

Dell PartnerDirect App

User's Manual

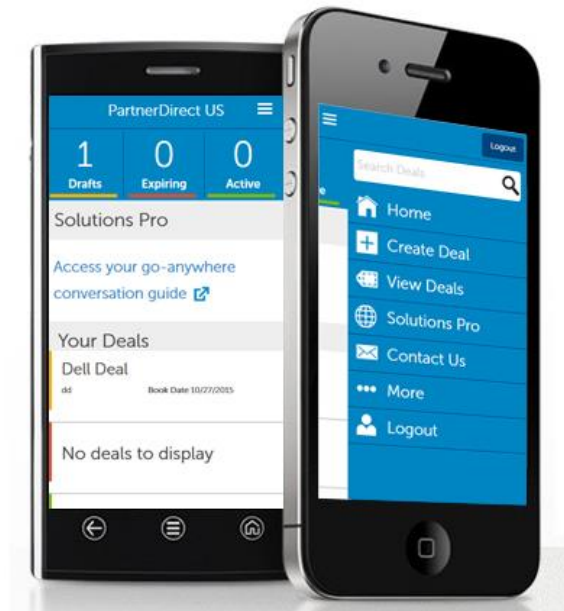


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iPad Instructions

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What is the Dell PartnerDirect app?

We continually strive to make it easier and faster to do business with Dell.

- Solution selling content and deal registration on the go.
- The app is optimized for mobile with an intuitive flow that requires less data input.
- A platform App for future mobile services to improve Channel Partner productivity



Faster Deal Registration

Easily register a complete deal in just a few clicks with less data input. Save as a draft and submit when ready.



Monitor Deal Status

Check the status of the deals you created and receive alerts when one is about to expire.



Solution Selling Content

Access concise, mobile-optimized content on the go. The guides aid in customer conversations and are easily shared with clients.



Getting started

The first step is for you to download the app to your smartphone or tablet.

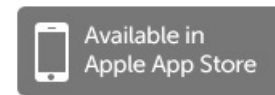
Search any app store for Dell PartnerDirect or use the links below.



[Download Now](#)



[Download Now](#)



[Download For iOS](#)

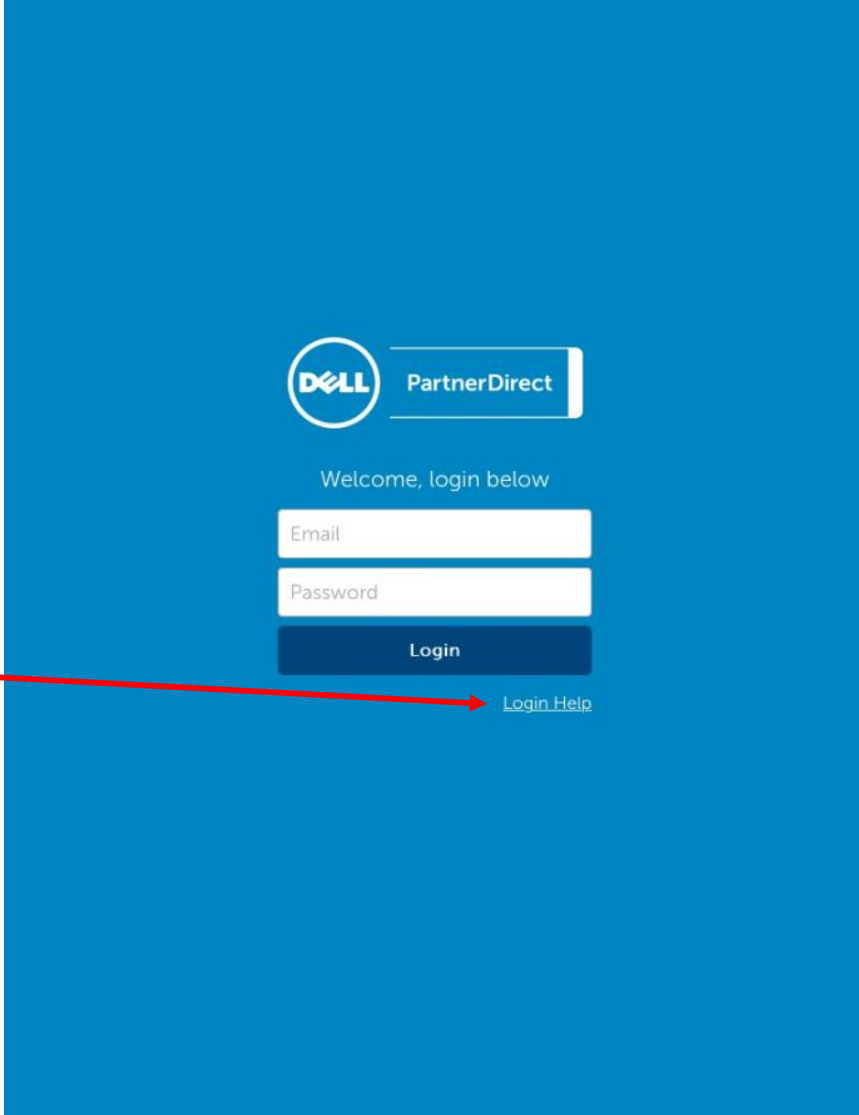
[Download For iPad](#)



Logging into the app

After downloading the app to your smartphone or tablet, launch it and log into the app using the same email and password you use for the Dell PartnerDirect web portal or SFDC login (they are the same).

If you encounter a problem logging into the app, click on the **Login Help** link. Select your country from the dropdown menu and an email will be generated. Complete the email with details about your issue and send. Our support staff will help to resolve the issue as quickly as possible.

The image shows the Dell PartnerDirect login interface on a blue background. At the top, there is a logo consisting of the Dell logo (a circle with 'DELL' inside) followed by the text 'PartnerDirect' in a white box. Below the logo, the text 'Welcome, login below' is displayed. There are two white input fields: the first is labeled 'Email' and the second is labeled 'Password'. Below these fields is a dark blue button with the word 'Login' in white. To the right of the 'Login' button, there is a link that says 'Login Help' in a smaller, lighter blue font. A red arrow points from the 'Login Help' link in the text on the left towards the 'Login Help' link on the screen.

DELL PartnerDirect

Welcome, login below

Email

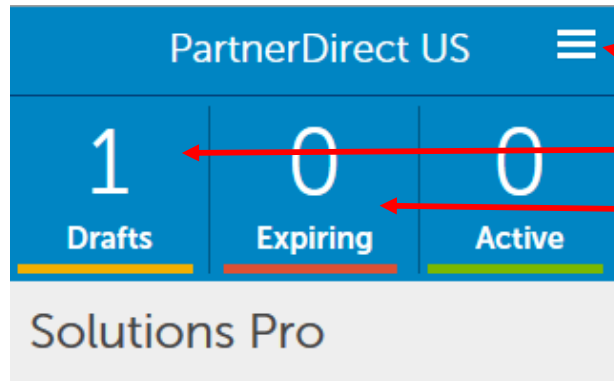
Password

Login

[Login Help](#)



Home page / Dashboard




From the Home page you can:

- Access menu and additional options

- View your Drafts

- View expiring deals

- View active deals

[Access your go-anywhere conversation guide](#) 

Access Solutions Pro

Your Deals

Test

test

Book Date 4/25/2015

Adam

test

Book Date 4/23/2015

test deal

test

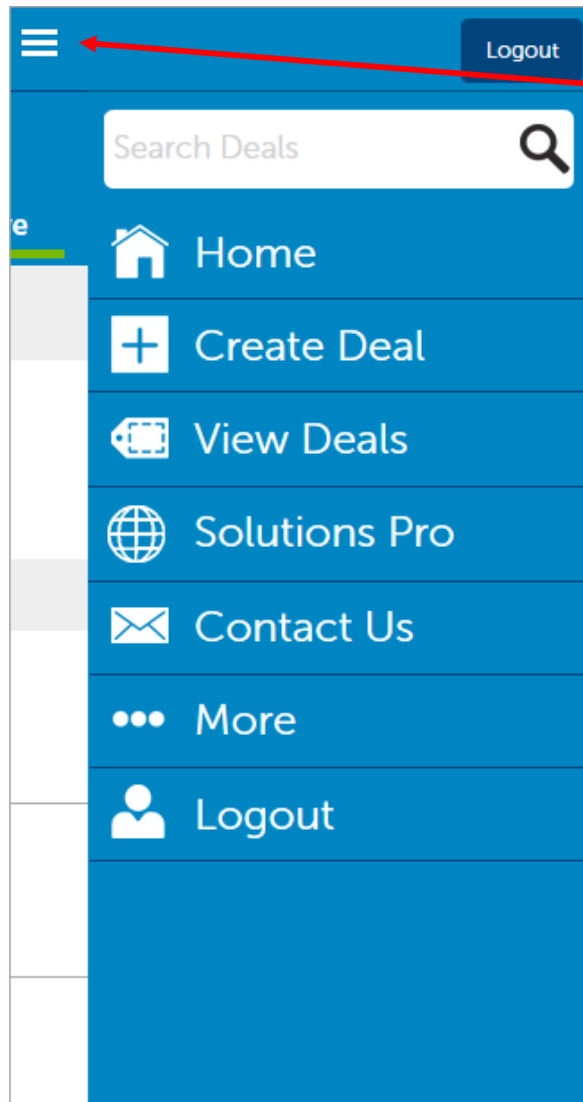
Book Date 4/22/2015

Most recent deals

You can click on any of the listed deals to edit or see more details for that deal.



Home page / Dashboard



From the menu, you can:

Collapse fly out panel

Search for a deal

Return to Home page

Create a new deal

View deals by different status types:

- Drafts
- Expiring
- Expiring Soon
- Active
- Pending
- Closing this Month

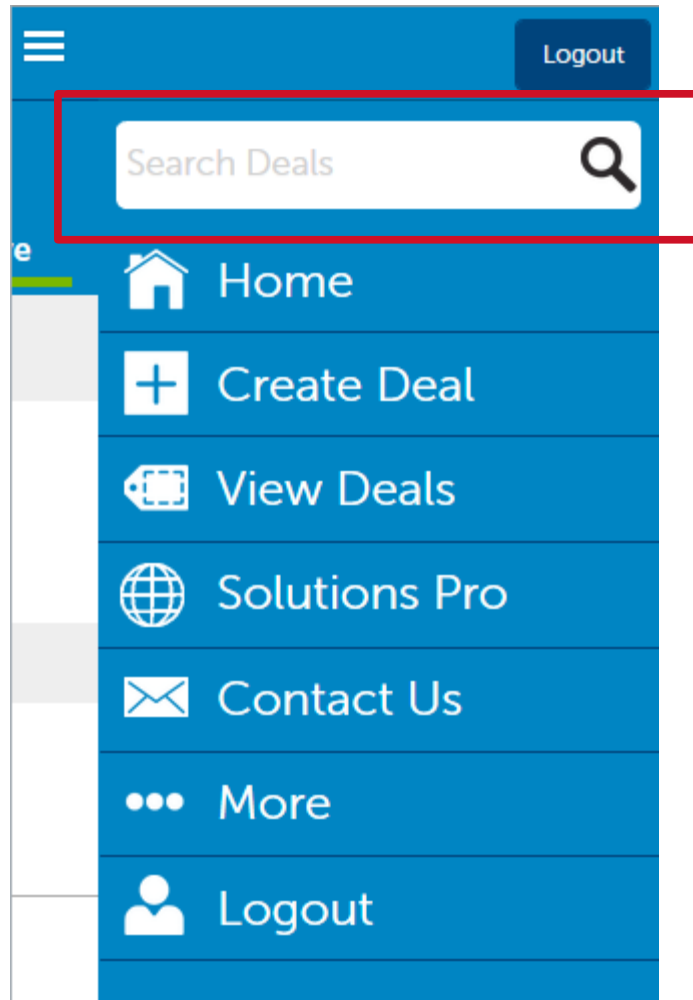
Launch Solutions Pro

Contact Dell via phone or email

Terms and conditions, link to PartnerDirect. See slide 16 for details



Searching for your deals

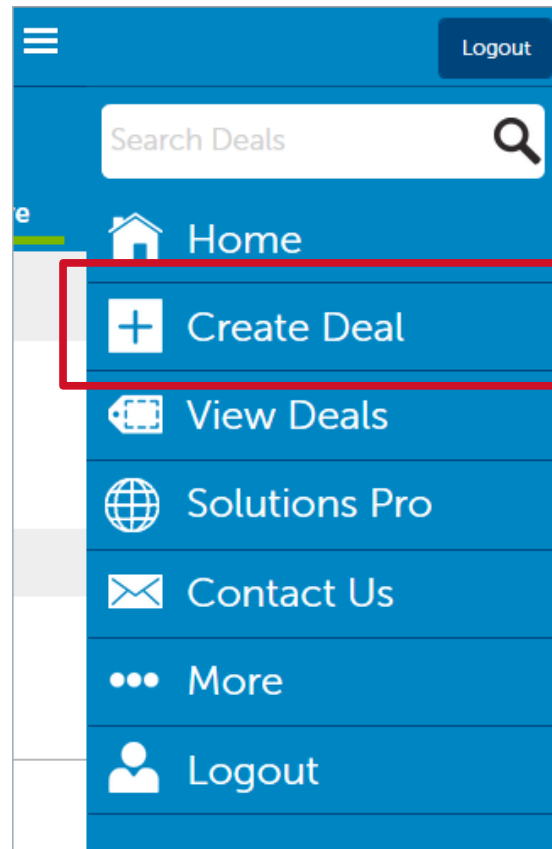


Use the search box to locate a particular deal.

Creating a deal

From the fly out panel, click on **Create Deal**.

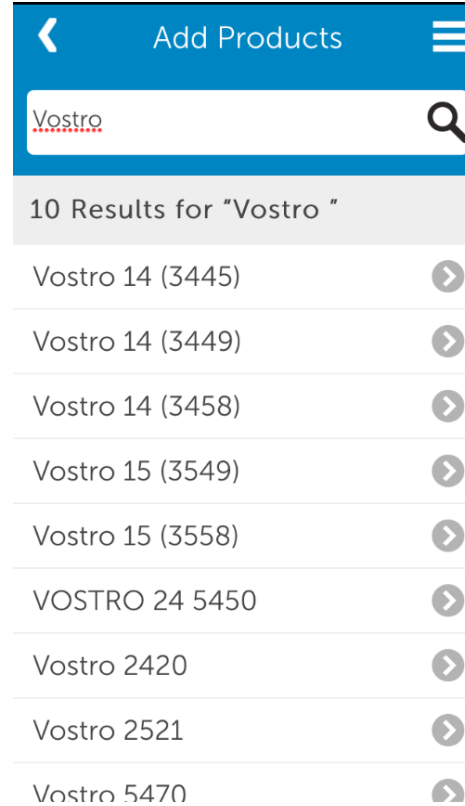
- Enter deal information
- Select the **Add Products** button to search and add products to the deal.
- Select **Save Draft** button to save deal as a draft and complete later.

A screenshot of the 'Create a Deal' form in the Dell CRM mobile app. The form is titled 'Create a Deal' and has a back arrow on the top left. It is divided into two main sections: 'Deal Information' and 'End User Information'. The 'Deal Information' section includes fields for 'Deal Name', a date field with '04/29/2015', 'Expected Revenue', and three dropdown menus for 'Engagement Type', 'Solution Type', and 'Justification'. The 'End User Information' section includes fields for 'Account Name', 'First Name', 'Last Name', 'Email Address', 'City', 'Zip Code', and a 'State' dropdown. At the bottom of the form are two large blue buttons: 'Add Products' and 'Save Draft'. The Dell logo is in the bottom right corner.

Adding products to a deal

To add products to a deal, enter the product name in the search field. For this example we searched "Vostro".

Select the product from the search results by clicking on the > symbol.





Adding products to a deal

Increase or decrease **Quantity** by using the + or – buttons, or just enter the quantity manually.

Enter the **Unit Price**.



Click **Add This Product** to add the item to your deal.

Click **Save Draft** to save the work you've done as a draft deal but don't want to submit it to Dell at this time.

 Product Details 

Vostro 15 (3558)

Quantity

Unit Price

| | |
|---------------|------------|
| Product Total | Deal Total |
| \$0.00 | \$0.00 |

Add This Product

Save Draft




Adding products to a deal


To add more products to a deal, click on the + symbol.

If there are no more products to add, select one of the two buttons.

Review & Submit Deal – Let's you review the deal for accuracy and submit.

Save Draft – Saves all your deal information and products added to the deal.




Add Products

Vostro 15 (3558)

Quantity 1

Unit Price
\$25,000.00

Product Total \$25,000.00

Add More Products

Deal Total

\$25,000....

Review & Submit Deal

Save Draft


Reviewing and submitting a deal

Before submitting the deal:


- Review deal and product information
- Make changes if necessary. To edit click on the pencil icon in the upper right.
- Click **Submit Deal** to send final deal to Dell, or **Save Draft**.

<

Review & Submit



Deal Information



Deal Name

Configuration Sample B

Book Date

4/29/2015

Expected Revenue

\$150,000.00

Engagement Type

Invited to Bid by Customer

Solution Type

IT Simplification

Justification Statement


Replacing competitor's product with Dell

Email

Location

USA

Products



Vostro 15 (3558)

Quantity 1 Unit Price \$25,000.00

Product Total \$25,000.00

Deal Total

\$25,000....

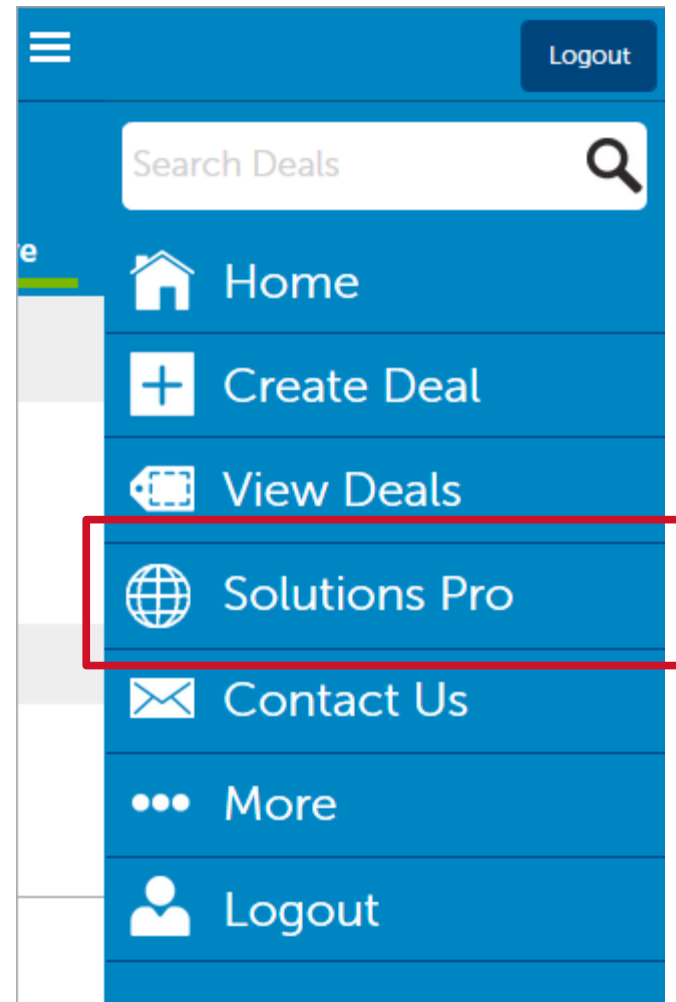
Submit Deal

Save Draft

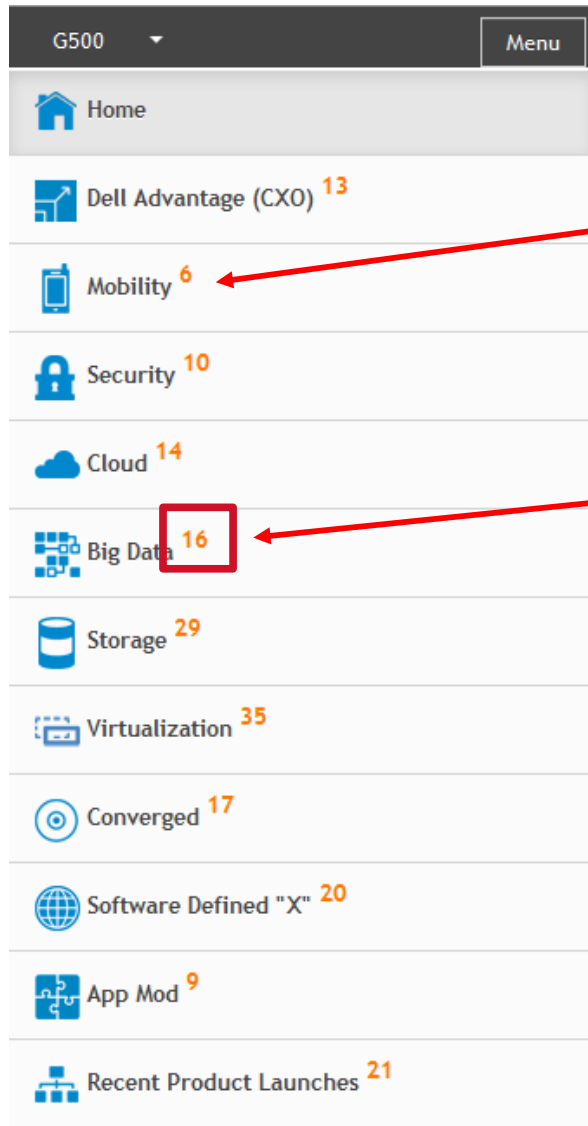


Launch Solutions Pro

To launch Solutions Pro, select the link from the home page menu.



Solutions Pro Menu



Select solution domain to see relevant content.

Orange numbers indicate content which you have not yet viewed.

Solutions Pro Content Categories

The screenshot shows the Dell Solutions Pro website. At the top, there's a dark header with 'G500' and a 'Menu' button. Below is a blue banner with the Dell logo and 'Solutions Pro'. A search bar is present. The main content area is divided into two sections: 'Prep for Meeting' and 'Customer Facing'. Each section lists various content types with their respective hit counts. A red bracket groups the 'Prep for Meeting' items, and another red bracket groups the 'Customer Facing' items. The footer contains copyright information and links to Privacy Policy and Legal Disclaimer.

| Category | Content Type | Hits |
|------------------|-----------------------|------|
| Prep for Meeting | Talking Points | 495 |
| | Competitive | 117 |
| | Videos (1) | 110 |
| | Current News (1) | 76 |
| Customer Facing | Case Studies (2) | 296 |
| | White Papers (1) | 85 |
| | Customer Presentation | 88 |
| | Videos (1) | 64 |

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Internal content to help you prepare for a customer meeting.

Customer facing content which you can easily share via email or social media.



Emailing content from Solutions Pro

Hi Adam G500 Menu

Solutions Pro

Search..

Home > Mobility > Talking Points

Overview

Mobile computing has transformed the way people interact. Constant connectivity provides an opportunity for high productivity and performance in the enterprise, but also increases security risk and added IT complexity. In the end, there is a gap between IT requirements and the promise of mobility.

Enterprises recognize the promise of mobility, but the reality of IT challenges is getting in the way. In fact, the Dell Global Technology Adoption Index results illustrate that only half the companies have a mobility strategy.

- 41%: Companies believe efficiency is the biggest mobility benefit
- 32%: Companies think employee productivity is the biggest mobility benefit
- 50%: Companies fear the risk of data breach

After selecting the category of interest (eg. Mobility > Talking Points), choose which documents to email, Tweet or post on LinkedIn. Check the radio buttons as shown in the image to the right.

Then click **Send All**

Communications and Collaboration (Global)

☐ **US Cellular: Leading Wireless Provider with a Successful 4G LTE Rollout (Commercial)** Hits:36

☐ **City of Sunnyvale: Ruggedized "Mobile Offices" Improve Public Safety (SLG)** Hits:33

☐ **SIU: Helping Ensure Student Success and Retention (HiEd)** Hits:29

☒ **HealthSpot: Comprehensive Care on the Spot (HCLS)** Hits:27

☒ **Providing Employees with Flexibility: How Dell Does Remote Access (Global)** Hits:26

Send All

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Emailing content from Solutions Pro (cont)

Email to

adam_forbes@dell.com

Sender

Adam Forbes

Your Email

Adam_Forbes@Dell.com

Subject

Dell Case Studies

Content

Thank you for your interest in Dell! We hope that the attached link/document will assist you in better understanding Dell's advantage.



HealthSpot_Comprehensive_Care_on_the_Spot_HCLS.pdf



Providing_Employees_with_Flexibility_How_Dell_Does_Remote_Access_Global.pdf

Send

Complete the email form and click **Send**.

A confirmation screen will display.

The screenshot shows the Dell Solutions Pro mobile app interface. At the top, a dark header bar displays 'Hi Adam' with a power icon, 'G500' with a dropdown arrow, and a 'Menu' button. Below this is a blue banner with the Dell logo and 'Solutions Pro' text. A search bar is positioned below the banner. A breadcrumb trail reads 'Home > Mobility > Back > Mail Send'. The main content area displays the message 'Your email has been sent successfully.' in a light blue font. At the bottom, a blue footer bar contains the text '© 2015 Dell Solutions Pro | Privacy Policy | Legal Disclaimer'.



More link

Under the More link on the right hand side there are links to the following:

Privacy Policy – Dell's Privacy policy

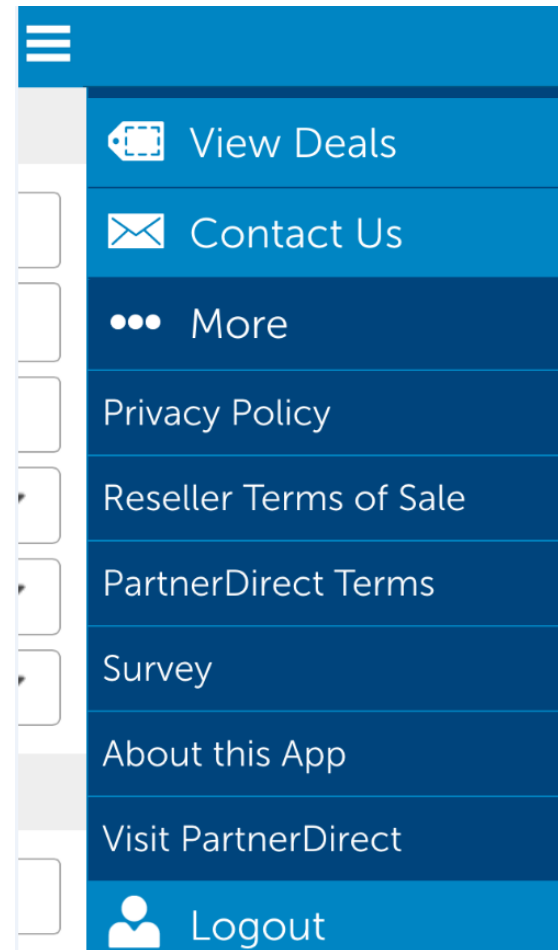
Reseller Terms of Sale – Dell's term of sales agreement.

PartnerDirect Terms – Terms and conditions regarding the PartnerDirect program.

Survey – provides a link to a feedback survey to let Dell know what you think about this app.

About this App – version details on the app

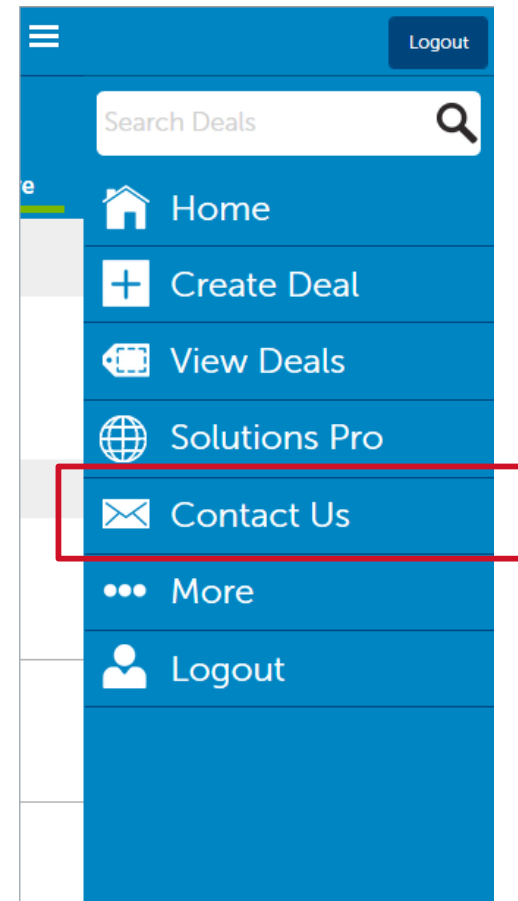
Visit PartnerDirect – Links you to the PartnerDirect portal



Support for Deal Reg App

If you need support while using your Dell PartnerDirect app, contact Dell by using the Contact Us link in the app.

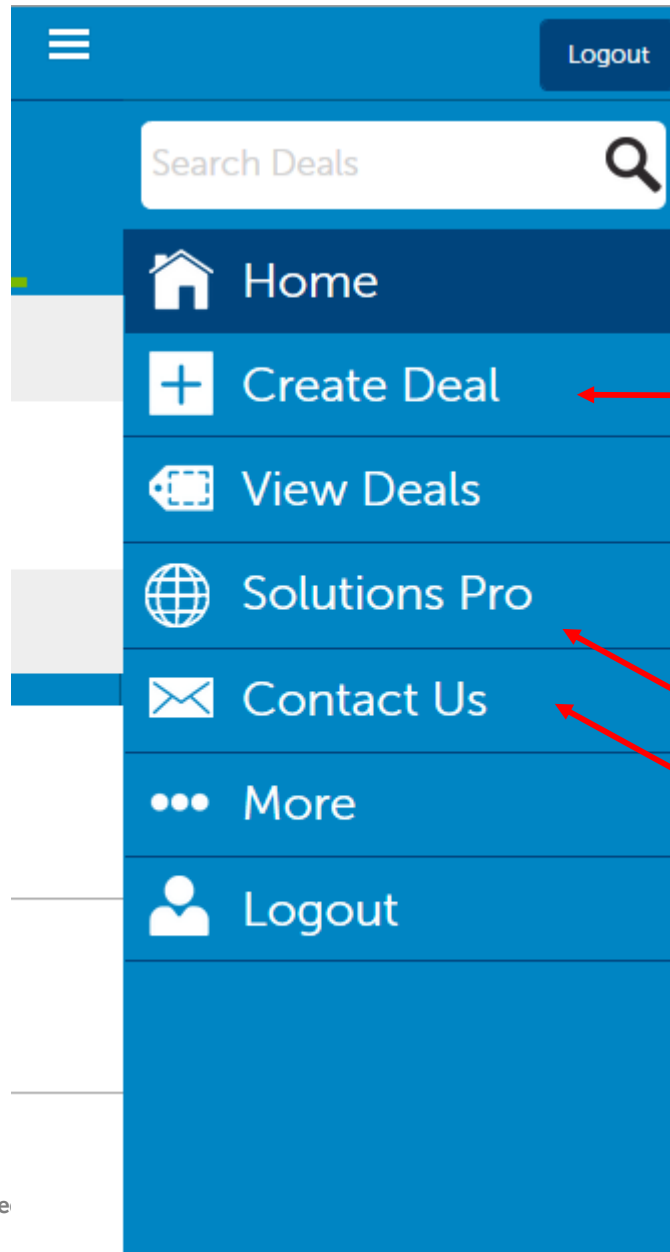
View a demo video of the Dell PartnerDirect app [here](#).



Dell PartnerDirect App iPad version



Home page / Dashboard (iPad)



From the home page you can:

Search for a deal

Create a new deal

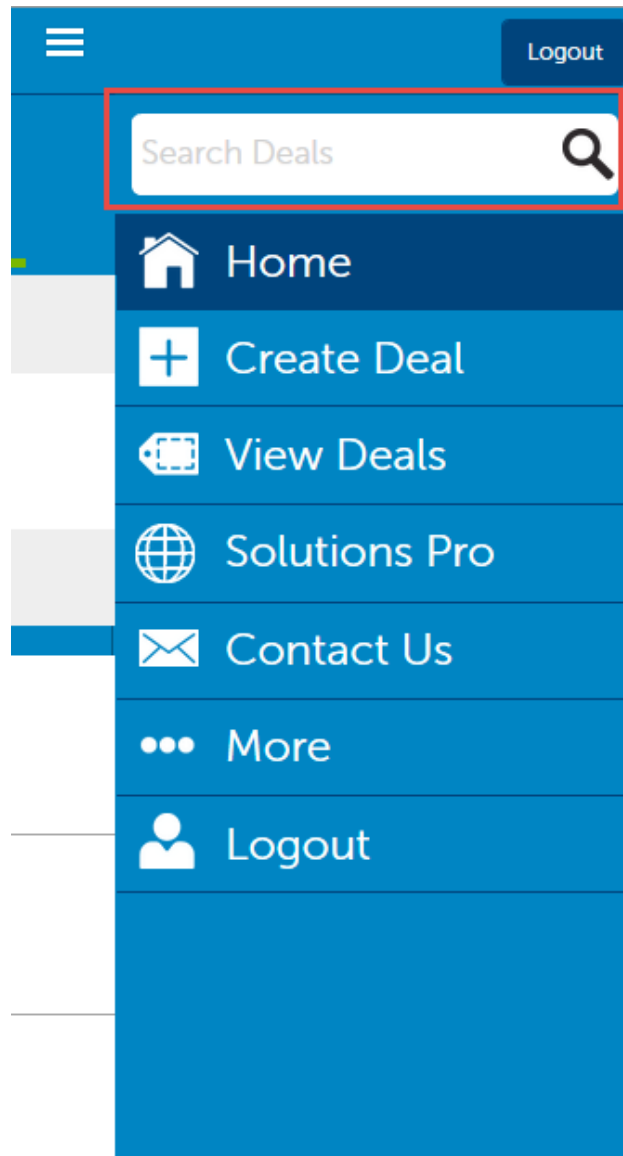
View deals by:

- Drafts
- Expiring
- Expiring Soon
- Active
- Pending
- Closing this Month

Access Solutions Pro

Contact Dell via phone or email

Searching for your deals (iPad)



Use the search box on the right to locate a particular deal.

Creating a Deal (iPad)

On the right-hand side of the screen, click on **Create a Deal** link.

- Enter deal information
- Select the **Add Products** button to search and add products to the deal.
- Select **Save Draft** button to save deal as a draft and complete later.

PartnerDirect US

Logout

Add Deal Information

Deal Information

Demo Deal

04/28/2015

\$150000

Invited to Bid by Customer

DataCenter Infrastructure

Replacing competitor's product with Dell

End User Information

Account Name

First Name Last Name

Email Address

City Zip Code

--Select State--

Save Draft Add Products

Adding products to a deal (iPad)

To add products to a deal, click on the **Add a Product** field.

Increase or decrease **Quantity** by using the + or – buttons, or just enter the quantity manually.

Enter the unit price.

Click **Add**.

The **Total Price** will be calculated automatically.

The screenshot shows the 'Add Products' screen in the PartnerDirect US app. At the top, there's a blue header with a back arrow, 'PartnerDirect US', and a 'Logout' button. Below the header, the title 'Add Products' is displayed. A table with four columns: 'Product', 'Quantity', 'Unit Price (\$)', and 'Total (\$)' is shown. The 'Quantity' field has a minus button, a text input with '1', and a plus button. The 'Unit Price' field has a text input labeled 'Unit Price' and an 'Add' button. Below the table, the 'Deal Total' is shown as '\$0.00'. At the bottom, there are three buttons: 'Deal Information', 'Save Draft', and 'Review Deal'. On the right side, there's a vertical sidebar with a menu icon, a list of numbers (4, 0, 1), a magnifying glass icon, and a home icon.

Adding products to a deal (iPad)

In this example, Vostro was entered in the search box.

Click on **Search** and several options for Vostro are returned.

Select the product to be added by checking the radio button and a green check mark will appear.

Click **Select** and the product will be added to the deal.

PartnerDirect US

Add Products

| Product | Quantity | Unit Price (\$) | Total (\$) |
|---------|----------|-----------------|------------|
| Vostro | 1 | | |

Search

Deal Total \$0.00

Buttons: Deal Information, Save Draft, Review Deal

PartnerDirect US

Add Products

| Product | Quantity | Unit Price (\$) | Total (\$) |
|---------|----------|-----------------|------------|
| Vostro | 1 | | |

Search

Deal Total \$0.00

Buttons: Review Deal

Product Selection List:

- ☐ Vostro 14 (3445)
- ☐ Vostro 14 (3449)
- ☐ Vostro 14 (3458)
- ☐ Vostro 15 (3549)

Select

PartnerDirect US

Add Products

| Product | Quantity | Unit Price (\$) | Total (\$) |
|---------|----------|-----------------|------------|
| Vostro | 1 | | |

Search

Deal Total \$0.00

Buttons: Review Deal

Product Selection List:

- ☐ Vostro 14 (3445)
- ☒ Vostro 14 (3449)
- ☐ Vostro 14 (3458)
- ☐ Vostro 15 (3549)

Select



Adding products to a deal (iPad)

Once you've added all the products to your deal, entered quantities and Unit Price, simply select one of the buttons at the bottom of the page.

Deal Information – Takes you back to the Deal Information page to complete all necessary fields.

Save Draft – Saves all your deal information and products added to the deal.

Review Deal – Let's you review and submit your deal

| Product | Quantity | Unit Price (\$) | Total (\$) |
|------------------|----------|-----------------|-------------|
| Vostro 14 (3449) | 1 | 22000 | \$22,000.00 |
| Add a Product | 1 | Unit Price | |

Deal Total **\$22,000.00**

[Deal Information](#) [Save Draft](#) [Review Deal](#)



Reviewing and submitting a deal (iPad)

Before submitting the deal:

- Review deal and product information
- Make changes if necessary
- Save as draft or submit final deal to Dell

PartnerDirect US Logout

Review & Submit

Deal Information

| | |
|----------------------------------|---|
| Deal Name Demo Deal | Engagement Type Invited to Bid by Customer |
| Book Date 4/28/2015 | Solution Type DataCenter Infrastructure |
| Expected Revenue \$150,000.00 | Justification Statement Replacing competitor's product with Dell |

End User Information

| | |
|---------|----------|
| Account | Location |
| Name | USA |
| Email | |

Products

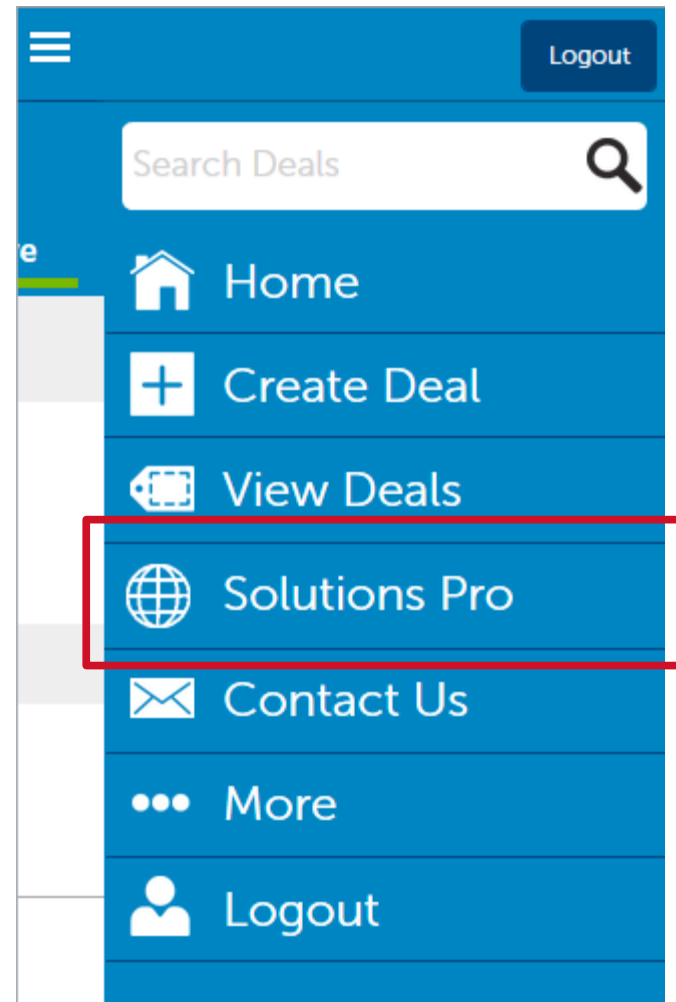
| Products | Quantity | Unit Price (\$) | Total (\$) |
|------------------|----------|-----------------|--------------------|
| Vostro 14 (3449) | 1 | \$22,000.00 | \$22,000.00 |
| Deal Total | | | \$22,000.00 |

Buttons: Add Products, Save Draft, Submit Deal

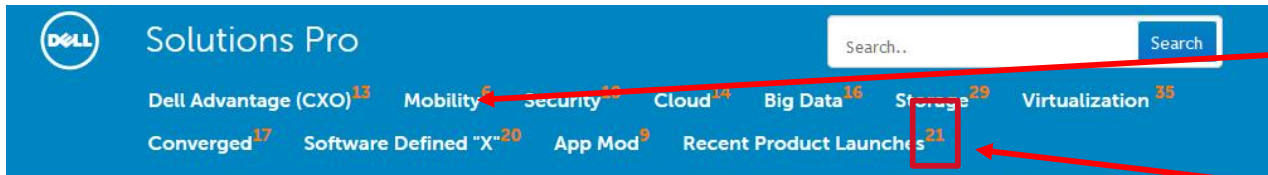


Launching Solutions Pro

To launch Solutions Pro, select the link from the home page menu.



Solutions Pro Menu



Select solution domain to see relevant content.

Orange numbers indicate content which you have not yet viewed.



Latest News

- Gartner rates Dell highly: 2015 Gartner Vendor Report
- Gizmodo: "Dell is the company building the most interesting computers right now"
- Forrester: Dell's FX a "bold new architecture"
- End of Support for Windows Server 2003 is 7/14/2015

Getting Started

Feedback?

salesforce®
Chatter



Solutions Pro Content Categories

The screenshot shows the Dell Solutions Pro website interface. At the top, there's a navigation bar with the Dell logo, a search bar, and various content categories with hit counts: Dell Advantage (CXO) 16, Mobility 14, Security 10, Cloud 14, Big Data 16, Storage 28, Virtualization 32, Converged 15, Software Defined "X" 20, App Mod 9, and Recent Product Launches 21. Below this, a breadcrumb trail shows 'Home > Mobility'. The main content area is divided into two sections: 'Prep for Meeting' and 'Customer Facing'. The 'Prep for Meeting' section lists 'Talking Points' (Hits: 505), 'Competitive' (Hits: 121), 'Videos (1)' (Hits: 111), and 'Current News (1)' (Hits: 77). The 'Customer Facing' section lists 'Case Studies (2)' (Hits: 297), 'White Papers (1)' (Hits: 85), 'Customer Presentation' (Hits: 88), and 'Videos (1)' (Hits: 64). A footer bar at the bottom contains the copyright notice: '© 2015 Dell Solutions Pro | Privacy Policy | Legal Disclaimer'.

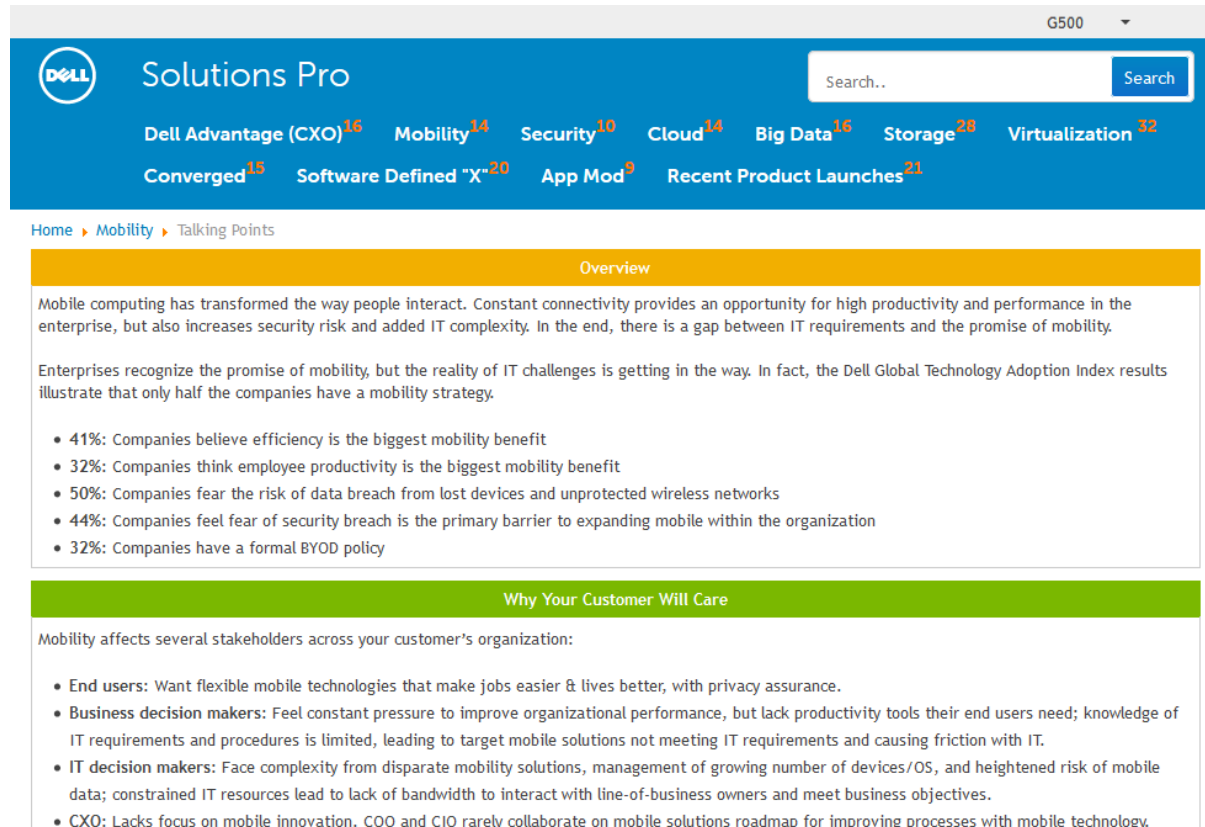
| Category | Content Type | Count | Hits |
|------------------|-----------------------|-------|------|
| Prep for Meeting | Talking Points | | 505 |
| | Competitive | | 121 |
| | Videos (1) | 1 | 111 |
| | Current News (1) | 1 | 77 |
| Customer Facing | Case Studies (2) | 2 | 297 |
| | White Papers (1) | 1 | 85 |
| | Customer Presentation | | 88 |
| | Videos (1) | 1 | 64 |

Internal content to help you prepare for a customer meeting.

Customer facing content which you can easily share via email or social media.



Sending content from Solutions Pro



The screenshot shows the Dell Solutions Pro website. The top navigation bar is blue with the Dell logo on the left and a search bar on the right. Below the navigation bar, there are several category links: Dell Advantage (CXO)¹⁶, Mobility¹⁴, Security¹⁰, Cloud¹⁴, Big Data¹⁶, Storage²⁸, Virtualization³², Converged¹⁵, Software Defined "X"²⁰, App Mod⁹, and Recent Product Launches²¹. The breadcrumb trail shows "Home > Mobility > Talking Points". The main content area has an orange header for "Overview". The text describes how mobile computing has transformed the way people interact and the challenges it presents. A bulleted list provides statistics on mobility benefits and barriers. Below this is a green header for "Why Your Customer Will Care", which explains how mobility affects various stakeholders in an organization.

G500

Solutions Pro

Search.. Search

Dell Advantage (CXO)¹⁶ Mobility¹⁴ Security¹⁰ Cloud¹⁴ Big Data¹⁶ Storage²⁸ Virtualization³²
Converged¹⁵ Software Defined "X"²⁰ App Mod⁹ Recent Product Launches²¹

Home > Mobility > Talking Points

Overview

Mobile computing has transformed the way people interact. Constant connectivity provides an opportunity for high productivity and performance in the enterprise, but also increases security risk and added IT complexity. In the end, there is a gap between IT requirements and the promise of mobility.

Enterprises recognize the promise of mobility, but the reality of IT challenges is getting in the way. In fact, the Dell Global Technology Adoption Index results illustrate that only half the companies have a mobility strategy.

- 41%: Companies believe efficiency is the biggest mobility benefit
- 32%: Companies think employee productivity is the biggest mobility benefit
- 50%: Companies fear the risk of data breach from lost devices and unprotected wireless networks
- 44%: Companies feel fear of security breach is the primary barrier to expanding mobile within the organization
- 32%: Companies have a formal BYOD policy

Why Your Customer Will Care

Mobility affects several stakeholders across your customer's organization:

- **End users:** Want flexible mobile technologies that make jobs easier & lives better, with privacy assurance.
- **Business decision makers:** Feel constant pressure to improve organizational performance, but lack productivity tools their end users need; knowledge of IT requirements and procedures is limited, leading to target mobile solutions not meeting IT requirements and causing friction with IT.
- **IT decision makers:** Face complexity from disparate mobility solutions, management of growing number of devices/OS, and heightened risk of mobile data; constrained IT resources lead to lack of bandwidth to interact with line-of-business owners and meet business objectives.
- **CXO:** Lacks focus on mobile innovation. COO and CIO rarely collaborate on mobile solutions roadmap for improving processes with mobile technology.

After selecting the category of interest (eg. Mobility > Talking Points), select which documents to email.



Sending content from Solutions Pro

The screenshot shows the Dell Solutions Pro interface. At the top, there's a navigation bar with the Dell logo and the text "Solutions Pro". Below this, there are several category links: Dell Advantage (CXO)¹⁶, Mobility¹⁴, Security¹⁰, Cloud¹⁴, Big Data¹⁶, Storage²⁸, Virtualization³², Converged¹⁵, Software Defined "X"²⁰, App Mod⁹, and Recent Product Launches²¹. A search bar is also present. Below the navigation bar, there's a breadcrumb trail: Home > Mobility > Case Studies. The main content area displays a list of case studies, each with a radio button for selection and social sharing icons (email, Twitter, LinkedIn). The case studies are:

| Case Study Title | Hits | Email | Twitter | LinkedIn |
|--|---------|-------|---------|----------|
| <input type="checkbox"/> Enhancing Employee Flexibility: How Dell Does VDI (Global) | Hits:90 | | | |
| <input type="checkbox"/> Dell: How Dell Does Unified Communications and Collaboration (Global) | Hits:56 | | | |
| <input type="checkbox"/> US Cellular: Leading Wireless Provider with a Successful 4G LTE Rollout (Commercial) | Hits:36 | | | |
| <input type="checkbox"/> City of Sunnyvale: Ruggedized "Mobile Offices" Improve Public Safety (SLG) | Hits:33 | | | |
| <input type="checkbox"/> SIU: Helping Ensure Student Success and Retention (HiEd) | Hits:29 | | | |
| <input checked="" type="checkbox"/> HealthSpot: Comprehensive Care on the Spot (HCLS) | Hits:27 | | | |
| <input checked="" type="checkbox"/> Providing Employees with Flexibility: How Dell Does Remote Access (Global) | Hits:26 | | | |

At the bottom of the list, there is a "Send All" button. The footer of the page contains the copyright information: © 2015 Dell Solutions Pro | Privacy Policy | Legal Disclaimer.

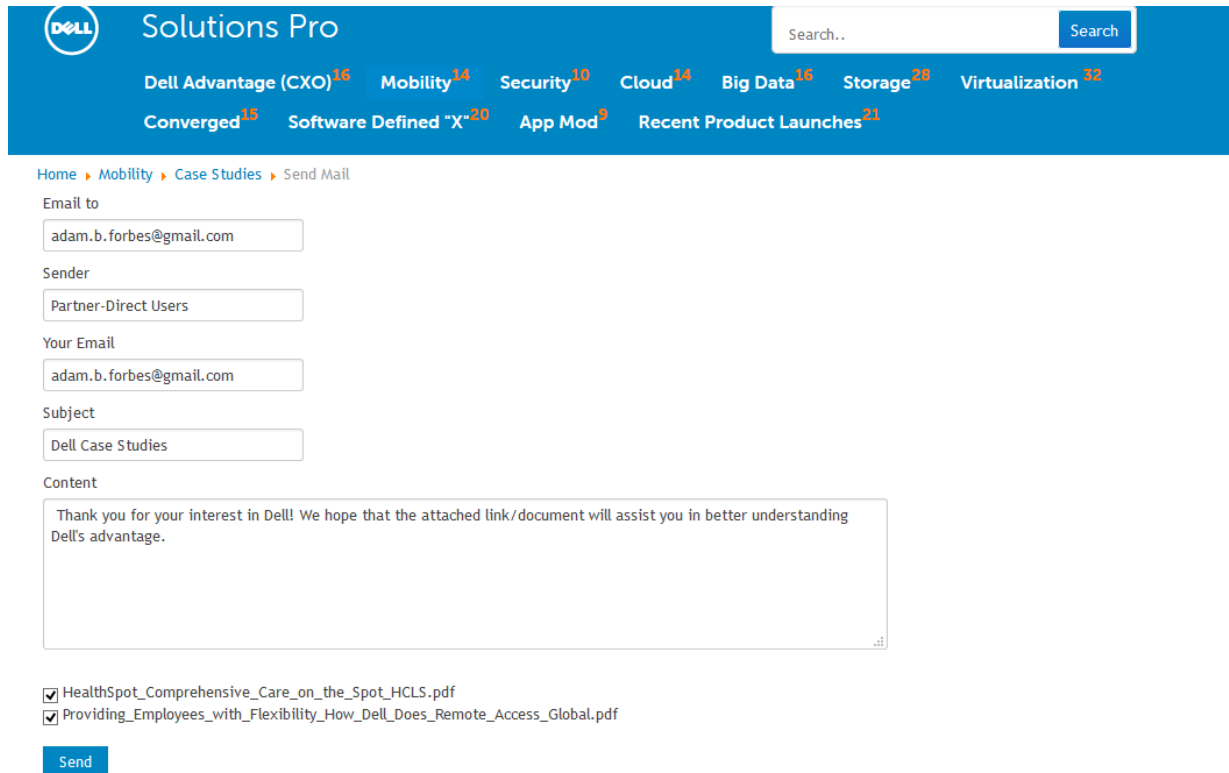
Simply check the radio buttons as shown in the screen shot to the right.

Choose email, Twitter or LinkedIn.

Then click **Send All**



Emailing content from Solutions Pro



The screenshot shows the Dell Solutions Pro interface. At the top is a blue header with the Dell logo and the text "Solutions Pro". To the right of the header is a search bar with the placeholder text "Search.." and a "Search" button. Below the header is a navigation bar with several links: "Dell Advantage (CXO)" with a red superscript "16", "Mobility" with a red superscript "14", "Security" with a red superscript "10", "Cloud" with a red superscript "14", "Big Data" with a red superscript "16", "Storage" with a red superscript "28", "Virtualization" with a red superscript "32", "Converged" with a red superscript "15", "Software Defined 'X'" with a red superscript "20", "App Mod" with a red superscript "9", and "Recent Product Launches" with a red superscript "21".

Below the navigation bar is a breadcrumb trail: "Home > Mobility > Case Studies > Send Mail".

The form itself has several sections:

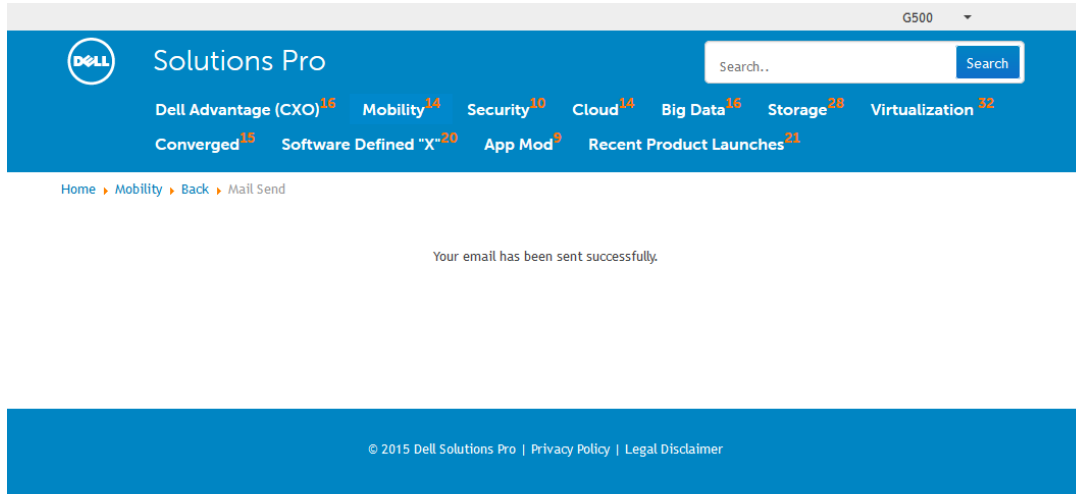
- Email to:** A text box containing "adam.b.forbes@gmail.com".
- Sender:** A text box containing "Partner-Direct Users".
- Your Email:** A text box containing "adam.b.forbes@gmail.com".
- Subject:** A text box containing "Dell Case Studies".
- Content:** A large text area containing the text "Thank you for your interest in Dell! We hope that the attached link/document will assist you in better understanding Dell's advantage."
- Attachments:** Two checkboxes are visible, both of which are checked:
 - ☒ HealthSpot_Comprehensive_Care_on_the_Spot_HCLS.pdf
 - ☒ Providing_Employees_with_Flexibility_How_Dell_Does_Remote_Access_Global.pdf
- Send:** A blue button with the text "Send".

In this example we selected to email the content.

Complete the email form and click **Send**.



Emailing content from Solutions Pro



A confirmation screen will display.



More link (iPad)

Under the More link on the right hand side there are links to the following:

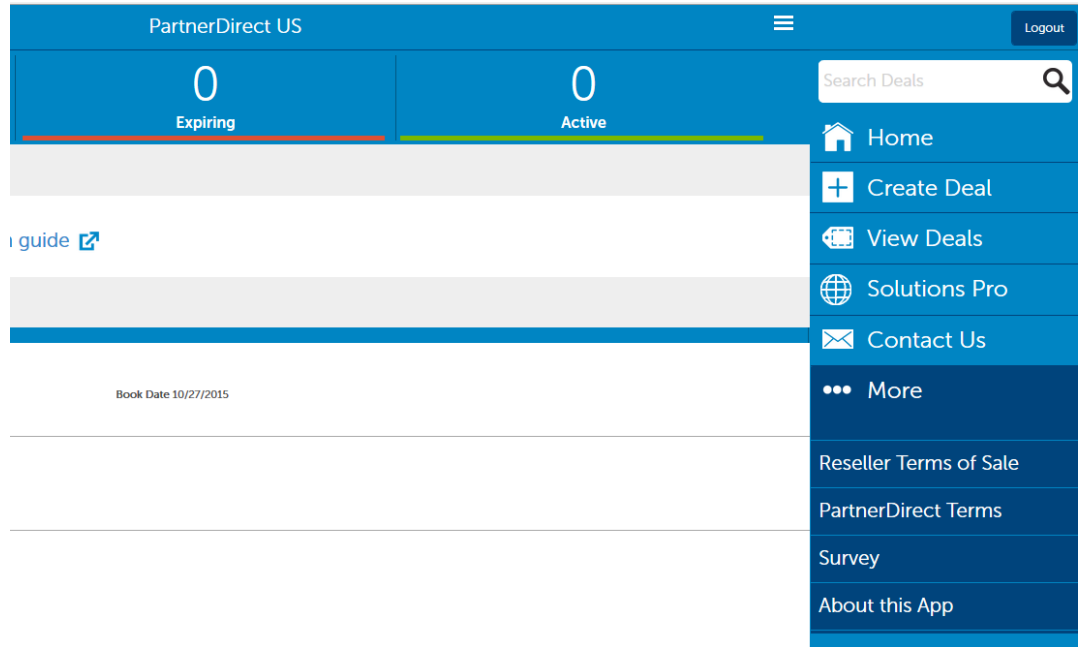
Reseller Terms of Sale –

Dell's term of sales agreement.

PartnerDirect Terms – Terms and conditions regarding the PartnerDirect program.

Survey – provides a link to a feedback survey to let Dell know what you think about this app.

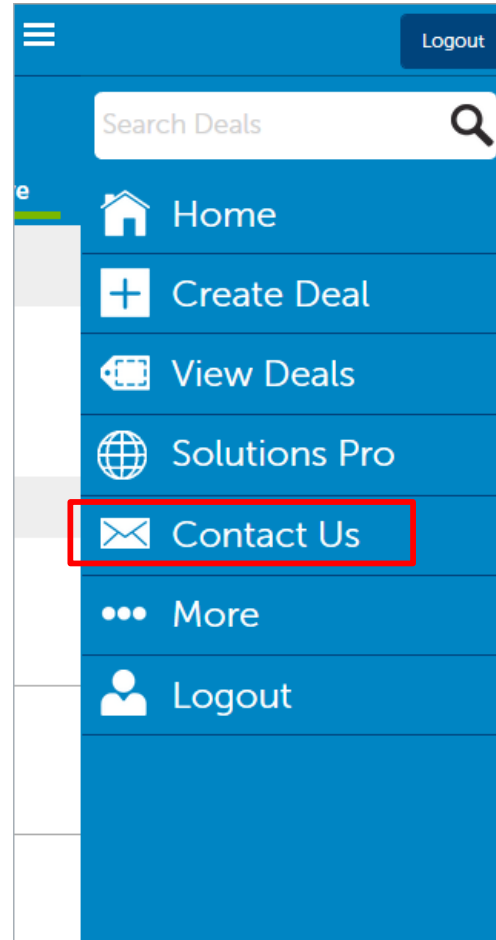
About this App – version details on the app



Support for Deal Reg App (iPad)

If you need support while using your Dell PartnerDirect app, contact Dell by using the Contact Us link in the app.

View a demo video of the Dell PartnerDirect app [here](#).





The power to do more