Approve a Partner Application

Steps to Approve a Partner Application

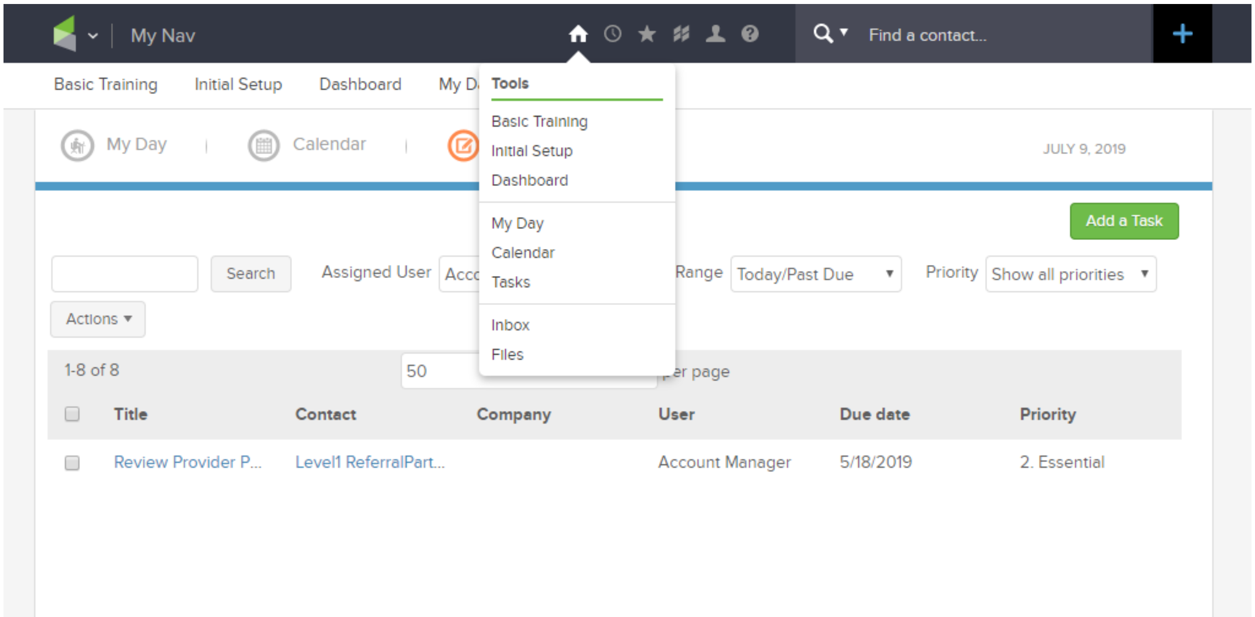
Overview

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 manage reviews the application and determines whether the application should continue or not.

Do the following:

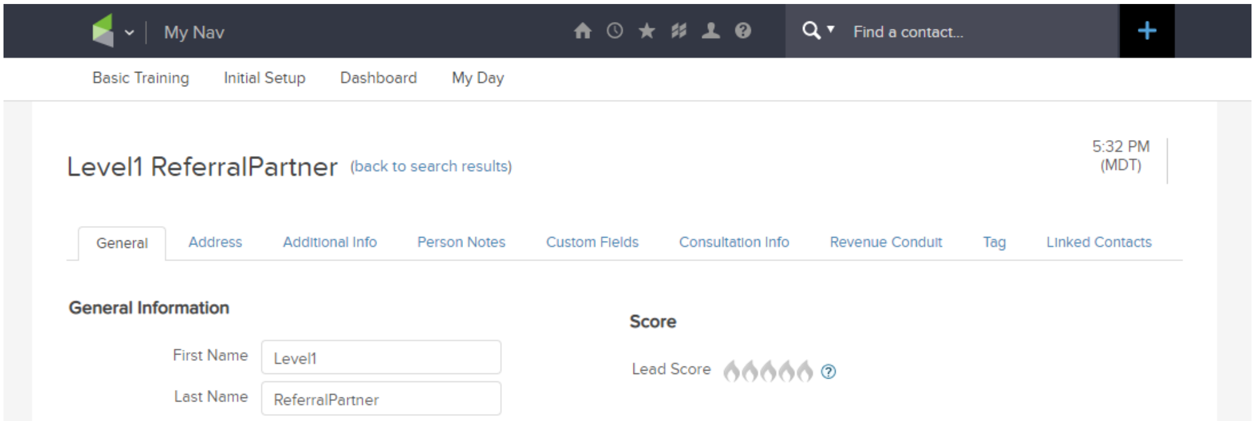
Step 1: Login to Infusionsoft as the Account Manager

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



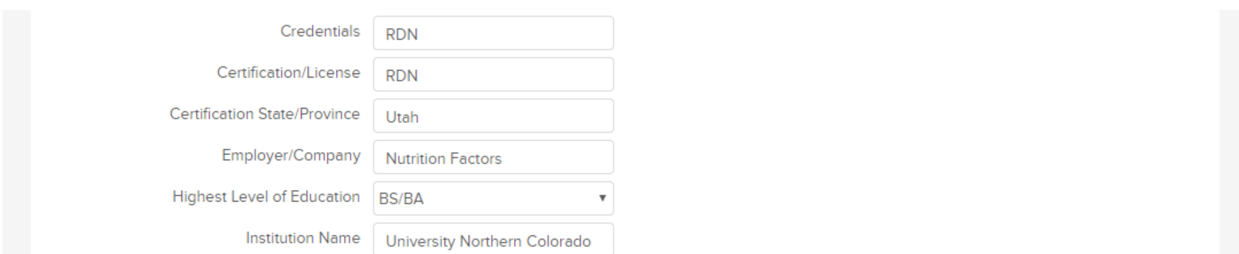
In the Title column a task "Review Provider Partner Application" is created for each new application submitted for review.

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



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

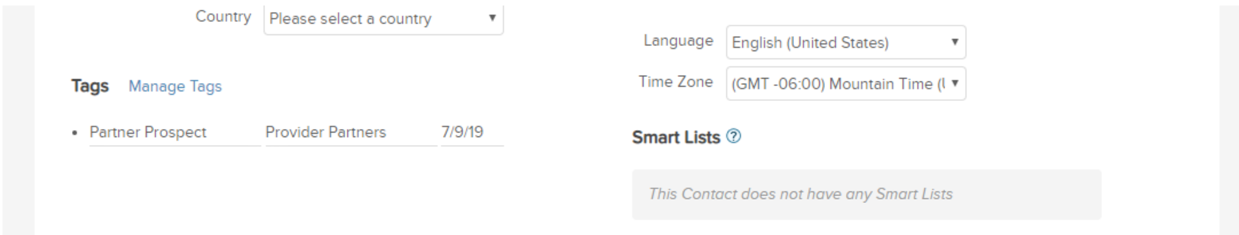
Step 4: Click on the Custom Fields link



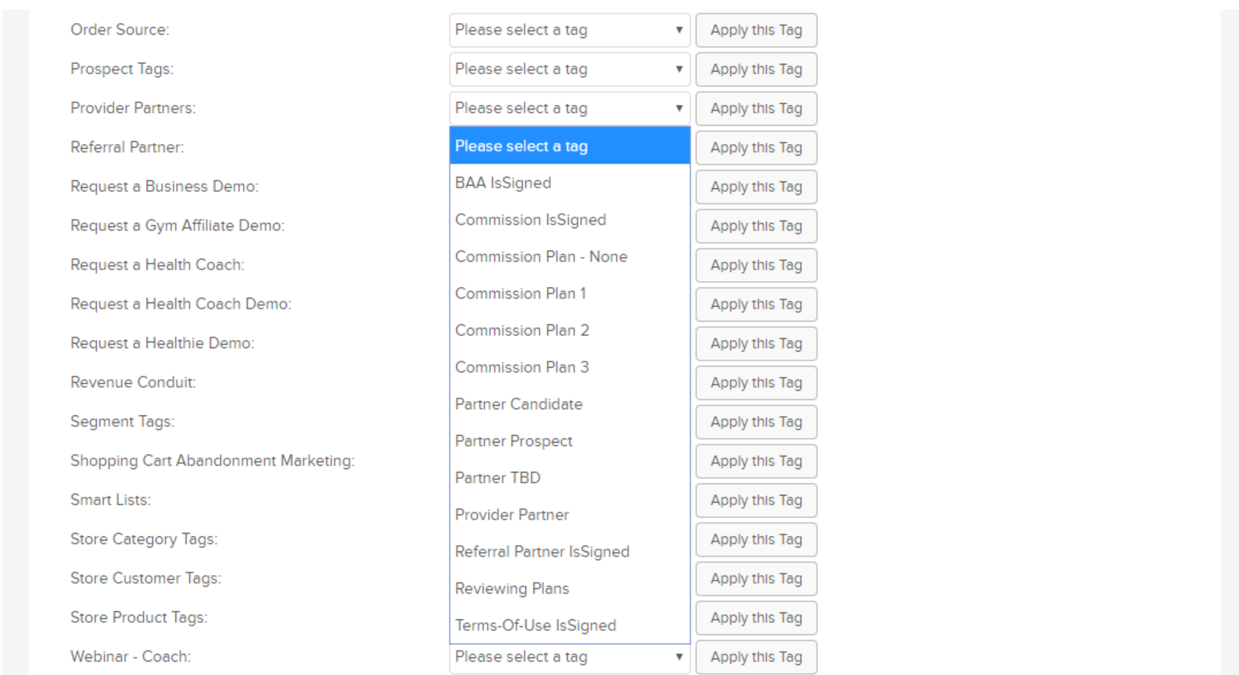
Review the information in the Custom Fields. Determine whether credentials, licensure and education are support approving the application.

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.



Step 6: Click the Manage Tags link



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	×
5/18/19	Partner Candidate	Provider Partners	×

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

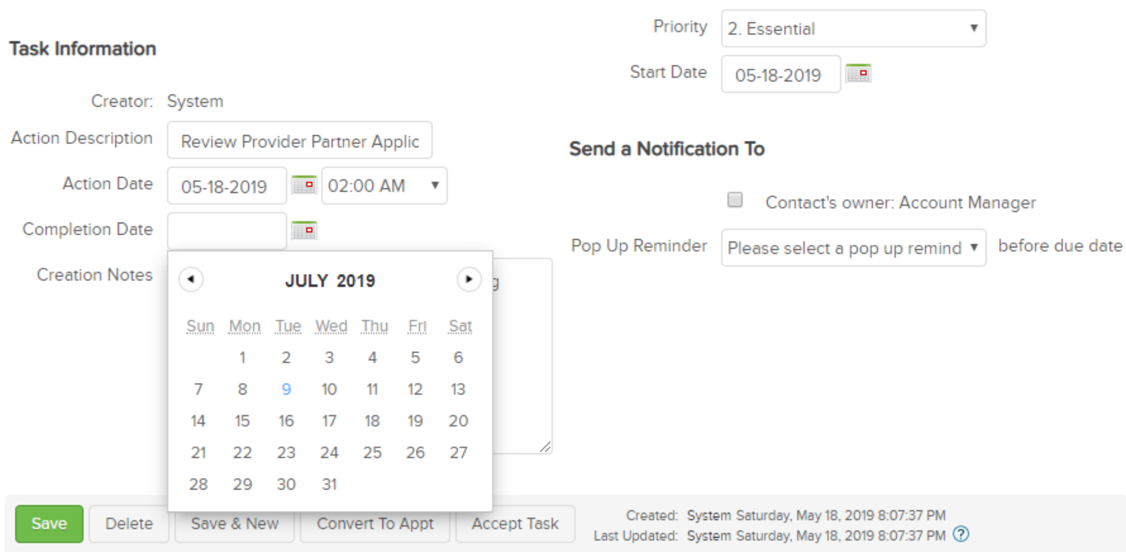
Tasks & Appointments

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.



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.