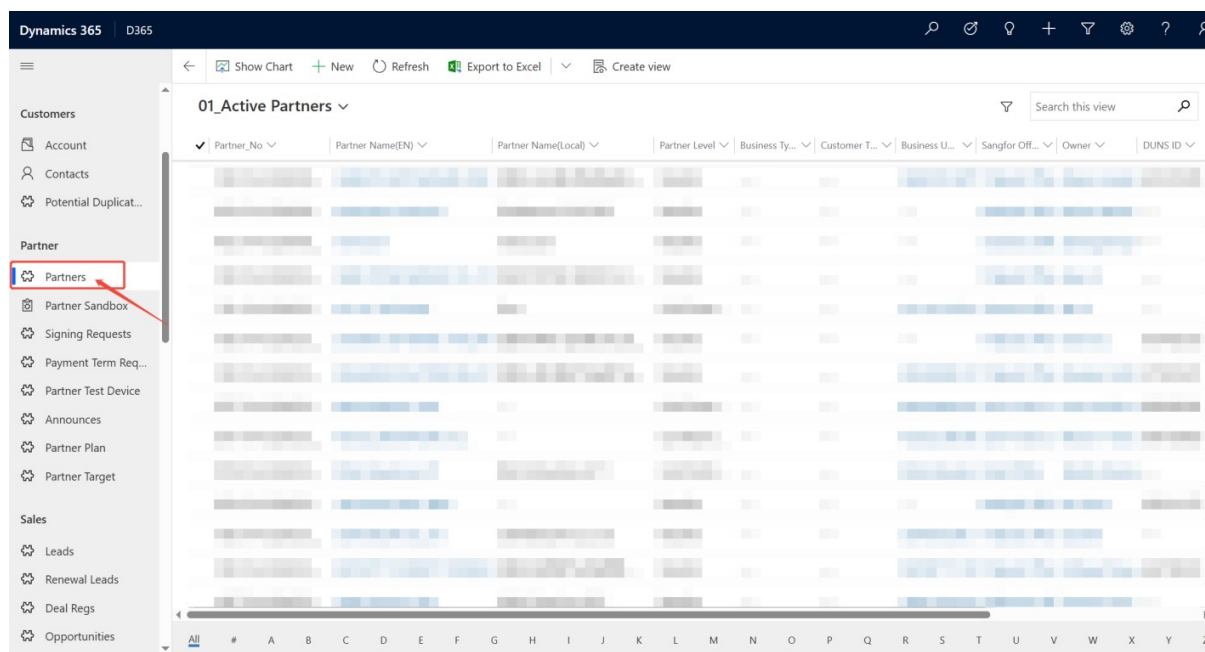


SANGFOR D365: Partner One Account Creation Guide

1. Accessing D365

Objective: Log in to the D365 system and navigate to the Partner module.

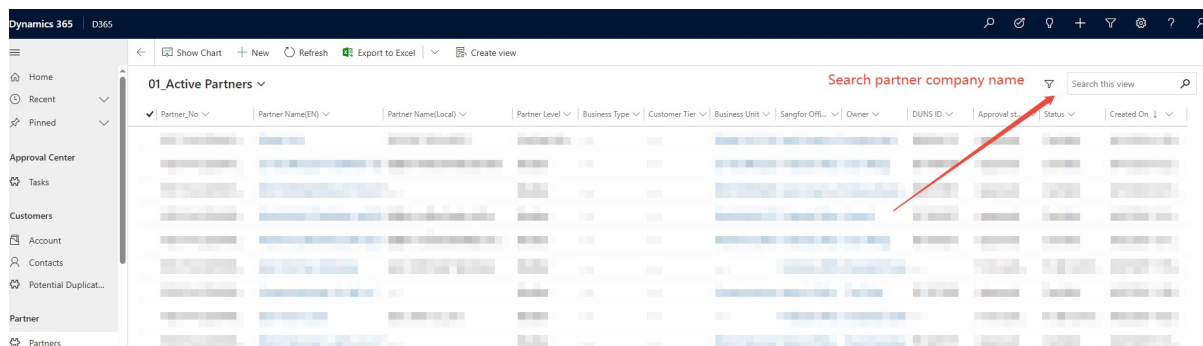
1. **Login Address:** Access the system via the official link: <https://sales.sangfor.com> or <https://saleseu.sangfor.com>.
2. **Navigation:** Log in to your D365 and click on the "Partner" module from the main menu.



2. Locating Partner Contact Information

Objective: Find the specific Partner Profile and access its contact list.

Search for Partner company name for which you need to open a portal account.



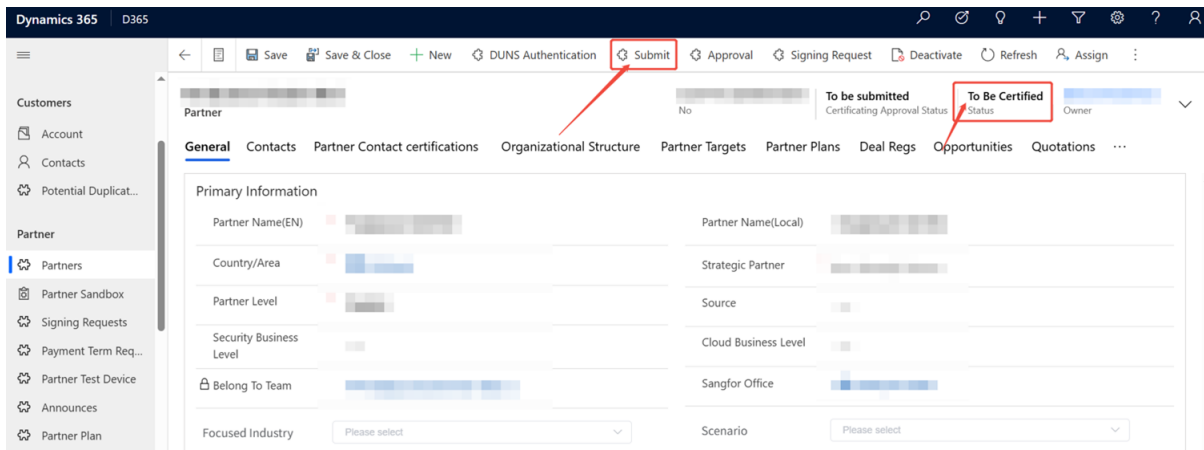
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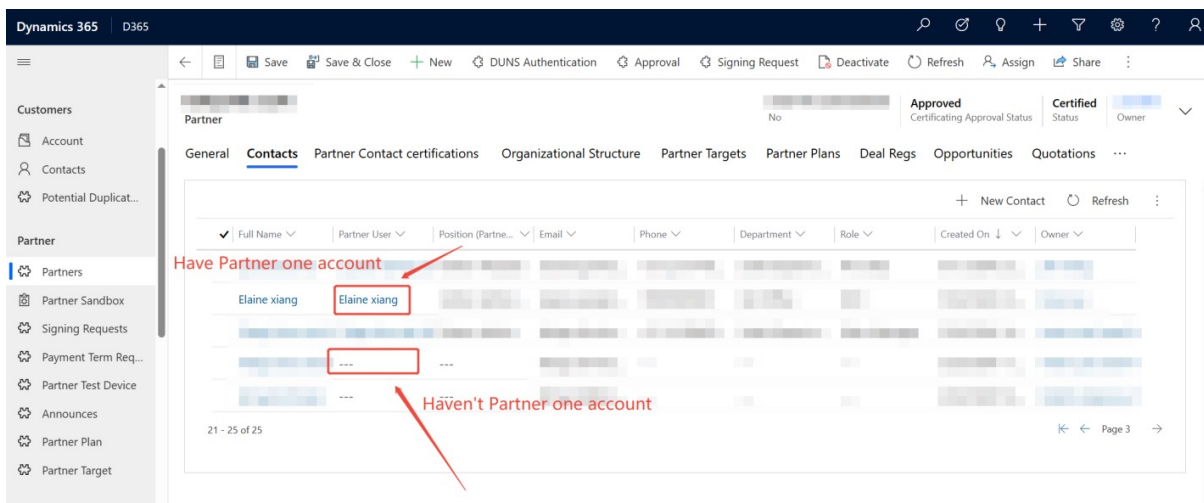
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Note: The partner company's status must be "Certified." If it is not, you must click the "Submit" button first.



Click on the "Contacts" sub-menu to view the existing contact list.

Note: If there is information in the "Partner user" row, it means that a Partner One account already exists for that partner; if it displays "---", it means that a Partner One account has not yet been activated.



Full Name	Partner User	Position (Partne...)	Email	Phone	Department	Role	Created On	Owner
Elaine xiang	Elaine xiang							
---	---							

3. Managing Contacts (New or Existing)

Objective: Select an existing contact or create a new one.

Option A: Existing Contact

Click the Existing Contact directly.

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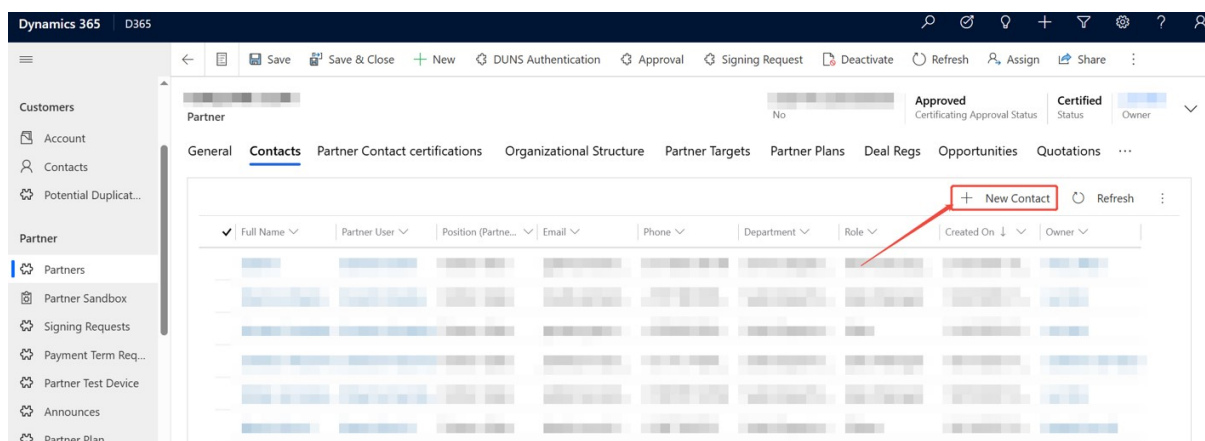
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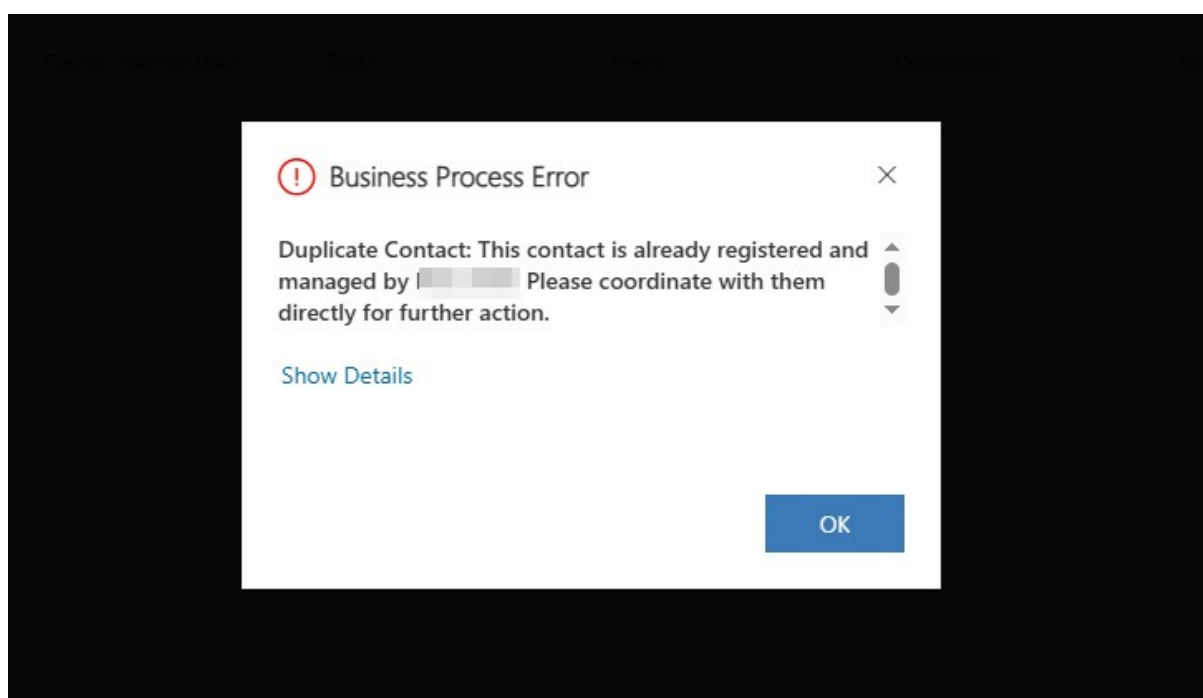
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Option B: New Contact

If the contact does not exist, click the "+ New Contact" button located in the top-right corner to create a new contact



Note: If you encounter this error when creating a new contact, you can follow the prompts to find the appropriate person to handle it.



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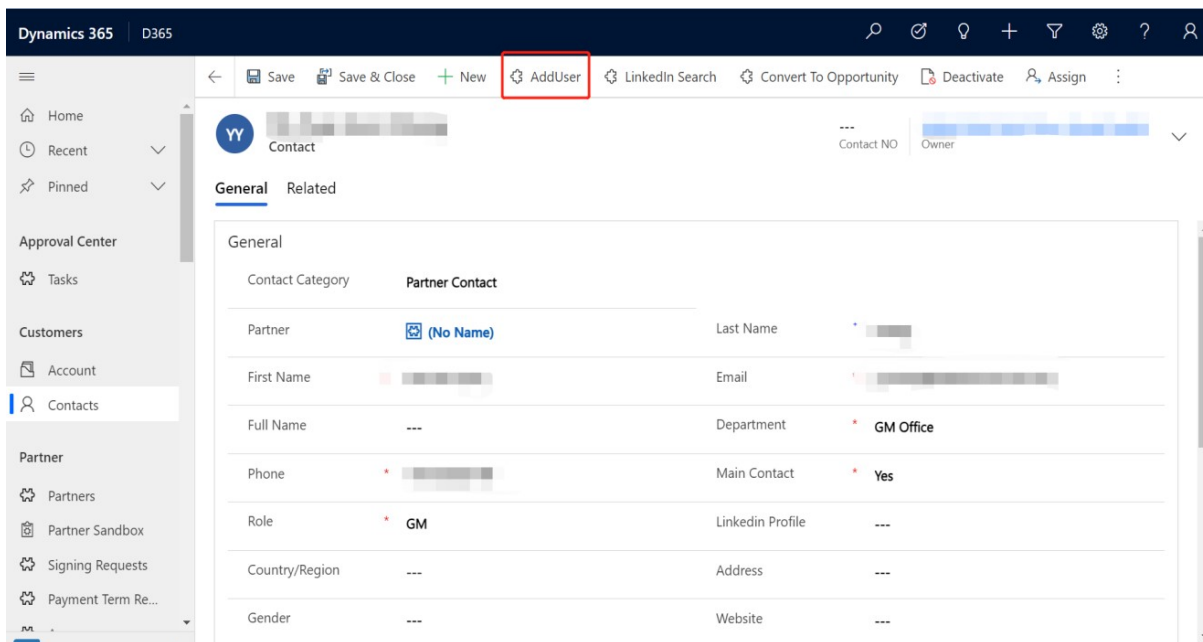
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4. Initiating User Creation

Objective: "Add partner user" for this contact.

Action: On the Contact details page, click the "AddUser" button.



The screenshot shows the Dynamics 365 interface for a contact. The top navigation bar includes buttons for Save, Save & Close, New, AddUser (highlighted with a red box), LinkedIn Search, Convert To Opportunity, Deactivate, and Assign. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, Approval Center, Tasks, Customers, Account, and Contacts. The main content area displays the 'General' tab for a contact, with fields for Contact Category (Partner Contact), Partner (No Name), Last Name, First Name, Email, Full Name, Department (GM Office), Phone, Main Contact (Yes), Role (GM), Country/Region, Address, Gender, and Website.

5. Completing User Details & Activation

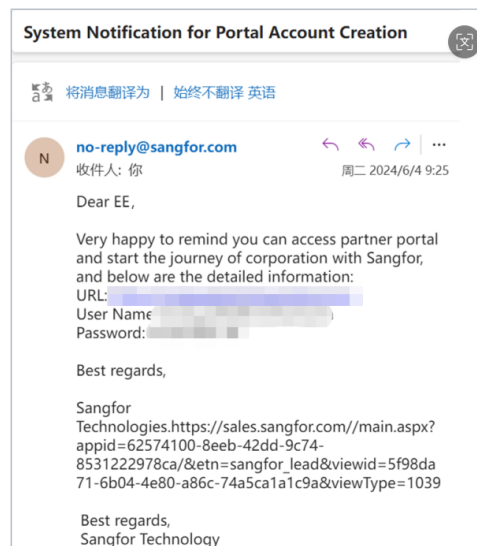
Objective: Fill in user information and trigger the account activation email.

Information Verification:

If existing information appears, verify its accuracy.
If no information is present, fill in the required fields (First Name, Last Name, Email, Phone, Job Title, Role, etc.).
Click "Save".

Result:

Upon saving, the Partner will automatically receive an Activation Email containing the account details.



Support

For any inquiries or assistance, please contact:
Elaine Xiang | <mailto:Elaine.xiang@sangfor.com>

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