



### Customize an Asset

- Email
- Social
- Banner Ads

[View All Assets](#) »



### Activate a Campaign

- Sample Vendor Campaign
- Sample Vendor Campaign 2
- Sample Vendor Campaign 3

[View All Campaign](#) »



### My Upcoming Activities

- Email
- Banner Ads
- Files

[View All Activities](#) »

# Partner Marketing Center Onboarding Guide

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Customer EDUCATION MANAGER

# What is the purpose of this onboarding guide?

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Welcome to Partner Marketing Center! This onboarding guide is designed to help you start using the most common features and tools available within Partner Marketing Center.

Use this guide **on-the-job**, to aid you as you work through a variety of tasks. Upon completion of the guide, you will be able to do the following:

- Navigate and prepare to use the platform
- Set up the most commonly used asset types
- Access relevant reports to help drive your marketing activities
- Manage contacts and leads

# How do I use this onboarding guide?

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- This guide is divided into six lessons.
- Each lesson includes a series of skills.
- When you are ready to complete tasks within Partner Marketing Center, do the following:
  1. Identify the **lesson** associated with the task you are completing. (See the next page)
  2. Click on the **icon** associated with the lesson.
  3. Select the **skill** you are hoping to achieve.
  4. Complete the **steps** contained within the selected skill.

# Agenda

Click on the icon to launch each lesson.



Lesson 1: Introducing Partner Marketing Center



Lesson 2: Preparing to use the platform



Lesson 3: Setting up campaigns



Lesson 4: Reviewing reporting options



Lesson 5: Reviewing contact management capabilities



Lesson 6: Introducing lead management



Lesson 7: Introducing Concierge Account Management



Lesson 8: Managing Partner Accounts



## Lesson 1: Introducing Partner Marketing Center

### We will cover these skills:

- [What is Partner Marketing Center?](#)
- [What four PMS features work together to enable campaign success?](#)

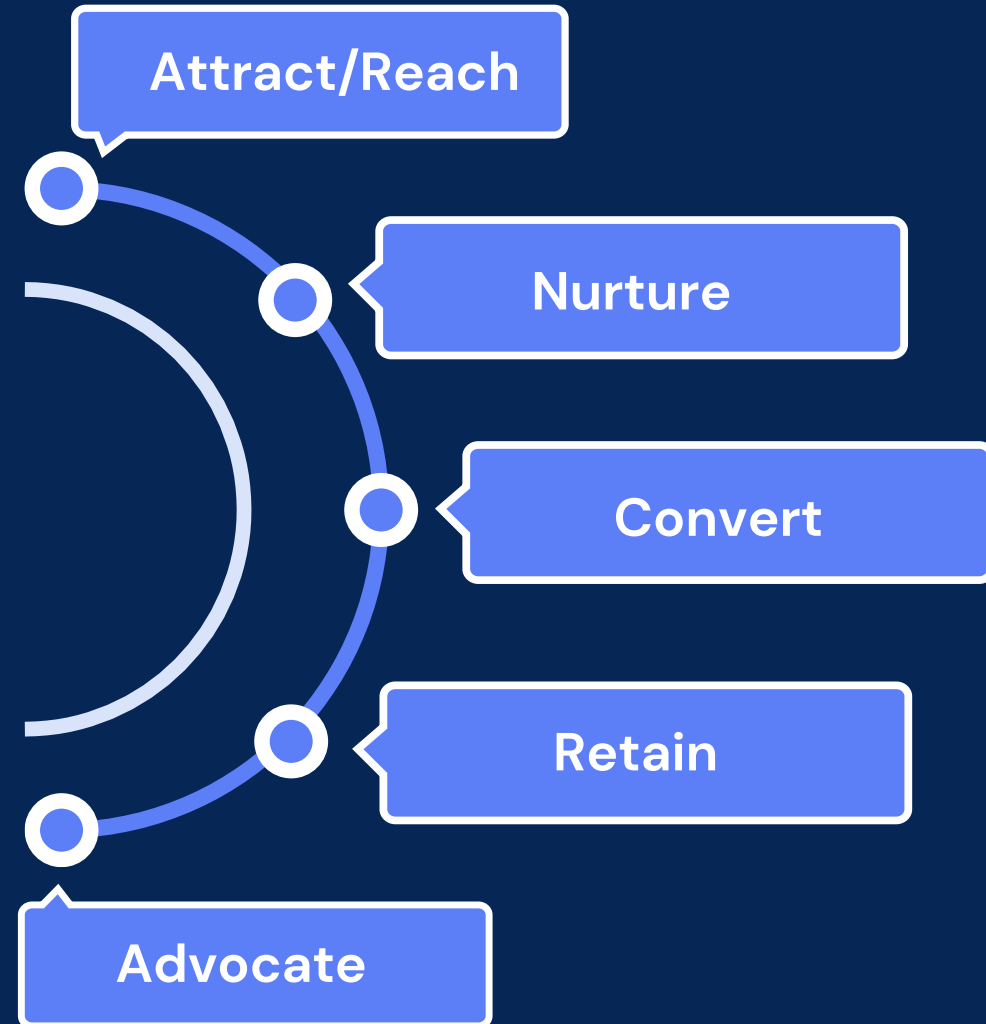


# What is Partner Marketing Center?

Partner Marketing Center (PMC) is a marketing automation platform that helps you accomplish tasks at each stage of the marketing funnel.

Using the PMS enables you to:

- Cobrand assets to provide value to your customers
- Reduce production time of assets
- Enhance the quality of assets
- Speed up the go-to-market process



# What four PMC features work together to enable campaign success?

[Main Menu](#) | [Return to Lesson 1](#)





## Lesson 2: Preparing to use the platform

### We will cover these skills:

- [How do I navigate the Partner Marketing Center?](#)
- [How do I create my profile?](#)
- [How do I update my language and time?](#)





# How do I navigate Partner Marketing Center?

[Main Menu](#) | [Return to Lesson 2](#)

1. **Home Page:** Featured content, such as campaigns, individual assets, recent activities, and more
2. **Campaigns:** Collection of assets related to specific products or services, with instructions on how to execute the campaign
3. **My Marketing:** Your content, including activities, contacts, settings, reports, etc.
4. **Asset Library:** Library of marketing assets grouped by asset type
5. **Social Media:** Social campaign library and your social posts
6. **Bootcamp:** Marketing 101 Bootcamp recorded webinars
7. **Resources:** Training Resources to help you learn about the PMC

The screenshot displays the Vendor Partner Marketing Center (PMC) interface. At the top, the 'VENDOR LOGO' is on the left, and a navigation bar includes 'Home', 'Campaigns', 'My Marketing', 'Asset Library', 'Social Media', 'Bootcamp', and 'Resources'. A 'SHOW ME HOW' button with a question mark icon and a user profile 'James Demo' are on the right. Below the navigation bar, a featured campaign titled 'Vendor Sample Campaign' is highlighted with a circled '1'. The campaign description reads: 'Click here to browse tactics and learn more about this Campaign'. A blue button labeled 'Take me to the Campaign' is positioned below the text. To the right of the text is a photograph of a woman with curly hair, wearing a yellow top, smiling while working on a laptop. Below the campaign section, there are navigation arrows and a blue button with an envelope icon labeled 'Contact us'.

# How do I create my profile?

Before setting up assets, update marketing assets with your company-specific content such as logos, address, phone number, and website. (Note: all required fields are marked by the red asterisk.)

1. From the toolbar, select **My Marketing > Settings** (Review [How do I navigate the Partner Marketing Center?](#))
2. Select the **Marketing Assets** tab.
3. For each **Marketing Asset** type, in the text box, type the **correct content**. Or, from the **Choose File** button, select the **correct image**.
4. Click **Save**.

Marketing Assets Unsubscribe Bcc Settings

**Edit Marketing Assets for Vendor Company LLC**

Update your account profile below with your company details. The information you enter below is used to automatically populate your details in the marketing materials you use.

**Save**

**General Use**

**Company Email**  
Company Email

**\*Company Logo**  
Recommended minimum size: 170px X 40px  2022-06-17\_15-05-14.png

**Company Name**  
e.g. ABC Company

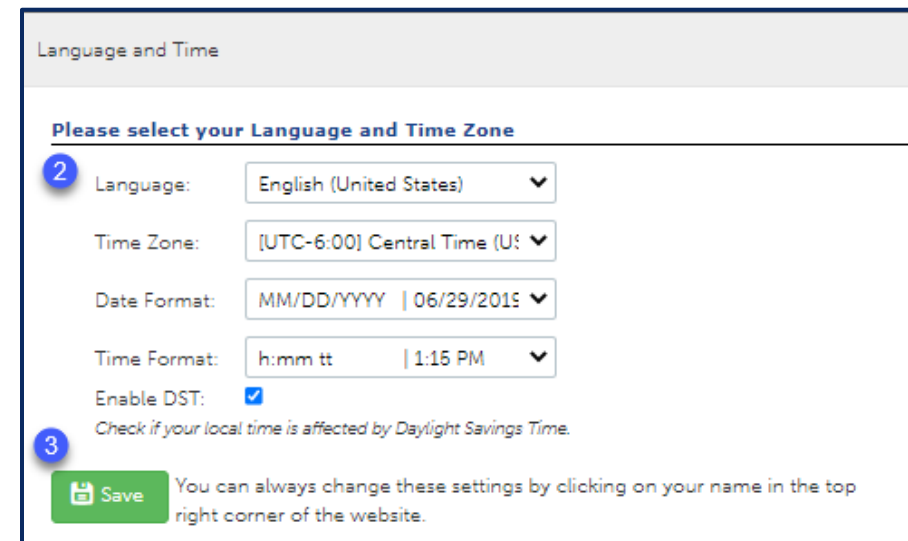
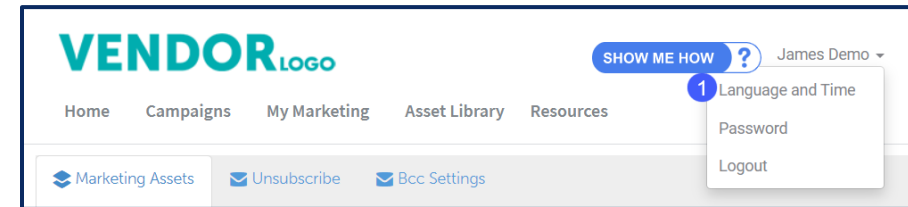
**Contact Email Address**  
Email address of contact person for tactic marketing leads

**Contact Name**  
Name of contact person for tactic marketing leads

# How do I update my language and time?

Update your preferred language and time zone at any time. To update your language and time do the following:

1. On the upper right side of any page, click the **drop-down** menu. Then select **Language and Time**.
2. From the Language and Time box, from each **drop-down** menu, select the **appropriate options**.
3. Click **Save**.



## Lesson 3: Setup Campaigns

### We will cover these skills:

- [What assets types are available?](#)
- [How do I select a campaign?](#)
- [How do I set up individual campaign assets, including](#)
  - [Landing pages](#)
  - [Email campaigns](#)
  - [Banner ads](#)
  - [Social campaigns](#)
- [How do I review my campaign activity?](#)
- [How do I access other campaign assets?](#)



# What asset types are available?

[Main Menu](#) | [Return to Lesson 3](#)

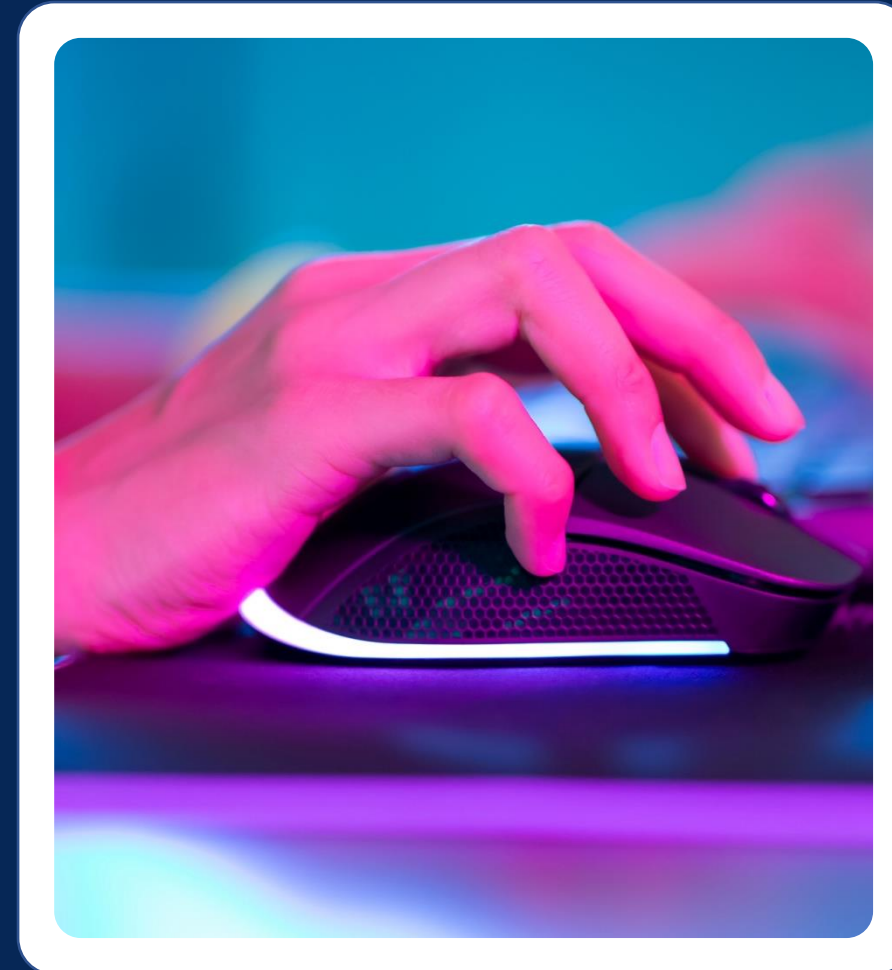
## Downloadable

Cobrand assets, then download them for use across multiple mediums.

Reporting is unavailable.

### Examples:

- Files
- eBooks
- Whitepapers
- Infographics
- Videos



## Executable

Cobrand assets, then execute them directly from the PMS.

Reporting is available.

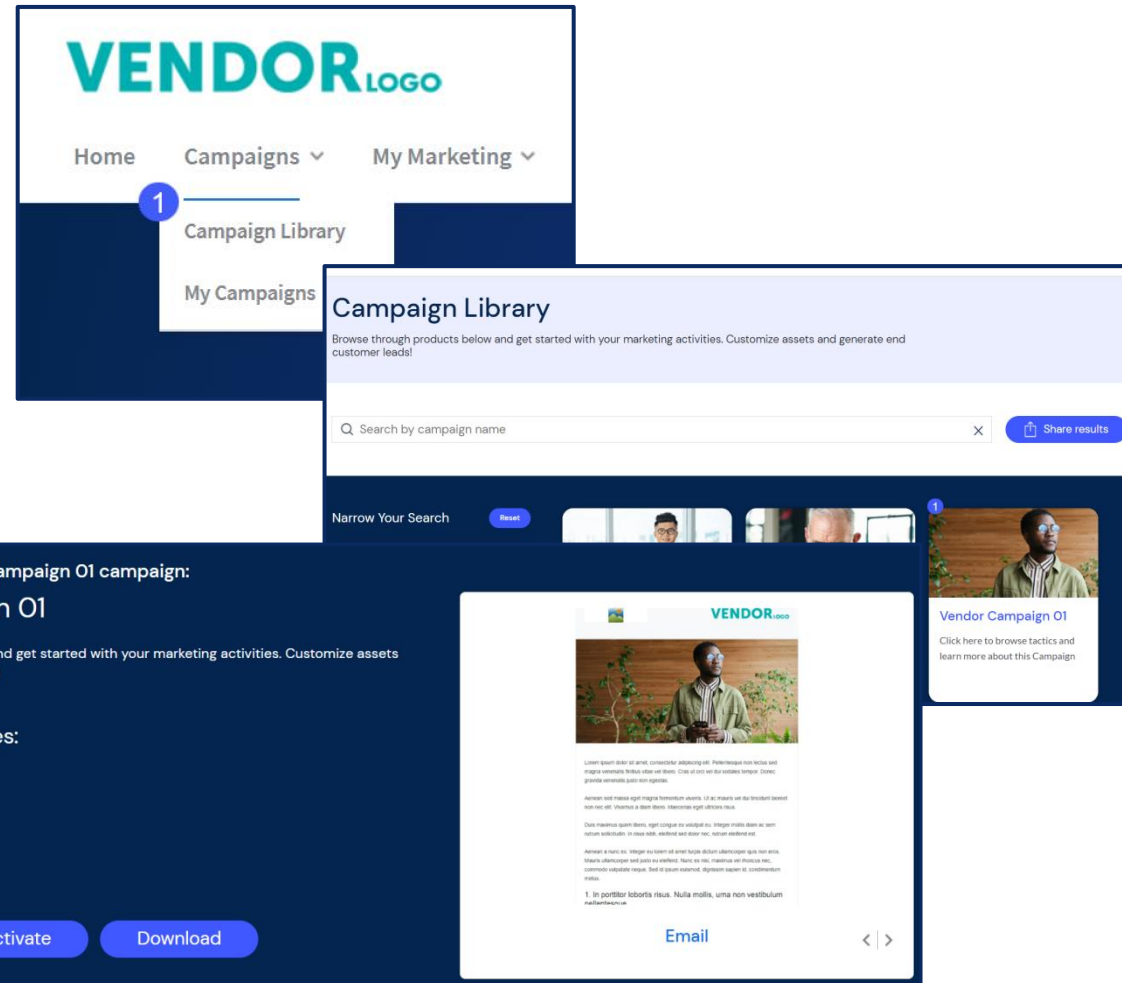
### Examples:

- Landing pages
- Email campaigns
- Banner ads
- Social campaigns

# How do I select a campaign (1)?

A campaign is a collection of assets on a particular product or service, along with instructions on how to execute the campaign. To access a campaign, do the following (This example displays the Vendor Campaign 01):

1. From the toolbar, select **Campaigns** > **Campaign Library**.
2. Select the **Campaign Topic** you want to use.
3. Scroll to the **Campaign Banner**. Then click **Activate**





# How do I select a campaign (2)?

Here, you have the option to **cobrand** and **deploy** the different **assets** available within the campaign, with instructions, to help you every step of the way.

1. From the **box**, type a **name** for your campaign,
2. Click **Yes, proceed**.
3. From the campaign page, scroll to review **the available assets**.
4. For the asset you choose, click **Edit**.

In the next section, you will learn how to customize and deploy a variety of asset types.

The screenshot illustrates the process of activating and customizing a campaign. It is divided into two main sections:

- Activation Step:** A dialog box asks, "Would you like to activate and customize this campaign?". Below the question is a text input field labeled "New Campaign Name:" containing the text "Vendor Campaign 01 #2". A blue button labeled "Yes, proceed" is highlighted with a circled '2'. A "No" button is also visible.
- Campaign Page:** The top of the page shows "Campaign Name: Vendor Campaign 01 #2" with an "Edit" link. Below this is a section titled "Your landing page(s)" with a blue bookmark icon. A paragraph explains that landing pages help prospects discover more about the offering. Below the text is a preview of a landing page asset titled "Vendor Campaign 01 Landing Page". The asset preview shows a blue header with "VENDOR" and a photo of two people. Below the preview, the text "Vendor Campaign 01 Landing Page" is displayed, and a blue "Edit" button is highlighted with a circled '4'. A green checkmark icon is visible to the left of the "Edit" button.

Numbered callouts (1, 2, 3, 4) are placed on the interface to guide the user through the steps: 1 points to the campaign name input field, 2 points to the "Yes, proceed" button, 3 points to the "Your landing page(s)" section header, and 4 points to the "Edit" button for the selected asset.



# How do I set up a landing page?

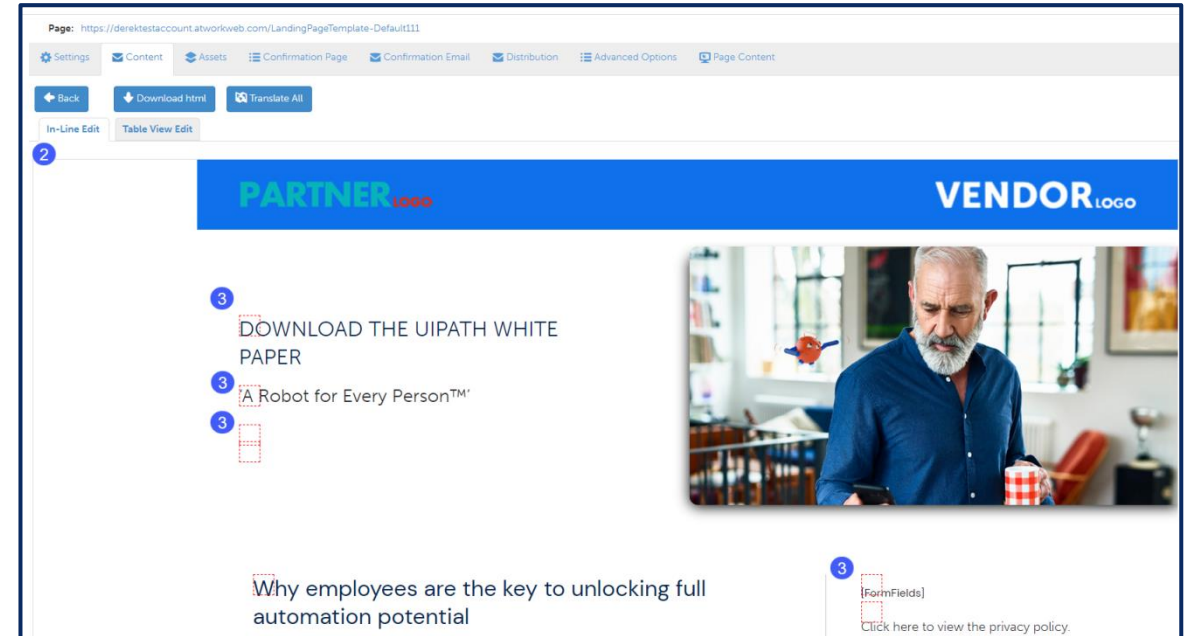
The landing page is the heart of each campaign. It's where contacts enter their information and eventually become leads and opportunities. Landing pages often include forms and are linked directly to campaign assets, such as emails, banner ads, and social campaigns through buttons and links.

**When setting up a landing page, complete the following steps:**

1. [Customize content](#)
2. [Update Marketing Assets](#)
3. [Set-up Confirmation page](#)
4. [Set-up Confirmation email \(Optional\)](#)
5. [Select Distribution assignment \(Optional\)](#)

# 1. Customize Content (Edit Content)

1. From the **Campaign** page, in the **Landing Page** box you want to deploy, click **Edit**. (Review [How do I select a campaign?](#))
2. Select **In-Line Edit** to edit **text**, **images**, and **call to action** buttons directly on the page. (Note: Table View Edit allows you to edit within a table.)
3. Click any **red box** to edit **content**, **images** and **call to action** buttons.



## 2. Update Marketing Assets

If you haven't updated your profile or would like to make a change to your information, update your marketing assets directly from the Landing Page setup area.

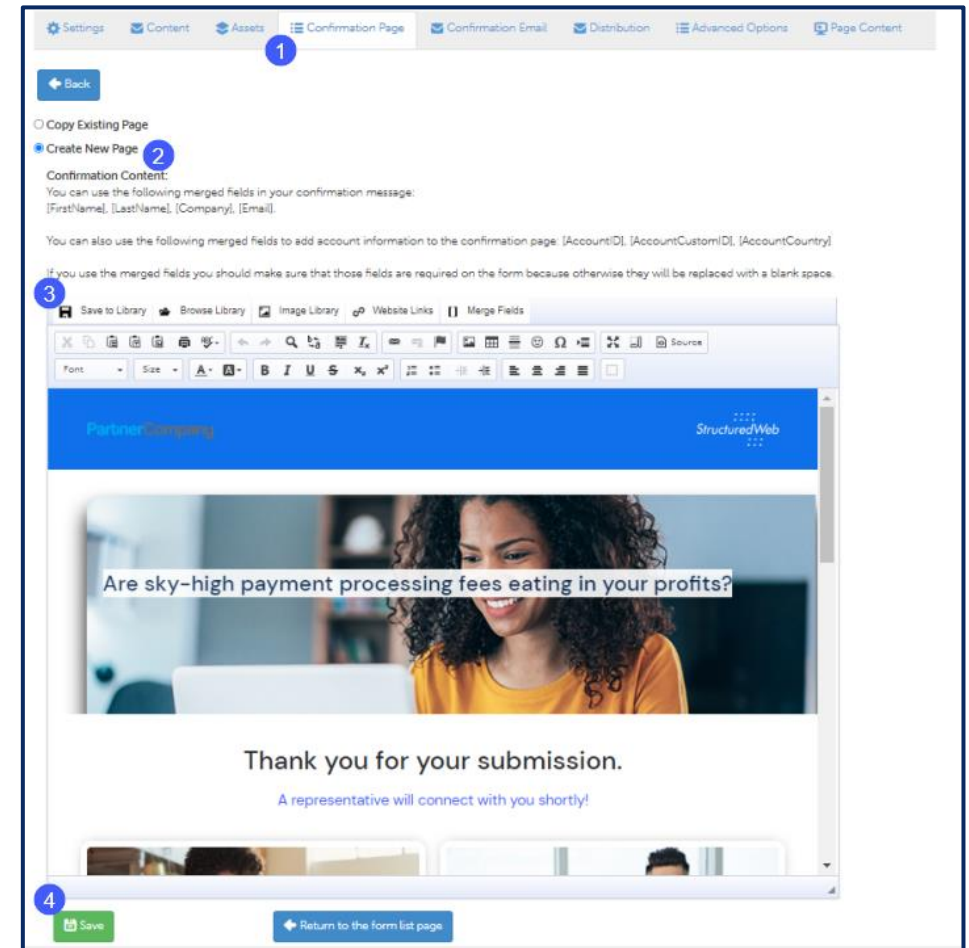
1. From the toolbar, click **Assets**.
2. For each **Marketing Asset** type, in the text box, type the **correct content**. Or, click the button, and select the **correct image**. (Note: your logo must be 170px by 40px)
3. Click **Save**.

The screenshot shows a web interface for editing marketing assets. At the top, there is a navigation bar with tabs for Settings, Content, Assets (highlighted with a blue circle and '1'), Confirmation Page, Confirmation Email, Distribution, Advanced Options, and Page Content. Below the navigation bar is a 'Back' button (highlighted with a blue circle and '2'). The main heading is 'Edit Marketing Assets for Vendor Co - Olli Test'. Below this is a sub-heading 'General Use' and a 'Save' button (highlighted with a green circle and '3'). The form contains several sections: 'Company Email' with a text input field containing 'test@test.com' (highlighted with a blue circle and '2'); '\*Company Logo' with a 'Choose File' button, 'No file chosen' text, a 'PartnerCompany' logo image, and a 'Delete Image' button; 'Company Name' with a text input field containing 'Reseller Company'; 'Partner logo' with a 'Choose File' button and 'No file chosen' text; and 'Phone Number' with a text input field containing '6465555555'.

# 3. Setup Confirmation Page

The confirmation page appears after your contact completes the form.

1. From the toolbar, click **Confirmation Page**.
2. Select **Create New Page**.
3. If desired, In the **Content Area**, using the **toolbar**, edit **content**, **images**, and **call to action buttons**.
4. Click **Save**.



# 4. Setup Confirmation Email

Like the confirmation page, the confirmation email is delivered after contacts fill out the form. (Note: This step is optional)

1. From the toolbar, click **Confirmation Email**.
2. From **Would you like to send an email confirmation to the customer that filled out the form**, select **Yes**. Then select **Send HTML Email**.
3. In the **Email Subject** text box, type a **subject**.
4. In the **Page Content** text field, enter the **content** for your confirmation email.
5. Click **Save**.

Page: <https://vendorcoollitest.atworkweb.com/Vendor-Campaign-04-Landing-Page>

Settings Content Assets Confirmation Page Confirmation Email Distribution Advanced Options Page Content

Back

You can use the following merged fields to add contact information to the email:  
[Email], [FirstName].[LastName], [Company], [Username], [Password].

If you use these merged fields you want to make sure that you make them required on the form because otherwise you could end up with blank areas in your email.

You can also use the following merged fields to add user information to the email:  
[UserFirstName], [UserLastName], [UserEmail], [AccountID], [AccountCustomID], [AccountCountry].

Would you like to send an email confirmation to the customer that filled out this form?

Yes  
 No

Send HTML Email  
 Send Text Only Email

Email Subject:  
Thank you for submitting your request

Page Content:  
Save to Library Browse Library Image Library Website Links Merge Fields

Dear [FirstName],  
Thank you for taking the time to fill out our form.  
Sincerely,  
[UserFirstName] [UserLastName]

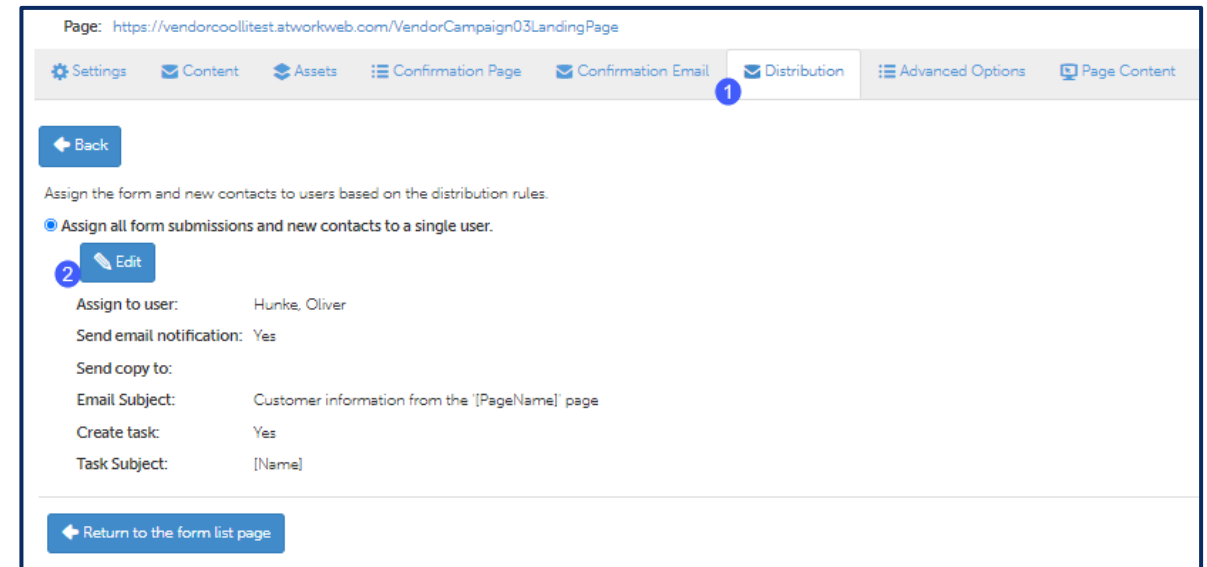
Save Return to the form list page

# 5. Edit Distribution Assignment (1)

Once a contact fills out the form, a notification email generates. By default, this notification is distributed to the PMC assigned user.

To change or add additional emails (users), do the following:

1. From the toolbar, select **Distribution**.
2. Click **Edit**.



## 5. Edit Distribution Assignment (2)

1. In the **Assign this form submission and new contacts to** drop-down menu, select the **appropriate user**.
2. In the **Would you like to send an email to the user you are assigning the form to**, click **Yes**. Then, in the **Send a copy of the email notification to** text box, **type additional emails**.
3. To add a new email, click **Select a different email or create a new email**. A box opens.
4. In the **Would like to create a task when this form is submitted** area, click **Yes**. Then, in the fields below, define the **task**. (Optional)
5. Click **Save**. (Not pictured)

The screenshot shows a web interface for editing a distribution assignment. At the top, there is a navigation bar with tabs: Settings, Content, Assets, Confirmation Page, Confirmation Email, Distribution (selected), and Advanced Options. Below the navigation bar, there are three sections of text explaining merged fields: contact information ([Email], [FirstName], [LastName], [Company]), user information ([UserFirstName], [UserLastName], [UserEmail]), and form data ([FormSubmissionContent], [PageName]).

The main form area contains the following elements:

- Assign this form submission and new contacts to:** A dropdown menu showing "Darek Rensing" with a blue circle '1' next to it.
- Would you like to send an email notification to the user you are assigning this form to?** Radio buttons for "No" and "Yes" (selected), with a blue circle '2' next to the "Yes" option.
- Send a copy of the email notification to:** A text input field with a blue circle '2' next to it. Below the field is a note: "Separate email addresses by ; and to send a copy to the current customer owner use the [CustomerOwner] merged field."
- Current Email:** A section with the text "Customer information from the '[PageName]' page" and a blue button labeled "Select a different email or create a new email" with a blue circle '3' next to it.
- Would you like to create a task when this form is submitted?** Radio buttons for "No" and "Yes" (selected), with a blue circle '4' next to the "Yes" option.
- Define this task:** A section with the text "You can use this field to merge the campaign, quote, form name data: [Name]" and a "Subject" label above a text input field containing "[Name]".



# How do I set up an email?

Within each campaign, you find one or more emails related to a particular product or service. Emails are provided by your vendor and ensure consistent messaging and design across email campaigns. Most emails include a call-to-action link or button, which directs your contact to a landing page where they fill out a contact form.

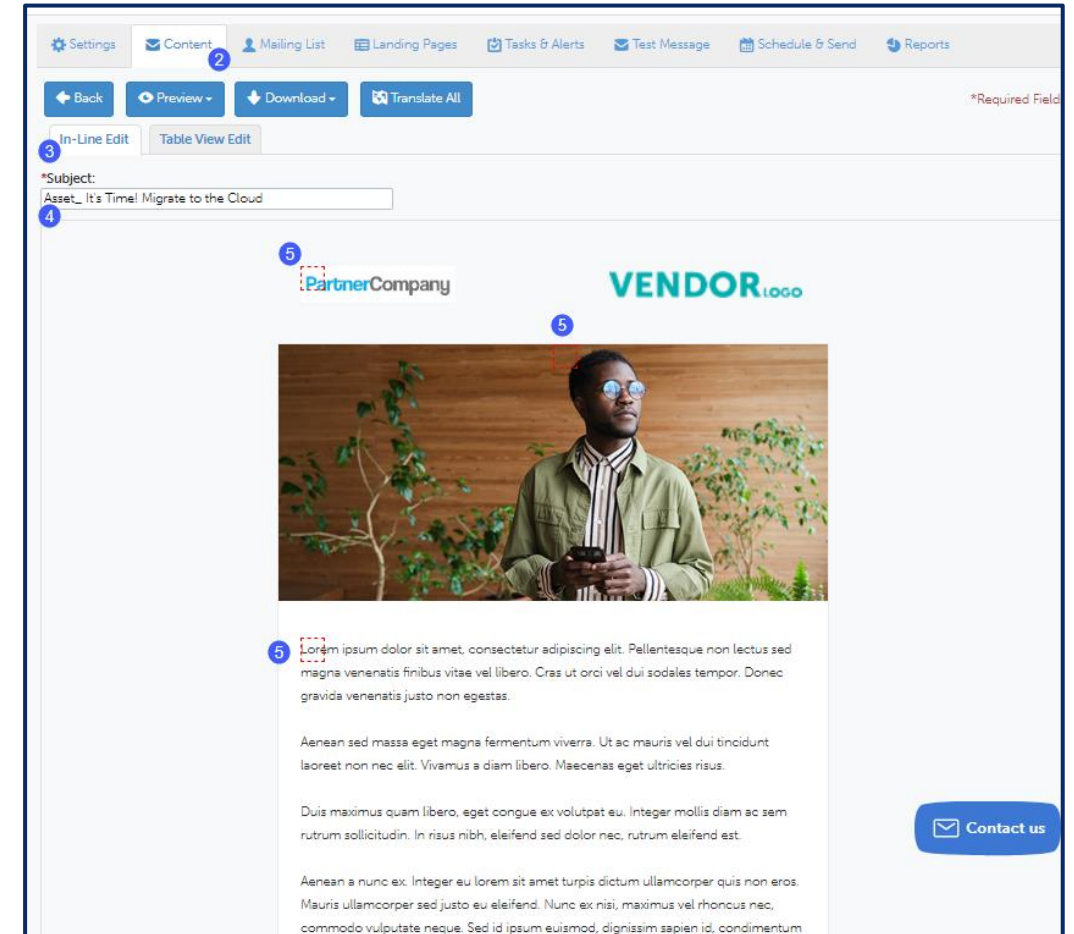
When setting up an email campaign, complete the following steps:

1. [Customize content](#)
2. [Add a mailing list](#)
3. [Update marketing assets](#)
4. [Create tasks and alerts \(Optional\)](#)
5. [Send a test message](#)
6. [Schedule and Send](#)

# 1. Customize Content

1. From the **Campaign** page, in the **Landing Page** box you want to deploy, click **Edit**. (Review [How do I select a campaign?](#))
2. Select **Content**.
3. Select **In-Line Edit** to edit **text** and **images** directly on the page. (Note: Table View Edit allows you to edit within a table form)
4. In the **Subject** text box, enter a **subject line** for your email.
5. Click any **red box** to edit **content**, **images**, and **call-to-action buttons**. (or in Table View Edit, click Edit for each row)

To review your updates, click **Preview**.



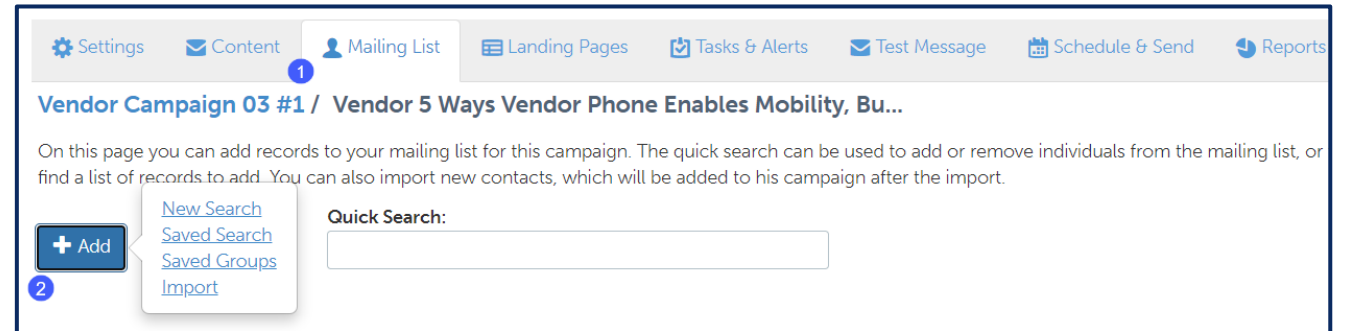
## 2. Mailing List

Before deploying an email, you must add a list of contacts to whom you want to send the email. Add a contact list in one of the following ways:

- Search for contacts by a set of criteria (click [here](#) for instructions)
- Select a saved search or group.
- Import new contacts. (Click [here](#) for instructions)

To access the mailing list area, do the following:

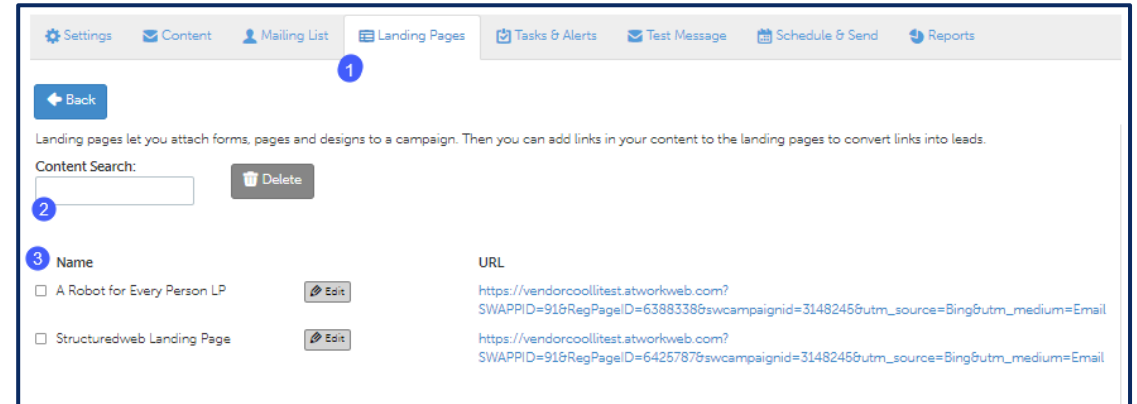
1. From the toolbar, select **Mailing List**.
2. Click the **Add** button. Then select **Import**. A box opens.



# 3. Update Landing Page

By default, your email often includes a landing page. To add or change the landing page, do the following

1. From the toolbar, click **Landing Pages**.
2. In the Content Search text box, type any letter for all forms and pages to appear. Then select the Landing Page you want to use.
3. In the **Name** area, check the **box** next to the Landing page you want to use. (Note: to edit a Landing Page, click edit).



## 4. Tasks & Alerts

Use Tasks & Alerts to notify the PMC assigned user of specific contact activity. This step is optional.

1. From the toolbar, select **Tasks & Alerts**.
2. In the **24 hours before an email is sent** area, select the **users** you want to receive the email.
3. In the **Send a copy to** text field, enter additional emails.
4. Select the **Tasks & Alerts** you want to include.
5. Click **Save**.

Settings Content Mailing List Landing Pages **Tasks & Alerts** Test Message Schedule & Send Reports

Back

On this page you can set up the feedback that you would like to get on the campaign. You can select the type of feedback you want to receive, who should receive the information, and even edit the information that the person is getting.

24 hours before an email is sent:

Send an email alert

Send an email alert

All record owners of cont

Send a copy to:

When an email is opened:

Lead Score Points: 1

Send an email alert

Create a new lead

When a link in the email is clicked:

Lead Score Points: 10

Send an email alert

Create a new lead

When the unsubscribe link in the email is clicked:

Send an email alert

Create a new lead

1 week after the campaign has been completed:

Send an email summary report

All record owners of cont

Send a copy to:

Save

Contact us

# 5. Test Message

Send a test message to verify that the email content and links are working as expected. Do the following:

1. From the toolbar, select **Test Message**.
2. In the **Select email address(es) for test** area, check the box for which you want to send the email test.
3. In the **Add additional email address(es)** area, type additional email addresses.
4. Check the box next to **Include "TEST:" in the subject line**. (Note: this step is optional. If you do not receive your test email, contact customer support.)
5. Click **Send Test Email**.

The screenshot shows the 'Test Message' interface. At the top, there is a navigation bar with 'Test Message' selected. Below it is a 'Back' button. The main content area contains the following elements:

- A blue circle with the number '1' is positioned above the 'Test Message' tab in the navigation bar.
- A blue circle with the number '2' is positioned above the 'Select email address(es) for test:' section. This section contains a table with four rows, each with a checkbox, a name, and an email address:

<input type="checkbox"/>	Hunke, Oliver	info@seitenweise.com
<input type="checkbox"/>	Team, Cloudera	design@structuredweb.com
<input type="checkbox"/>	Team, Design	Design@structuredweb.com
<input type="checkbox"/>	User, Test	testuser03@nowebsite.com
- A blue circle with the number '3' is positioned above the 'Add additional email address(es):' section. This section contains a large text input area. Below the input area, there is a note: 'Please separate the email addresses with a semicolon (;). You should enter address with the following format: John.Doe@abccompany.com'.
- A blue circle with the number '4' is positioned above the 'Include "TEST:" in the subject line' checkbox and the 'Send Test Email' button.

## 6. Schedule & Send

The final step is to send and schedule your email. After you choose a date and time, your email is automatically generated from Partner Marketing Center. Do the following:

1. From the toolbar, select **Schedule & Send**.
2. In the **Distribution Schedule** area, in the **Date** field, type the **Date** you want to send the email.
3. In the **Time** area, select the **time** you want to send the email.
4. In the Quantity Limit area, select the **correct option**.
5. Click **Schedule**.

Note: Click [here](#) for guidance on how to whitelist structured web servers and improve email deliverability.

The screenshot displays the 'Schedule & Send' configuration page. At the top, a navigation bar includes 'Settings', 'Content', 'Mailing List', 'Landing Pages', 'Tasks & Alerts', 'Test Message', 'Schedule & Send' (highlighted with a blue circle 1), and 'Reports'. A 'Back' button is located on the left. The main section is titled 'Distribution Schedule' and contains the following elements:

- Status:** A dropdown menu showing 'New - Not Scheduled' (2).
- Date:** A text input field containing '05/22/2022' (3).
- Time:** Three dropdown menus for hours (7), minutes (15), and period (PM) (4). A note indicates the current time zone is Eastern Standard Time.
- Quantity Limit:** Two radio button options: 'Send all email at the selected time and date.' (4) and 'Limit daily distribution.'
- Agreement:** A checkbox labeled '\* Check here to indicate that you have read and agree to the following terms.' Below it is a scrollable text area containing the 'Data Processing and Privacy Agreement'.
- Schedule:** A green button at the bottom right (5).



# How do I set up a Banner Ad?

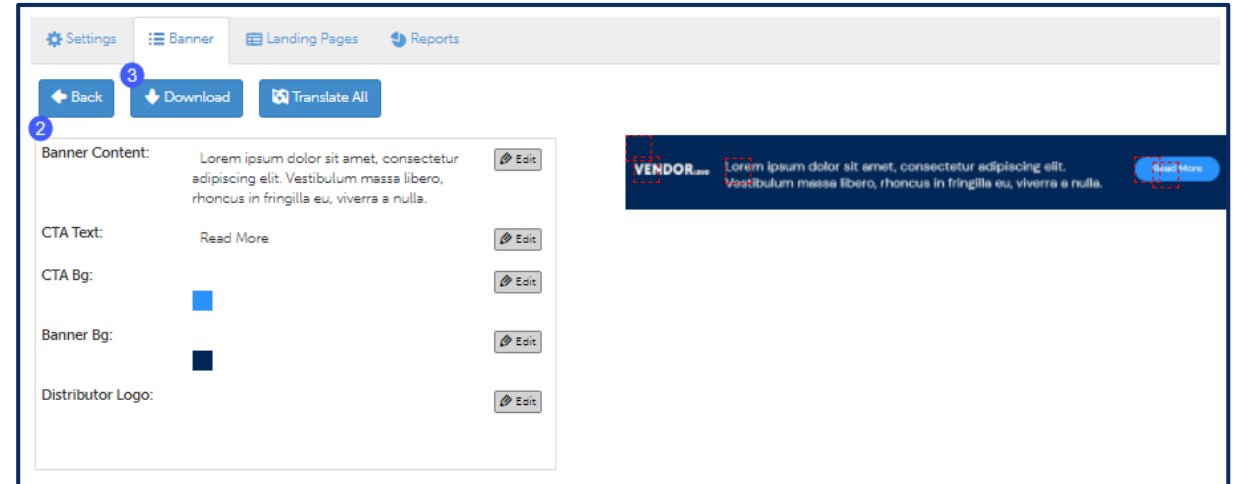
Unlike an email, which is limited to a single use, banner ads are a flexible asset type that allows you to expand your reach across multiple mediums. Banner ads can be added to your website and used in digital advertising; and they are adaptable to mobile devices. Banner ads can attach a landing page, so it's another great method to gather leads.

When setting up a banner ad, complete the following steps:

1. [Edit a Banner Ad](#)
2. [Update a landing page \(optional\)](#)

# 1. Edit banner ad

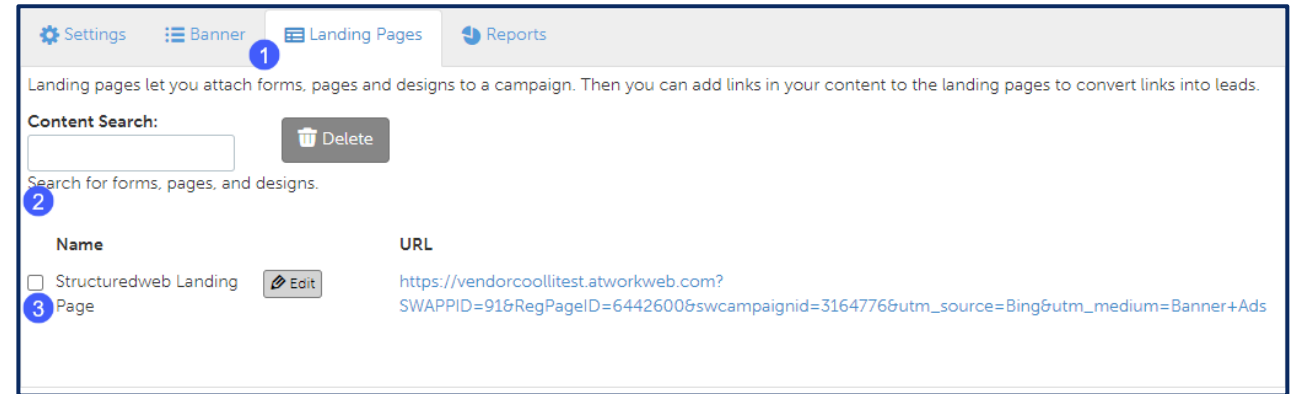
1. From the **Campaign Page**, select the **banner ad** you want to set up. Then click **Edit**. (Review [How do I select a campaign?](#))
2. In the **Banner Content** area, next to the **field** you want to edit, click the **Edit**. (Or, on the banner, click directly on the red boxes to edit).
3. Click **Download**. (Or, select a Landing page, then return to the Banner tab to click Download).



## 2. Landing Pages

By default, a landing page is often attached to the banner ad. However, if you would like to change the landing page, do the following:

1. From the toolbar, select **Landing Pages**.
2. In the **Content Search** text box, type **any letter for all forms and pages to appear**. Then select the Landing Page you want to use.
3. In the **Name** area, check the **box** next to the Landing page you want to use. (Note: to edit the landing page, click **Edit**).



# How do I activate a social campaign?

Increase your visibility and reach by executing social campaigns directly from Partner Marketing Center. Social posts create name recognition that builds trust with potential contacts.

When setting up a social campaign, complete the following steps:

1. [Activate social media account](#)

# 1. Activate Social Media campaign (1)

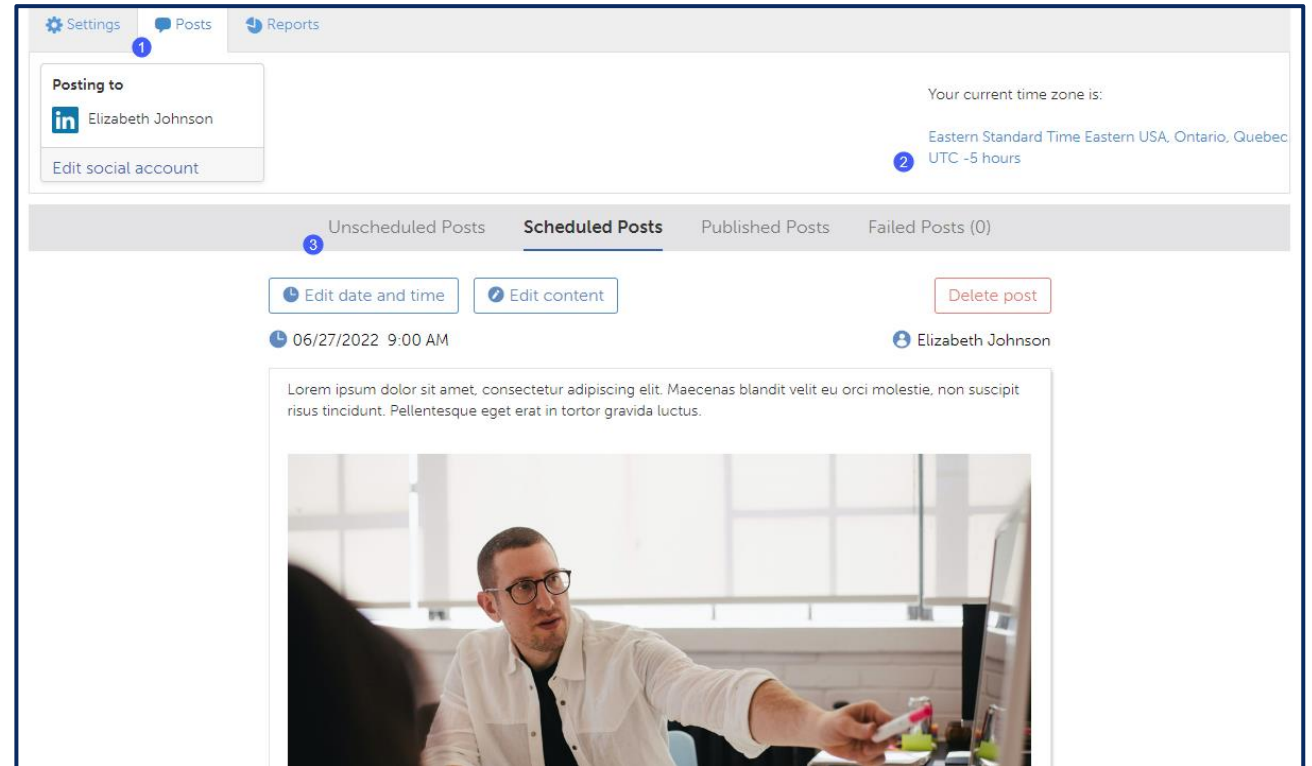
1. From the **Campaign Page**, select the **social campaign** you want to activate. Then click **Edit**.  
(Review [How do I select a campaign?](#))
2. Click **Continue** to activate the social media account.  
The Social Account Setup box opens.
3. Click **Continue to Facebook** (Or the social media platform you selected). The social media platform opens. Follow the instructions within the platform.

The screenshot shows two overlapping panels. The top panel, titled 'Activate overview', contains the following text: 'Activating a campaign allows you to pu to your chosen social media account', 'After you authorize an account, all you start scheduling posts for whenever yo post to your selected account.', and 'You will also receive a weekly email be go out, so you'll never miss a thing!'. A blue button labeled 'Continue' with a circled '2' is positioned at the bottom right of this panel. The bottom panel, titled 'Social account setup', contains the text: 'In order to publish posts through the platform, you need to connect your social account. The process is quick and safe.', 'The next step will take you to Facebook where you will need to login to the account you'd want to use. After that you'll return to the platform to complete the setup.', and a diagram. The diagram shows a box labeled '1' with 'Login to' and a Facebook 'f' icon, followed by two horizontal bars. An arrow points to a box labeled '2' with the text 'You'll automatically be redirected back here'. A blue button labeled 'Continue to Facebook' with a circled '3' is at the bottom of the second panel, and a 'Skip for now' link is below it.

# 1. Activate Social Media campaign (2)

1. From the toolbar, remain on the **Posts** tab.
2. In the **Your current time zone is** area, verify that the **time zone** is accurate.
3. Notice you can **monitor** your posts within the **bar underneath your post**.

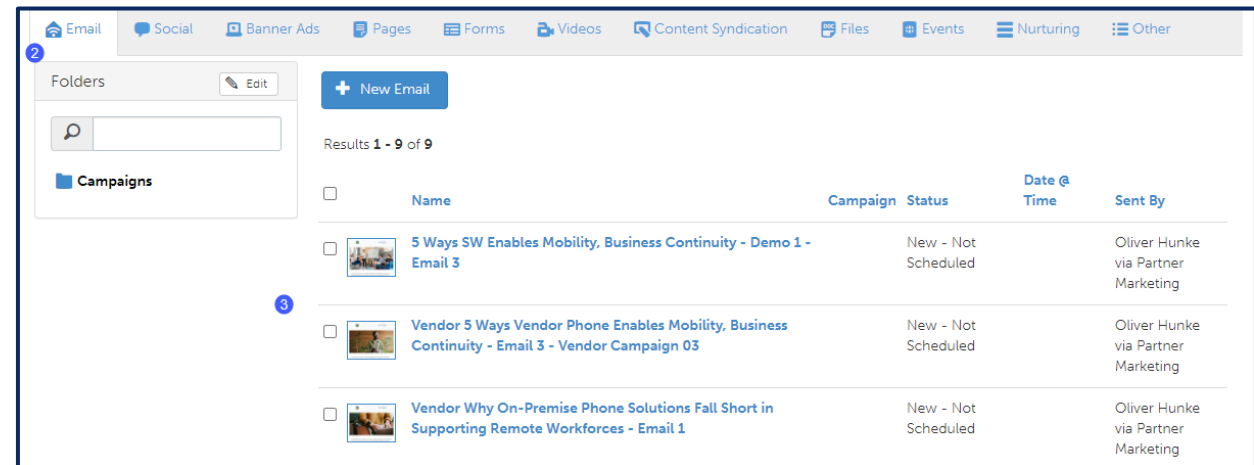
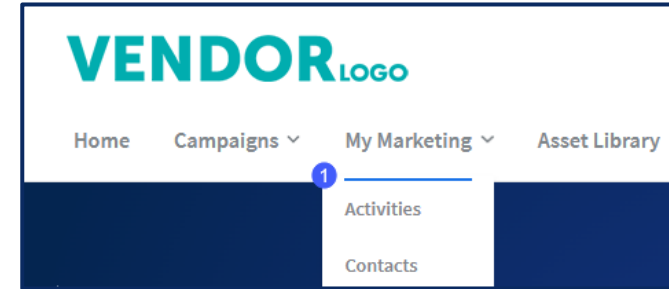
In some cases, your initial subscription may expire, and you may need to resubscribe to the social network. (This will be indicated by a red box appearing around the connect account tab)



# How do I view my asset activity?

After you deploy campaign assets, review your campaign activity at any time. To access your campaign activity, do the following:

1. From the toolbar, select **My Marketing > Activities**.
2. Select the **Asset Type** you want to review, then select the **activity**.

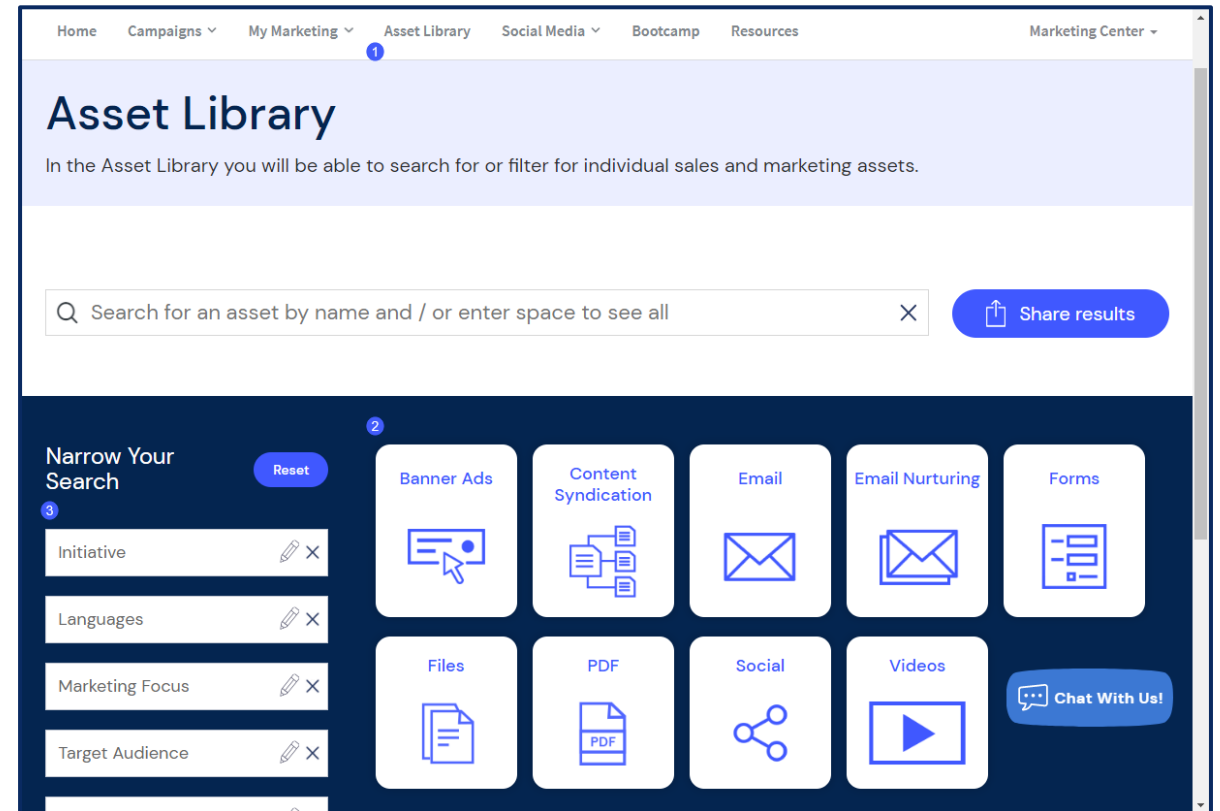


# How do I access other asset types?

In addition to campaigns, you can access standalone asset types from the Asset Library.

1. From the toolbar, select **Asset Library**.
2. To access assets by type, click on the **appropriate asset type** drop-down menu.
3. To narrow your search, use the **Filters** on the left side of the page.

From there, select the asset, then customize and download or customize and activate depending on the asset type chosen.





## Lesson 4: Reporting

### We will cover these skills:

1. [What is the difference between individual reports & aggregate reports?](#)
2. [How do I access individual campaign reports?](#)
3. [How do I access aggregate reports?](#)



# What are different report types available within the PMC?

[Main Menu](#) | [Return to Lesson 4](#)

## Individual Reports

Review and monitor marketing activity for individual campaigns. Individual reports are interactive. Click on data points to view more detailed information.

The data displayed varies across campaign types, however each report details the following:

- Campaign interaction
- Leads generated
- Potential opportunities



## Aggregate Reports

Review and monitor activity for all your marketing efforts in single report. Aggregate reports are static.

Use aggregate reports to review

- Marketing trends and costs
- Lead and opportunities generated by campaigns
- Email and Social Media engagements
- And much more ...

# How do I generate reports?

To ensure you get the best results from your campaign efforts, Partner Marketing Center provides a variety of reports to review success metrics.

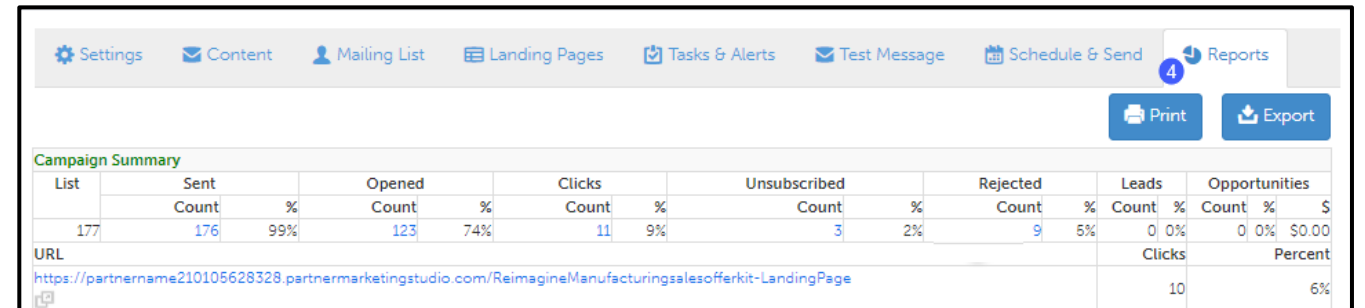
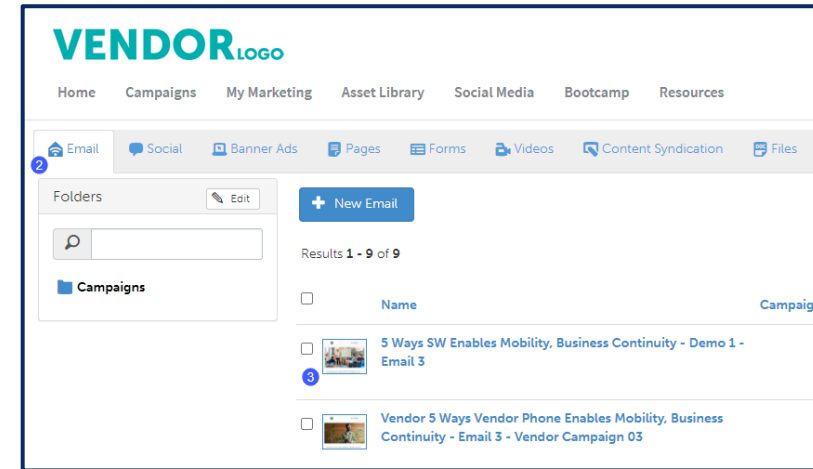
Reports can be generated for a variety of campaign activities. This lesson describes how to access reports for the following campaign types:

1. [Email Campaign Report](#)
2. [Social Campaign Report](#)
3. [Aggregate Reports](#)

# 1. Access Email Campaign Report

1. From the header, select **My Marketing > My Assets** (Review [How do I view my asset activity?](#)).
2. From the **toolbar**, select **Email**.
3. In the **Name** column, click the **name of the email campaign** you want to access a report for. The email setup page opens.
4. From the email toolbar, select **Reports**.

To export the reports for further analysis, click **Export**. (Note: to export a specific data point, click on the value. Then click export.

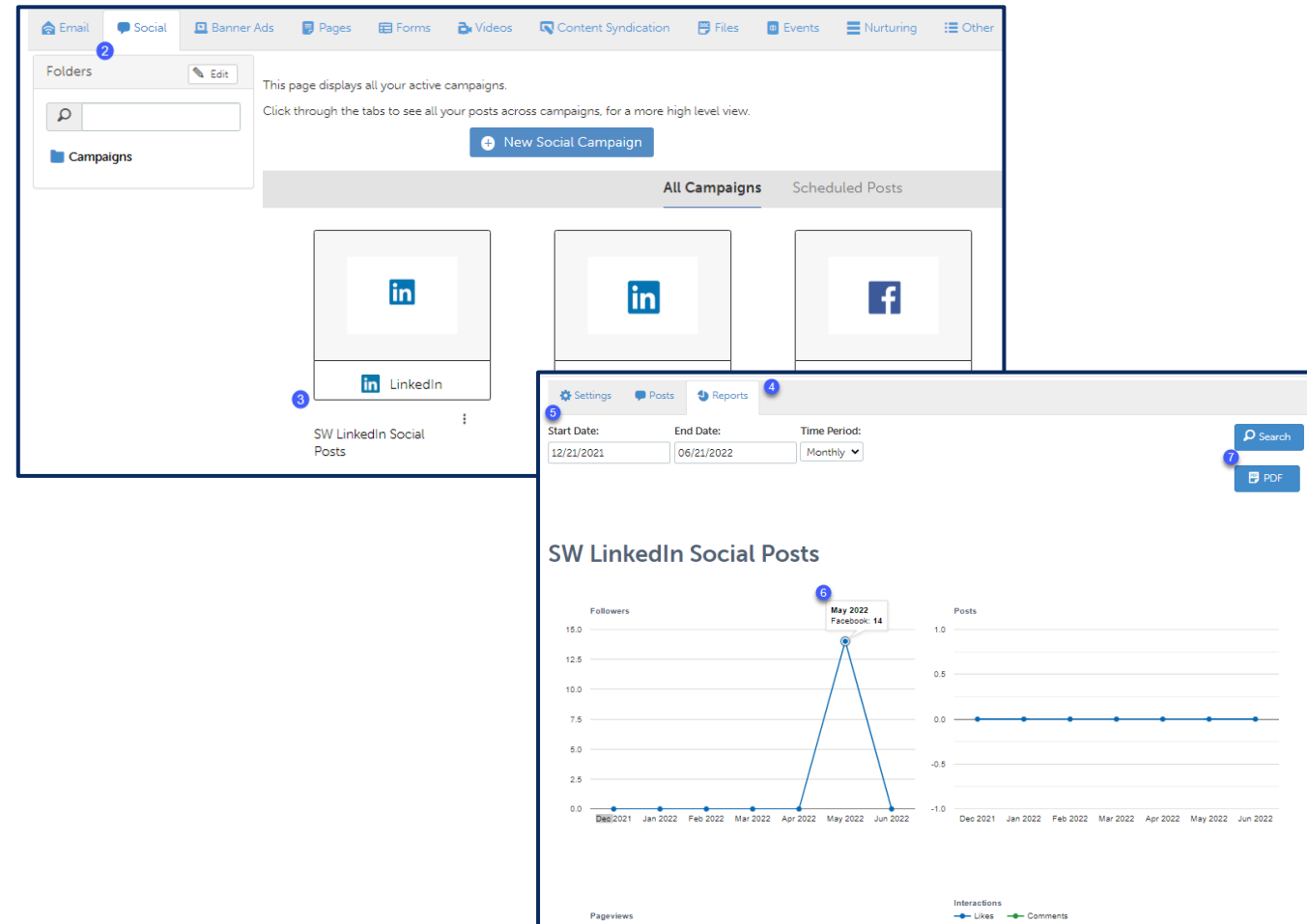
A screenshot of the 'Campaign Summary' report. The top navigation bar includes 'Settings', 'Content', 'Mailing List', 'Landing Pages', 'Tasks & Alerts', 'Test Message', 'Schedule & Send', and 'Reports'. The 'Reports' icon is highlighted with a blue circle and the number '4'. Below the navigation bar are 'Print' and 'Export' buttons. The main content area is a table with the following data:

Campaign Summary															
List	Sent		Opened		Clicks		Unsubscribed		Rejected		Leads		Opportunities		
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	\$
177	176	99%	123	74%	11	9%	3	2%	9	5%	0	0%	0	0%	\$0.00
URL <a href="https://partnername210105628328.partnermarketingstudio.com/ReimagineManufacturingsalesofferkit-LandingPage">https://partnername210105628328.partnermarketingstudio.com/ReimagineManufacturingsalesofferkit-LandingPage</a>											Clicks		Percent		
											10		6%		

## 2. Access Social Campaign Report

Main Menu | Return to Lesson 4 | How do I generate reports?

1. From the header, select **My Activities > My Assets** (Review [How do I view my asset activity?](#)).
2. From the **toolbar**, select **Social**.
3. In the **All Campaigns** tab, click the **social campaign** you want to view a report for.
4. In the **Social** toolbar, select **Reports**.
5. In the **Date** fields, enter a **Start Date** and **End Date**. Then, in the **Time Period** drop-down, select the **correct option**.
6. Hover over **any point** to view details.
7. To export the reports for further analysis, click **PDF**.



# 4. Access Aggregate Reports

1. From the header, select **My Marketing > Reports** (Review [How do I navigate the Partner Marketing Center?](#))
2. From the **Current Report** drop-down menu, select the **report** you want to run (In this example, Email Marketing List is selected).
3. In the date range area, in the **Start** text field, type the **start date**. Then, in the **End** text field, type the end date.
4. Click **Search**.
5. To export the reports for further analysis, click the **export options**.

Note: Unlike the individual reports, aggregate reports display static values only.

The screenshot shows the 'My Marketing' section of the Partner Marketing Center. The 'Current Report' dropdown menu is open, showing a list of reports including 'Email Marketing List', 'Campaigns by Message', 'Marketing Cost Analysis', 'Marketing Trends Dashboard', 'Leads Generated by Campaigns', 'Opportunities Generated by Campaigns', 'Social Media', and 'Social Marketing by Network'. The 'Email Marketing List' report is selected. Below the dropdown, the 'Start' date is set to 12/21/2021 and the 'End' date is set to 06/21/2022. The 'Search' button is highlighted. Below the search area, there are buttons for 'Export to CSV', 'Export to Excel', and 'PDF'. The table below shows the results of the search, with columns for Name, List, Sent, Opened, Clicks, Unsubscribed, Rejected, Leads, and Opportunities. The table has two rows of data and a 'Total' row.

Name	List		Sent		Opened		Clicks		Unsubscribed		Rejected		Leads		Opportunities	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	\$	
Email 2 - [ITDM] How it's done 23/03/2022	165	8	4	4.85%	2	50.00%	0	0%	0	0%	1	25.00%	0	0%	\$0.00	
Email 2 - [ITDM] How it's done 23/03/2022	177	176	123	99.44%	11	73.65%	3	8.94%	9	1.70%	5.11%	0	0%	0	\$0.00	
Total:	342	184	127	53.80%	13	72.57%	3	10.24%	9	1.63%	5.11%	1	0.79%	0	\$0.00	

## Lesson 5: Contact Management

### We will cover these skills:

- [How do I manage my contacts?](#)
- [How do I set up my CSV file?](#)
- [How do I import contacts?](#)
- [How do I search for & save contact lists?](#)





# How do I manage my contacts?

The contacts area allows you to import and manage your contacts in one convenient location. Once imported, search for and save your contacts by a series of criteria to create targeted campaigns, faster.

In addition, use lead scoring to track the interest level of your contacts when executing campaigns directly from Partner Marketing Center. (Note: lead scoring will be introduced in the next lesson).

When managing your contacts, complete the following steps:

1. [Set up CSV file](#)
2. [Import contacts](#)
3. [Search for & save contacts in a list](#)
4. [Viewing Contact Information](#)



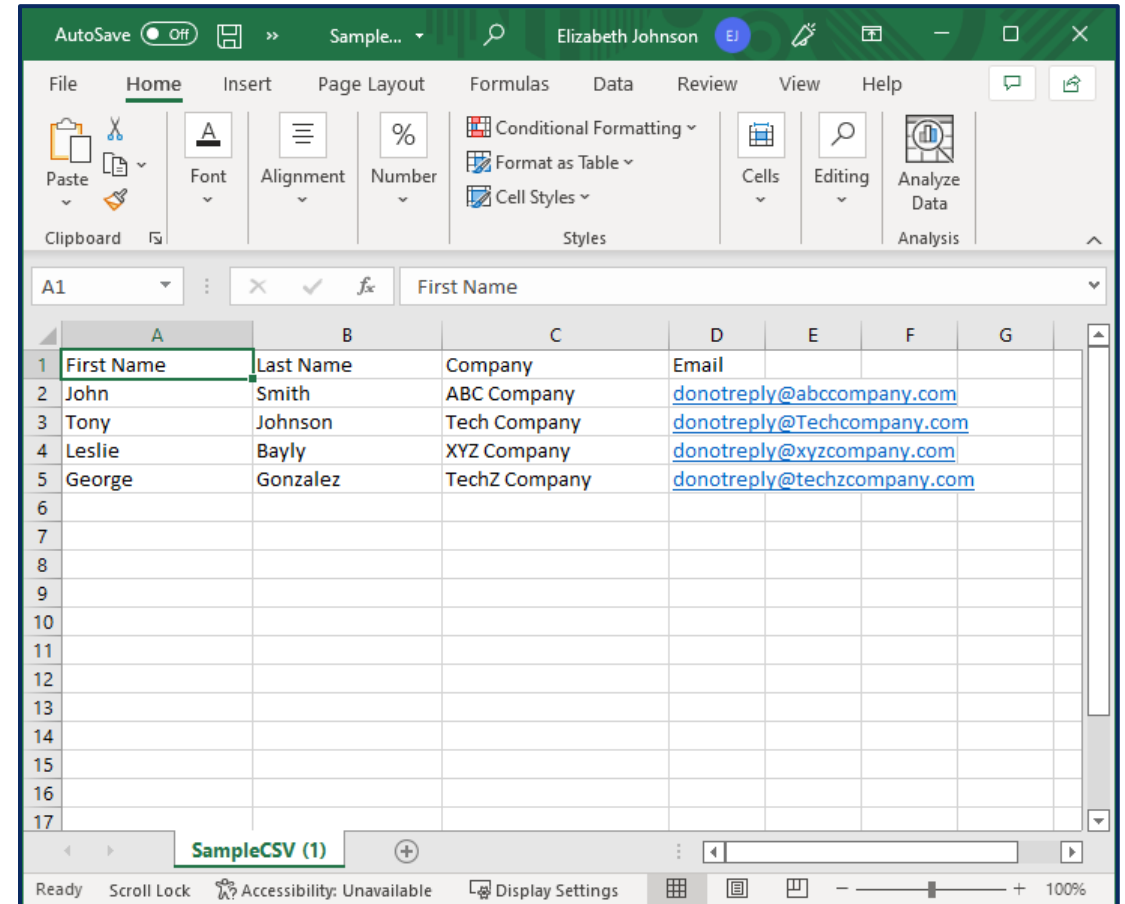
# 1. Setting up CSV files

Before importing your contacts list, be sure to prepare your spreadsheet. Partner Marketing Center requires a comma-separated file (or .csv) and requires, at a minimum, the following fields:

- First name
- Last Name
- Company
- Email Address

(Note: Each field must reside in a separate column header, i.e., First Name and Last Name must be separated. See the example to the right.)

Once imported, map your column header to the appropriate field name.

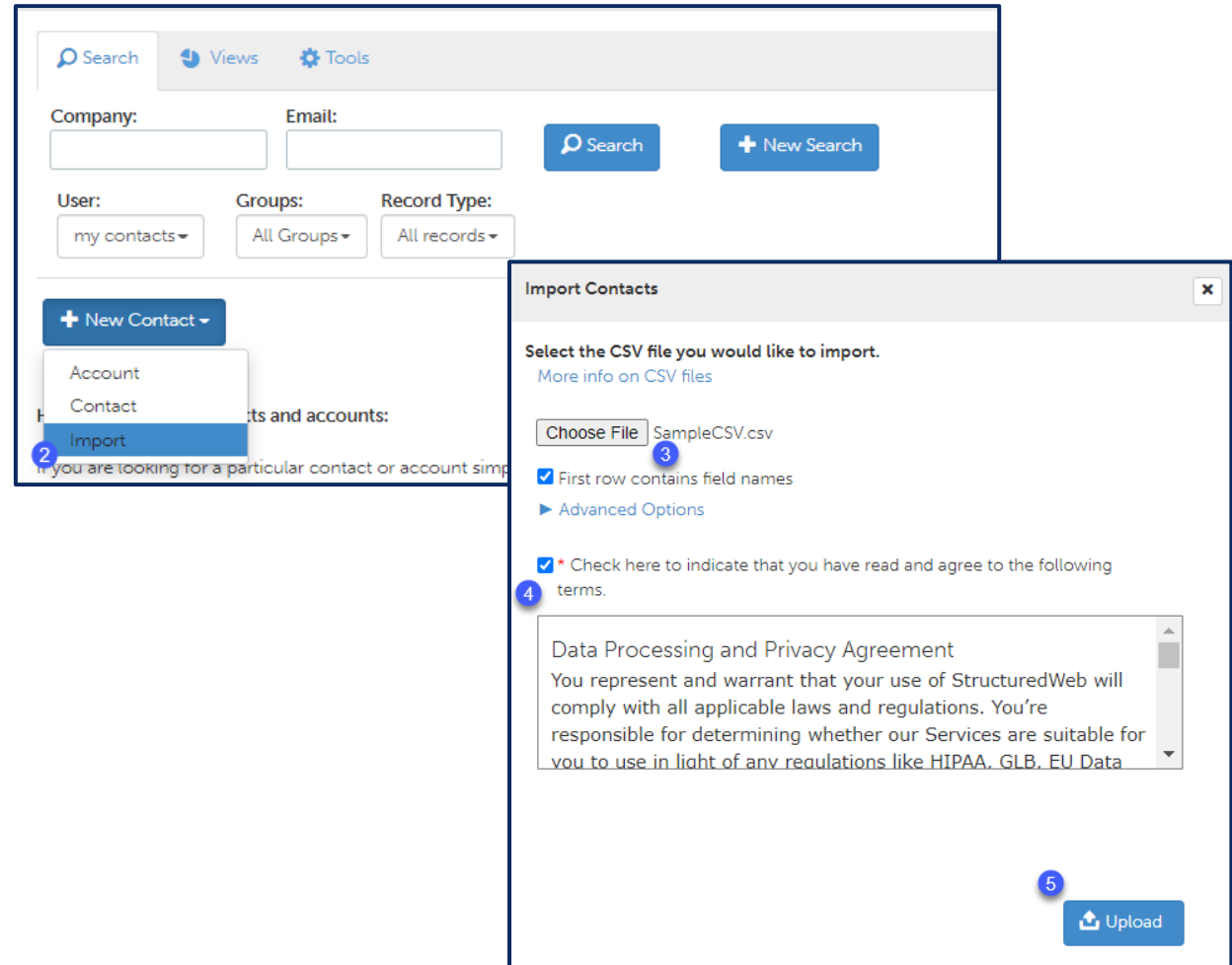


The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	First Name	Last Name	Company	Email			
2	John	Smith	ABC Company	<a href="mailto:donotreply@abccompany.com">donotreply@abccompany.com</a>			
3	Tony	Johnson	Tech Company	<a href="mailto:donotreply@Techcompany.com">donotreply@Techcompany.com</a>			
4	Leslie	Bayly	XYZ Company	<a href="mailto:donotreply@xyzcompany.com">donotreply@xyzcompany.com</a>			
5	George	Gonzalez	TechZ Company	<a href="mailto:donotreply@techzcompany.com">donotreply@techzcompany.com</a>			
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							

## 2. Importing Contacts(1)

1. From the toolbar, select **My Marketing > Contacts**. Then select **Contacts** (Review [How do I navigate Partner Marketing Center?](#))
2. From the **Search** tab, select **New > Import**.
3. From the Import Contacts box, click **Choose File**, then select the **prepared CSV file** from your local drive. (See [Setting up CSV files.](#))
4. Above the **Data Processing and Privacy Agreement** box, click the **check box**.
5. Click **Upload**.



## 2. Importing Contacts(2)

1. In the **Import** row, select the **appropriate column header**.
2. **Scroll to the bottom** of the box. Then, click **Continue**. A box opens
3. From the **Import into Group(s)** area, select the **option** that best suits your needs. (Note: when creating a new group, in the text box, rename the group to easily identify contacts.)
4. Click **Run Import**.

Once contacts have been uploaded you find a confirmation page alerting you that all contacts have been uploaded successfully.

The screenshot shows two overlapping windows from the 'Import Contacts and Add to Campaign' process. The top window is titled 'Map Columns to Fields' and contains a table for mapping imported columns to system fields. The bottom window is titled 'Import into Group(s)' and shows options for how to sort contacts into groups.

**Map Columns to Fields**

Use this form to associate the fields from your upload with the following fields in CustomerCenter.

The column on the left shows the fields available in CustomerCenter, while the right column shows the fields imported from your file. For each CustomerCenter field, use the drop-down box to choose what data you would like saved. To leave a field blank, select 'None'.

Field Name	Import
Title	None
Salutation	None
First Name	Column 1: First Name
Last Name	Column 2: Last Name
Company Name	Column 3: Company
Address 1	None
Address 2	None

**Import into Group(s)**

Choose how contacts will be sorted into groups

Import into a single existing group:

Select existing group:

Import into a single new group:

Import on 05/22/2022 at 05/22/2022 5:35 PM

Import into multiple groups based on imported data:

Field containing group name(s):

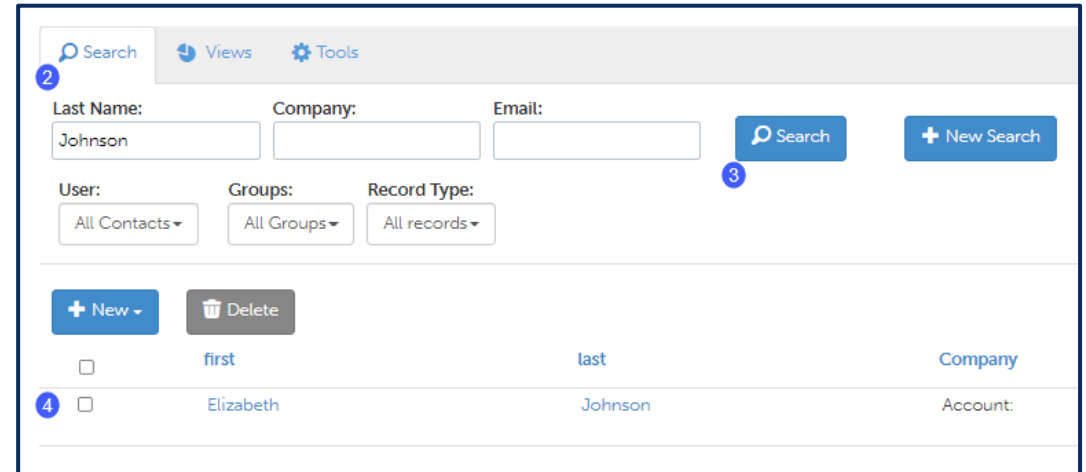
Create new groups from unrecognized group names

Multiple values, separated by:

# 3. Searching for Contacts (Quick Search)

To search for a specific contact record, use the quick search tool. Do the following:

1. From the toolbar, select **Reports & Contacts** > **Contacts**. (Review [How do I navigate the Partner Marketing Center?](#))
2. In the **Search** tab, enter one of the following fields:
  - **Last Name**
  - **Company**
  - **Email**
3. Click **Search**. (Note: to view all contacts at once, click Search)
4. At the **bottom** of the page, find your **contact**.

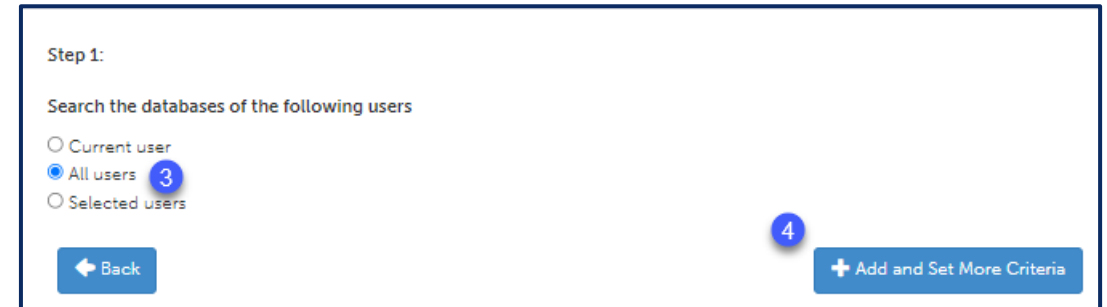
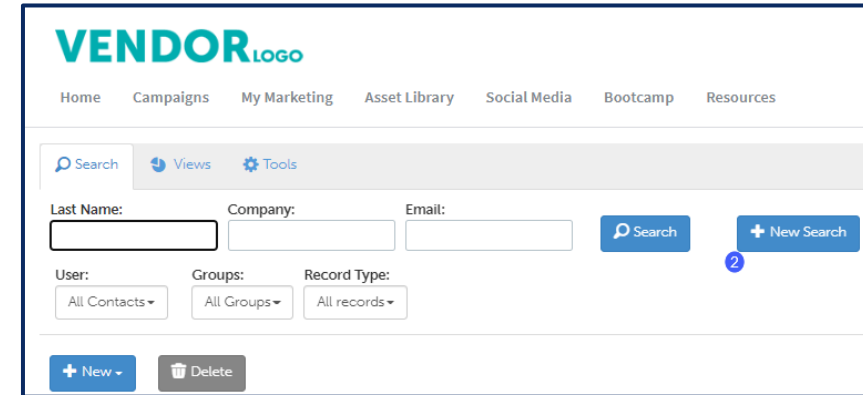


## 2. Searching for Contacts(Advanced 1)

Partner Marketing Center includes a robust search engine that allows you to search and save your contact by a variety of criteria. Searching allows you to create contact lists targeted by region, lead score, and more.

To create a search, do the following:

1. From the toolbar, select **Reports & Contacts > Contacts**. (Review [How do I navigate the Partner Marketing Center?](#))
2. In the **Search** tab, click **New Search**. A new page opens.
3. In Step 1, select **All Users**. (Note: when selecting All Users, all contacts will appear across all users of the platform.)
4. Click **Add and Set More Criteria**.



# 3. Searching for Contacts (Advanced 2)

1. From the **Select the search category** area, select the **appropriate search criteria**. (In this example, Contact Information is selected).
2. From the **Select the contact field that you would like to search on** area, select the **appropriate contact field**. (In this example, City is selected)
3. Within Step 3, enter the **appropriate criteria** (In this example, New York is entered)
4. Click **Save the Search**.

The image displays three overlapping screenshots of a search interface, illustrating the steps for searching for contacts. Each screenshot shows a 'Current search criteria' panel on the right with buttons for 'Run the Search', 'Save the Search', and 'Remove Checked Search Criteria'.

- Step 1:** Shows the 'Select the search criteria category:' section with a list of categories: Contact Information, eMarketing Campaigns, Events, Forms, Groups, Lead Scoring, Opportunities, Profile, Tasks, and Users. 'Contact Information' is selected.
- Step 2:** Shows the 'Select the contact field that you would like to search on.' section with a list of fields: Address 1, Address 2, City, Company, Contact Type, and Contact attached to account. 'City' is selected.
- Step 3:** Shows the 'Include contacts and accounts' section with radio buttons for 'Include contacts and accounts' (selected) and 'Exclude contacts and accounts'. Below this is the 'Where City:' section with a dropdown menu set to 'Exactly Matches' and a text input field containing 'New York'. A 'Back' button is on the left, and an 'Add and Set More Criteria' button is on the right. The 'Save the Search' button in the 'Current search criteria' panel is highlighted with a blue circle and the number 4.

# 3. Searching for Contacts (Advanced 3)

1. From the Save Advanced Search page, in the **Save this search as** text box, type the **name** of your search.
2. Click **Save and then Run the Search**. Your search opens in the Contacts window.
3. At the **bottom** of the page, find your **contacts**.
4. To access your saved search, click the **Select a search to run** box. Then select your saved search.

The image shows two screenshots from a CRM system. The top screenshot is the 'Save Advanced Search' dialog. It has a text input field labeled 'Save this search as:' containing 'New York City Contacts', a dropdown menu for 'Which folder would you like to place this search in?' set to 'My Searches', and a green button 'Save and then Run the Search'. The bottom screenshot is the main search interface. It features search filters for 'Last Name', 'Company', 'Email', 'User', 'Groups', and 'Record Type'. A 'Saved Searches' dropdown menu is open, showing 'My Searches' and 'New York City Contacts'. Below the filters is a table of search results with columns for 'first', 'last', 'Company', 'ID', 'Email', 'Phone', 'Next Activity', and 'Owner'. The table lists five contacts: Leslie Bayly (XYZ Company), George Gonzalez (TechZ Company), Tony Johnson (Tech Company), and John Smith (ABC Company). A third contact is partially visible at the bottom of the table.

# 4. Viewing Contact information

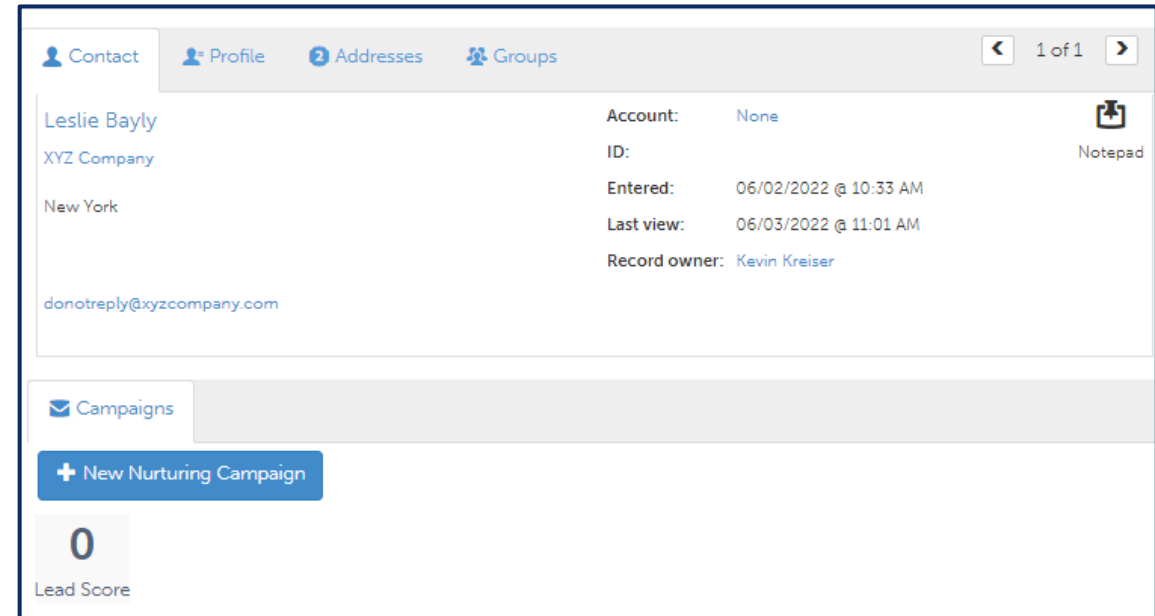
Once your contact is imported, click directly on the contact record to view, update, and add contact information. Contact information is broken into the following tabs:

- Contact
- Profile
- Addresses
- Groups

To make changes to records in mass, re-import your contact list. The system will override any existing contact record.



<input type="checkbox"/>	first	last	Company	ID	Email
<input type="checkbox"/>	Leslie	Bayly	XYZ Company		donotreply@xyzcompany.com
<input type="checkbox"/>	George	Gonzalez	TechZ Company		donotreply@techzcompany.com



Navigation tabs: Contact (selected), Profile, Addresses, Groups. Page indicator: 1 of 1.

**Leslie Bayly**  
XYZ Company  
New York  
donotreply@xyzcompany.com

Account: None  
ID:   
Entered: 06/02/2022 @ 10:33 AM  
Last view: 06/03/2022 @ 11:01 AM  
Record owner: Kevin Kreiser

Notepad

Campaigns

+ New Nurturing Campaign

0  
Lead Score



## Lesson 6: Introduce lead management

### We will cover these skills:

- [What defines a lead?](#)
- [What is lead scoring?](#)
- [Where do you find the lead score of a contact?](#)
- [How do I access lead management?](#)



# What is a lead?

So far, you've learned about the different capabilities available within Partner Marketing Center.

However, at its core, the platform is designed for one single purpose ... generating and managing your leads.

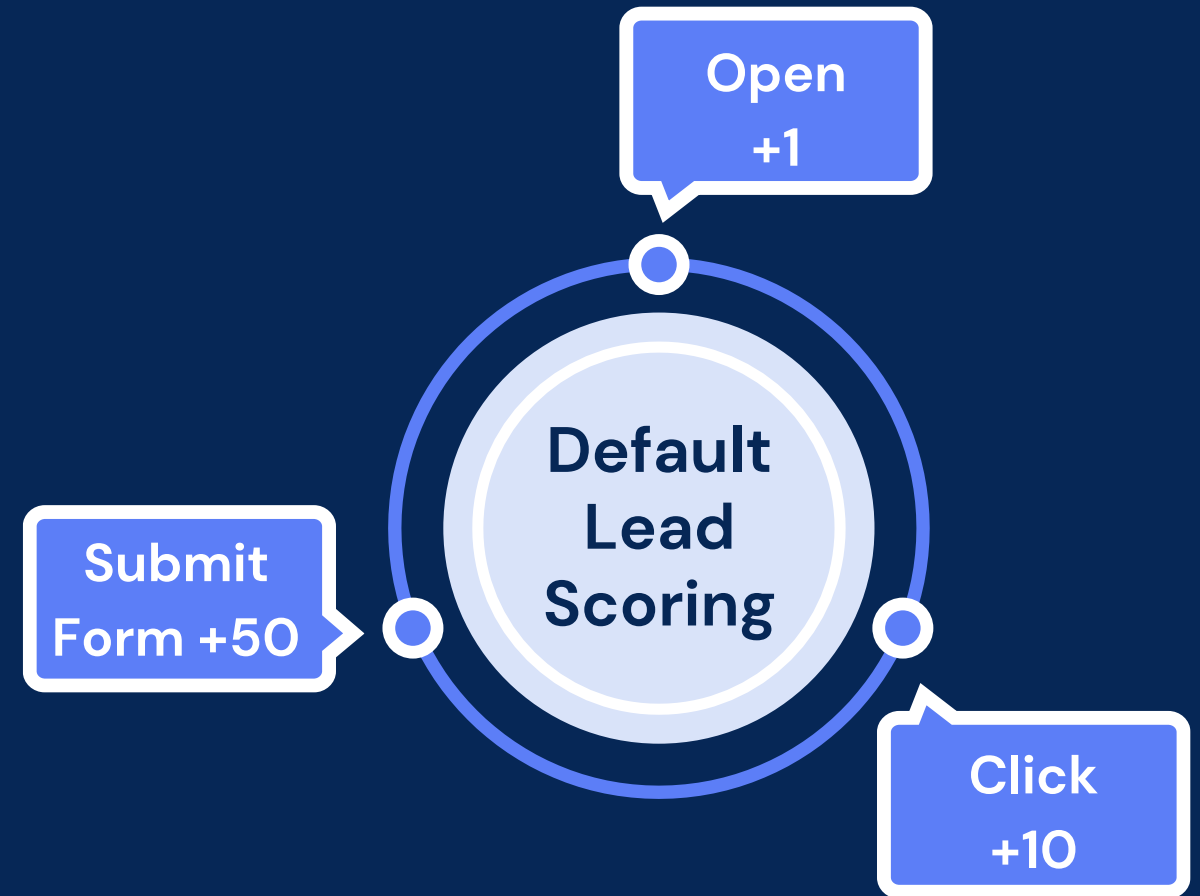
Leads are contacts who have interacted with a campaign by either opening an email, clicking on a link, or filling out a form.



# What is lead scoring?

Lead scoring allows you to track the interest level or behavior of your contacts. Lead scores measure specific actions, such as opening an email or filling out a form by assigning a score value to that activity. The higher the lead score the more interest the contact has shown.

Partner Marketing Center provides a default lead scoring system; however, you do have the option to create your own lead score values.

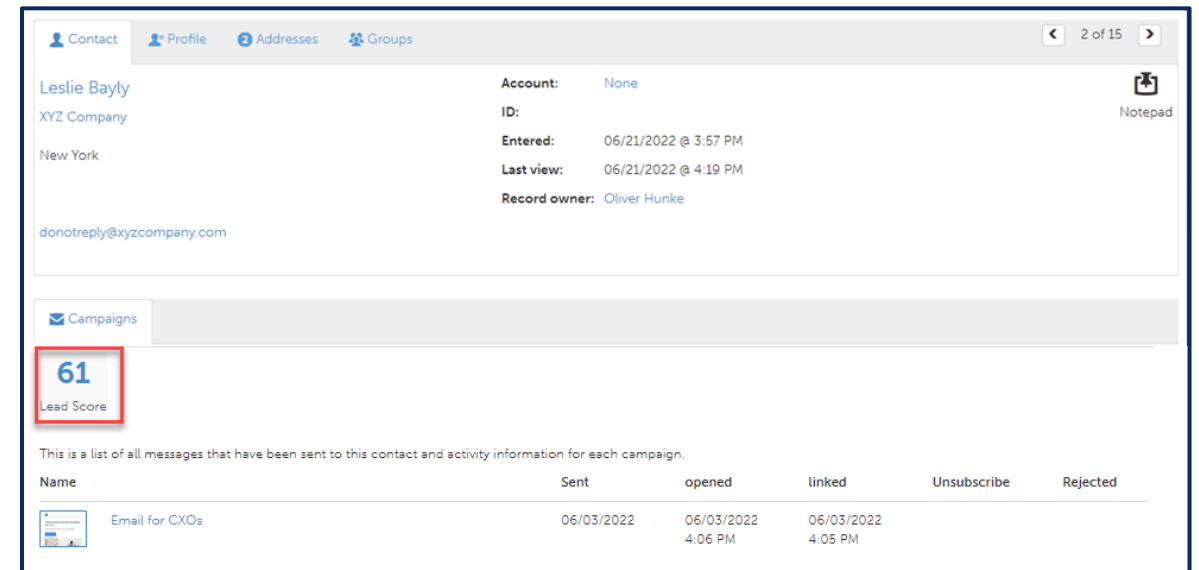


# Where do I find lead scores?

Lead scores are generated automatically based on the activity that the contact has completed.

Lead scores are located within your contact's record. (see [How do I view a contact record?](#)) In this example, the contact's lead score is 61 based on the activities they've completed.

By reviewing their lead score, you can target the appropriate content to bring them from a lead to a customer.



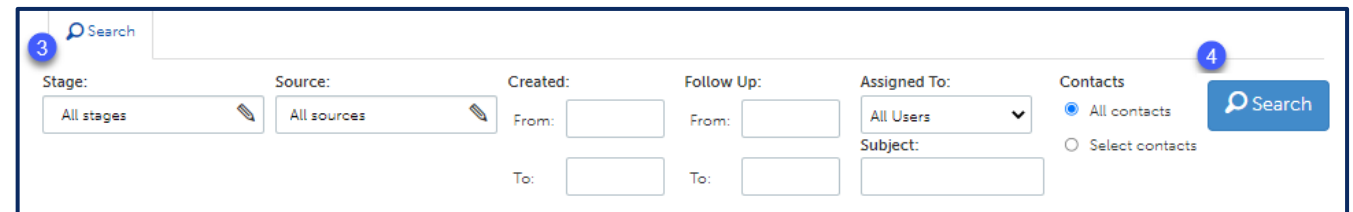
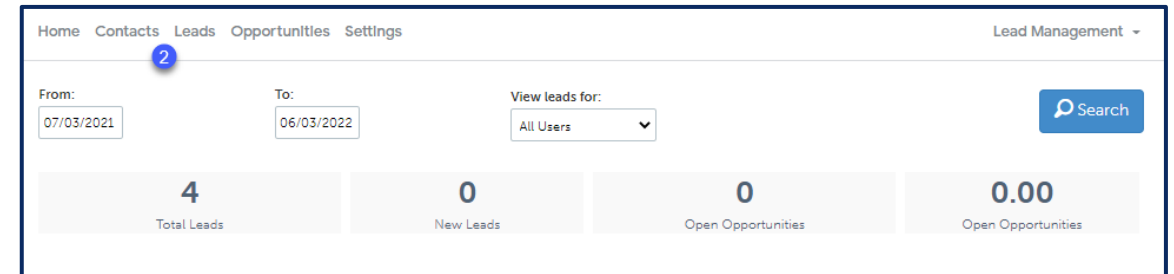
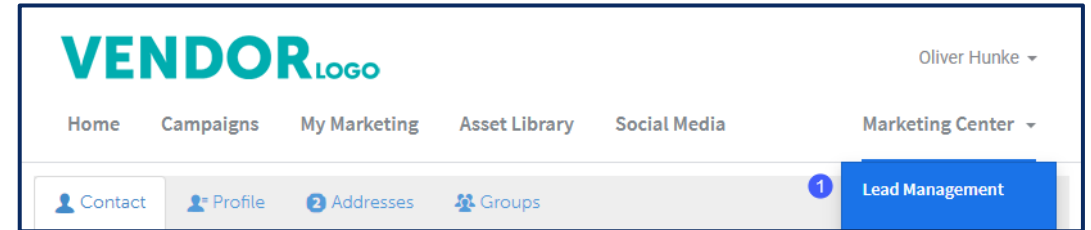
The screenshot displays a contact record for Leslie Bayly at XYZ Company. The contact's lead score is 61, which is highlighted with a red box. The record also shows the contact's email address, phone number, and a list of campaigns sent to them. The lead score is located in the 'Campaigns' section of the contact record.

Name	Sent	opened	linked	Unsubscribe	Rejected
Email for CXOs	06/03/2022	06/03/2022 4:06 PM	06/03/2022 4:05 PM		

# Where do I locate Lead Management (1)?

Lead management is a separate area of Partner Marketing Center to identify and manage your leads. To view all your leads from inside Lead Management, do the following:

1. On the right-hand side of the page, from the **drop-down menu**, select **Lead Management**.
2. On the toolbar, click **Leads**.
3. To view all leads, in the **Stage** drop-down menu, select **All stages**. Then remove all other data fields. (i.e., Source, Date, etc.)
4. Click **Search**.



# Where do I locate Lead Management (2)?

Once your leads list generates, click inside any lead record to manage your leads, including the following:

1. Adjust the stage of the lead
2. Create Notes or send an email
3. Review the information entered into the form

The screenshot displays the 'Lead Management' interface for a specific lead record. The top navigation bar includes 'Home', 'Contacts', 'Leads', 'Opportunities', and 'Settings'. The main content area is titled 'Task Details' and shows the following information:

- Task Details:** Gated Download Landing Page: Google's Guide to Innovation whitepaper
- Follow Up:** 06/03/2022
- Stage:** New
- Source:** Forms
- Lead Cost:** [Empty field]
- Assigned To:** Kreiser, Kevin
- Created:** 06/03/2022 (0 days ago) by an automatic process
- Rating:** ☆☆☆☆☆
- Marketing Campaign:** Email for CXOs - "Google's Guide to Innovation"

Below the task details, there is a 'Contact' section for Elizabeth Morgan, with contact information and a 'Record owner' of Kevin Kreiser. Action buttons include 'Save', 'Save & Next', 'Save & Close', 'Convert to New Opportunity', 'Delete', and 'Return to list'. There are also buttons for 'Calendar', 'Notes', and 'Email'. The bottom section shows the 'Form Submission View' for the 'Gated Download Landing Page: Google's Guide to Innovation whitepaper' form, filled out on 06/03/2022 at 4:06 PM. The form data is as follows:

Fields	Form Values
*First Name	Elizabeth
*Last Name	Morgan
*Email Address	lizmorgan@gmail.com
Phone	
Job Title	
Website	
Organization	
*Sign up for our emails with news, updates, event information, special offers and more.	Yes

## Lesson 7:

### Introducing Concierge Account Management

#### We will cover these skills:

- [How do I manage accounts for a vendor?](#)
- [How do I navigate Program Manager](#)





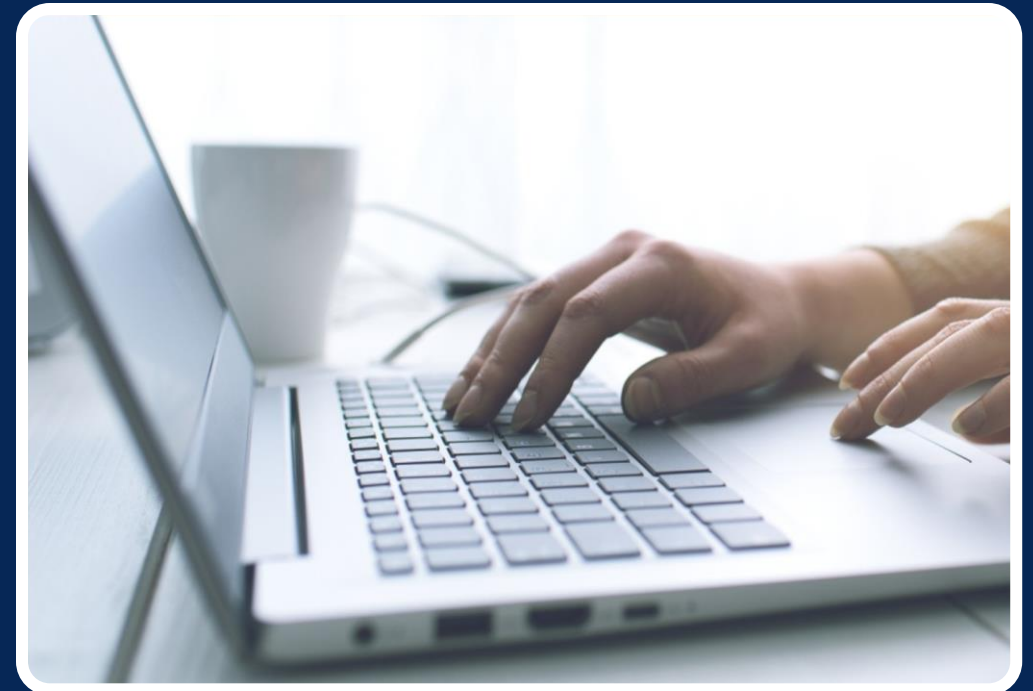
# How do I manage accounts for a vendor?

So far, you've learned about the different areas within the Partner Marketing Center and how they work together to enable campaign success for partners.

As a VpMM, not only must you be an expert on Partner Marketing Center, but you must also master managing vendor's partner accounts. Accounts are managed within the Program Manager area of StructuredWeb.

## Program Manager Features

- Search for and find all partner accounts added through single sign-on by the vendor
- Preview and edit partner account information
- Complete necessary actions, such as recording keeping, calendar entries, account sign-on and more.
- Create Test Accounts.





# How do I navigate Program Manager?

1. **Scope Menu:** Access the different areas of StructuredWeb
2. **User Menu:** Select your StructuredWeb Account
3. **Current Program:** Access available programs for your vendor. Partner accounts are most often found in Program Manager; however, you may find additional programs per region.
4. **Accounts Tab:** Access all partner accounts
5. **New Accounts:** Create accounts manually. (Most partner accounts are created automatically through SSO).
6. **Search:** Search for individual partner account records.
7. **Account Table:** Click to enter individual partner account records.

The screenshot displays the Vendor Program Manager interface. At the top, the 'VENDOR Logo' is visible on the left, and the 'Current Program' is set to 'Partner Marketing' on the right. A navigation menu includes 'Accounts', 'Contacts', 'Content', 'Tactics', 'Campaigns', 'Assets', 'Users', 'Settings', 'Tasks', 'Projects', and 'Reports'. The 'Program Manager' tab is selected, and the 'Design Team' is indicated in the top right corner. Below the navigation, there are buttons for '+ New Account', 'Copy Account', 'Delete', 'Mark Inactive', and 'Export'. A search bar is present with a 'View' dropdown set to 'Accounts' and a 'Search' input field. The 'Display' options are 'Active Accounts' (selected), 'Inactive Accounts', and 'All Accounts'. The table below shows 'Results 1 - 2 of 2' with columns for 'Account', 'Start Date', 'End Date', 'Subscription', and 'Manager'. The first account is 'WhatFix Test Acct' with a start date of 06/08/2022 and a manager of '30 Unknown'. The second account is 'Zoom Setup Test Account' with a start date of 05/05/2021 and a manager of '30 Unknown'.

Account	Start Date	End Date	Subscription	Manager
<input type="checkbox"/> Account ID: 128755 (Login) WhatFix Test Acct SW Test Team United States donotreply@structuredweb.com 0 whatfixtestacct.atworkweb.com	06/08/2022		Email:	30 Unknown
<input type="checkbox"/> Account ID: 107141 (Login) Zoom Setup Test Account QA Tester	05/05/2021		Email:	30 Unknown

## Lesson 8: Managing Partner Accounts

We will cover these skills:

- [How do I use Program Manager?](#)



# How do I use Program Manager?

Program Manager includes the tools you need to manage your relationship with your vendor's partner accounts. As a VpMM, you work exclusively in the account tab to review account information, take necessary actions, and enter the partner's instance to troubleshoot and verify partner account activity.

When managing your vendor's partner accounts, complete the following tasks:

1. [Search for specific partner accounts](#)
2. [Review and edit account information](#)
3. [Update Marketing Assets](#)
4. [Review Partner User information](#)
5. [Use the Actions toolbar](#)
6. [Create Test Accounts](#)

# 1. Search for Partner Accounts

Use the search bar to quickly locate the account record for the partner you are engaging with. Do the following:

1. In **Program Manager**, from the **Current Program** drop-down menu, select the **program** for which the partner belongs.
2. Select the **Accounts** tab.
3. In the **Search** text field, type the **name of the account** you want to access. (Note: As you type, options dynamically appear.)

The screenshot displays the Vendor Logo Partner Marketing interface. At the top, the 'Current Program' is set to 'Partner Marketing'. The 'Accounts' tab is selected, and the search bar contains 'Vendor Com'. A table below shows the search results for 'Vendor Company LLC'.

Account	Start Date	End Date	Subscription	Manager
<input type="checkbox"/> Account ID: 116365 (Login) Vendor Company LLC James Demo 555 Right St. New York, New York 10013 United States  dnr@vendorcompany.com (555) 5555 zoompartneraccount.atworkweb.com	10/25/2021		Email:	30 Unknown 3

## 2. Access & Edit Account Information

Because accounts are entered using the vendor's SSO, many account fields cannot be updated, however, you can update demographic information such as addresses, do the following:

1. From the **Accounts** tab, in the **Account** column, click on the **account name**. The account record opens.
2. In the top header, click **Addresses**. Then select **New Address**.
3. Select the **Address Type**.
4. Enter **all required fields**. (Note: Required fields contain a red asterisk.)
5. Click **Save**.

The screenshot illustrates the process of adding a new address to an account. It is divided into three overlapping panels:

- Top Panel:** Shows the 'Accounts' tab with a search bar containing 'vendor.com'. A blue circle '1' highlights the 'New Account' button.
- Middle Panel:** Shows the account details for 'Vendor Company LLC'. A blue circle '1' highlights the account name, and a blue circle '2' highlights the 'Addresses' tab in the top header.
- Bottom Panel:** Shows the 'Enter Shipping Address' form. A blue circle '2' highlights the 'New Address' button. A blue circle '3' highlights the 'Address Type' dropdown menu (set to 'Mailing'). A blue circle '4' highlights the 'Address' field (containing '111 Winchester St'). A blue circle '5' highlights the 'Save' button at the bottom.

Required fields in the form are marked with a red asterisk (\*):

- \*Address Type
- \*First Name
- \*Last Name
- \*Address
- \*City
- \*State
- \*Zip Code

# 3. Update Marketing Assets

Marketing Assets allows partners to incorporate their company information into marketing tactics they deploy. To verify and update your partner account's marketing assets from program manager, do the following:

1. From the middle header, click **Assets**.
2. From the **Select a single asset to edit** drop-down menu, select **All marketing assets**.
3. Verify that **all fields are entered**. If needed, in the **associated text box**, enter **marketing assets**. (Note: you must verify all marketing assets with the partner before editing).
4. Click **Save**.

## 4. Add New Users

If a new point of contact joins a partner account, add them as a User to the partner account record.

1. From the middle header, click **Users**.
2. Click **New User**.
3. In **Basic User Information**, enter **all required fields**. (Note: Required fields contain a red asterisk.)
4. Click **Save**. An email with login credentials is automatically generated and sent to the new user.

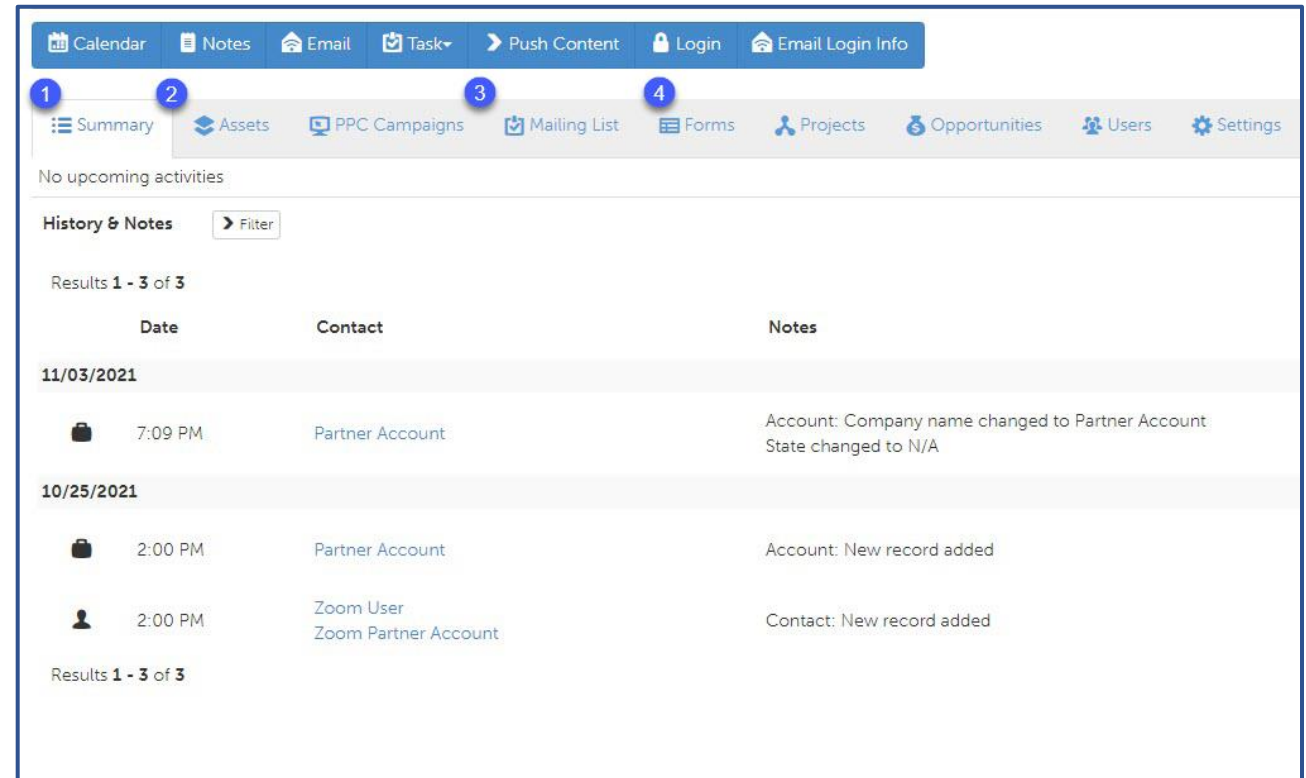
The screenshot displays the user management interface. The top navigation bar includes 'Calendar', 'Notes', 'Email', 'Task', 'Push Content', 'Login', and 'Email Login Info'. The middle header shows 'Summary', 'Assets', 'PPC Campaigns', 'Mailing List', 'Forms', 'Projects', 'Opportunities', 'Users', and 'Settings'. The 'Users' tab is selected, and a '1' callout points to it. Below the header, there are buttons for '+ New user', 'Select user access', and 'Remove user access'. A '2' callout points to the '+ New user' button. The main content area shows a 'User' form for 'Vendor Company LLC'. The form has two tabs: 'User' and 'Email'. The 'User' tab is active, and a '3' callout points to the 'Basic User Information' section. This section includes fields for '\*First Name:' (Elizabeth), '\*Last Name:' (Johnson), '\*Email:' (elizabeth.johnson@structuredweb.com), '\*Telephone:' (555 5555555 ext.), and '\*Username:' (elizabeth.johnson@structuredweb.com). Below these are '\*Password:' and '\*Confirm Password:' fields, both with '3' callouts. The 'User Group Access' section has checkboxes for 'Email Only Access', 'Site Content Manager', 'Sales Rep' (checked), 'Customer Service Rep', and 'Sales Manager'. A '4' callout points to the 'Save' button at the bottom of the form.



# 5. Use the Actions tool bar

The Actions toolbar helps you keep track of your interactions with partner accounts, use the following tools:

1. **Calendar:** enter partner training and other notifications to ensure all appointments and deadlines are met.
2. **Notes:** Keep accurate records of all client interactions and reference previous notes to aid in partner troubleshooting and discussions.
3. **Push Content:** Ensure that partners have access to the latest content additions from vendors.
4. **Login:** Login to the partner's instance to review partner activities and troubleshoot errors.





# 6. Create Manual Accounts

In most cases, new partner accounts are created by the vendor's SSO, however, you may need to create manual accounts for test purposes to ...

When creating a test account, be sure to use generic information (do not enter real credentials) to ensure that you don't create a duplicate accounts. Do the following:

1. In the **Account** tab, click **New Account**. The New Account box opens.
2. In the **Account Information** area, enter **all required fields**. (Note: Required fields contain a red asterisk.)
3. Click **Save**. A new box opens.

# 6. Create Manual Accounts

1. From the next **New Account** box, leave all options **as is**.
2. Click **Save**. A new box opens.
3. From the next **New Account** box, leave options **as is**.
4. Click **Save**.

The image shows two overlapping screenshots of a 'New Account' form. The top screenshot shows the 'Set up subscriptions for EJ Test Account' section with a table of subscription options and a 'Save' button. The bottom screenshot shows the 'Create trackable phone for campaigns' section with a 'Save' button. Blue circles with numbers 1-4 point to specific elements: 1 points to the 'Telemarketing' checkbox, 2 points to the 'Save' button in the top screenshot, 3 points to the 'Yes' radio button, and 4 points to the 'Save' button in the bottom screenshot.

What is this account subscribing to:	Active	Type	Monthly Budget
<input type="checkbox"/>		Direct Mail	\$ <input type="text" value="0"/>
<input checked="" type="checkbox"/>		Email	\$ <input type="text" value="0"/>
<input type="checkbox"/>		Pay Per Click	\$ <input type="text" value="0"/>
<input type="checkbox"/>		Telemarketing	\$ <input type="text" value="0"/>

What type of phone tracking would you like to set up?  
 Account level tracking  
 Program level tracking

Start Date:   
End Date:   
Target Leads:   
Target Opportunities:

Create trackable phone for campaigns:  
 No  
 Yes

# 6. Create Manual Accounts

In the next box, enter generic marketing assets to test cobranding functionality from your instance. From there, push vendor content to the new test account. Do the following:

1. From the next **New Account** box, from **Select a single asset to edit** drop-down menu, select **All marketing assets**.
2. In **General Use** area, in the **text boxes**, type or upload **content** into all fields.
3. Click **Save**. A new box opens.
4. Click **Push out the content**. Your new test account is created.

New Account

Edit Marketing Assets for EJ Test Account

Now that you have added this new account to the program you should make sure that you have all of the marketing assets set up for this account. These assets you are setting up with this program.

Select a single asset to edit: All marketing assets

Select assets by subscription type:  Direct Mail  Email  Pay Per Click  Telemarketing  General Use

Save

General Use

Company Email

\*Company Logo Recommended size: 170px x 40 px Choose File Test Logo.png

\*Company Name

Contact Email Address

Contact Name

New Account

**Push out the content to sfsdfs**

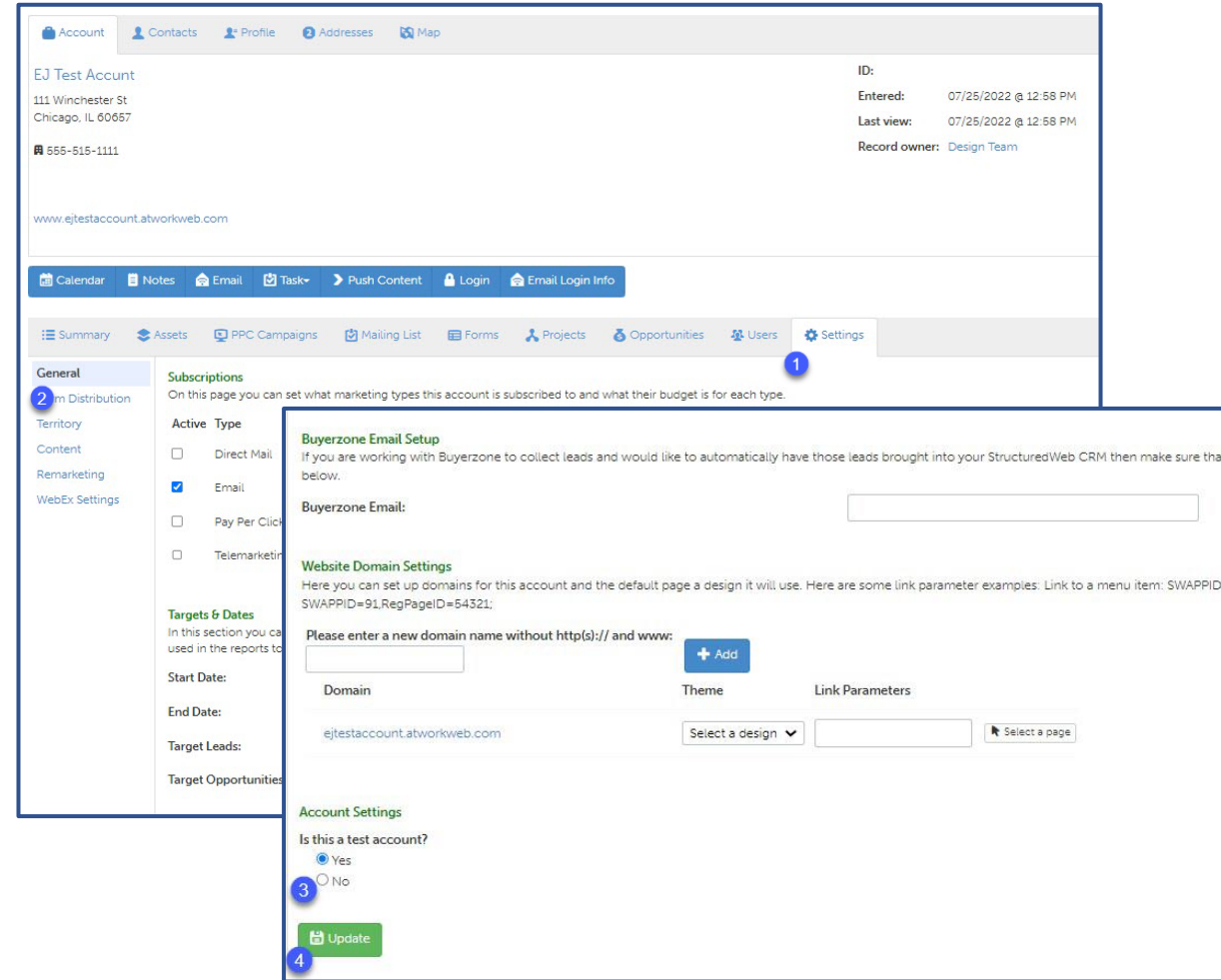
You are almost done setting up your new account. You just need to push out all of the marketing content. And now your new account should be completely set up.

Push out the content

# 6. Create Manual Accounts

The final step is to mark the new account as a test account. Do the following:

1. In the new account record, click **Settings**.
2. From the **General** page, scroll to the bottom.
3. From **Is this a test account?**, select **Yes**.
4. Click **Update**.







**Thank You!**