

Aurenza
CONSULTING

AURENZA PORTAL

Account Executive user guide

Work your assigned accounts, record outreach and carry each opportunity from discovery through proposal.

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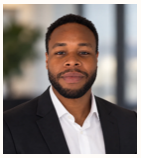
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Sign in to the portal ↗ | Try the sample workspace ↗

YOUR AURENZA TEAM



Ivan Nlondock
Head of Product

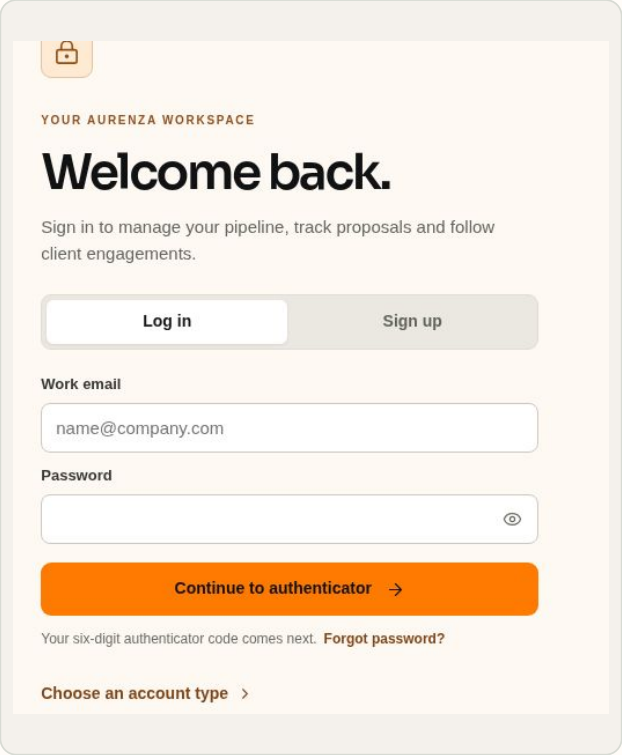


Ausar McGruder
Head of Sales

GETTING STARTED

Sign in and find your guide

On your first verified sign-in, the portal offers a walkthrough for your account type. You can replay it from User guide whenever you need it.



Sign-in screen on the portal domain.

1. Choose your entry point

Returning users select Log in. For a new account, select Sign up and choose your role. Use the private setup code issued for your approved email.

2. Verify with your authenticator

Enter your portal password. At first enrollment, scan the QR code in your authenticator app and enter its six-digit code. Save your recovery codes privately.

3. Open the walkthrough

Select Start walkthrough to visit your role's tabs. Use Next step or Back to move through it. If you skip it, open User guide in the sidebar to restart.

If you need help with your password

Select Forgot password? and enter your password recovery key or an admin-issued reset code. Six-digit authenticator codes are used after the password step. Keep both types of recovery information private.

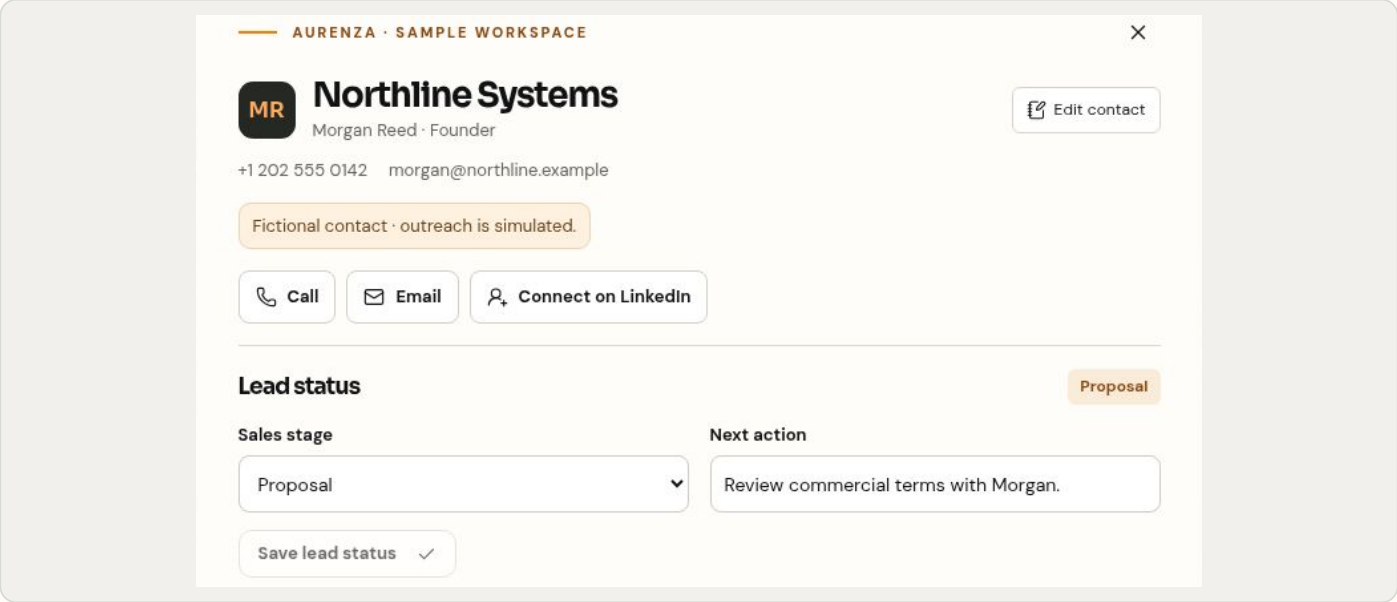
Open user guide ↗ | Open password recovery ↗

To revisit an announcement, open User guide and select View update under What's new.

MY LEADS

Update a lead and its next step

Use Assigned leads for live work. To rehearse the same workflow, open Sample leads and choose a fictional account.



Inside a fictional lead record, the stage and next action are saved together.

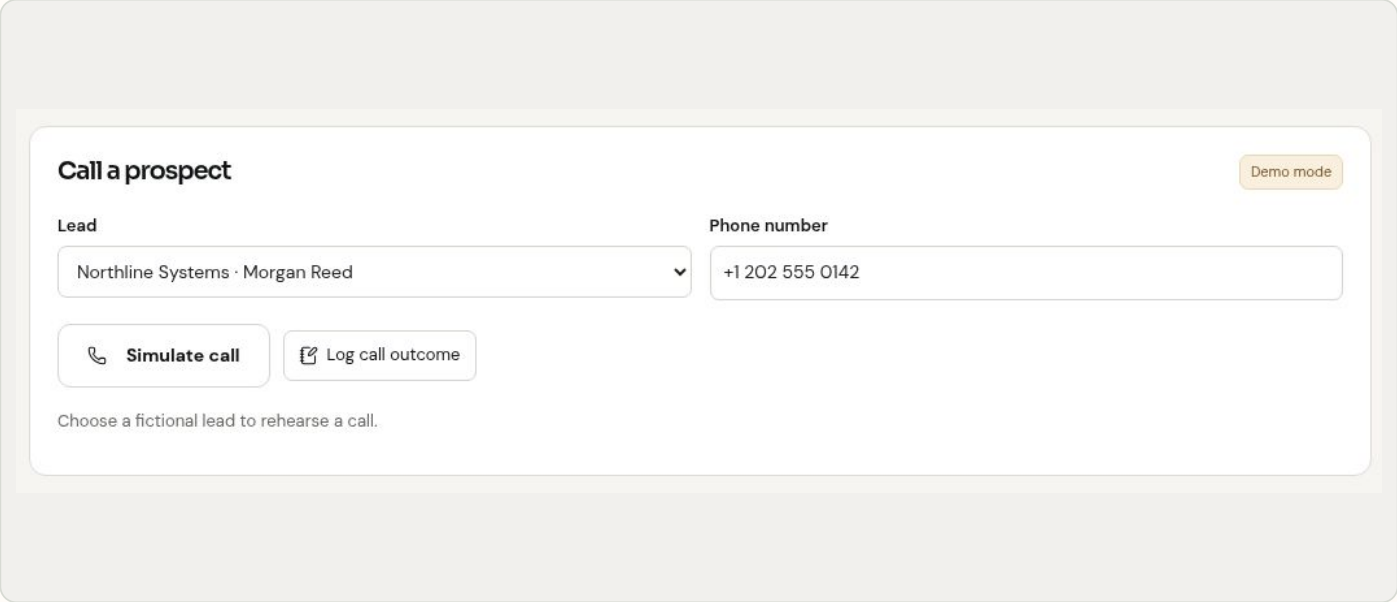
Open the right account	Choose My leads, then Assigned leads. If the list is empty, ask an admin for an assignment. You can use Sample leads while you wait.
Update the stage	Open the lead profile. Choose Prospecting, Discovery, Technical discovery, Quote builder, Proposal or Closed to reflect the buyer's actual progress.
Record the next action	Write the agreed action and who will take it, then select Save lead status. When closing a lead, record the outcome shown in the form.

Open assigned leads ↗ Open sample leads ↗

OUTREACH

Call and follow up

Keep the conversation, the outcome and the next commitment attached to the same account.



Demo call controls with a fictional lead selected. Live calling options depend on your setup.

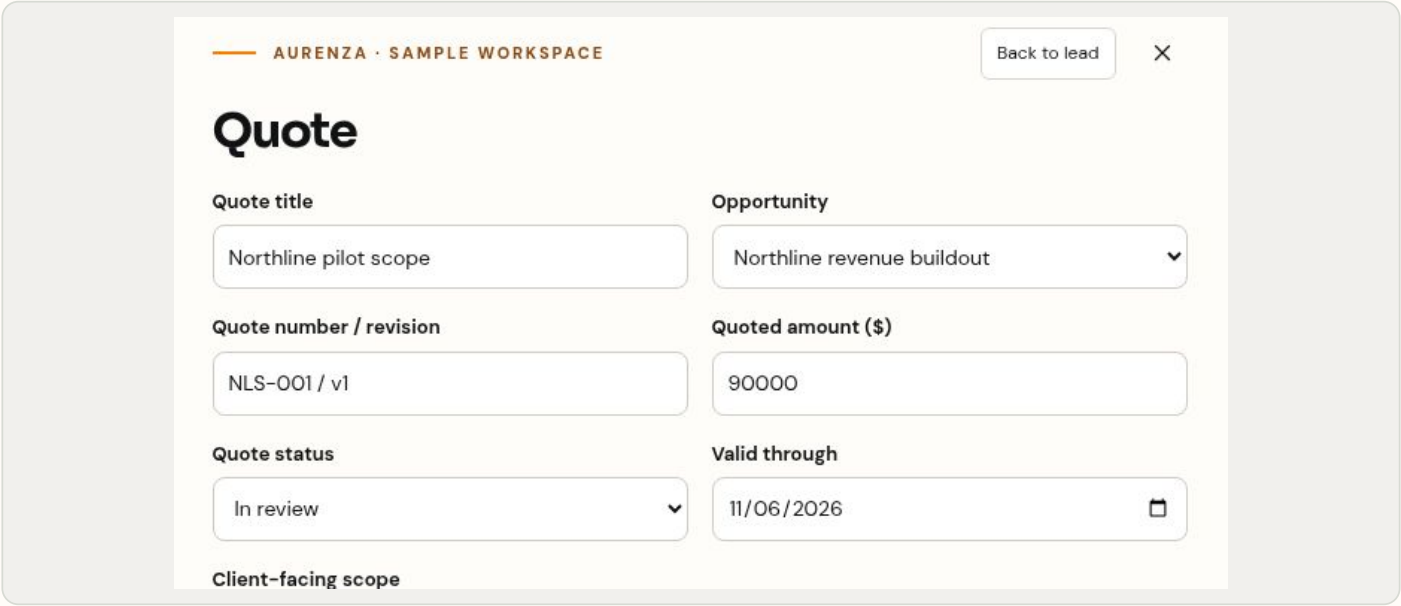
Start the conversation	Open Calling and choose the assigned lead. Confirm the phone number, then use the available call option. The device option opens your phone app.
Log what happened	Select Log call outcome and save what the buyer said. For email, use Email composer to personalize a message. Use the LinkedIn link in the lead profile when a profile URL is available.
Make discovery actionable	In Discovery call register, link the call to the account. Record the buyer's problem, next step and due date. Open Sales tasks to find the follow-up.

Open calling ↗ | Open email composer ↗ | Open discovery calls ↗

DISCOVERY & PROPOSALS

Prepare a quote for a buyer

Build the quote against an opportunity so the scope, revision and decision stay with the deal.



A sample quote shows its opportunity, revision, quoted amount and status.

Check the opportunity	In Sales pipeline, open the opportunity linked to the assigned account. Review its stage and next action before preparing a quote.
Record the quote	Open Quote register and create or update the quote. Select the opportunity, enter the revision and amount, and describe the client-facing scope.
Follow the decision	Save the quote and log the buyer's next step. Update the lead to Proposal when the proposal is presented, then record the outcome when the buyer decides.

Open sales pipeline ↗ Open quote register ↗