

HOW TO DO BUSINESS GUIDE CLEVER RX



Website: www.cleverrx.com

Customer Service phone number: (303) 437-8921

How to Activate your Partner Portal:

1. Within 24 hours of receiving your welcome email from Clever Rx, you should receive another email to activate your Partner Portal. If you do not receive this email, please contact partnersuccess@cleverrx.com. You can also request a new portal activation email [here](#).

Why activate your Partner Portals?

- a. Invite new partners
- b. Track growth
- c. Know the exact savings of your clients
- d. Set up proper documents to get paid

To Find Marketing Materials:

1. Once you can log into your Partner Portal, click “Marketing” on the far-left side.
2. Click “Marketing Materials.”
3. Here you will have an array of materials you can use.

To Order Cards:

1. Click [here](#) to fill out the order form.

To Add a Partner:

1. Once you are logged into your Partner Portal, click “Account,” then “Partner.”
2. Here you can see all your current partners.
3. To add another, click “Actions” in the top right corner.
4. Fill out all the fields and hit “Invite Partner.”

***Note: Partner invitations require approval before going live. This usually takes 24-48 hours.**

To Share your personal Clever Rx link:

1. The most efficient way to share your link is through your Clever Rx app.
2. In the app, click “Share” to text or email the link. Downloading the Clever Rx App from the link that is shared will auto-populate your numbers into the Clever Rx App.

Senior Marketing Specialists

801 Gray Oak Drive, Columbia, MO 65201 | (800) 689-2800 | www.smsteam.net

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***Note: If you share the Clever RX App without your direct link, the Group ID number and Member ID number MUST be entered manually when the user is prompted. This ensures the exclusive savings and claims are tracked back to you.**

To Check Claims Report:

1. Once you are logged into your Partner Portal, click “Claims Report.”
2. Here you can see the number of claims, as well as the amount of each.
3. You can also check card activity and partner performance in the Claim Report tab.

To Check your Payout Amount:

1. Once you are logged into your Partner Portal, click “Payout Ledger.”
2. Here you can see the amount available, as well as a history of your compensation.

For questions please call Senior Marketing Specialists at 800-689-2800.

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