getting started with partnerCRM. It assumes you have already had a demonstration of the product and understand the main features and value of the product. If, after reading this document, you wish to proceed, then please work with your Account Manager to go through the process explained in this document.

2   What is partnerCRM?

partnerCRM provides an API to Mondago's CRM integration libraries. The libraries provide integration to a comprehensive range of CRM and contact orientated business applications. Both a PC-Windows and a MacOSX client is available although it should be noted that a much more extensive range of integrations is available with the PC-Windows client. The solution also includes an extensive range of click to dial techniques.

3   How does it work?

The partnerCRM API is a REST API with a WebSocket for events. The API is presented by a Windows / OSX desktop client. A user license is required to activate the software. The architecture slide below details the different licensing methods available. These options are explained further in section 8.

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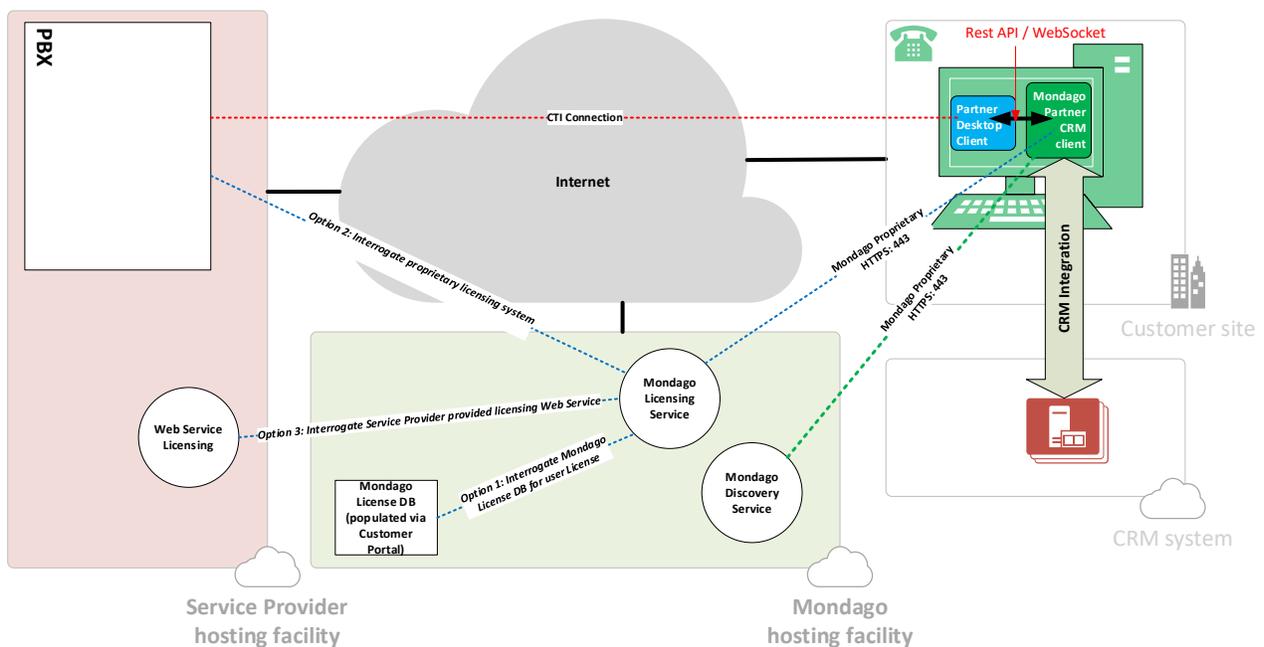
4   Overview of API features

The following primary features are available through the API

POST Register	Used to register the PDC with partnerCRM using a unique GUID
POST ShowWindow	Opens the user interface used to configure CRM integration and click to dial techniques
POST Search	Used to search integrated CRMs using name or number
POST DoAction	Used to pop CRM contact record following successful search or write activity logs
GET AddressBooks	Get a list of integrated CRMs
GET Version	Get Version of partnerCRM
GET OwnerContact	Get current user caller ID/DDI information used for telephone number matching
POST Unload	Close partnerCRM
Events system (WSS)	partnerCRM sends events through a web socket to the PDC e.g make call

5   API Explorer

An online test harness / API explorer is available at: https://api-partnercrm.mondago.com. This tool enables you to test the features of the partnerCRM product.

6   Implementing partnerCRM

partnerCRM requires you to modify your own desktop client (Partner Desktop Client or PDC) to add the CRM integration features available through the API. The libraries and API are installed on the end user desktop either independently or through the Partners own software installation process.

7   Provision of Software, Branding options and Access codes

partnerCRM is provided as a standard software installation download. The Software is customized for use with your PDC through the use an Access Code which is applied to the software when the PDC launches it. The Access code will deliver a set of pre-defined parameters e.g., product name, branding images, etc. through Mondago's cloud-based discovery system, and it will check if any of these parameters have changed each time it launches. This provides the ability to dynamically change these features without a new version of the software needing to be provided. Although the software can be installed separately it is typically installed with the PDC.

Two levels of branding are available with partnerCRM as detailed below.

Branding Level	CI-B	CI-C
Part number	BRAND-CIB-MBX0BL	BRAND-CIC-MBX0CL
Licensing options	Licensing portal or "Own" licensing	Licensing portal or "Own" licensing
Branded CRM Viewer	✖	✓

CI-C attracts a higher fixed monthly fee compared to CI-B. Product pricing is provided separately to this document.

Standard CRM Viewer page: https://integrations.pc.mondago.com/

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Once installed and launched, an optional product Splash screen can be displayed briefly with the only visible indication of the software when running being a discrete system tray icon. This icon along with the name displayed would be based on your product icons and naming (see section 8 below)
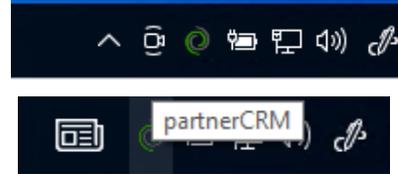
8   Product naming

partnerCRM is only available as an OEM level product. Essentially this means two things:

1. You, not Mondago, act as the licensor of the product and your EULA terms will apply
2. It is promoted as an integral part of your product set and not as a Mondago product.

This means that, although it is physically a separate program, the software should be named / productized as a part of your product portfolio*. For example, if your UC client is called "UC Desktop" then the partnerCRM component might be called e.g., "UC Desktop CRM Integrator". The name "partnerCRM" is used by Mondago expressly for marketing purpose, and is not intended as name you would use to promote the product to your customers

* The only exception to this rule is the installation program folder "Partner CRM" and cannot be re-labelled through the branding process.

9   Licensing / Authentication

partnerCRM requires a user to be licensed for it to operate. The preferred method of licensing is known as "Own" licensing where your PDC passes an ID unique to the physical user of the software (probably the same user id used to login to the PDC) to the partnerCRM client (via the API) which is used to make a licensing check using the configured licensing method.

The are several methods available to license the product which allows you to select a licensing mechanism which can link in with your existing provisioning systems, streamlining the delivery of licenses to the end user.

Licensing Portal: with this technique the user is licensed by adding the username of the partnerCRM user into an online portal provided by Mondago. The Portal also allows you to configure resellers and associate the end-customers (and hence users) to them. Each month we will invoice you based on the combined total of all licenses allocated. A corresponding report is made available for your own billing purposes. This method relies on the user-id provided being unique to the user (probably the same as the username used for your PDC login).

Web Service (own licensing): with this technique, when partnerCRM starts up, the Mondago license service makes an HTTPS call that includes the user's unique user-id as part of the URL to your web service. Your web service should then respond with the license type associated with the user to make the software available for use. The Web Service technique allows you to directly control licensing and fully integrate it with your own provisioning and billing services. You will be required to send us a monthly usage report which will use to generate your monthly invoice.

Proprietary (own licensing): With this technique we will set up partnerCRM to work with an existing method you use to license your products to your users.

10   Upgrade now options

partnerCRM can provide an option for both dynamic and passive user upgrade options. This ships as standard with the product but only becomes active once your control file is correctly configured. The control file and installer download location are hosted by the Service provider.

11   Partner onboarding steps

The onboarding process will require the followings steps to be completed and information provided.

Prior to distribution contract signature:
- Product demonstration and sign-off
- Proof of Concept testing
- Pricing and Distribution contract agreement

Post distribution contract signature:
- Agree licensing method
- Confirm product naming and branding images
- PDC development and test cycle
- Agree provisional Go Live date and related project activities
- Set up of licensing service
- Partner Sales and Support training
- Launch planning and marketing
- Go Live