

Deal Registration Program Guidelines



The Lock 'n' Charge Deal Registration Program ("Program") is available to all Lock 'n' Charge Authorized Resellers ("Resellers") in **North America**. The purpose of the Program is to protect and reward Resellers for sourcing and closing new Lock 'n' Charge sales opportunities.

Benefits of Deal Registration

- Establishes a co-selling relationship between the Reseller and Lock 'n' Charge
- Enhances the profitability of the Reseller
- Provides a selling advantage to Reseller to win the business

All qualified Resellers participating in the Program must understand and adhere to the Program Guidelines. The Program terms and conditions outlined in this document are subject to modification or termination by Lock 'n' Charge at any time.

Program Overview

Resellers can leverage their sales teams to register eligible Lock 'n' Charge sales opportunities through the Lock 'n' Charge Deal Registration Program. Eligible Lock 'n' Charge sales opportunities are defined as deals that are: 1) not currently registered in the Lock 'n' Charge Deal Registration System; 2) net new to the Lock 'n' Charge Sales pipeline; and 3) **have an incubation period of at least five business days**.

Resellers that register eligible opportunities in accordance with the Program Guidelines qualify to purchase at an additional discount when sourcing and closing approved registered deals. At each Reseller's discretion, the discount may be extended in whole or in part to the end customer to help close the deal, or can be captured as additional margin. Lock 'n' Charge has authorized The Douglas Stewart Company to extend the additional discount to qualifying Resellers (off-invoice) when providing quotes and processing orders for approved registered deals.

Deal Registration Policies

Program Eligibility & Administration

- Reseller must be an authorized Lock 'n' Authorized Reseller to qualify for the Program.
- Reseller must register eligible sales opportunities via the Lock 'n' Charge Deal Registration Form ("Form") and submit the Form to **The Douglas Stewart Company** via email to: dealreg@dstewart.com

Opportunity Eligibility

- Registered opportunities must identify the specific sales opportunity within the institution or organization,

including the department that will deploy the Lock 'n' Charge solution.

- Reseller agrees to pre-qualify opportunities, and submit valid and complete opportunity details via the Deal Registration Form.
- All opportunities must be submitted and registered in the Lock 'n' Charge Deal Registration Program.
- Opportunities must be registered at least five (5) business days prior to the deal closing.
- The Reseller will receive a Deal Registration number if the opportunity meets the sales eligibility requirements defined under the Approval Process section.
- Once the Reseller receives approval for a Deal Registration opportunity, they are eligible to receive a 5% discount off Reseller unit cost if they close the deal within the specified time period.
- Opportunities need to be at least \$5,000 of combined Reseller cost to be considered.
- Deals sourced by Lock 'n' Charge and extended to Resellers for fulfillment are not eligible for the Program.
- RFQ & RFPs qualify for Deal Registration. Note that first submitted will be first for consideration of approval.
- Orders must be placed on a single purchase order and cannot be combined across multiple purchase orders.
- The deal registration must meet program guidelines at the time of deal closure.

Approval Process

- Reseller submits the Deal Registration Form to The Douglas Stewart Company via email to: dealreg@dstewart.com.
- Once the Reseller submits an eligible sales opportunity, Lock 'n' Charge will validate the opportunity to ensure it is:
 - New to the Lock 'n' Charge Registration System,
 - Net new to the Lock 'n' Charge Sales pipeline
- The Program Administrator will review and respond to deal registration submissions within five (5) business days.
- Resellers should contact the Program Administrator with questions regarding registration submissions.
- The Program Administrator will review and approve or deny registration submissions using the following criteria:
 - Completeness of information submitted
 - Existence of prior registration for the opportunity
 - Existence of any Lock 'n' Charge direct relationship for the opportunity (i.e., opportunity exists in the Lock 'n' Charge Sales database)
- All valid communications regarding approvals or denials will originate from the Lock 'n' Charge Program Administrator.

Extension Request

A registration is active for 90 days from date of approval. If the registration is approaching the expiration date, the approved Reseller may request an extension of the registration for up to an additional 30 days.

- To request an extension, Reseller must submit an updated Deal Registration Form with the new requested expiration date and justification indicating why the deal will close within the next 30 days.
- Extension requests must be submitted to the Program Administrator at least one day prior to expiration of the initial registration.
- Extension requests will be approved or denied at the discretion of Lock 'n' Charge.
- Only one extension request is allowed per opportunity. If the extension request is approved, the opportunity expiration will be extended 30 days.
- Once a registered opportunity expires, it is no longer eligible for the Deal Registration Program.

Approved Deal Registration Discount

- If a deal registration is approved, Reseller will receive a quote that includes the program discount applied to each individual line item.
- Once the deal closes, Resellers must place the order with The Douglas Stewart Company to receive the off-invoice deal registration discount.
- Orders must be placed on a single order and cannot be combined across multiple orders.
- Resellers must include the Lock 'n' Charge Deal Registration number with their purchase order as they submit the order.

Exceptions Policies

- In the event that two registrations are submitted for the same opportunity, Lock 'n' Charge will review the issue to determine which Reseller first registered the deal completely and correctly prior to awarding approval.
- Resellers must submit any disputes, whether with Lock 'n' Charge or another Reseller, arising from the Program to the Distributor Program Administrator. The dispute must include a written description of all issues. The Distributor Program Administrator will submit the written dispute to Lock 'n' Charge. Lock 'n' Charge will respond to the submission within five (5) business days.

Steps for Creating a NEW Registration

Before an eligible sales opportunity can become an approved deal registration, the opportunity must be submitted to the Lock 'n' Charge Distributor Program Administrator via the Lock 'n' Charge Education Deal Registration Form:

1. Complete Lock 'n' Charge Education Deal Registration Form and send via email to: dealreg@dstewart.com.
2. Lock 'n' Charge Distributor Program Administrator will verify Form is complete. All fields must contain valid values. Incomplete Forms or entry of "n/a" under any fields are subject to immediate rejection and will be declined.

3. Once the Form is complete, the registration will be reviewed for consideration. The Lock 'n' Charge Distributor Program Administrator will respond via email with a status of the registration within five (5) business days.
4. If the registration is rejected for any reason, the email from the Lock 'n' Charge Distributor Program Administrator will provide the reason.
5. If the registration is approved, the Lock 'n' Charge Distributor Program Administrator will provide a Lock 'n' Charge Deal Registration ID. This ID will be used by Lock 'n' Charge to track the registration throughout the process.

Deal Registration Rejection Reasons

Deal registrations can be rejected for, but are not limited to, the following:

- The same partner has previously registered the same opportunity.
- The opportunity is already in the Lock 'n' Charge sales pipeline and therefore not new to Lock 'n' Charge at the time of registration.
- The opportunity is below the minimum deal size requirement and does not have a chance to grow per the Lock 'n' Charge sales rep.
- Another partner has already registered the opportunity.
- The account is currently under compliance audit by Lock 'n' Charge and therefore the opportunity cannot be registered.
- Not a valid opportunity (i.e. is a lead, etc.).
- Close date is before or the same day as the submit date.
- Close date is more than 90 days from the submit date.
- Deal registration opportunity came from an RFQ/RFP. Only opportunities initiated and driven by the partner are eligible for deal registration.
- Deal registration opportunity came from a bid board. Only opportunities initiated and driven by the partner are eligible for deal registration.

Reasons for cancelling the deal registration discount include, but are not limited to, the following:

- The products on the sales order do not match the products on the deal registration.
- The products on the order do not meet the minimum deal size requirement.
- The Lock 'n' Charge sales order number has already been claimed on another deal registration.
- Lock 'n' Charge sales order number was entered more than 60 days after the order close date.
- Order close date is within five (5) business days or prior to the deal registration submit date.
- The order number is invalid.
- The customer account on the order is different than the customer account on the registration.

Deal Registration Form



Please note: only deal registration forms that are filled out completely can be considered for approval.

Today's Date

Expected Close Date*

**Must be within 90 days of Today's Date*

[Click here to request an extension for your registered deal.](#)

Partner Information

Partner Name

DSC Account Number

Product Specialist Name

Phone

Email

Sales Rep Name

Phone

Email

Customer Information

End User Name

Deploy-to Department

Customer Type

Address

City

State

Zip

Contact Name

Title

Phone

Email

Opportunity

Please provide information that shows why this is a new opportunity that you uncovered. Please describe details of efforts made in qualifying the opportunity, in providing end-user assistance to quantify the deal/project budget, in providing end-user assistance to define the deal requirements to include Lock 'n' Charge products, etc.

Please give details on delivery of presentations, product collateral, demos, etc. to targeted customer. Please give details on time/place of meetings with decision makers. If this is a renewal application for an expired deal registration, please indicate why the deal registration should be extended.

**Click here for a pricelist of available
Lock 'n' Charge Products**

Contact your Account Manager at 1 800-279-2795 or dealreg@dstewart.com. Visit our website at www.dstewart.com

Expiration Terms

Approved deal registrations expire after 90 days. However, registered deals can be extended upon request. During the last 30 days of the initial approved period, a one-time deal extension for another 30 days can be requested. If the extension is granted, the deal registration will expire 120 days after initial deal approval.

Note: Program assumes that reseller will provide rationale for deal registration extension, including:

- Details on why the deal did not come to closure within initial approved period
- Details and documentation of on-going account focus and sales efforts
- Details on why reseller believes deal can still be closed during extension period

Program Terms

I acknowledge that I have reviewed the Deal Registration guidelines and policies.

Initial

For Internal Use Only

Date/Time Received

Deal Registration ID#

Deal Registration Status

Reviewer Notes