



## Maximize Your Partnership Potential With IDI's Partner Portal

Providing a superior user experience for partners and agents is crucial for service providers. Traditional vendor solutions often become static and separate, leading to a disjointed partner experience. IDI Billing Solutions' Partner Portal offers an innovative solution by integrating partner functionalities within the same applications used by employees. This ensures a seamless, tailored experience for partners while maintaining full visibility for employees. IDI's flexible design adapts to your business needs, creating a partner experience that aligns with your current operations.



## Configure Your Partner Experience

### ► Define Channel Relationships

Utilize the Channel Management interface to map partner organizations in a single, easy-to-manage hierarchical view. Track financial and contact information for each node.

### ► Access to Accounts

Provide unified account access for employees and partners. Employees have full access, while partners are limited to their assigned accounts. Partner hierarchies allow lead agents and managers to view accounts across their organization.

### ► Set Data Security Rules

Create customer data access profiles for each partner and different roles within their organizations. Set limits on account information visibility and servicing options.

## Increase Partner Productivity

IDI's Partner Portal provides a centralized, easy-to-use dashboard that empowers partners with the visibility they need—including real-time insight into customer health and standing, service delivery status, and any service issues that customers are experiencing.

### ► Monitor Account Health

Partners can view the current status of all assigned accounts, including balances, billables, and service summaries. Detailed account information is accessible with a single click.

### ► Track Order Status

Partners can monitor order progress, reducing support calls. View current order states, delivery status, completion percentages, and projected delivery dates.

### ► Watch Service Tickets

Partners can track service issues across all accounts, viewing ticket details, priorities, statuses, commitments, and escalations.

## Ready To Build A Better Experience? Talk To IDI Today.

Through continuous innovation and a deep understanding of the industry's needs, IDI is committed to helping our customers excel in a challenging and rewarding market. We are transforming the way businesses connect with their customers and empower their employees, setting new standards for excellence in the communications industry.



To learn more about how IDI can help transform your business, call **800.208.6151** or **request a demo**.

## Easily Provide Service And Support

### ► Notice Board

Post important messages to the entire sales channel or individual users. Prioritized notices ensure critical information is not overlooked.

### ► Partner Resources

Centralize sales tools in the Resources section, with categories, notes, and version control.

### ► Partner Support Tickets

Use IDI's Tickets Module to provide consistent support. Partners can open tickets by sending an email, with separate ticket types and service flows for partner support groups.

## Comprehensive Experience From An Intuitive Interface

Enjoy the ability to customize your partner experience beyond our B/OSS by linking in your additional business or vendor applications so that all of the tools they need can be found in a single location.

### ► Quicklinks

Create embedded navigation links to internal or external applications. Customize link visibility, behavior, and data sent to the receiving system.

### ► Core Commissions Integrations

Embed partner commissioning dashboards and reports from IDI's commissions partner, Core Commissions, directly into the Partner Portal.

