

User Guide RENSON Partner Portal

URL to the portal : <https://partnerportal.renson.net>

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1 Introduction to the Partner Portal

The Partner Portal helps you, as a Renson Dealer, to manage and convert leads from Renson into sales.

What is a lead?

A lead is a potential customer who has shown interest in Renson products (via the Renson website, events, fairs, showroom, ...)

What information is provided through the Renson Partner Portal

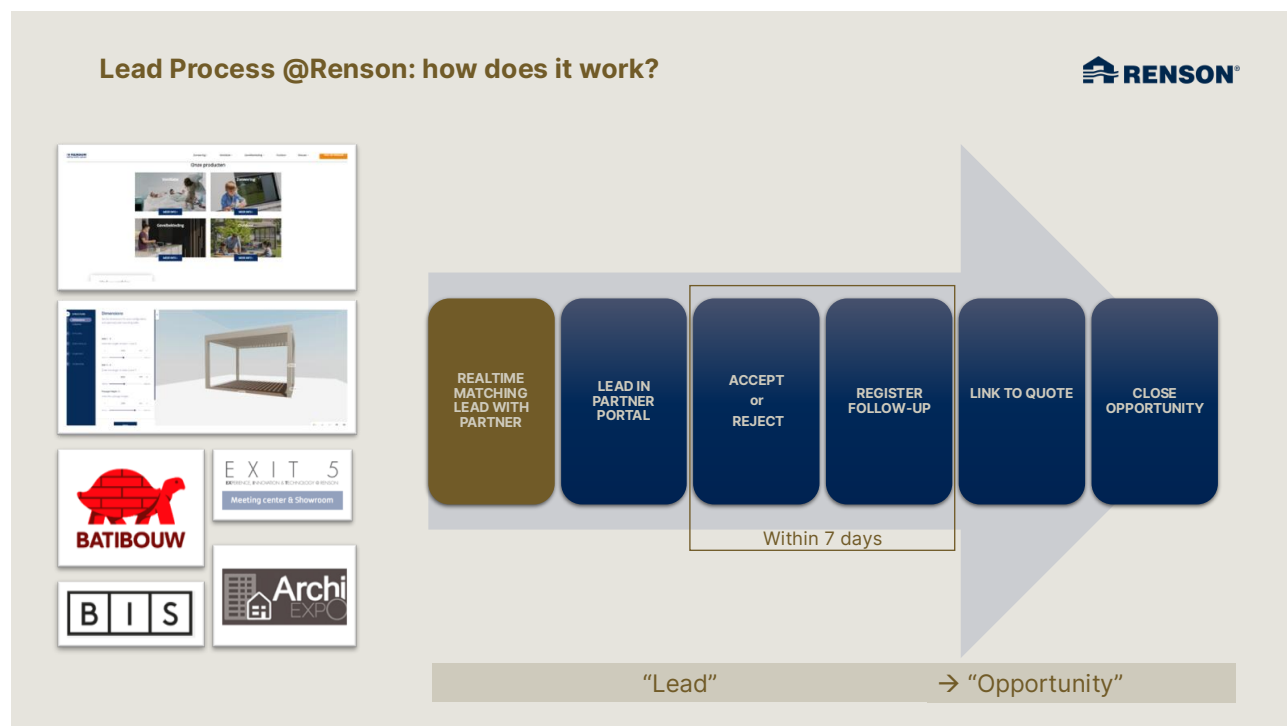
The Renson Partner Portal is a platform where all lead information is shared with you, enabling you to efficiently follow up, manage, and convert these leads into opportunities:

For each lead, you get:

- Contact details (name, address, email)
- Project information where applicable (new build, renovation, timing, ...)
- Product interest
- Lead source (website, fair, showroom, ...)
- Lead score (High / Medium)

2 Lead Process Overview

Below visual shows the full lead process at Renson:



Explanation:

- **Lead Received** -> The lead is assigned in real time to the closest partner who offers the product group requested by the customer.
- **Accept or Reject** -> Your first action is to review the data and decide if you want to follow-up this lead. You do this by either **Accepting or Rejecting** the lead.

- **Register follow up** -> Within 7 days after the initial contact of the lead, we ask you to also register a follow-up activity. This ensures that the lead information stays within your partner account.
- **Quote** -> Once you link a quote to the lead, the lead becomes an '**opportunity**'.

What is an opportunity?

An opportunity is a qualified lead with real sales potential, meaning you are actively following up to turn it into a quote or order.

- **Close** -> Final step is either a won or a lost opportunity.

At any moment in time, you can also stop the follow-up process by Rejecting the lead.

3 Getting Started

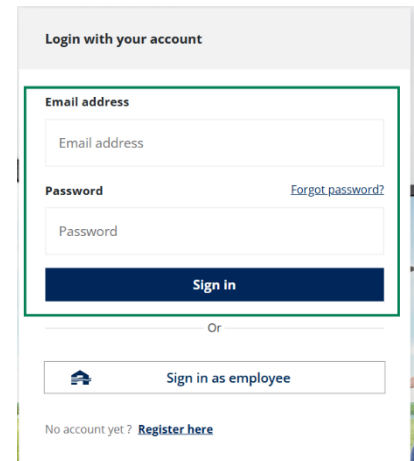
3.1 Login

Go to: portal.renson.net

Use your Renson account (same login as for RIO) to login in the Partner Portal. Your account is centrally managed by Renson, in order to have 1 login for all Renson applications.

In case you don't have a Renson account yet, you can contact your Renson contact person.

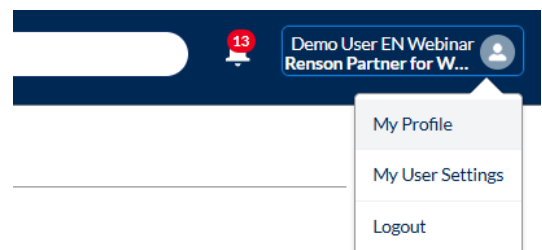
There is always only one user per e-mail address.



3.2 User settings

Within the Partner Portal, the options to modify your user settings are quite limited because it is directly linked with the general Renson account.

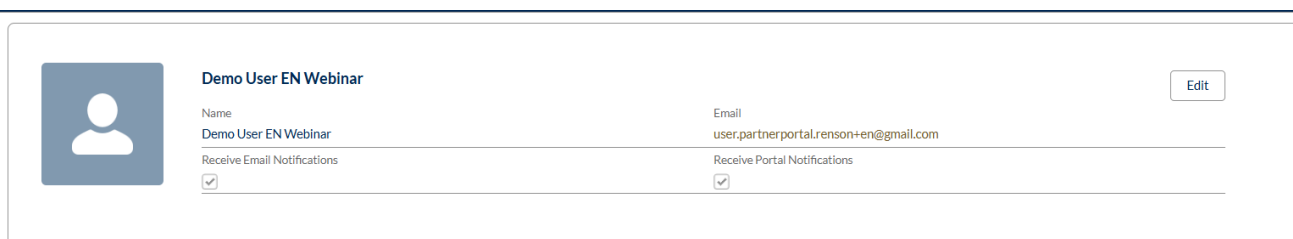
Clicking on My Profile will directly link you to your general Renson account.



3.3 Emails & notifications

Under "My User Settings", you have the possibility to Edit the **Email and Portal Notifications**.

By clicking on "Edit" at the right top, the checkmarks for each will be editable.



To update your language preferences, please contact your Renson representative.

4 Working with Leads (Core Process)

4.1 Step 1 – Accept or Reject a Lead

When logging into your Partner Portal, you will start at the Home page.

You immediately see the brand new leads that have been assigned to your account listed.



Welcome to the Renson Partner Portal, Demo User EN

Working together, Winning together !



MY NEW & ACCEPTED LEADS

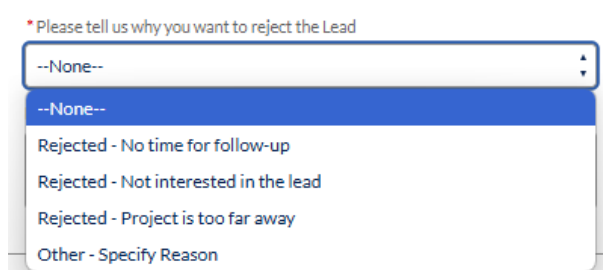
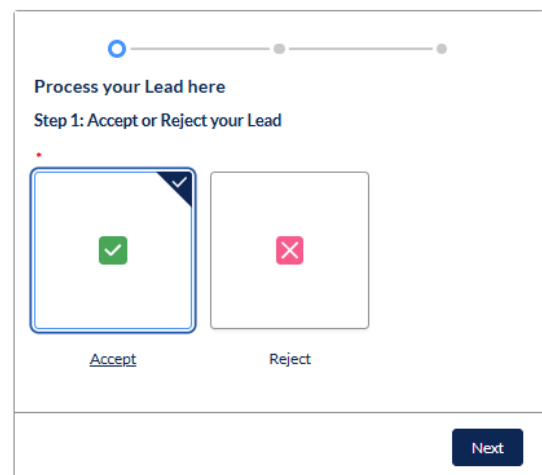
Name ↑	Lead Status	Priority Label	Product Group	Follow-up Du...	Lead Source	Partner Account
1 Test Franse notificatie	To Accept	Low	Sun Protection Screens for Existing Windows	6 days	B2C Configurator	Renson Partner for Webinar

How?

The first step in the lead process is to Accept or Reject the lead within 7 calendar days after creation date of the lead.

You can click on the lead Name hyperlink to go into the details of the lead.

Based on the lead information on the left-hand side of the Lead screen, you can either choose to Accept or Reject the lead.



If you decide to reject the lead, we request you to indicate this as soon as possible, in order give Renson the possibility to decide as quickly as possible what to do with the lead: re-assign to another partner, or decide to otherwise.

There are 3 defaulted possible rejection reasons and a fourth option with a free field in case none of the other 3 options apply.

4.2 Step 2 : Log an Activity or Event

Why?

To keep a Lead on your account, you need to complete step 2 within the total available time of 7 calendar days starting from the lead creation date.

How?

The portal guides you to the next action:



Process your Lead here

Step 2: Log an activity

To keep your Lead, please contact **Veerle TEST** and log your activity in the follow-up pane below within **6 days**

To register a follow-up activity, choose either a New Activity or a New Event, as in the screenshot below:

Follow-up Pane



Result?

From this moment, the lead is 100% yours and the status changed from “Accepted” to “**Active**”.

4.3 Step 3 : Link a quote

When?

When the lead is interested in a quote, step 3 can be performed.

How?

Now that we have an lead in status ‘Active’, we can either create a quote for the lead starting from the Partner Portal or immediately in RIO:

4.3.1 Link quote from the Partner Portal

In the follow up pane we have four options now:

1. **New Quote**

With this option, when you click next, RIO will open the Quote creation screen.

-> **Result:** After the Quote is finished in RIO, the lead will automatically be converted into an Opportunity in stage ‘Proposal’

2. **New Order**

With this option, when you click next, RIO will open the Order creation screen.

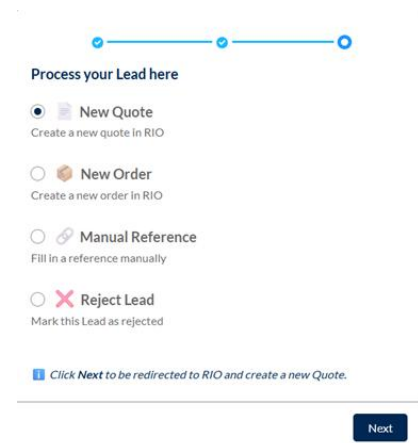
-> **Result:** After the Order is finished in RIO, the lead will automatically be converted into an Opportunity in stage ‘Closed Won’

3. **Manual Reference**

If you don’t use RIO, you can still manually insert the Quote or Order reference manually

-> **Result:**

If a manual quote reference was provided, the lead will be converted to an Opportunity in stage ‘Proposal’



Process your Lead here

☒ **New Quote**
Create a new quote in RIO

☐ **New Order**
Create a new order in RIO

☐ **Manual Reference**
Fill in a reference manually

☐ **Reject Lead**
Mark this Lead as rejected

[Click Next to be redirected to RIO and create a new Quote.](#)

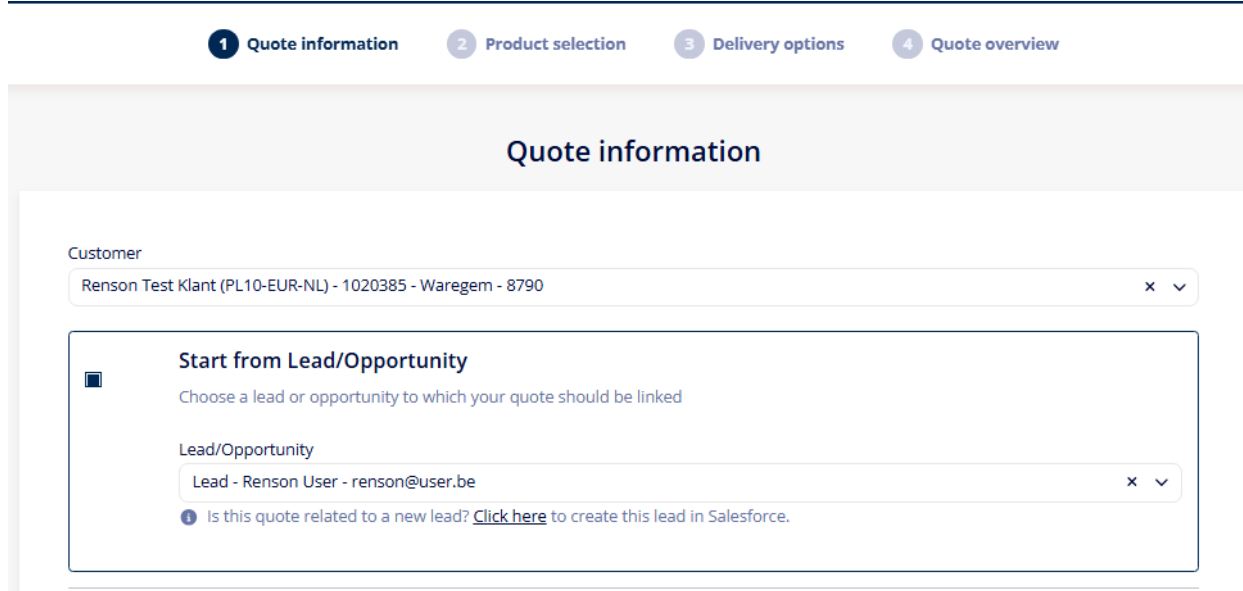
Next

If a manual order reference was provided, the lead will be converted to an Opportunity in stage 'Closed Won'

4. Reject Lead

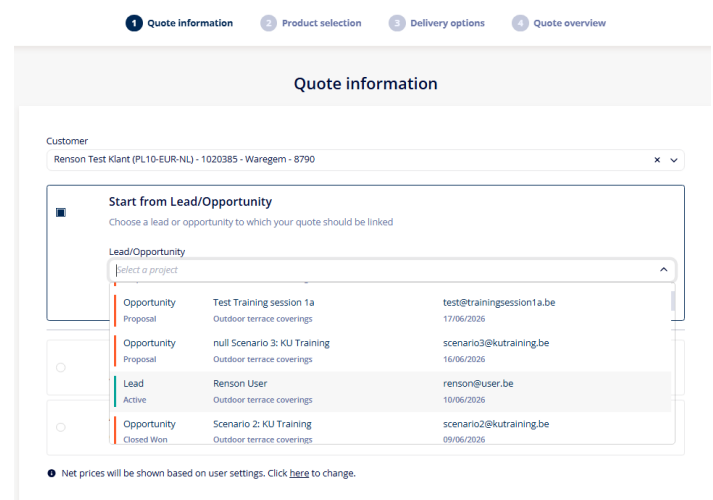
Finally, you are still able to reject the lead and give a good rejection reason.

Important: When you are redirected to RIO, the link with the lead is automatically made. This is visible as follows in the quote and/or order creation screen:



4.3.2 Link quote from RIO

1. In RIO, when starting a new Quote, you can indicate if you are making a quote for an 'active' lead from the Partner Portal:
In the first step of the Quote creation process, Quote information, you can select the first option 'Start from Lead/Opportunity'. There you can select the lead for which you are making the Quote.
2. Follow the steps in RIO as usual:
 2. Product Selection
 3. Delivery Options
 4. Quote Information
 5. Request Quote
3. The moment you receive the Quote number, automatically the lead status in the partner portal will change to an Opportunity in status 'Proposal'



Result?

After creating a quote, starting from the Partner Portal or immediately in RIO, the lead is converted into an Opportunity in status 'Proposal'.

On the Opportunity screen you will see the linked Quote(s):

Opportunity

Test Lead 3

Stage

Proposal

Account Name

Test Lead 3

Dealer Account

Renson Test Klant (PL10-EUR-NL)

Product Group

Outdoor Terrace Coverings

Close Date

30/06/2026

Oppc

Quotes (1)

Quote Number	Quote Number	Status	Total Gross Amount	
00000244	20392289	Expired	EUR 21,30	

View All

Orders (0)

4.4 Step 4 Close the Opportunity

When?

1. The end-customer wants to order the quote that was provided in the previous step, and the opportunity is thus 'closed won'
2. The end-customer is no longer interested, and the opportunity is thus 'closed Lost'

How?

Again, we can either close our Opportunity starting from the Partner Portal or immediately in RIO

4.4.1 Link Order from Partner Portal

On the right side of our Opportunity screen, in the follow up pane, we can now:

1. Continue with an existing Quote

With this option you will be redirected to the selected quote in RIO to either convert the quote into an Order, or to copy the quote and configure a slight variation of the quote.

-> **Result:**

If you converted the quote to an order, the Opportunity will automatically be 'Closed Won'

If you copied the quote and made a slight variation, the Opportunity will stay in 'Proposal', and the second quote will be linked to the Opportunity.

2. New Quote

With this option, when you click next, RIO will open the Quote creation screen.

-> **Result:** After the Quote is finished in RIO, this quote will also be linked to the Opportunity

3. New Order

With this option, RIO will open, and you can configure a new Order without starting from a previously made quote.

-> **Result:** After finishing the Order in RIO, the Opportunity will be 'Closed Won'

4. Close Opportunity

When selecting this option, you can either mark the Opportunity manually as 'Closed Won' or 'Closed Lost'

-> **Result:** Opportunity in status 'Closed Won' or 'Closed Lost'

Process your Opportunity here

- ☒  Continue with existing Quote
Order or Copy existing RIO Quote
- ☐  New Quote
Create new RIO quote
- ☐  New Order
Create new RIO order
- ☐  Close Opportunity
Finalize this Opportunity by marking it as Won or Lost

Related Quotes			
1 of 1 item • 1 item selected			
Quote ...	Status	Quote ...	Quote ...
☒ 20392364	VALID	€10,895.00	Scenario 3: KU Training

 Click **Confirm** to be redirected to the selected RIO Quote.

4.4.2 Link Order from RIO

1. In RIO, you can easily find back the original quote you made for the lead

- If you convert this quote to an order, RIO remembers the link with the lead

1 Order information
2 Product selection
3 Delivery options
4 Order overview

Order information

Customer
Renson Test Klant (PL10-EUR-NL) - 1020385 - Waregem - 8790

Start from Lead/Opportunity
Choose a lead or opportunity to which your quote should be linked

Lead/Opportunity
Opportunity - Test Lead 3 - test@lead3.be

Is this order related to a new lead? [Click here](#) to create this lead in Salesforce.

- From here you can continue the order as usual in RIO
- When the Order is finished, automatically in the Partner Portal, the status of the Opportunity will be set to 'Closed Won'

Result?

After converting the quote, made in the previous step, starting from the Partner Portal or immediately in RIO, the Opportunity status is automatically set to 'Closed Won'

On the Opportunity screen you will see the linked Quote(s), and also the linked Order's) now:

 Opportunity test Training 3b				
Stage Closed Won	Account Name test Training 3b	Dealer Account Renson Test Klant (PL10-EUR-NL)	Product Group Outdoor Terrace Coverings	Close Date 22/05/2026

Quotes (1)			
Quote Number	Quote Number	Status	Total Gross Amount
00003786	20392680	Ordered	EUR 10.215,00
View All			

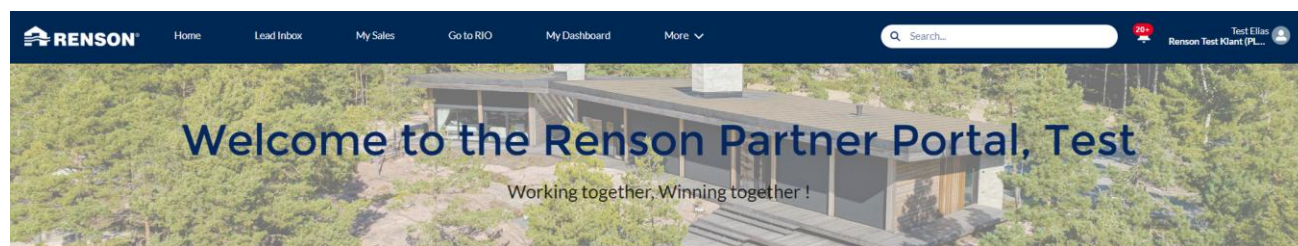
Orders (1)			
Order Number	Order Number	Status	Total Gross Amount
00002184	227088	Confirmed	EUR 10.215,00
View All			

5 Portal Navigation

	Home	Lead Inbox	My Sales	Go to RIO	My Dashboard	More ▾
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5.1 Homepage

When logging in to the Renson Partner Portal, you will always be sent to the Homepage.
On the homepage you can find TBA



MY NEW & ACCEPTED LEADS

	Name ↑	City	Lead Stat...	Priority Label	Product Group	Follow-up Due in	Lead Source	Dealer Account	Assignment Date	Last Po...
1	Partner Portal Lead 1	Waregem	To Accept	Low	Outdoor Terrace Coverings	6 days	B2C Configurator	Renson Test Klant (PL10-EUR-NL)	16/06/2026 14:49	

5.2 Lead Inbox

This section shows all your leads that are either **New or Accepted**, but still need follow-up by registering an activity.



Lead Inbox

Below you find your **New & Accepted Leads**
[Please note](#); if you do not log an activity in the follow-up pane of the lead within 7 days, the lead will be removed from your account.

MY NEW & ACCEPTED LEADS

	Name ↑	City	Lead Stat...	Priority Label	Product Group	Follow-up Due in	Lead Source	Dealer Account	Assignment
1	Partner Portal Lead 1	Waregem	To Accept	Low	Outdoor Terrace Coverings	6 days	B2C Configurator	Renson Test Klant (PL10-EUR-NL)	16/06/2026 1

5.3

My Sales

Under this section of the Partner Portal you will find:

1. My Leads
2. My Opportunities
3. My Activities
4. My Closed Leads & Opportunities

5.3.1 My Leads

The 'My Leads' section contains all your **active leads**.

Meaning all leads that you have accepted and on which you have registered a follow up activity.



My Leads

Below you find your **Active Leads**

MY ACTIVE LEADS

Create New Lead

	Name ↑	City	Lead St...	Priority Label	Product Group	Lead Source	Dealer Account	Assignment Date	Last Portal Activi...
1	Renson User	Waregem	Active	Low	Outdoor Terrace Coverings	Quote Request	Renson Test Klant (PL10-EUR-NL)	10/06/2026 08:38	10/06/2026 08:40
2	Test Lead 2	Wielbeke	Active	Low	Garden Elements	Campaign	Renson Test Klant (PL10-EUR-NL)	5/05/2026 17:33	5/05/2026 17:43
3	Test Lead 4	Waregem	Active	Low	Outdoor Terrace Coverings	Contact Form	Renson Test Klant (PL10-EUR-NL)	12/05/2026 10:07	12/05/2026 10:07

5.3.2 My Opportunities

Once a quote is linked to the lead, we no longer speak of leads but "opportunities". The information is moved from the My Leads tab to the My Opportunities tab under "My Sales" Cf screenshot below:

RENSON®

Home

Lead Inbox

My Sales

Go to RIO

My Dashboard

Support

Q Search...

20

Test Elias
Renson Test Klant (PL...

My Leads

My Opportunities

My Activities

My Closed Leads & Opportunities

Below you find your **Open** Opportunities

MY OPPORTUNITIES

	Opportunity Name ↑	Stage	Product Group	Dealer Account	Number of Quotes	Close Date	
1	null Scenario 3: KU Training	Proposal	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	1	16/06/2026	
2	Test Lead 3	Proposal	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	1	30/06/2026	
3	Test Training session 1a	Proposal	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	1	17/06/2026	
4	test Translations NL	Proposal	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	1	27/06/2026	

5.3.3 My Activities

Gives you an overview of all your registered activities grouped by active and completed.

5.3.4 My Closed Leads & Opportunities

This pages gives you an overview of all Closed Leads (closed in the Active stage) and Opportunities (closed in the Proposal stage).



Home

Lead Inbox

My Sales

Go to RIO

My Dashboard

Support

Q Search...

99

Test Elias
Renson Test Klant (PL...

My Leads

My Opportunities

My Activities

My Closed Leads & Opportunities

MY CLOSED OPPORTUNITIES

	Opportunity Name ↑	Stage	Product Group	Dealer Account	Close Date	
1	null Scenario 1: KU Training	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	12/05/2026	
2	null Scenario 4: KU Training	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	18/05/2026	
3	null Test KUs	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	11/05/2026	
4	Scenario 2: KU Training	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	9/06/2026	
5	Test Lead	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	28/05/2026	
6	Test Opportunity	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	5/05/2026	
7	TTest Scenario form RIO	Closed Won	Outdoor Terrace Coverings	Renson Test Klant (PL10-EUR-NL)	29/05/2026	

6 Support

The Support pages links directly to our professional Renson website, where you can find all available support and information : <https://renson.net/nl-be/pro/partnerportal>