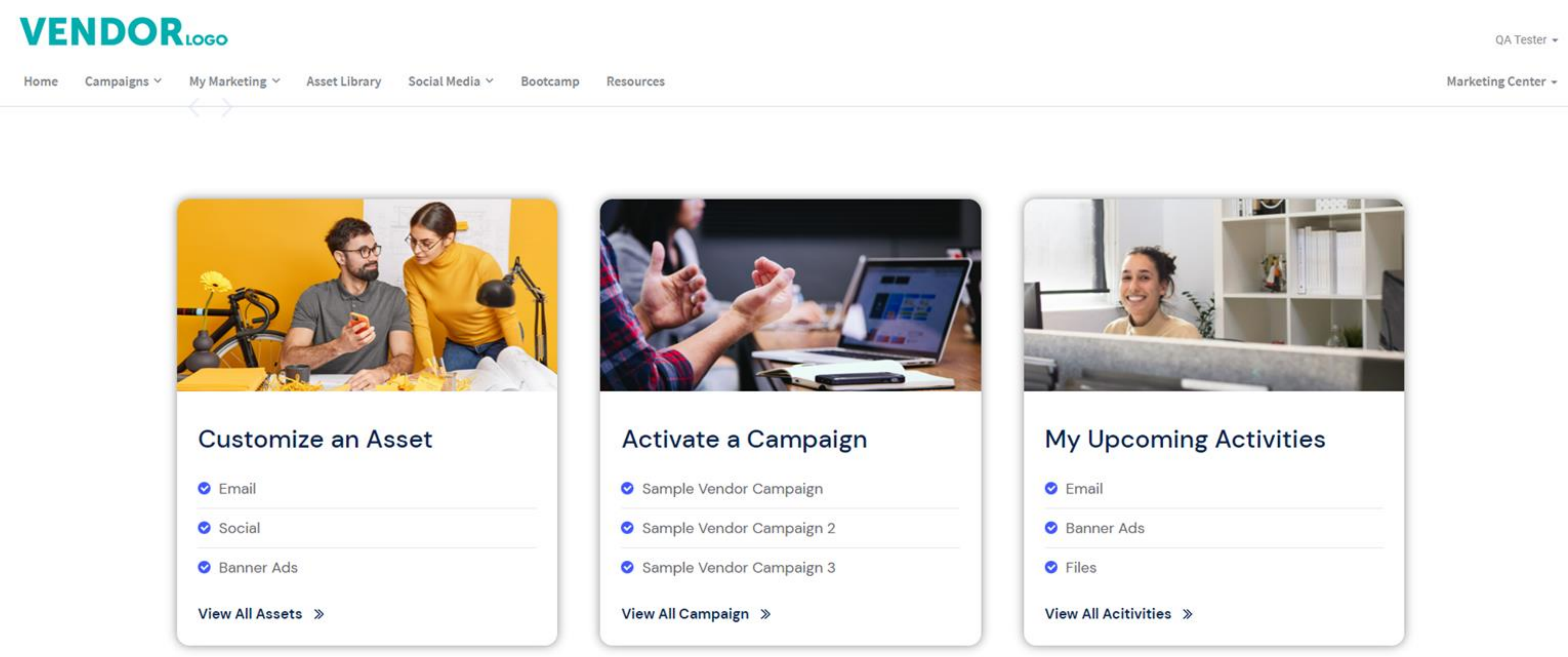

Partner Marketing Center Onboarding Guide

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Customer EDUCATION MANAGER

StructuredWeb

What is the purpose of this onboarding guide?

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?

- 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

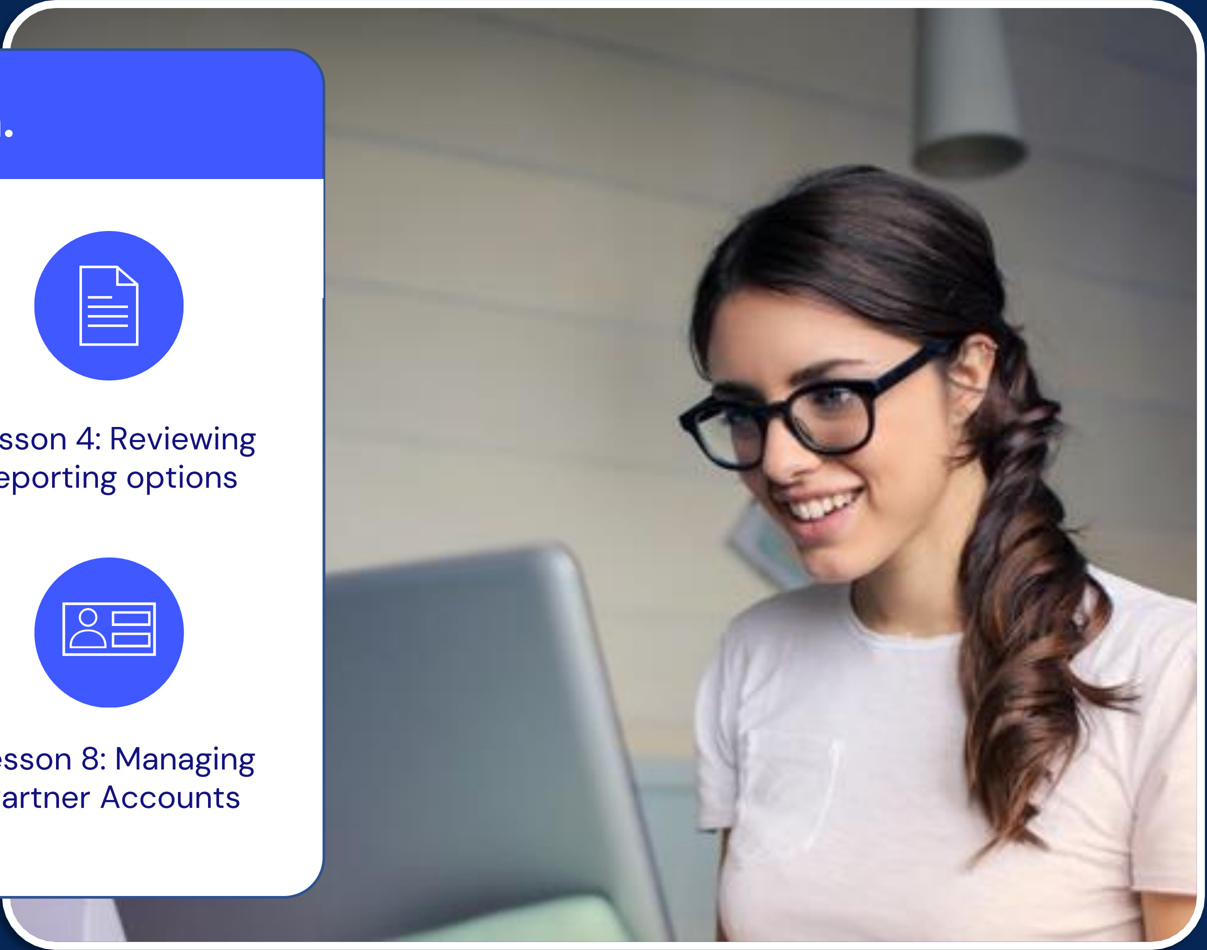
Lesson 4: Reviewing reporting options

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:

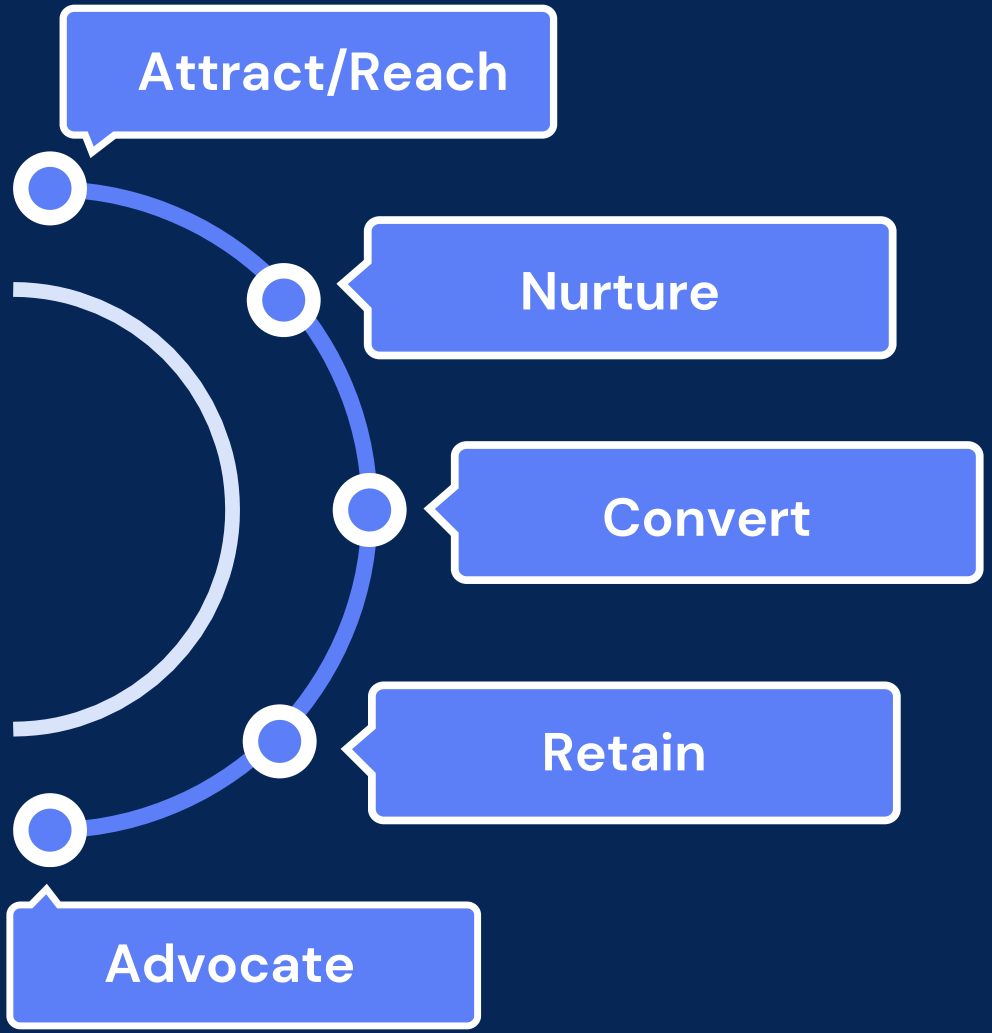
- What is Partner Marketing Center?
- What four PMS features work together to enable campaign success?

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?

Campaign Success

Content

Assets to be cobranded and deployed at every stage of the funnel:

- Email campaigns
- Social campaigns
- Banner Ads
- Files

Contact Management

All-in-one contact center to:

- Import and edit contacts
- Run advanced searches to target the right contacts at the right time

Reporting

Robust analytics to monitor:

- Campaign performance
- Successful tactics to repeat
- Less successful tactics to improve

Lead Management:

- Manage leads
- Manage lead Scores

Lesson 2:

Preparing to use the platform

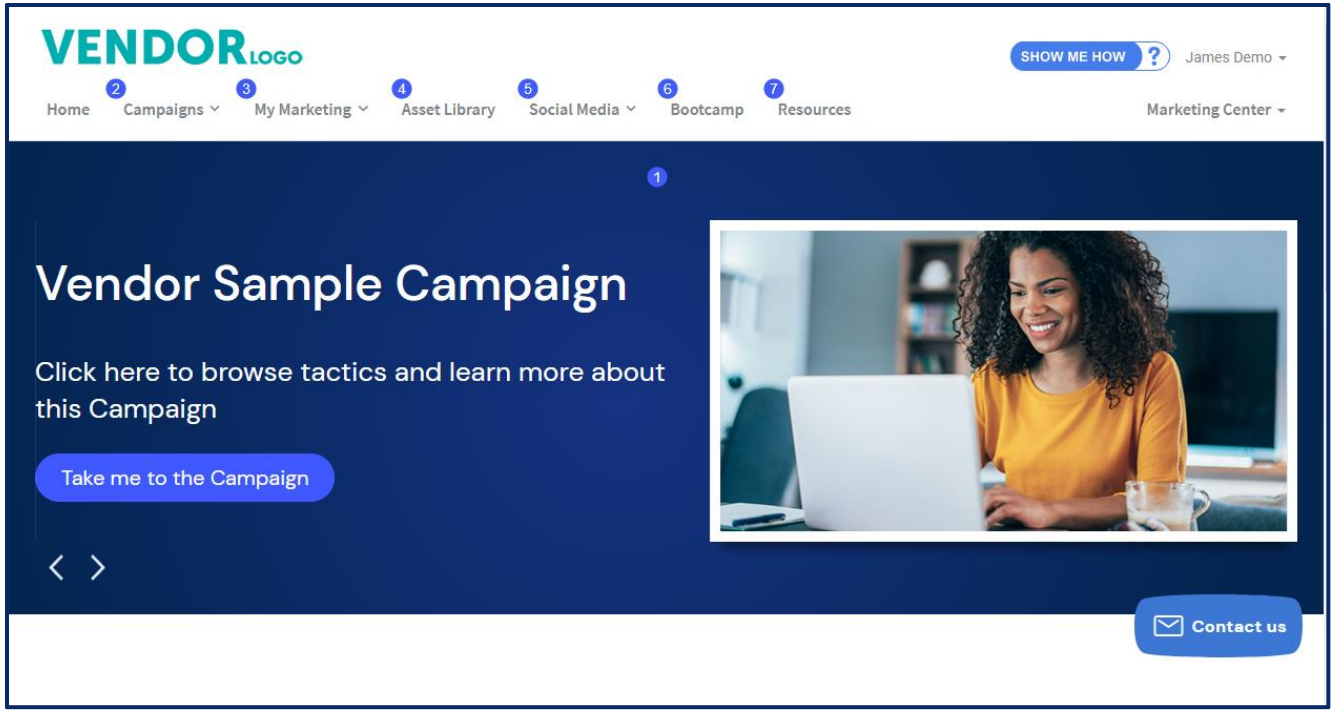
We will cover these skills:

- 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

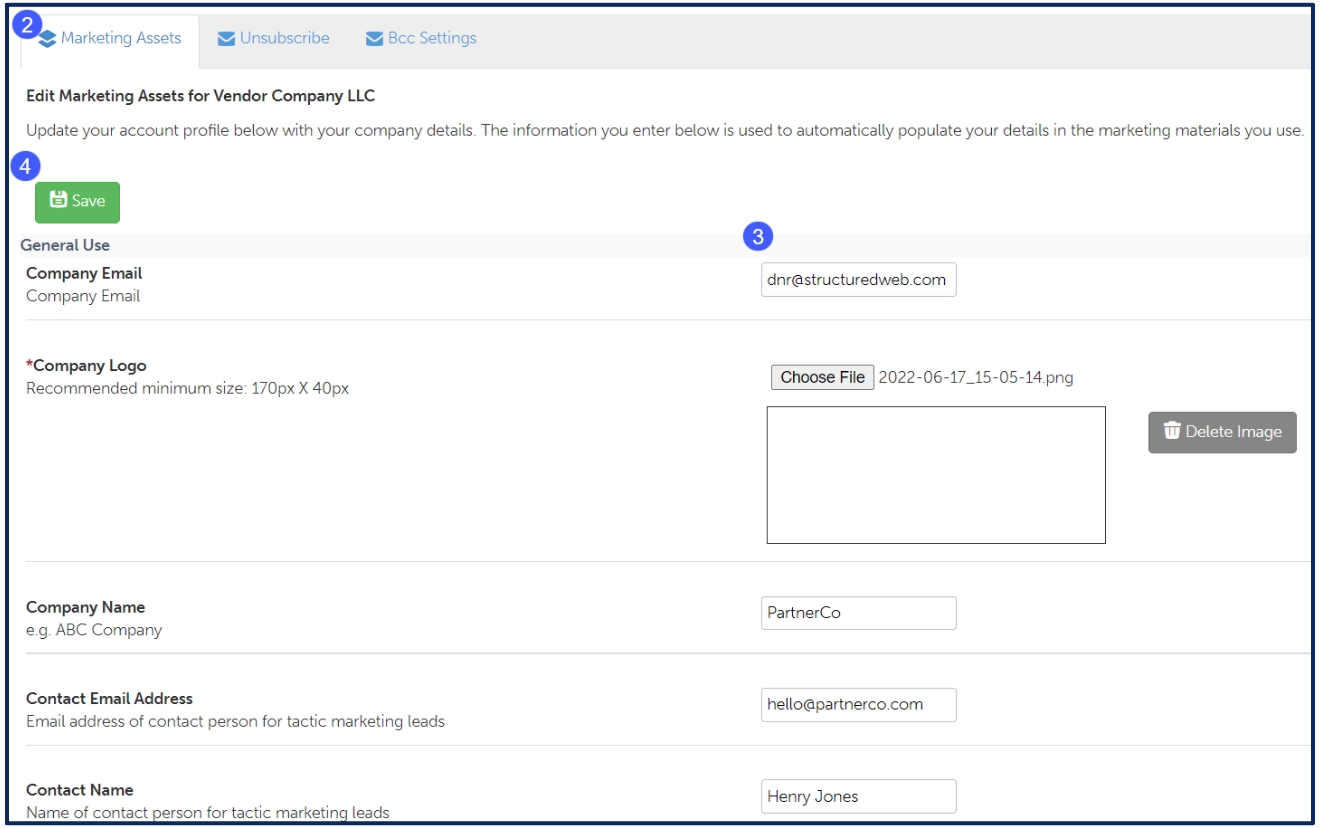
1. **Home Page:** Featured content, such as campaigns, individual assets, recent activities, and more
2. **Campaigns:** Collection of assets related to specific products or services, with instructions on how to execute the campaign
3. **My Marketing:** Your content, including activities, contacts, settings, 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



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.)

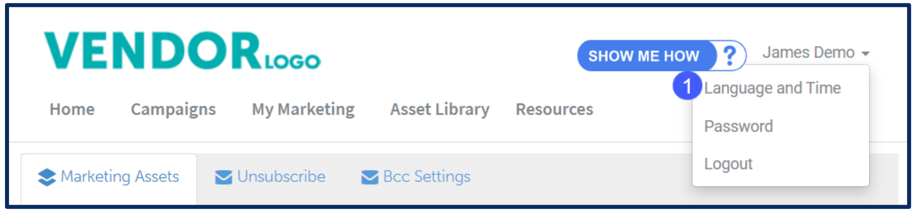
1. From the toolbar, select **My Marketing > Settings** (Review How do I navigate the Partner Marketing Center?)
2. Select the **Marketing Assets** tab.
3. For each **Marketing Asset** type, in the text box, type the **correct content.** Or, from the **Choose File** button, select the **correct image**.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

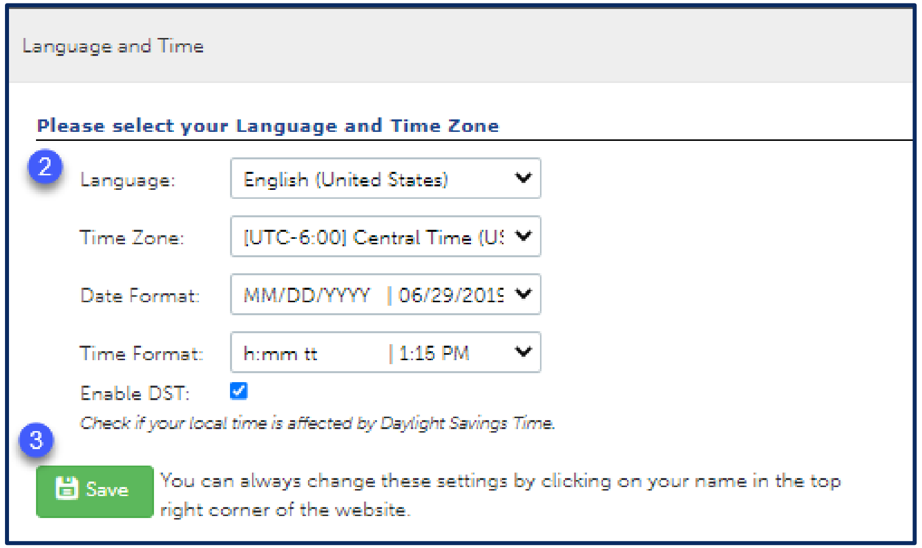


How do I update my language and time?

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?

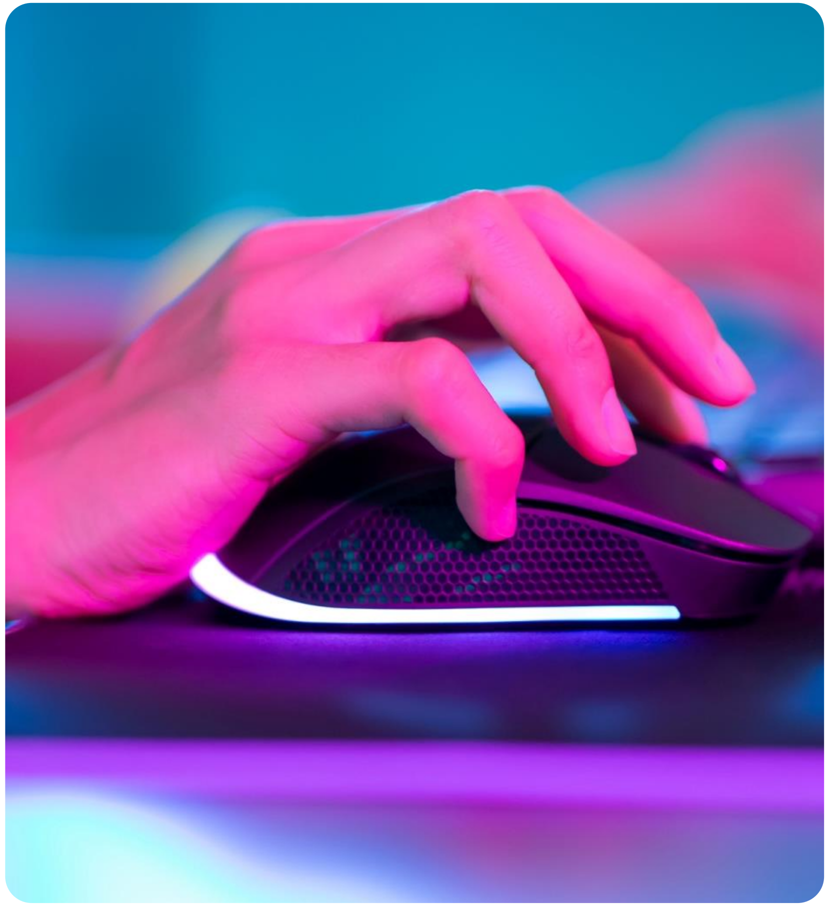
Downloadable

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.

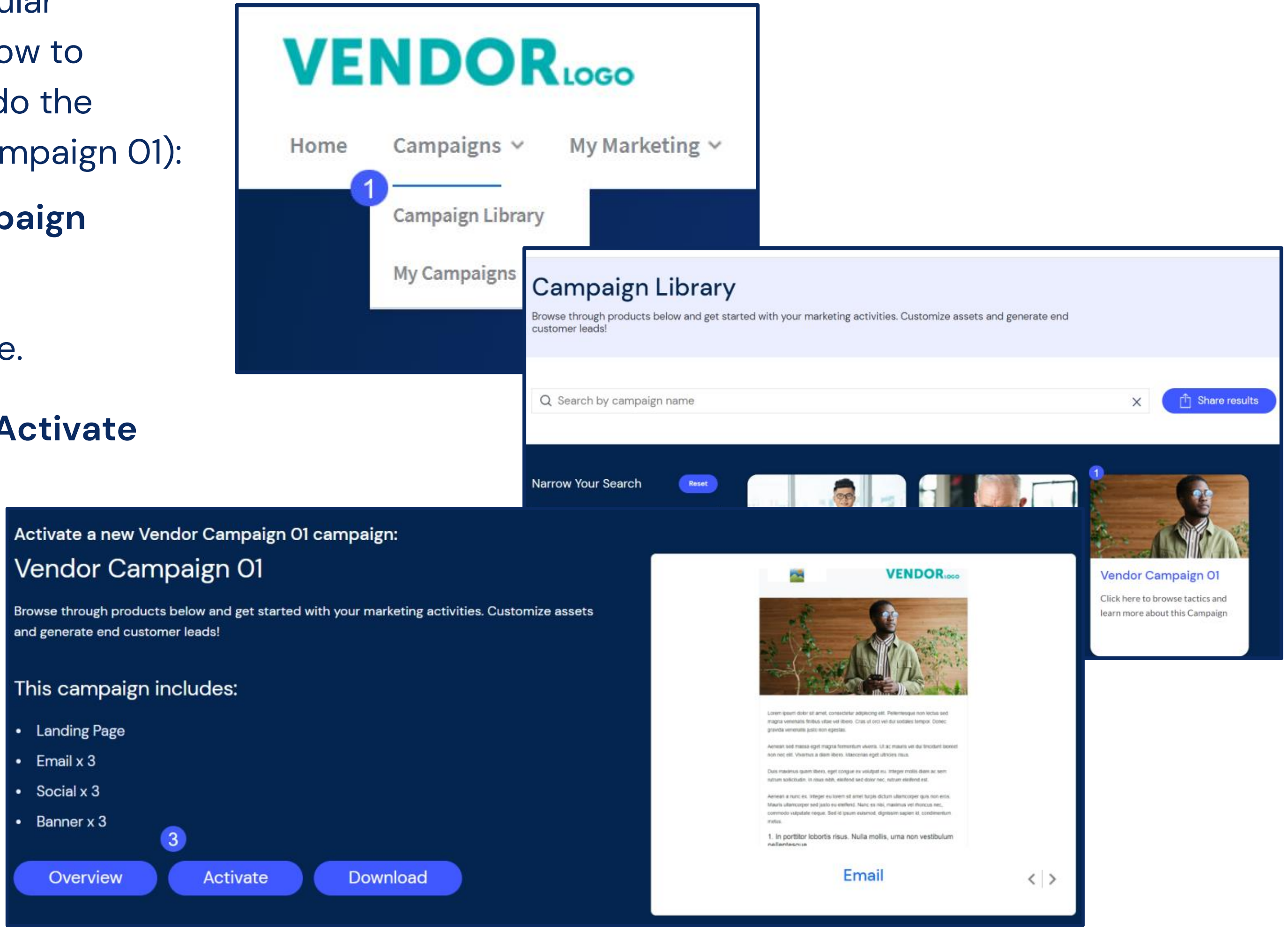
Examples:

- 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**

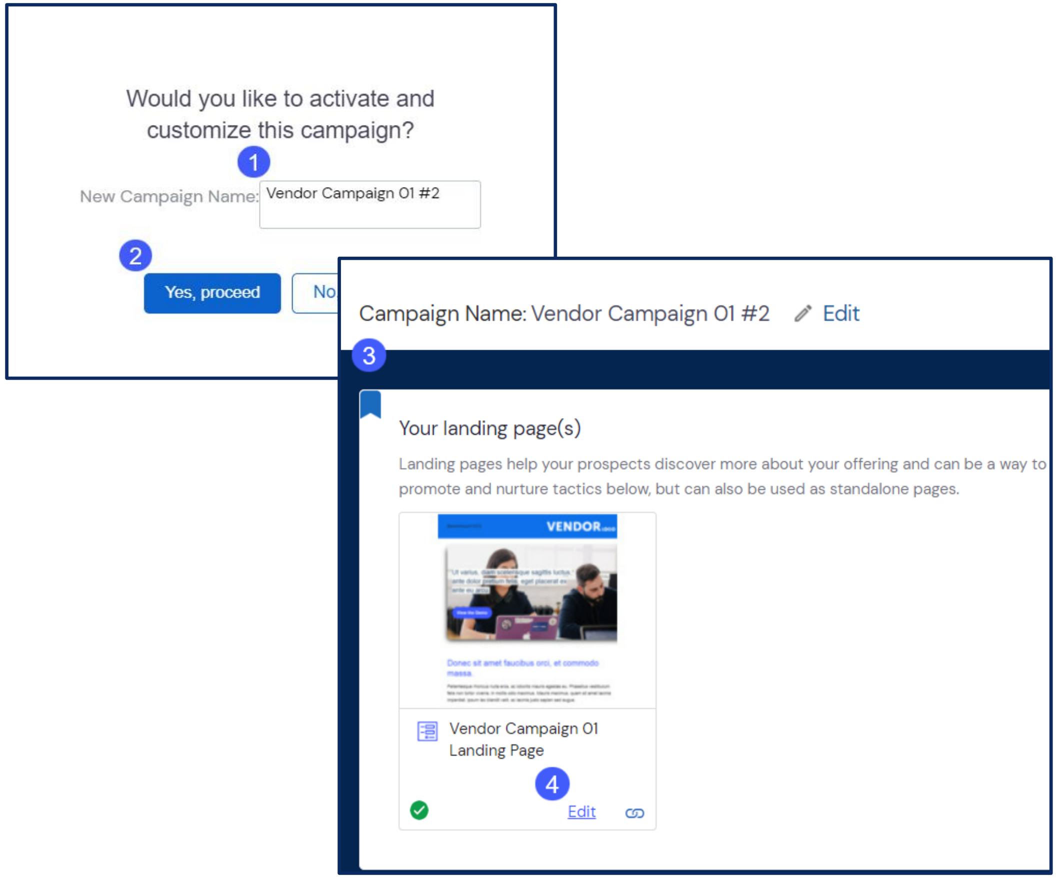


How do I select a campaign (2)?

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.



How do I set up a landing page?

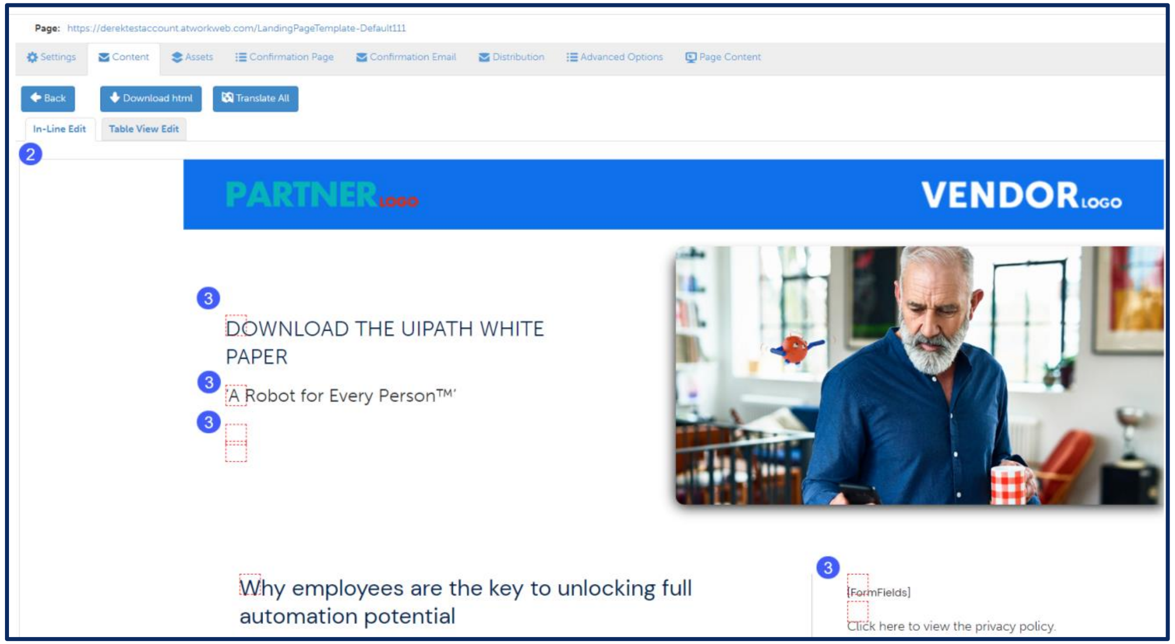
The landing page is the heart of each campaign. It's where contacts enter their information and eventually become leads and opportunities. Landing pages often include forms and are linked directly to campaign assets, such as emails, banner ads, and social campaigns through buttons and links.

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)

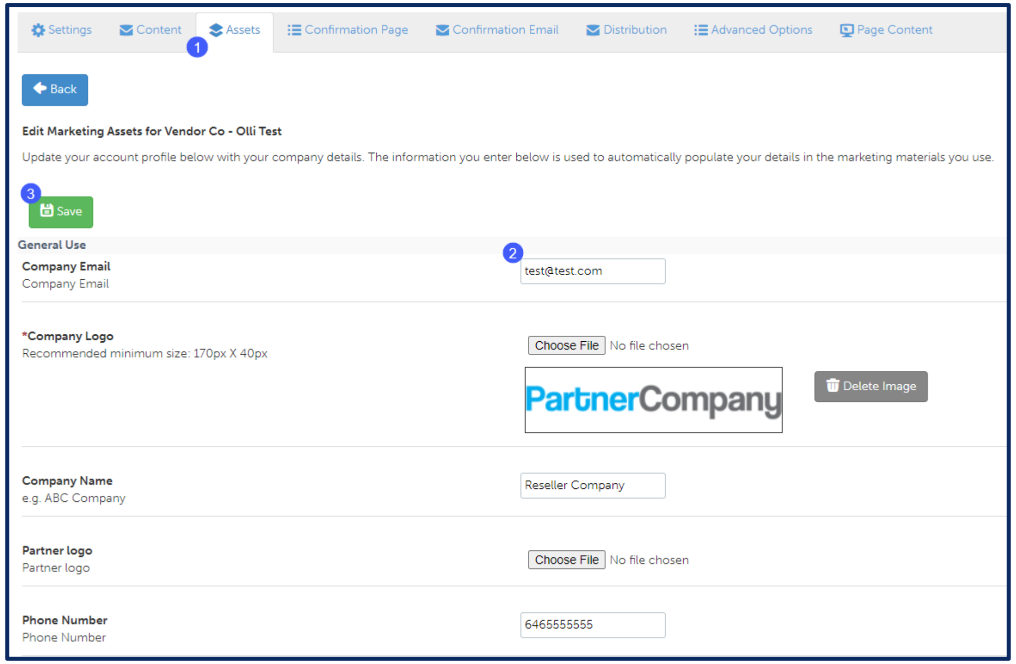
1. From the **Campaign** page, in the **Landing Page** box you want to deploy, click **Edit**. (Review How do I select a campaign?)
2. Select **In-Line Edit** to edit **text, images,** and **call to action** buttons directly on the page. (Note: Table View Edit allows you to edit within a table.)
3. Click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

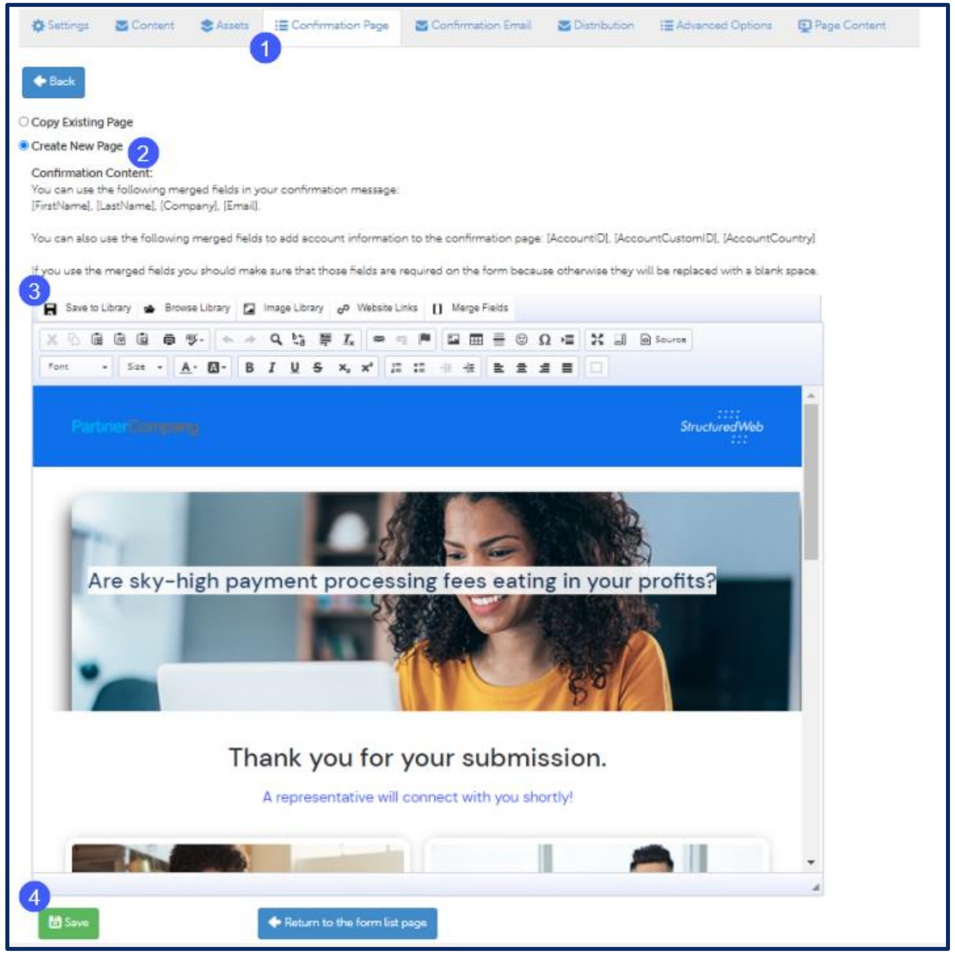
1. From the toolbar, click **Assets.**
2. For each **Marketing Asset** type, in the text box, type the **correct content.** Or, click the button, and select the **correct image**. (Note: your logo must be 170px by 40px)
3. Click **Save**.



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)

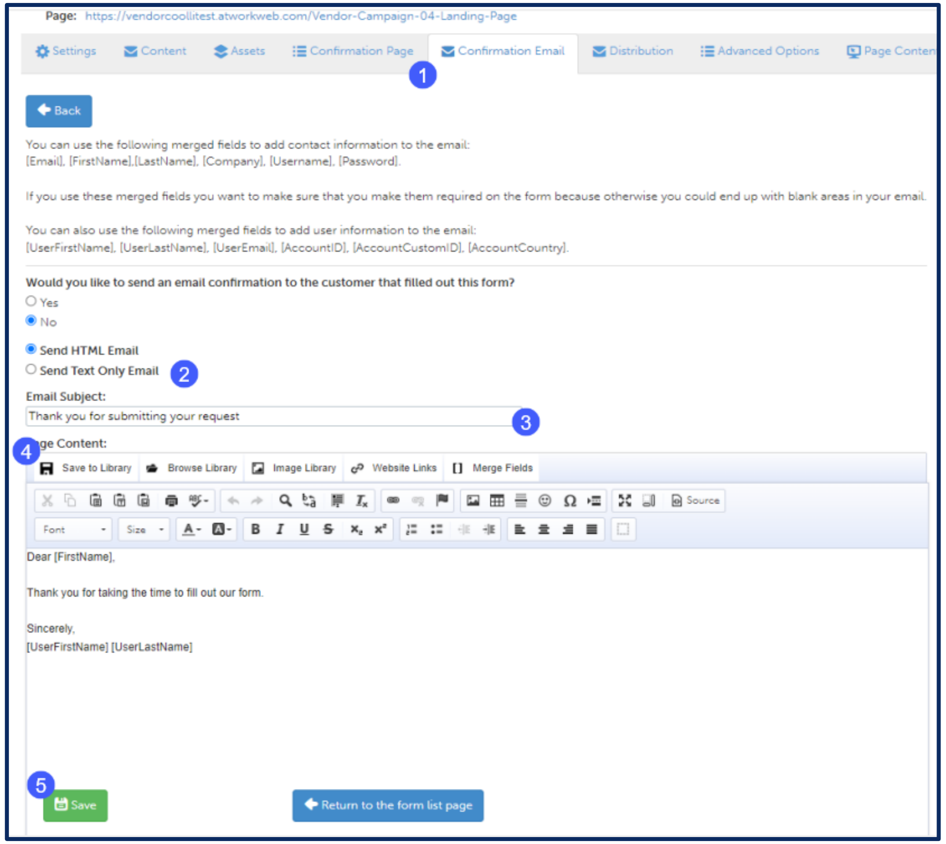
1. From the toolbar, click **Confirmation Email.**

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**.



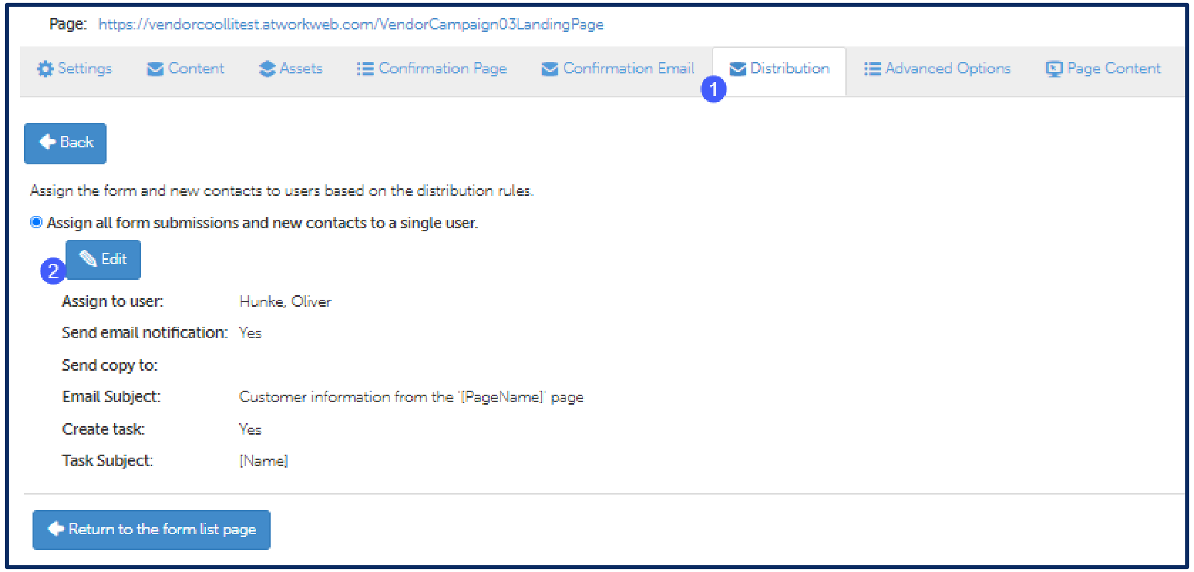
5. Edit Distribution Assignment (1)

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:

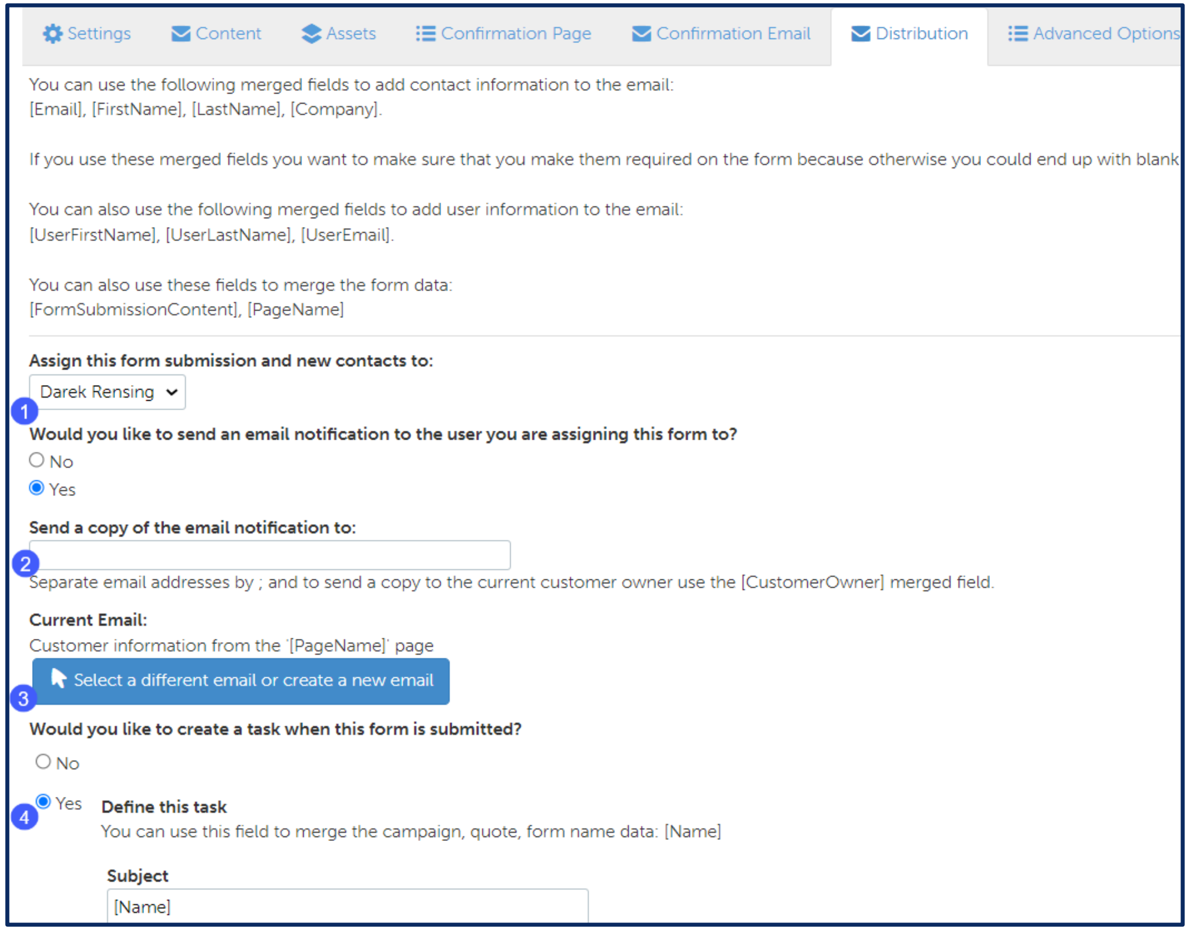
1. From the toolbar, select **Distribution**.

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)



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.

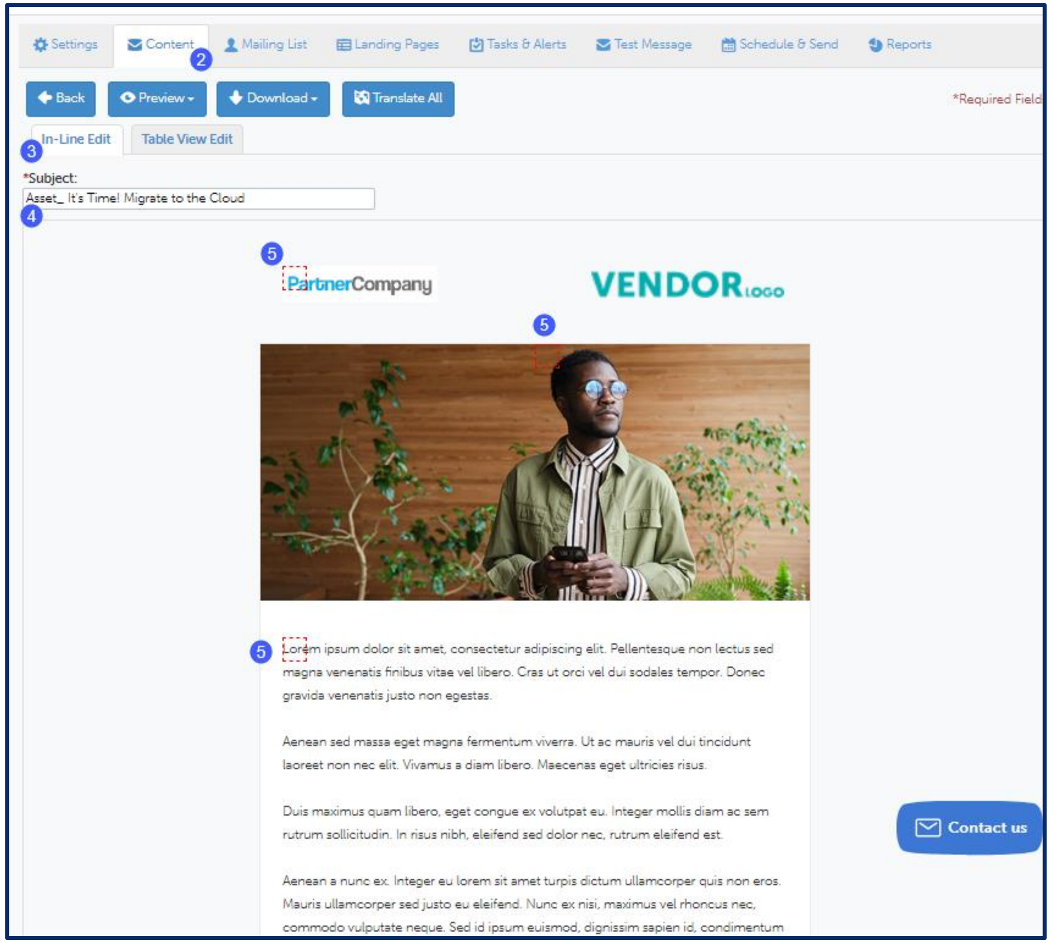
When setting up an email campaign, complete the following steps:

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**.



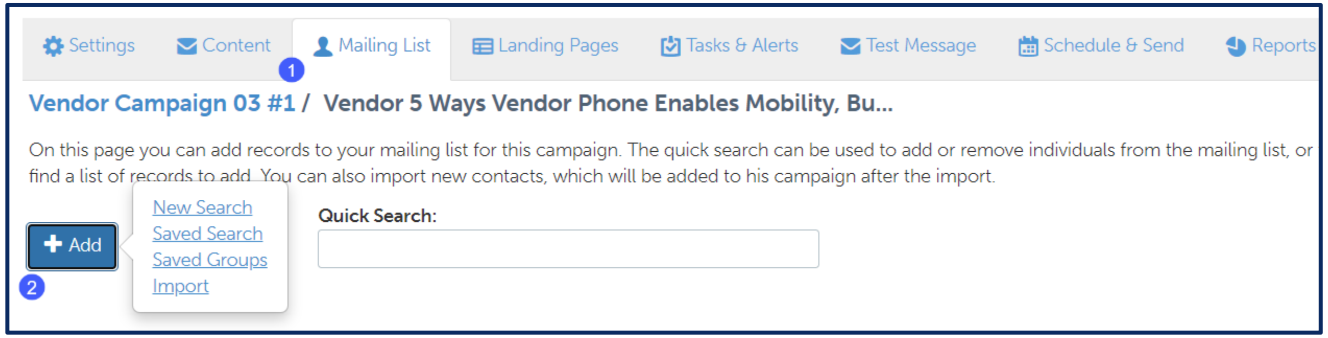
2. Mailing List

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:

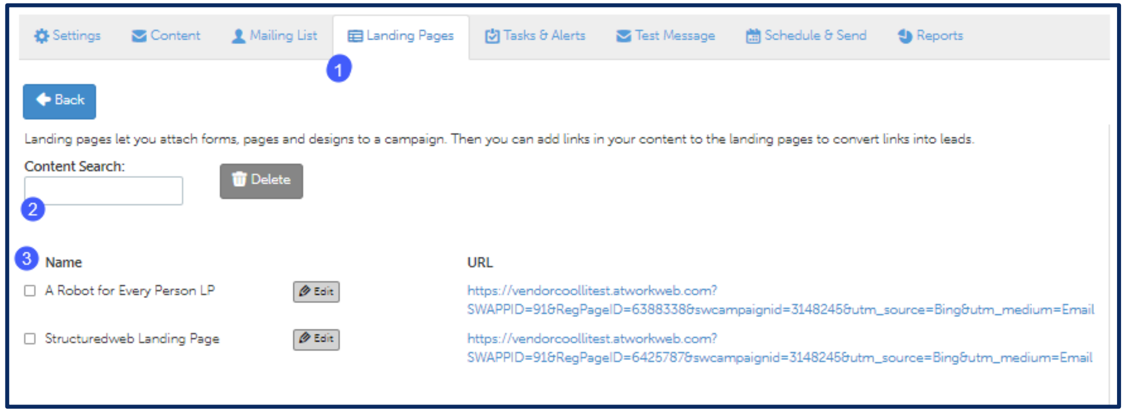
1. From the toolbar, select **Mailing List.**
2. Click the **Add** button. Then select **Import**. A box opens.



3. Update Landing Page

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

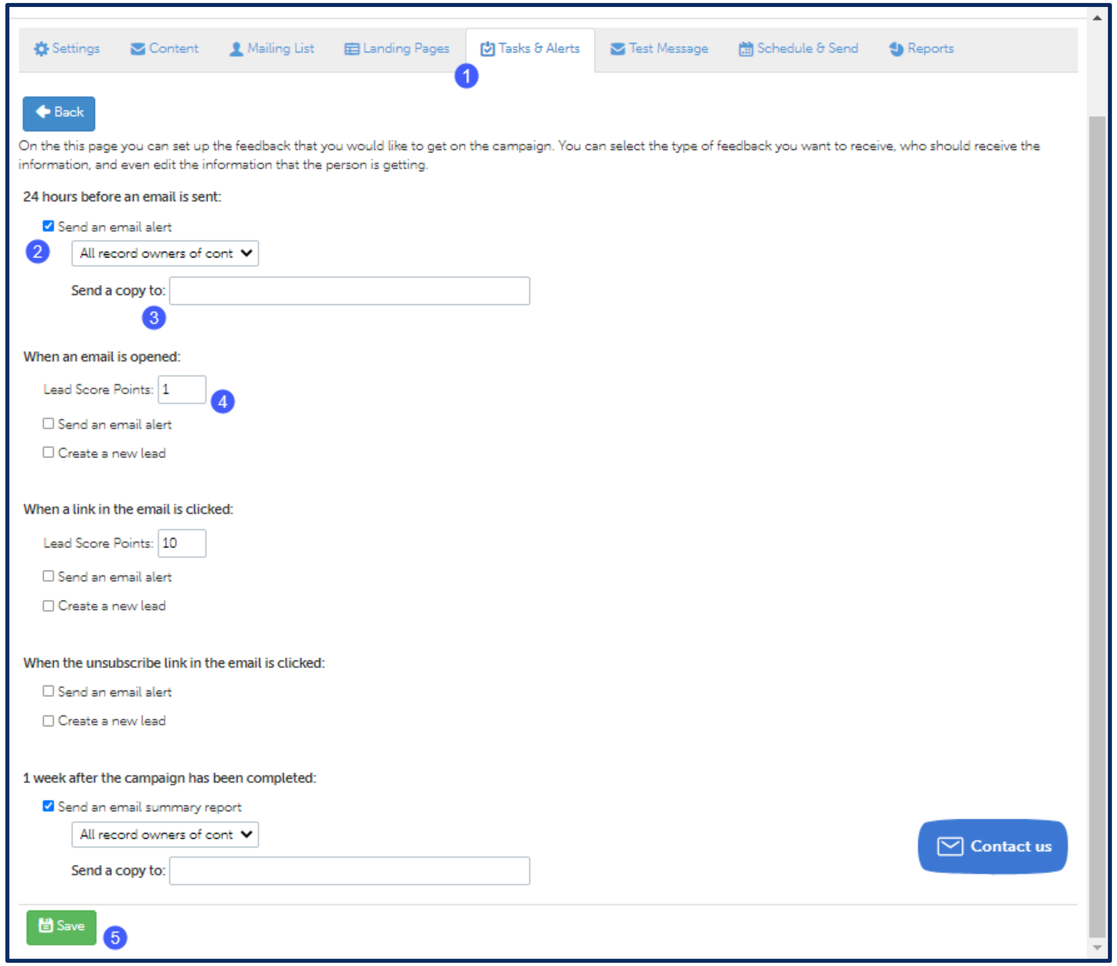
1. From the toolbar, click **Landing Pages.**
2. In the Content Search text box, type any letter for all forms and pages to appear. Then select the Landing Page you want to use.
3. In the **Name** area, check the **box** next to the Landing page you want to use. (Note: to edit a Landing Page, click edit).



4. Tasks & Alerts

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

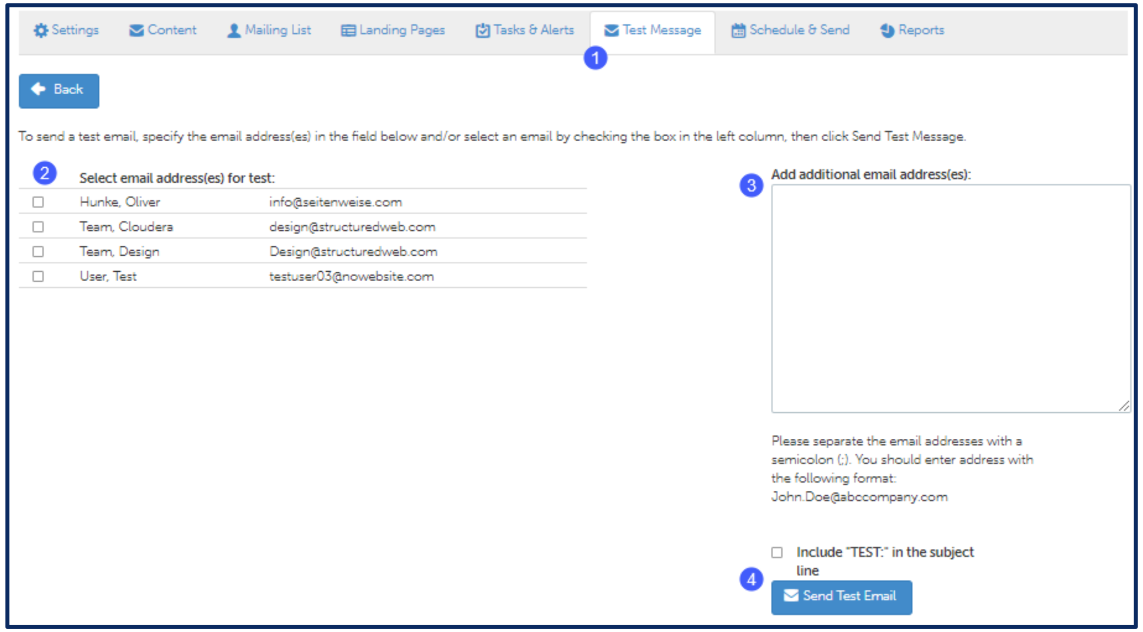
1. From the toolbar, select **Tasks & Alerts**.
2. In the **24 hours before an email is sent** area, select the **users** you want to receive the email.
3. In the **Send a copy to** text field, enter additional emails.
4. Select the **Tasks & Alerts** you want to include.
5. Click **Save**.



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.**



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.

How do I set up a Banner Ad?

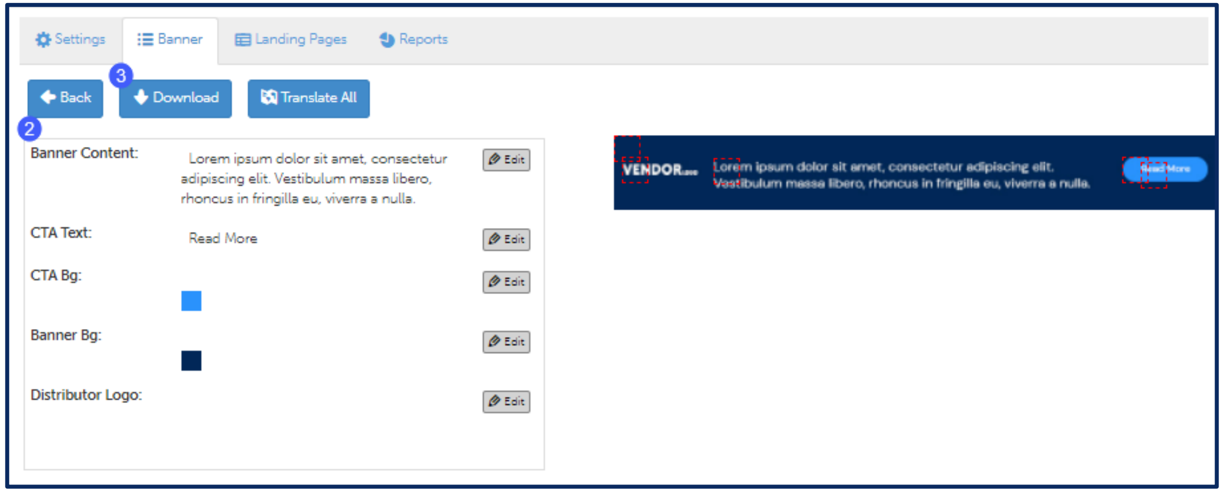
Unlike an email, which is limited to a single use, banner ads are a flexible asset type that allows you to expand your reach across multiple mediums. Banner ads can be added to your website and used in digital advertising; and they are adaptable to mobile devices. Banner ads can attach a landing page,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

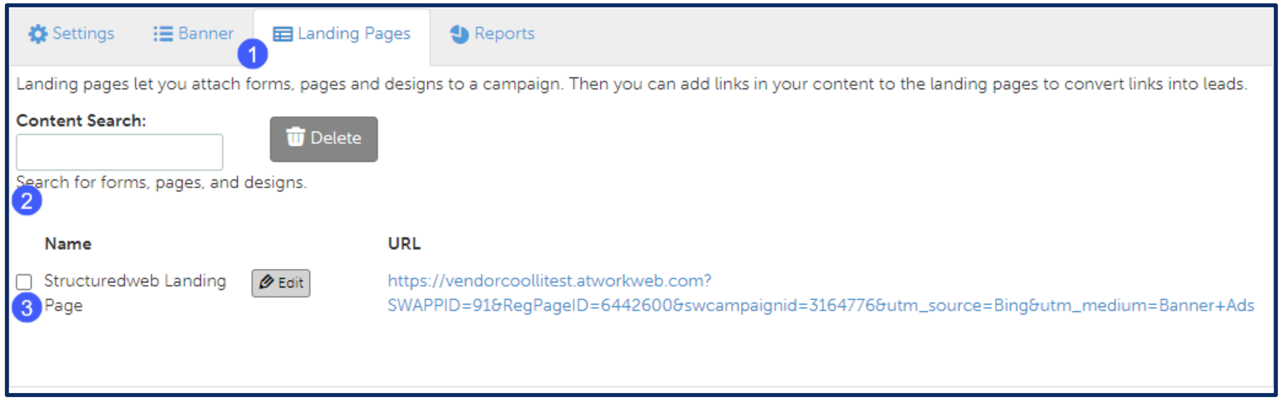
1. From the **Campaign Page**, select the **banner ad** you want to set up. Then click **Edit.** (Review How do I select a campaign?)
2. In the **Banner Content** area, next to the **field** you want to edit, click the **Edit.** (Or, on the banner, click directly on the red boxes to edit).
3. Click **Download**.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

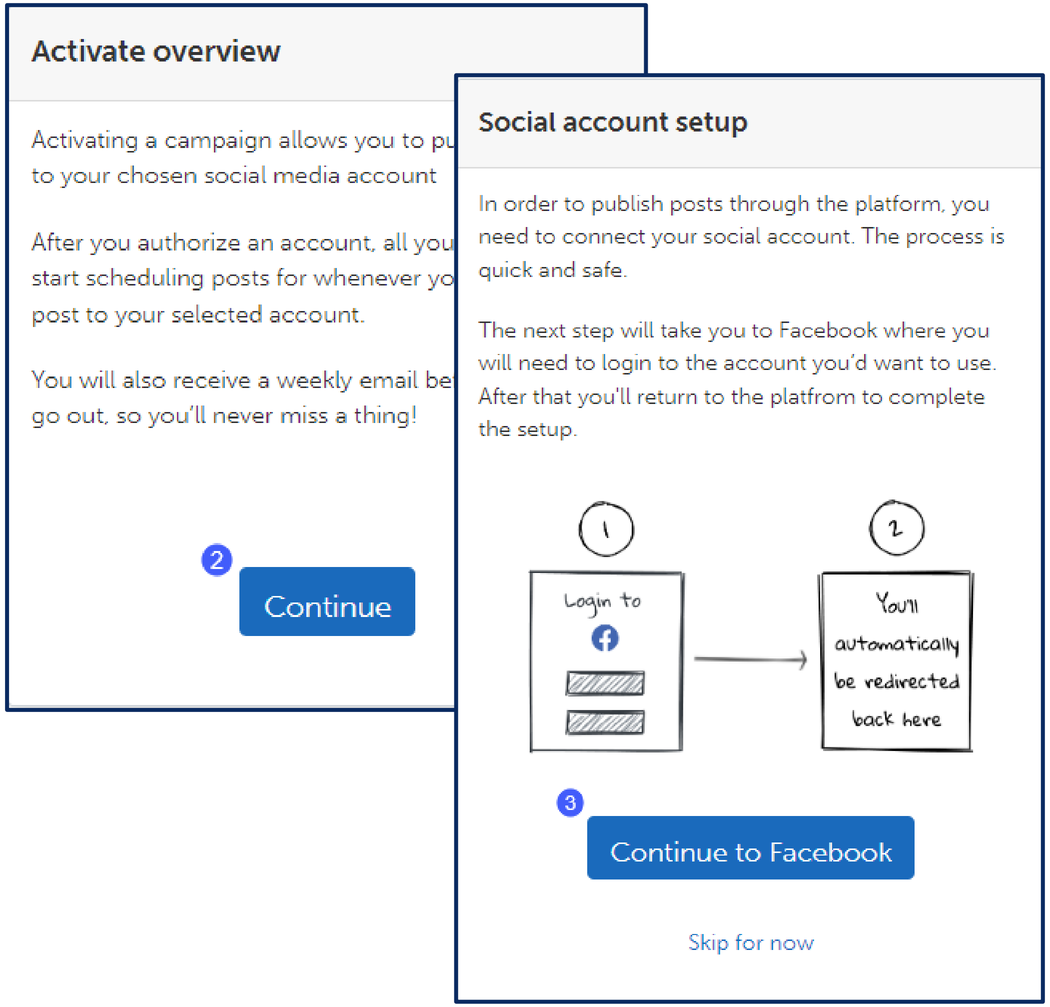
Increase your visibility and reach by executing social campaigns directly from Partner Marketing Center. Social posts create name recognition that builds trust with potential contacts.

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.

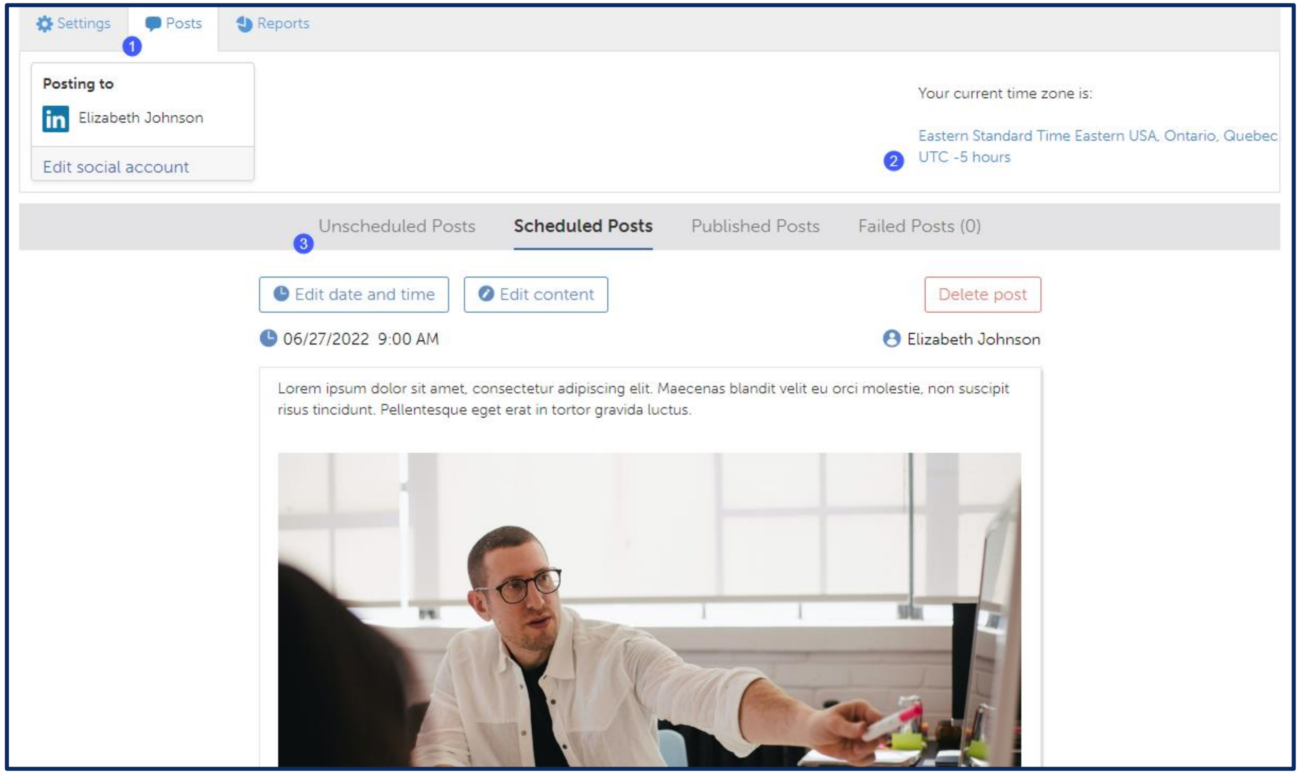


1. Activate Social Media campaign (2)

Main Menu | Return to Lesson 3

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**.

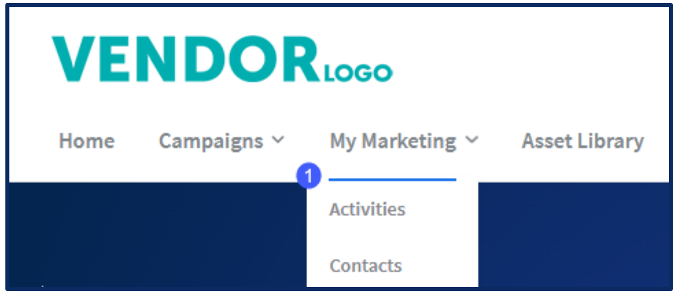
In some cases, your initial subscription may expire, and you may need to resubscribe to the social network. (This will be indicated by a red box appearing around the connect account tab)

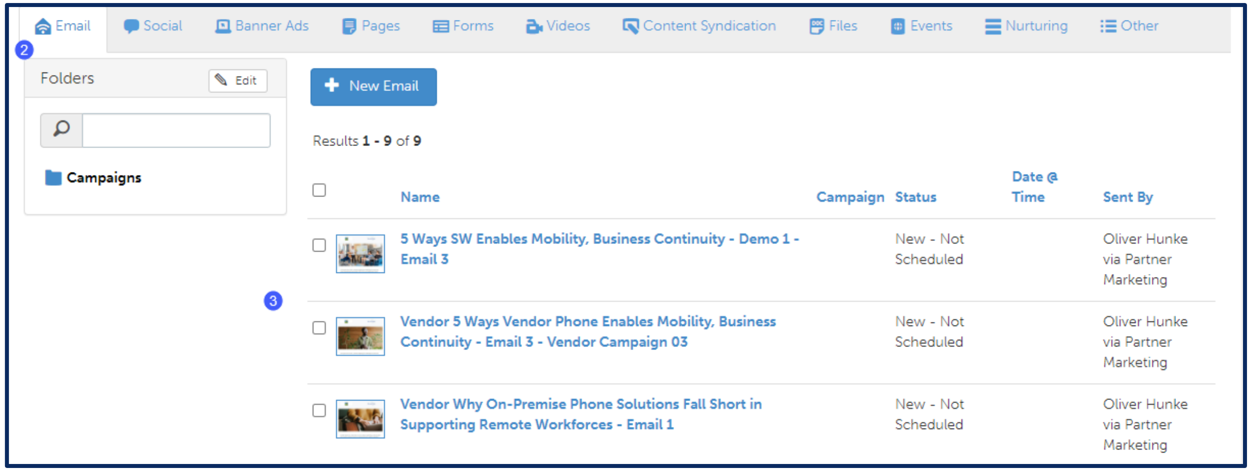


How do I view my asset activity?

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**.





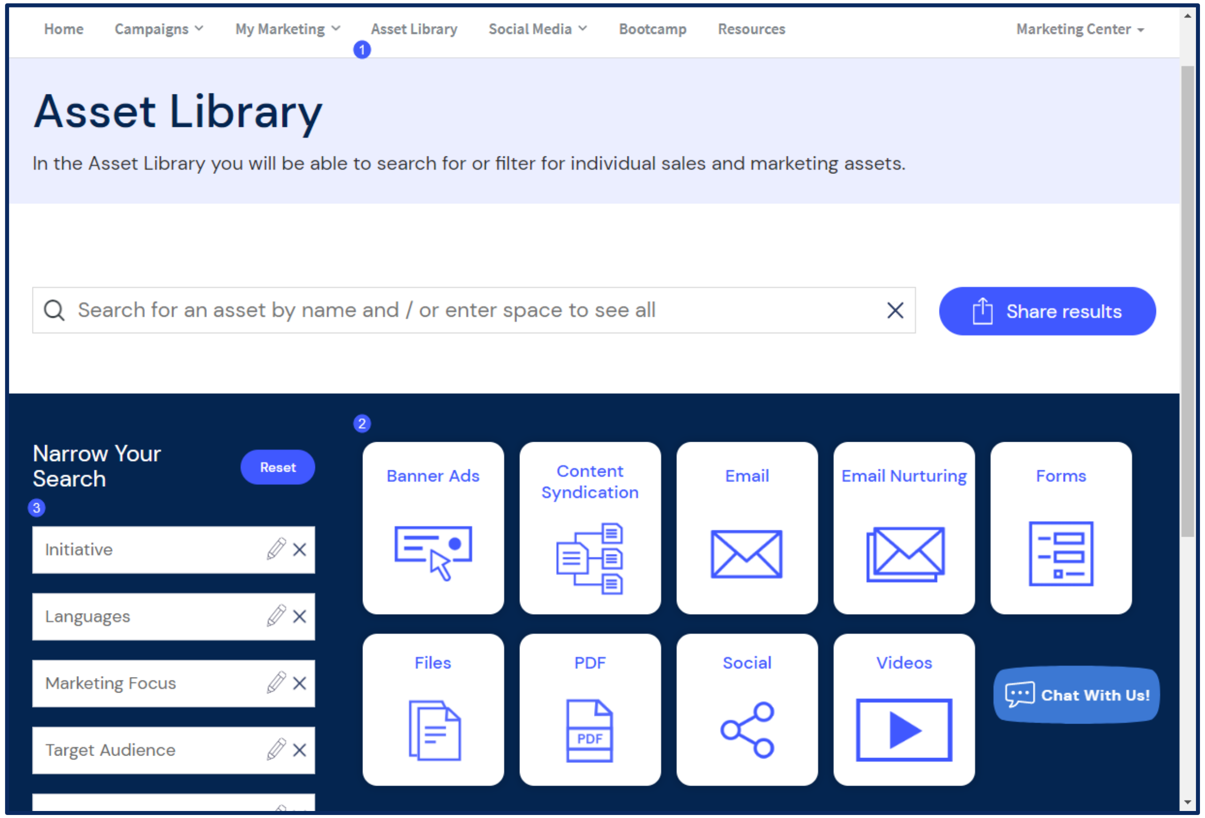
How do I access other asset types?

Main Menu | Return to Lesson 3

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?

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?

Main Menu | Return to Lesson 4

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

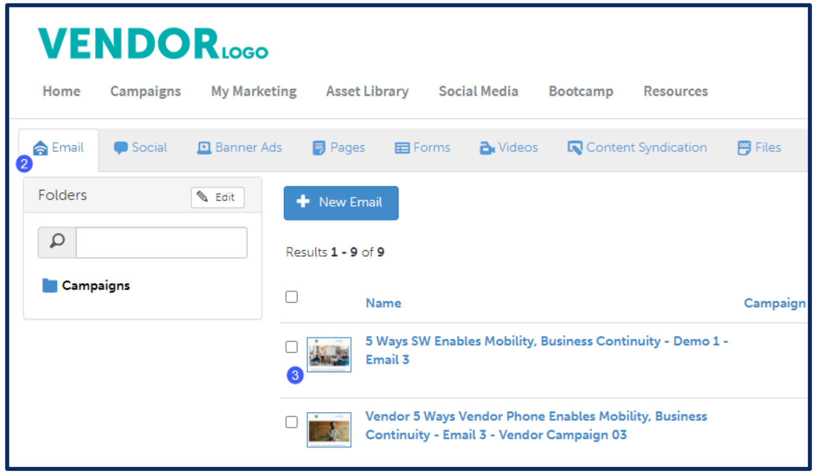
1. From the header, select **My Marketing > My Assets** (Review How do I view my asset activity?).

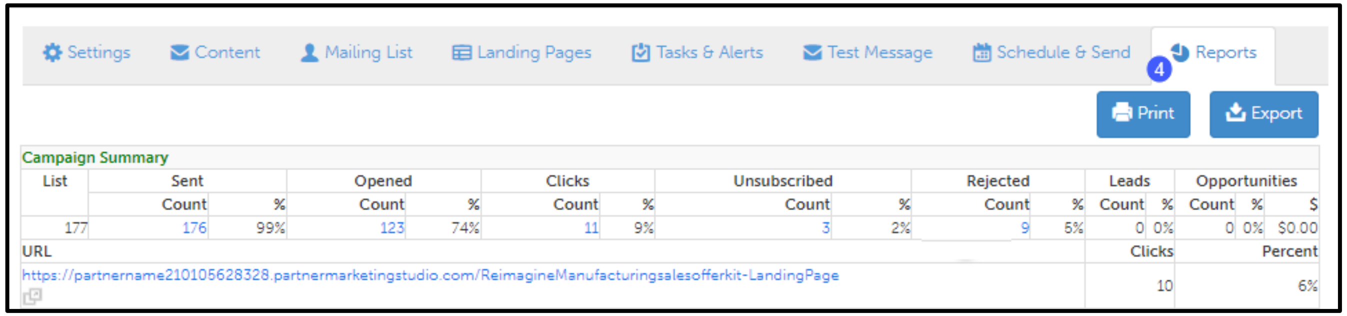
2. From the **toolbar**, select **Email**.

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**.

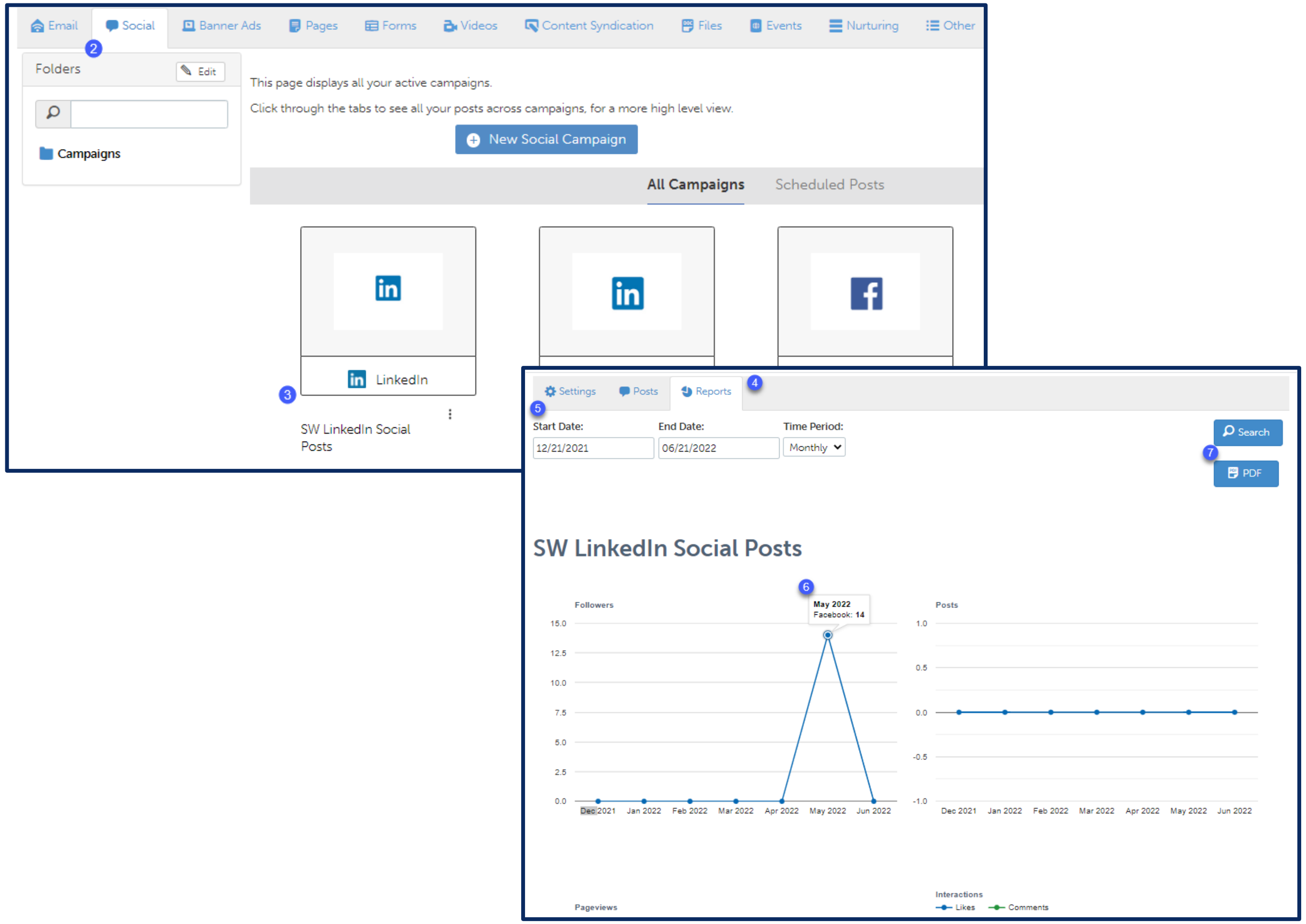
To export the reports for further analysis, click **Export**. (Note: to export a specific data point, click on the value. Then click export.





2. Access Social Campaign Report

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

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

1. From the header, select **My Marketing > Reports** (Review How do I navigate the Partner Marketing Center?)

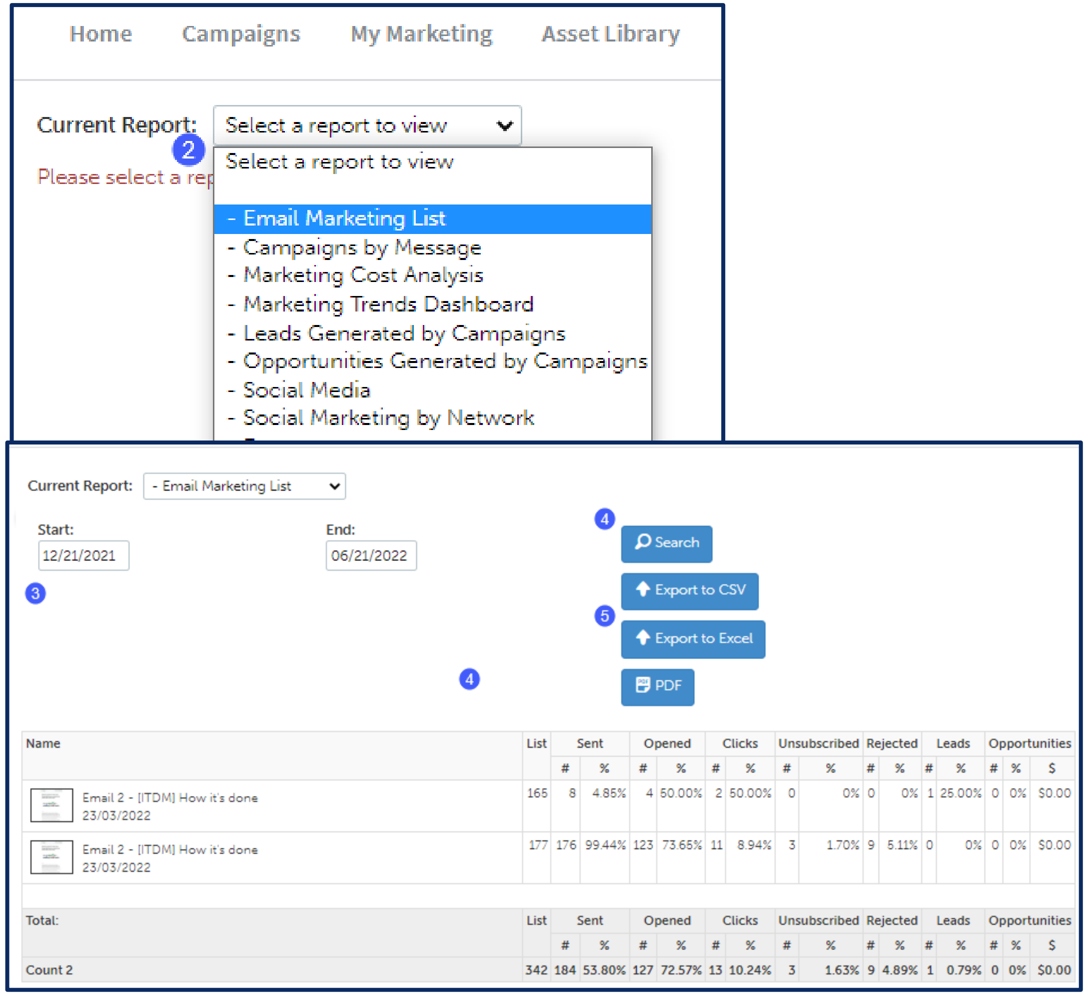
2. From the **Current Report** drop-down menu, select the **report** you want to run (In this example, Email Marketing List is selected).

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.



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?

Main Menu | Return to Lesson 5

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

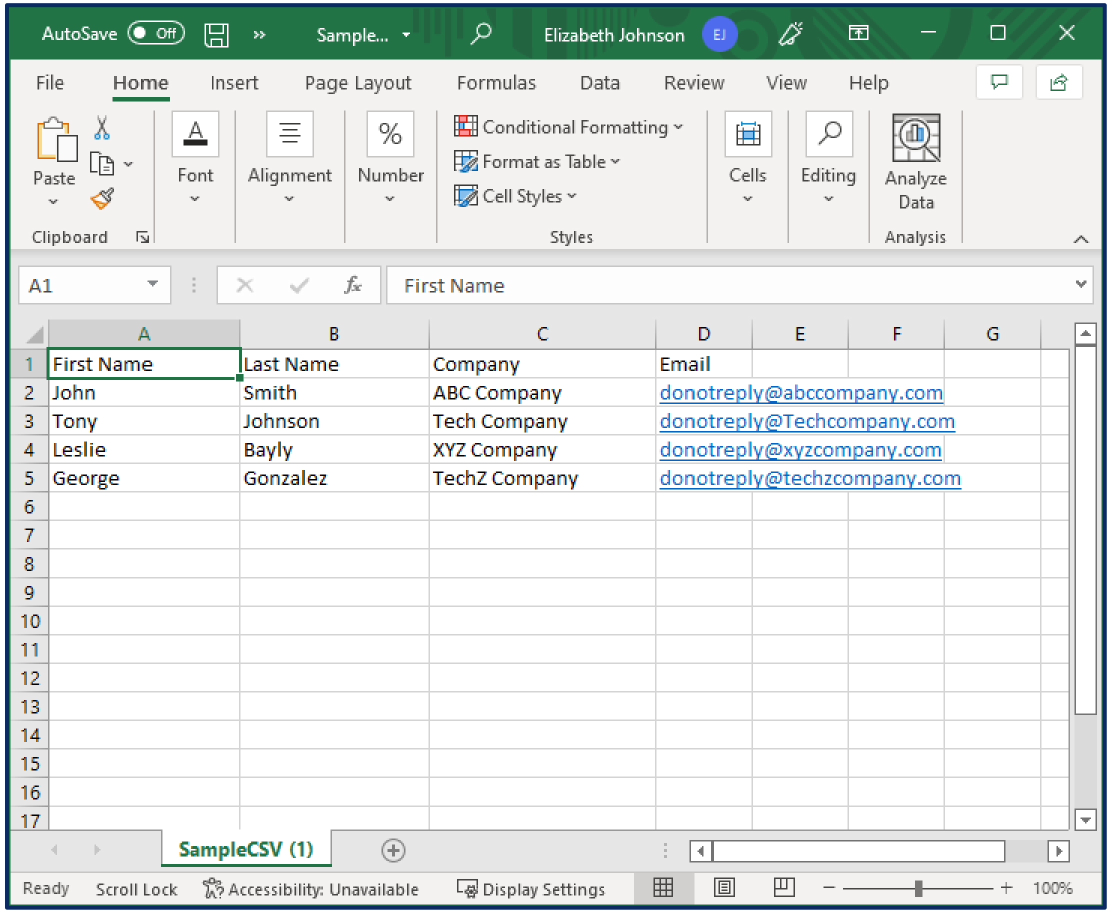
1. Setting up CSV files

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.)

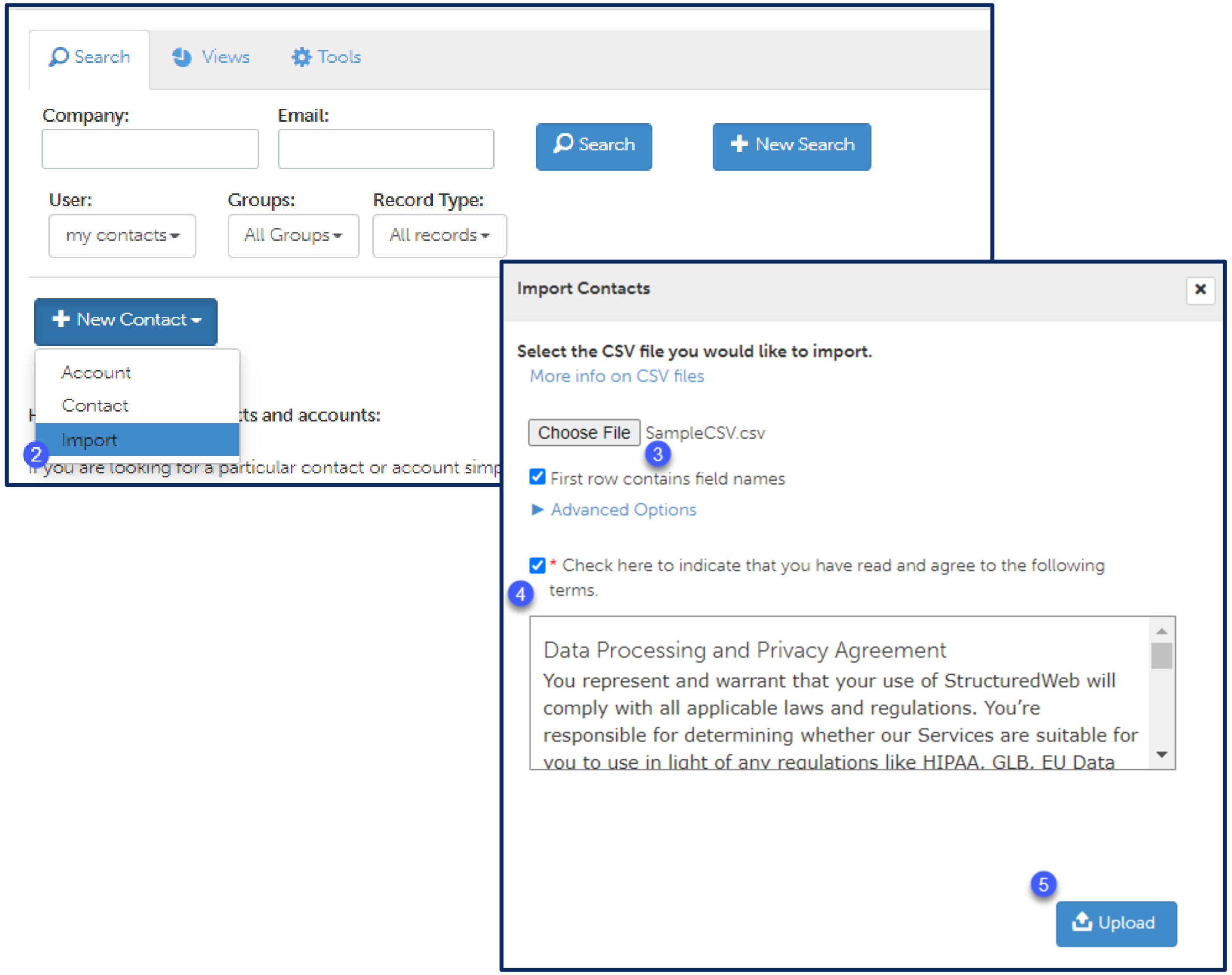
Once imported, map your column header to the appropriate field name.



First Name	Last Name	Company	Email
John	Smith	ABC Company	donotreply@abccompany.com
Tony	Johnson	Tech Company	donotreply@Techcompany.com
Leslie	Bayly	XYZ Company	donotreply@xyzcompany.com
George	Gonzalez	TechZ Company	donotreply@techzcompany.com

2. Importing Contacts(1)

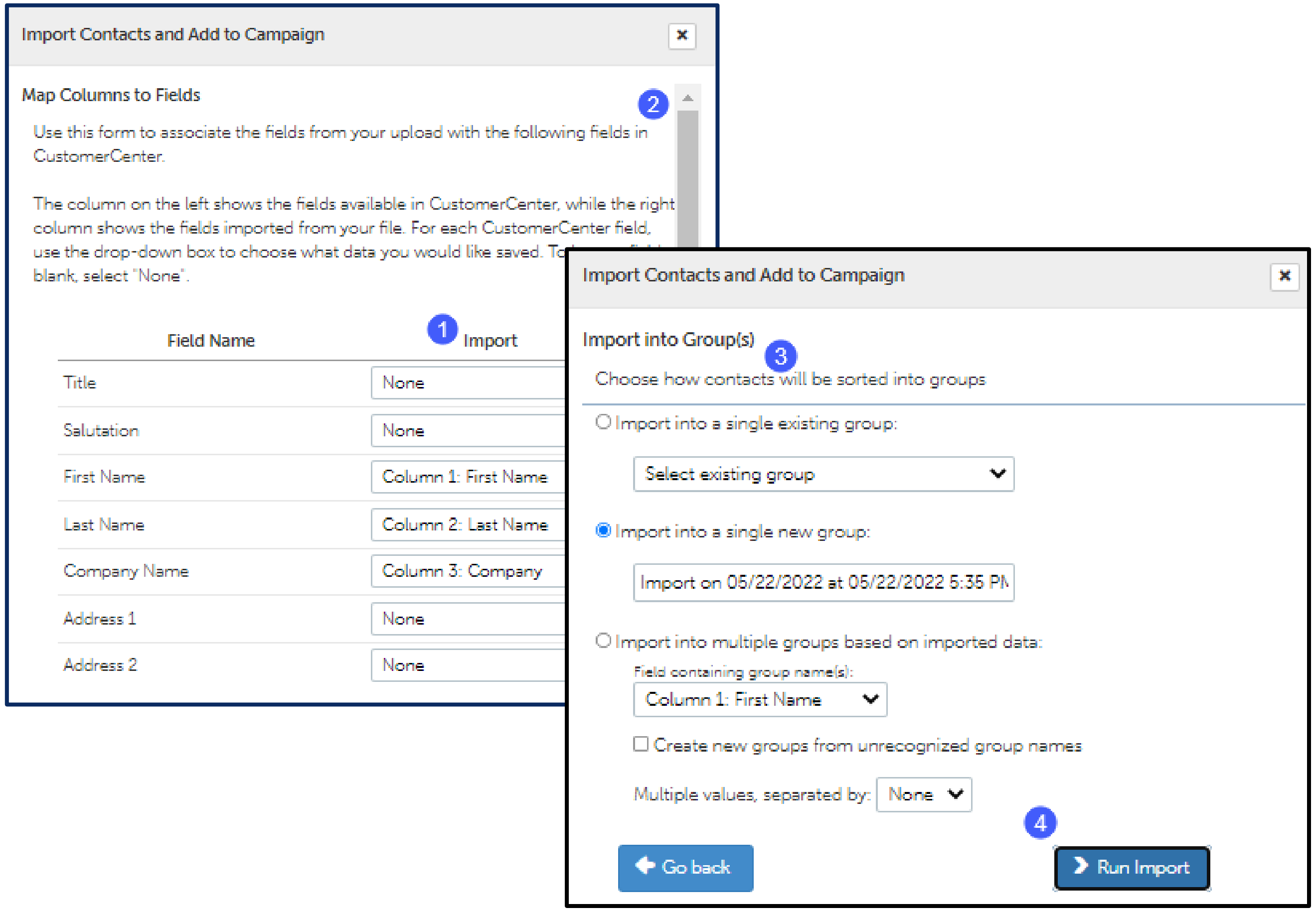
1. From the toolbar, select **My Marketing > Contacts**. Then select **Contacts** (Review How do I navigate Partner Marketing Center?)
2. From the **Search** tab, select **New > Import**.
3. From the Import Contacts box, click **Choose File**, then select the **prepared CSV file** from your local drive. (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**.

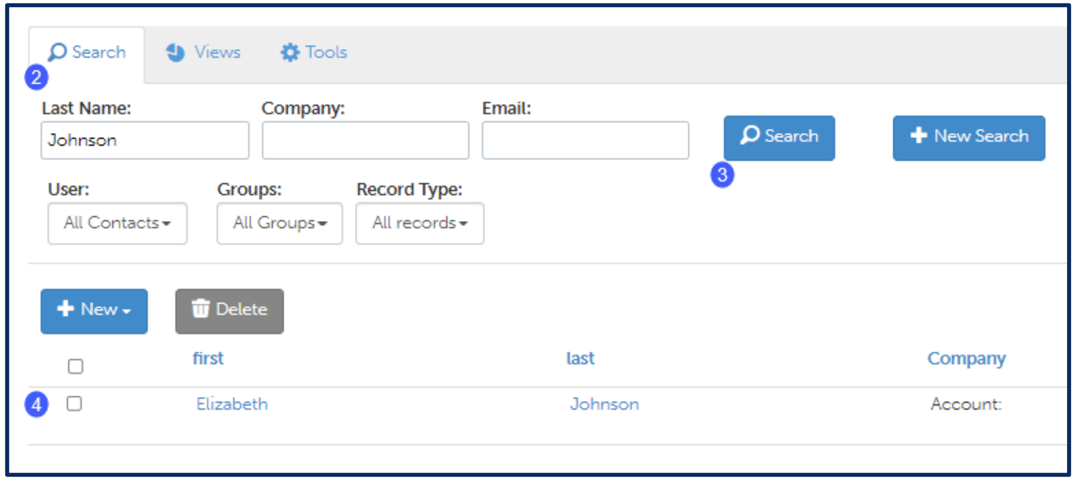
Once contacts have been uploaded you find a confirmation page alerting you that all contacts have been uploaded successfully.



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**.

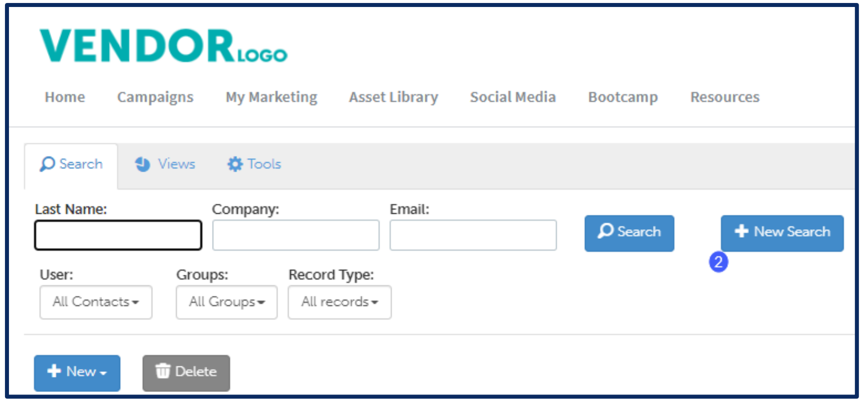


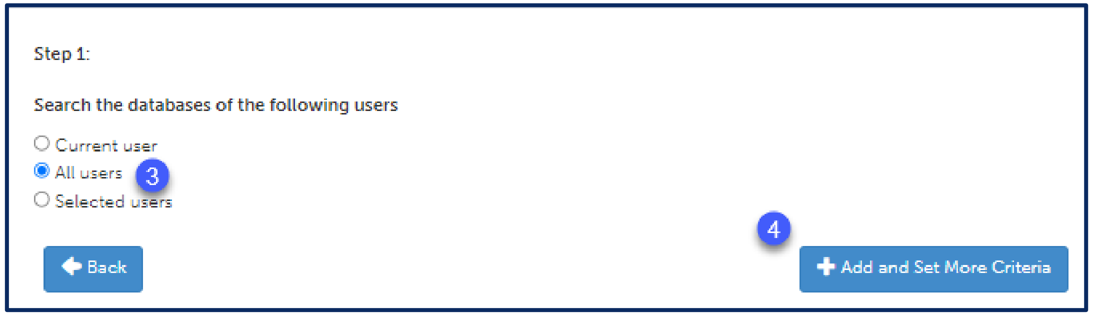
2. Searching for Contacts(Advanced 1)

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:

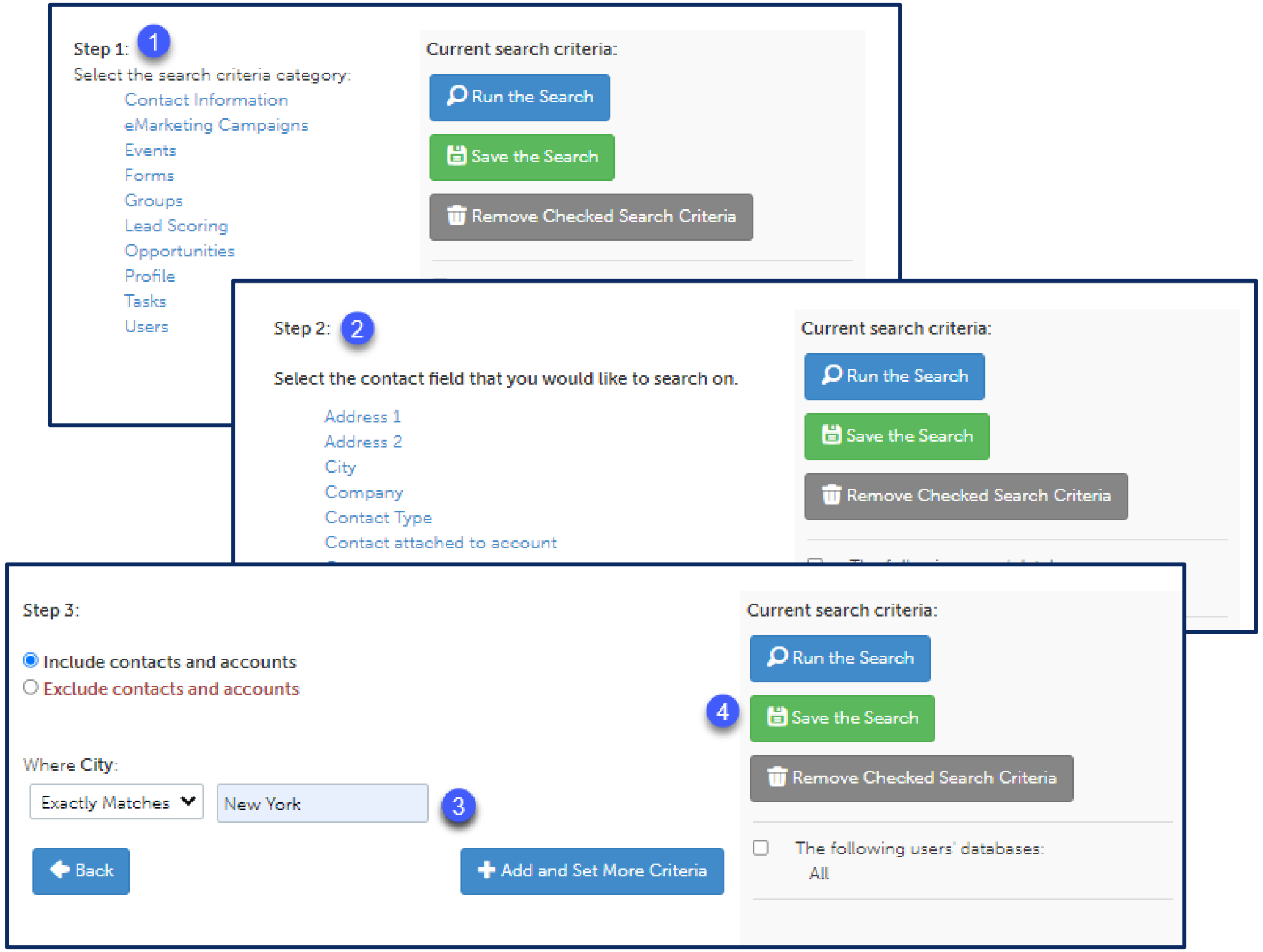
1. From the toolbar, select **Reports & Contacts > Contacts.** (Review How do I navigate the Partner Marketing Center?)
2. In the **Search** tab, click **New Search**. A new page opens.
3. In Step 1, select **All Users**. (Note: when selecting All Users, all contacts will appear across all users of the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





3. Searching for Contacts (Advanced 2)

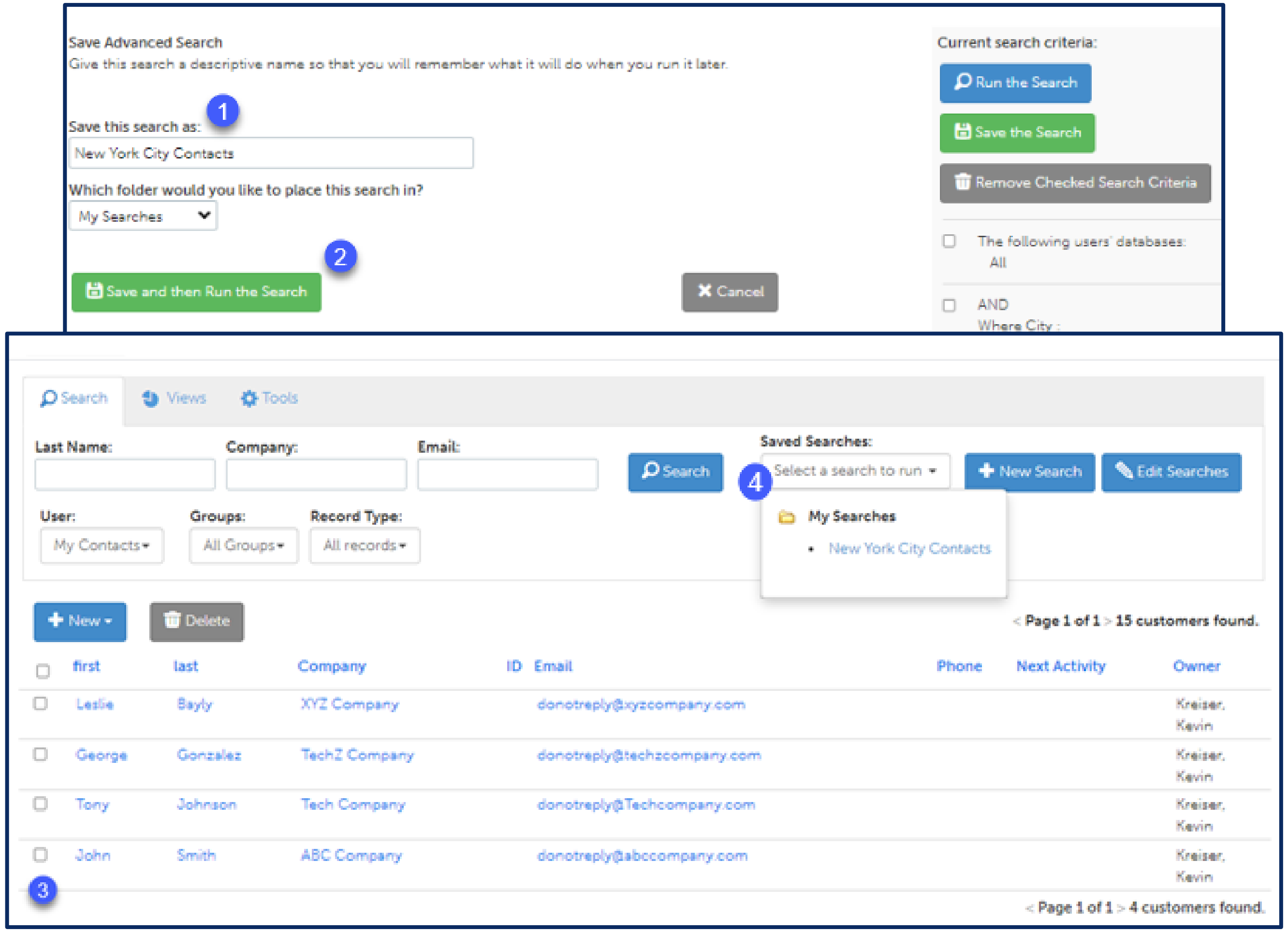
1. From the **Select the search category** area, select the **appropriate search criteria**. (In this example, Contact Information is selected).
2. From the **Select the contact field that you would like to search on** area, select the **appropriate contact field**. (In this example, City is selected)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



3. Searching for Contacts (Advanced 3)

Main Menu | Return to Lesson 5

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.

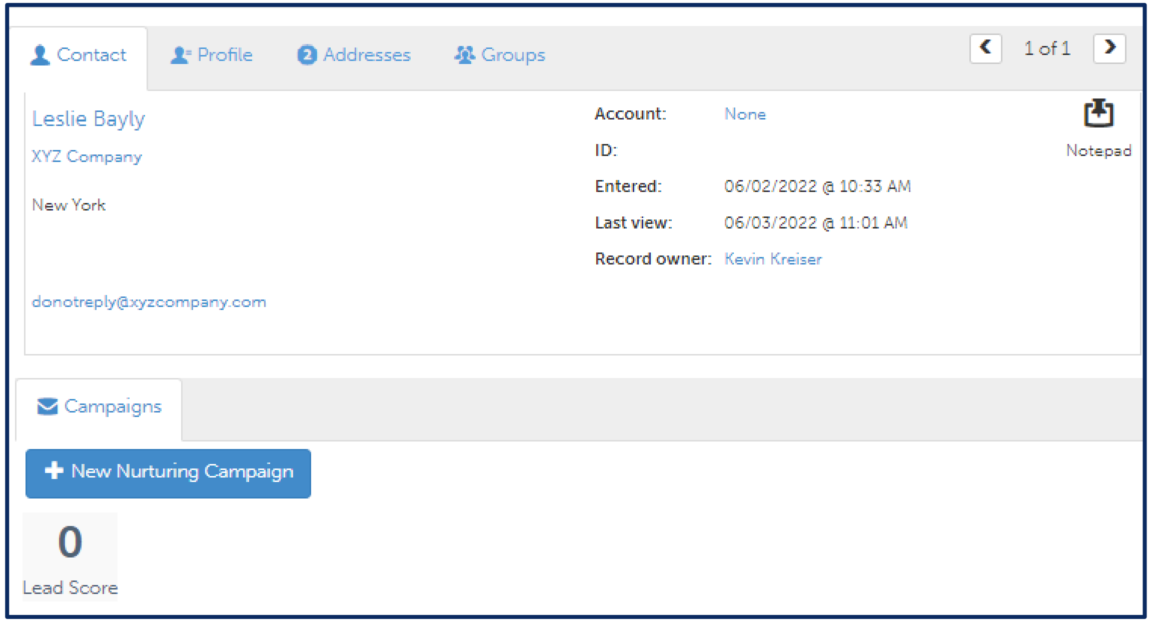


4. Viewing Contact information

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.



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.

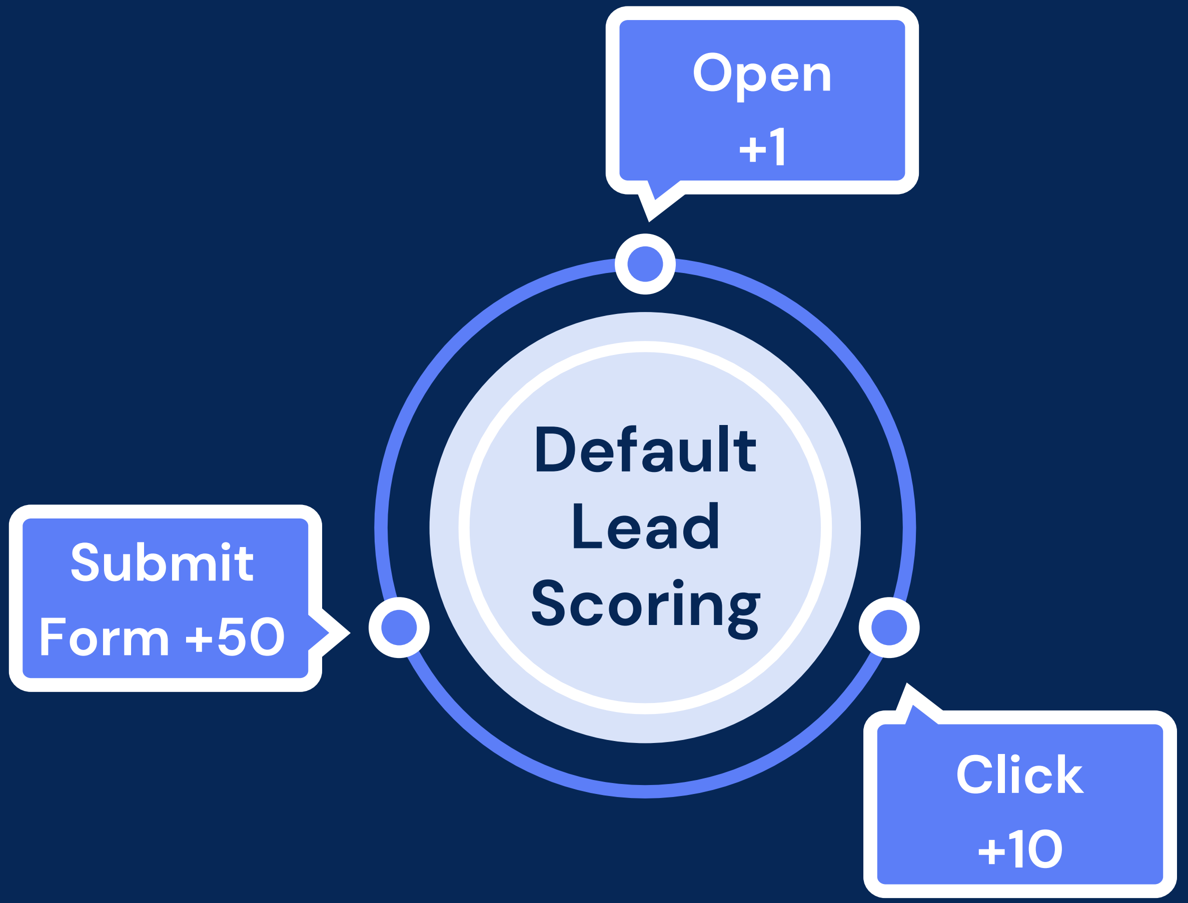
However, at its core, the platform is designed for one single purpose … generating and managing your leads.

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.

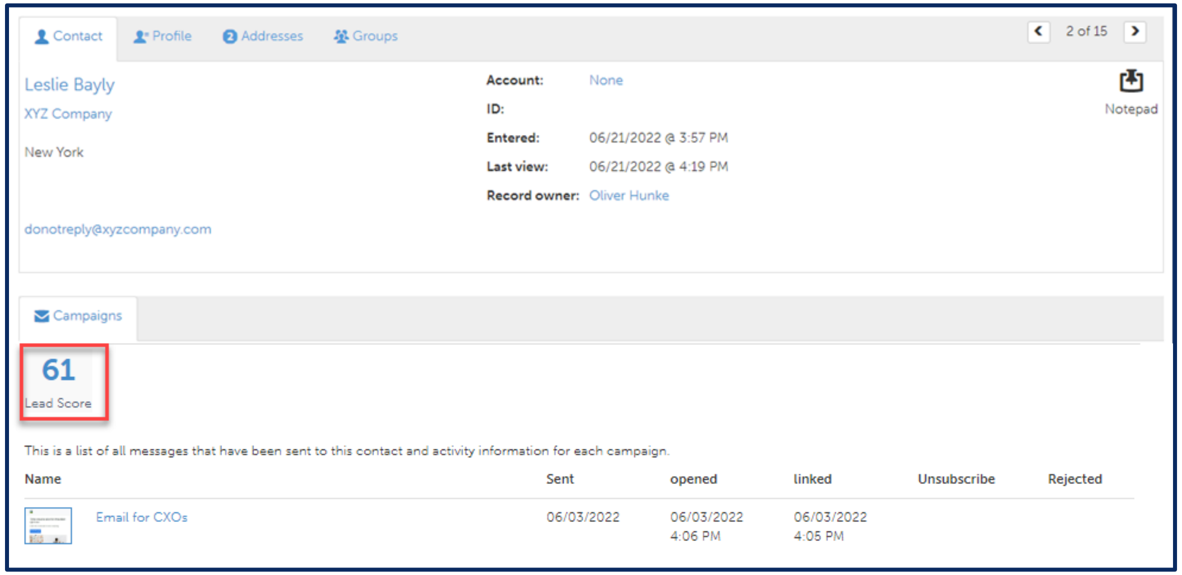


Where do I find lead scores?

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.



Where do I locate Lead Management (1)?

Main Menu | Return to Lesson 6

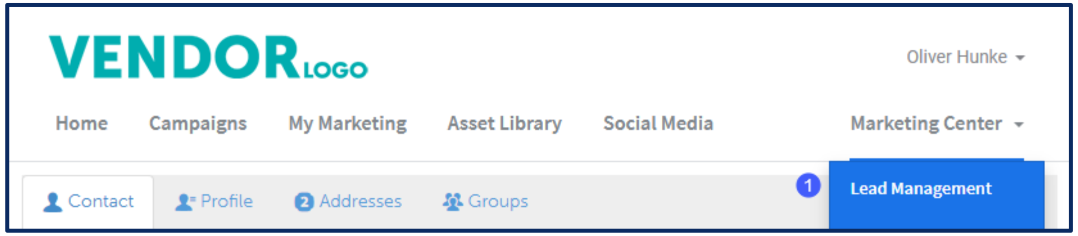
Lead management is a separate area of Partner Marketing Center to identify and manage your leads. To view all your leads from inside Lead Management, do the following:

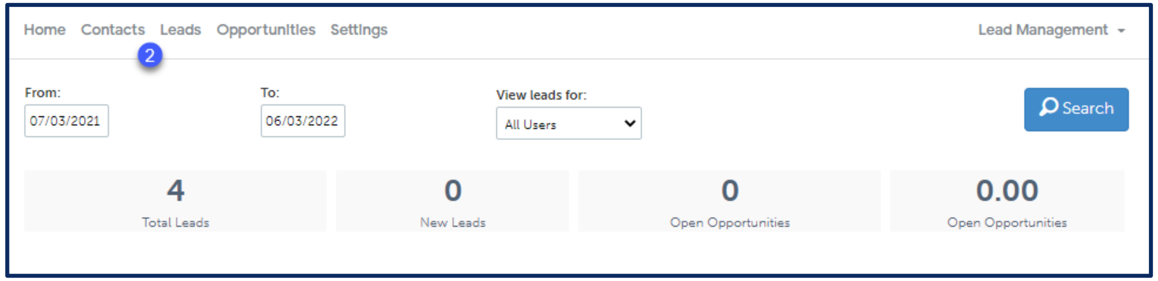
1. On the right-hand side of the page, from the **drop-down menu**, select **Lead Management.**

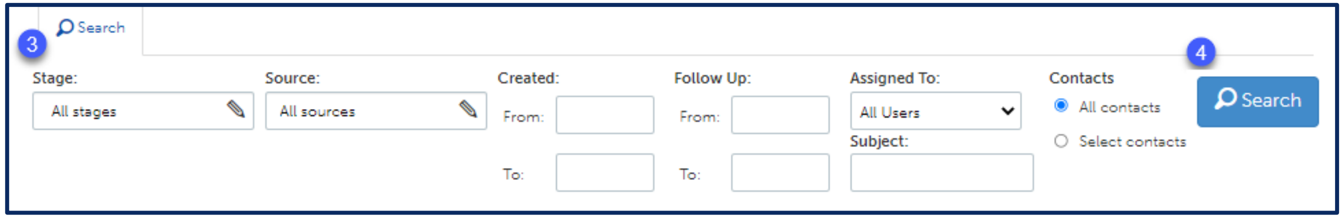
2. On the toolbar, click **Leads**.

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**.



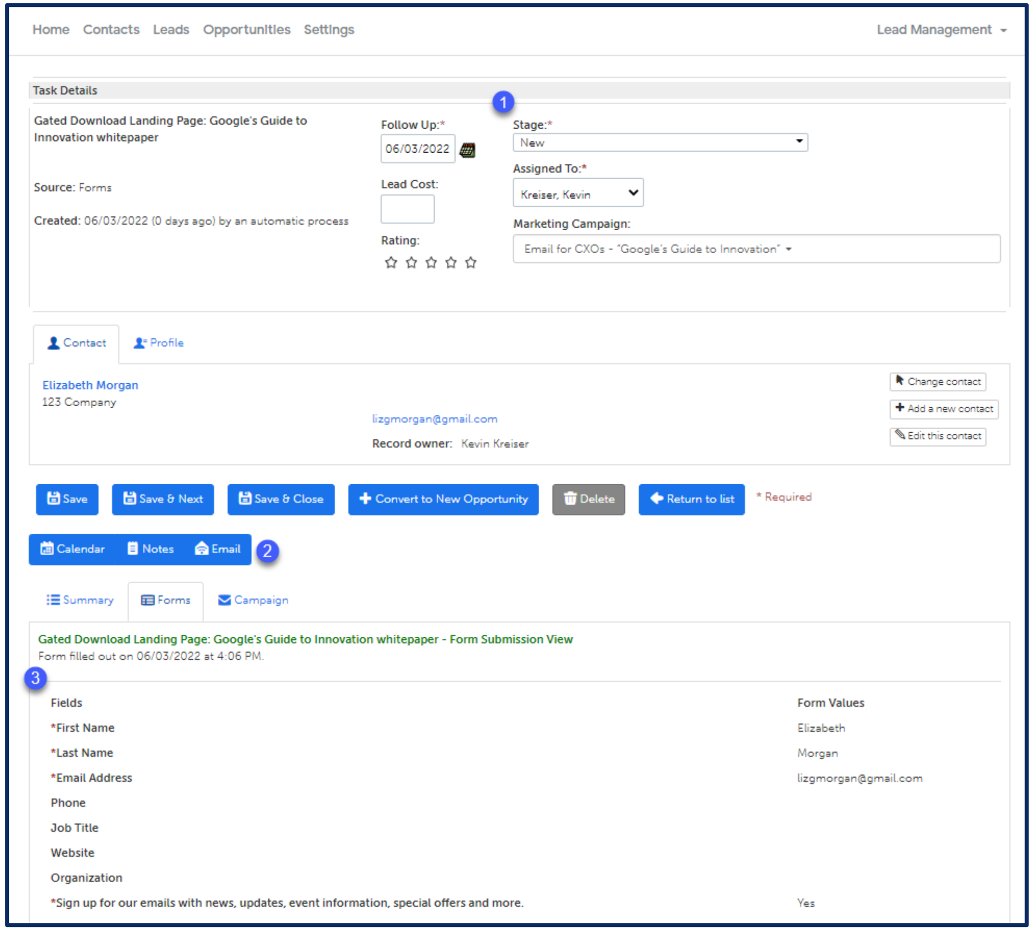




Where do I locate Lead Management (2)?

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



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.

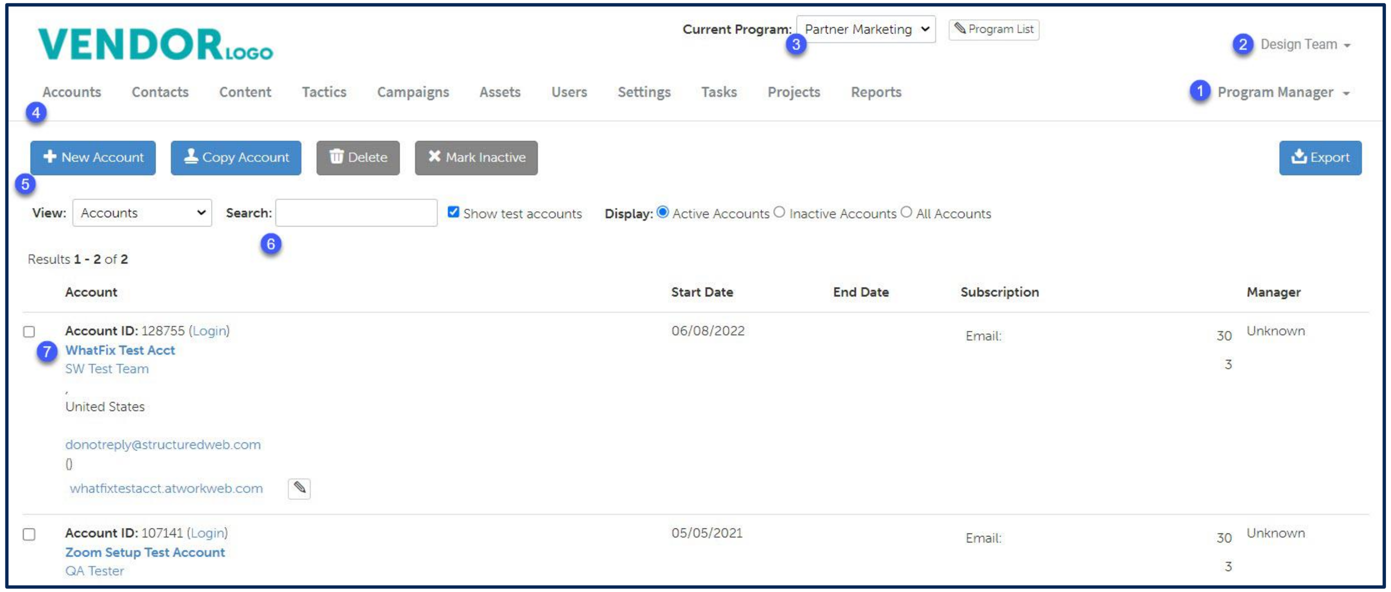
Program Manager Features

- 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?

Main Menu | Return to Lesson 7

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.



Lesson 8:

Managing Partner Accounts

We will cover these skills:

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

How do I use Program Manager?

Main Menu | Return to Lesson 8

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.

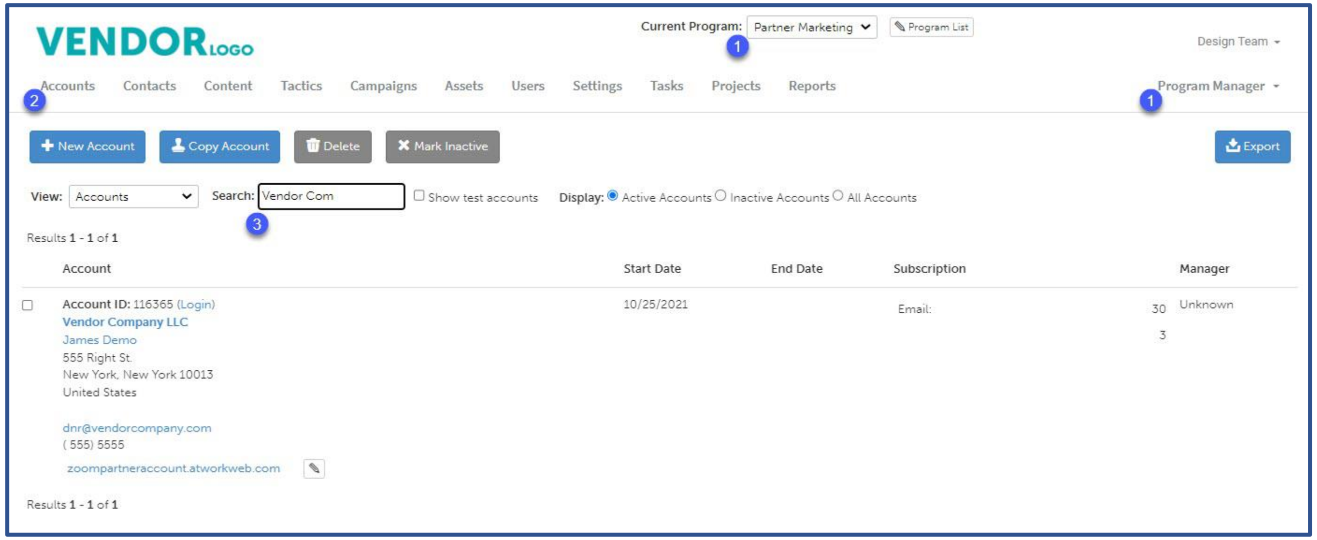
When managing your vendor’s partner accounts, complete the following tasks:

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:

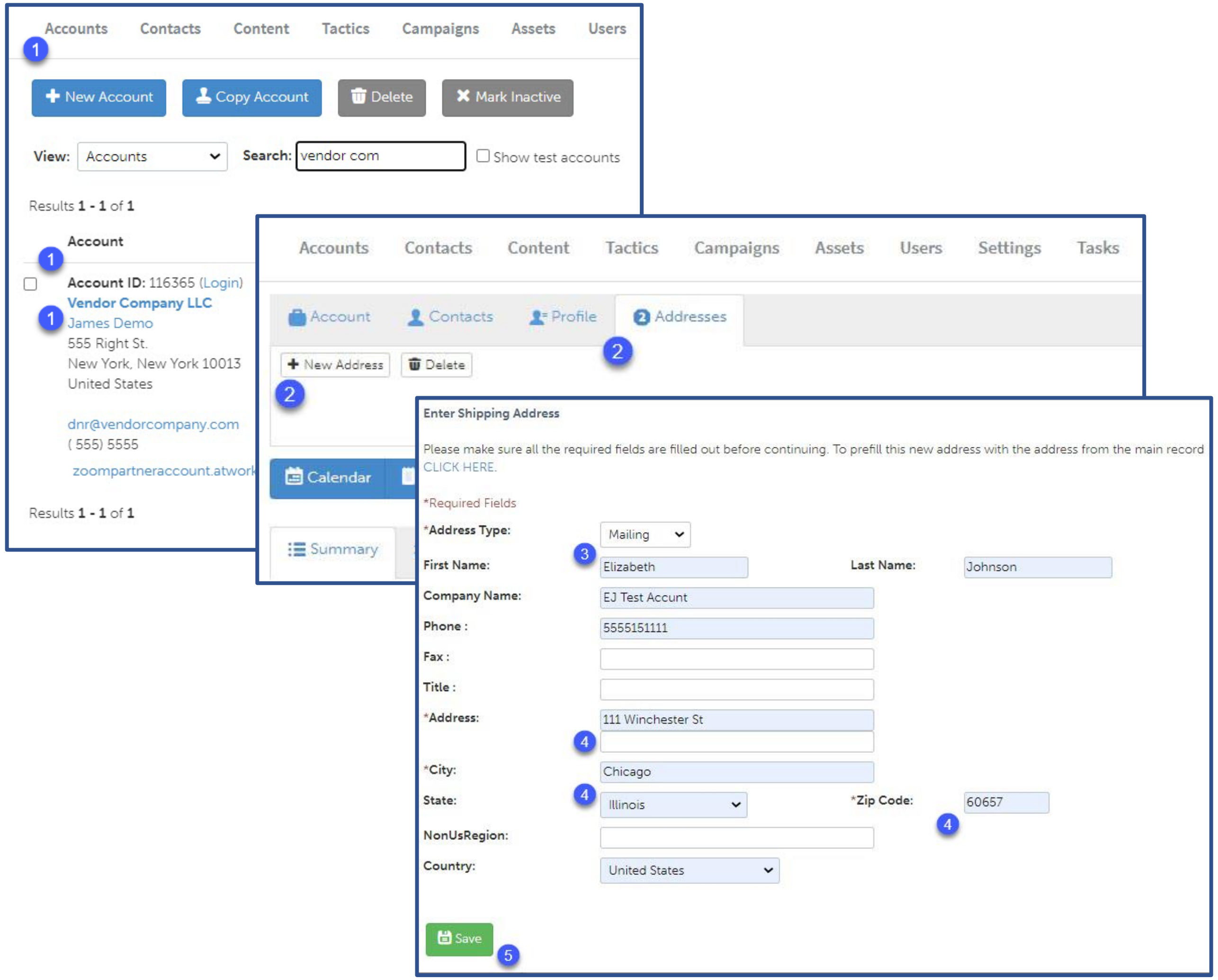
1. In **Program Manager**, from the **Current Program** drop-down menu, select the **program** for which the partner belongs.
2. Select the **Accounts** tab.
3. In the **Search** text field, type the **name of the account** you want to access. (Note: As you type, options dynamically appear.)



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:

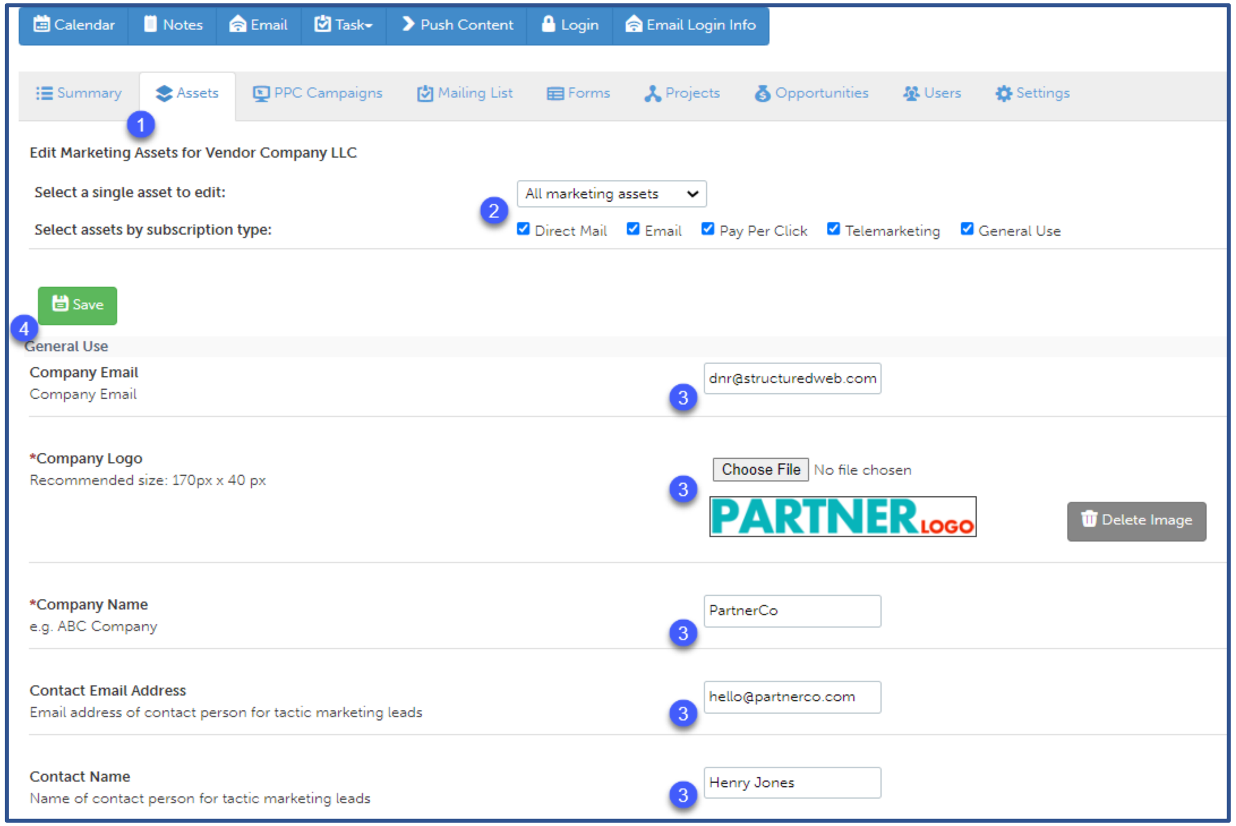
1. From the **Accounts** tab, in the **Account** column, click on the **account name**. The account record opens.
2. In the top header, click **Addresses**. Then select **New Address**.
3. Select the **Address Type**.
4. Enter **all required fields**. (Note: Required fields contain a red asterisk.)
5.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



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:

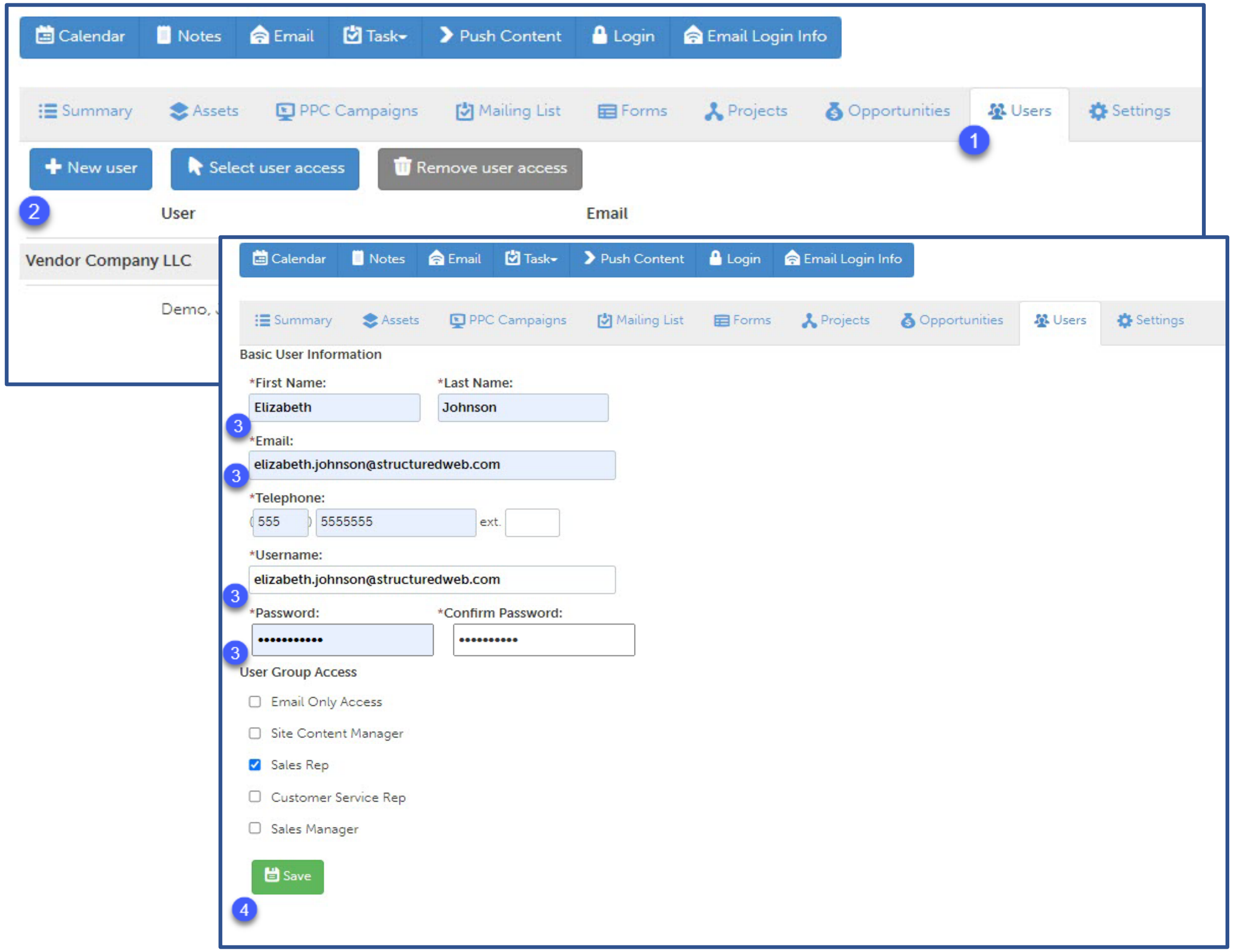
1. From the middle header, click **Assets**.
2. From the **Select a single asset to edit** drop-down menu, select **All marketing assets**.
3. Verify that **all fields are entered**. If needed, in the **associated text box**, enter **marketing assets**. (Note: you must verify all marketing assets with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



5. Use the Actions tool bar

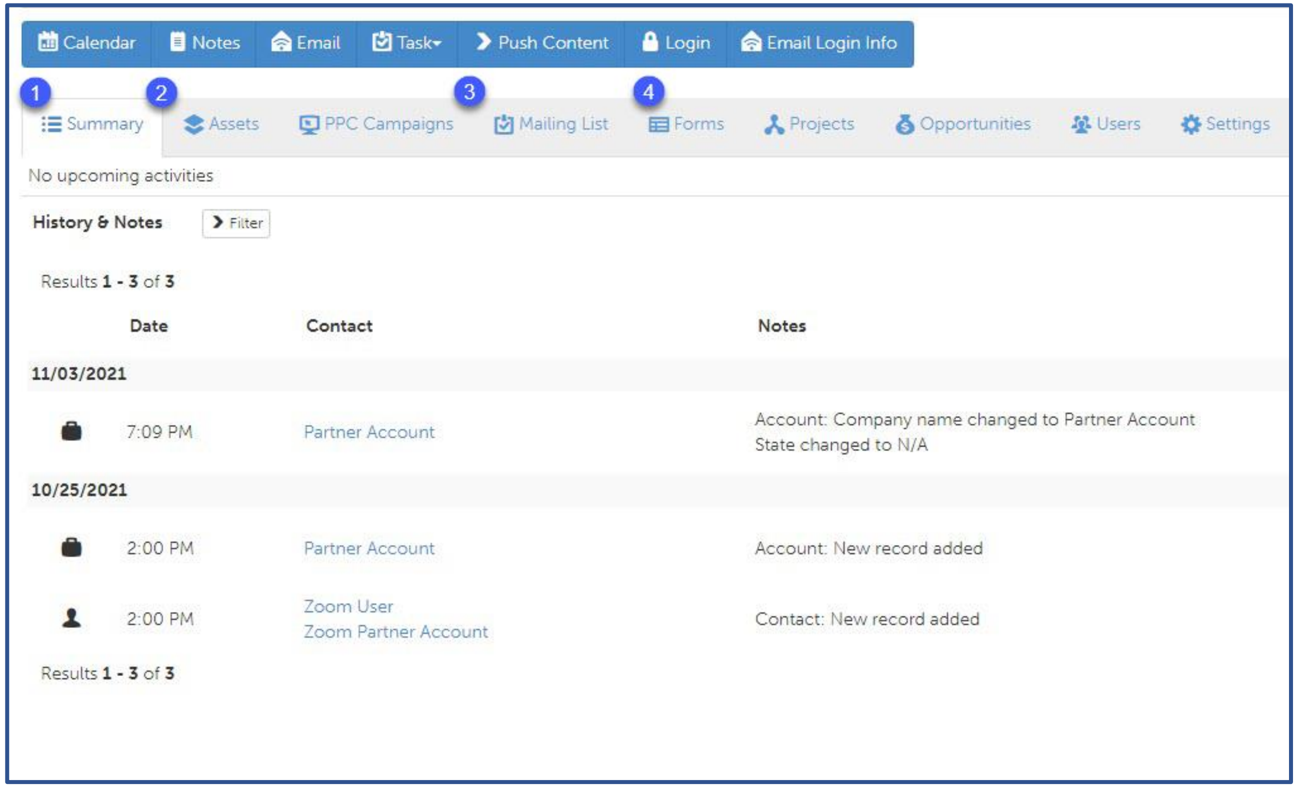
The Actions toolbar helps you keep track of your interactions with partner accounts, use the following tools:

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

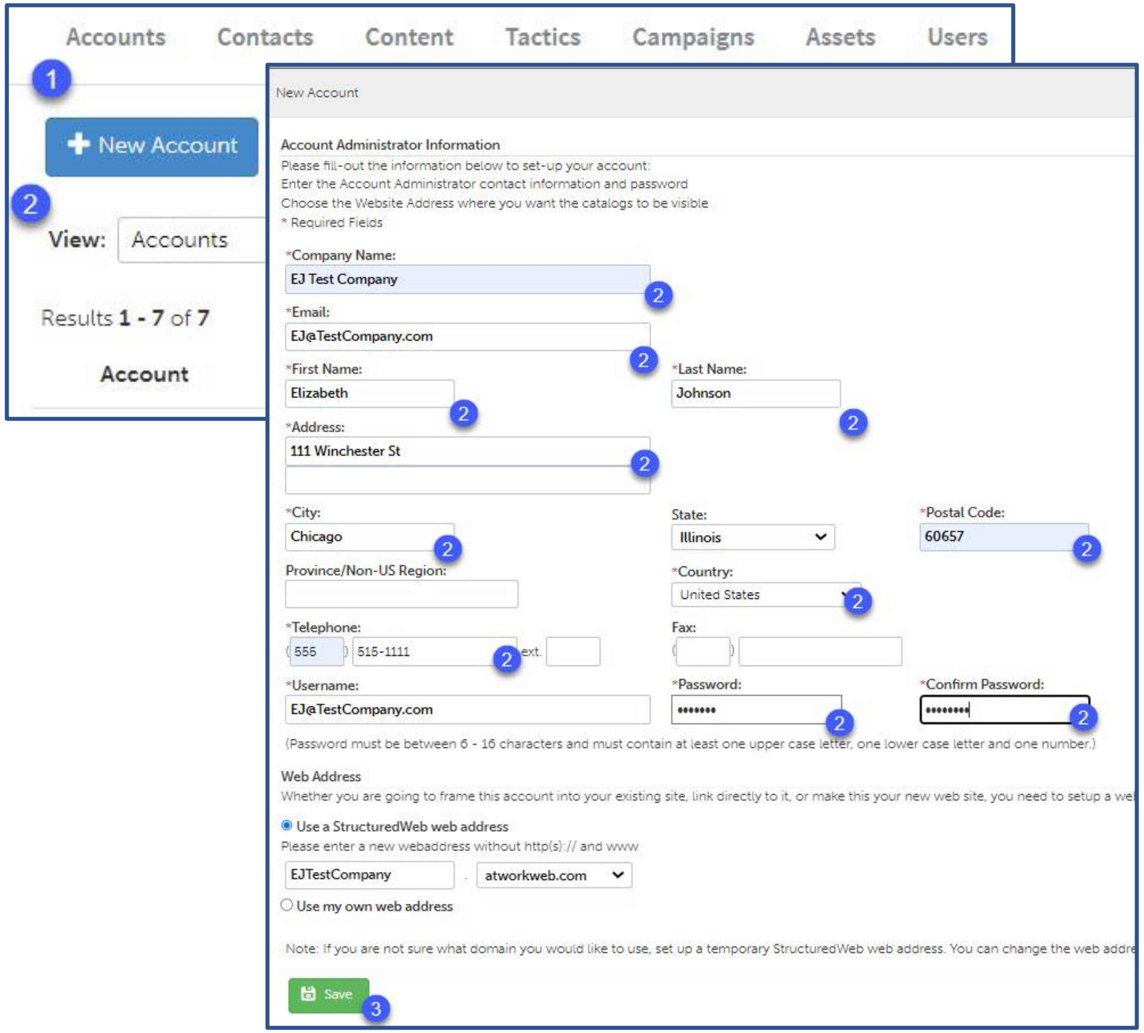
In most cases, new partner accounts are created by the vendor's SSO, however, you may need to create manual accounts for test purposes to …

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.

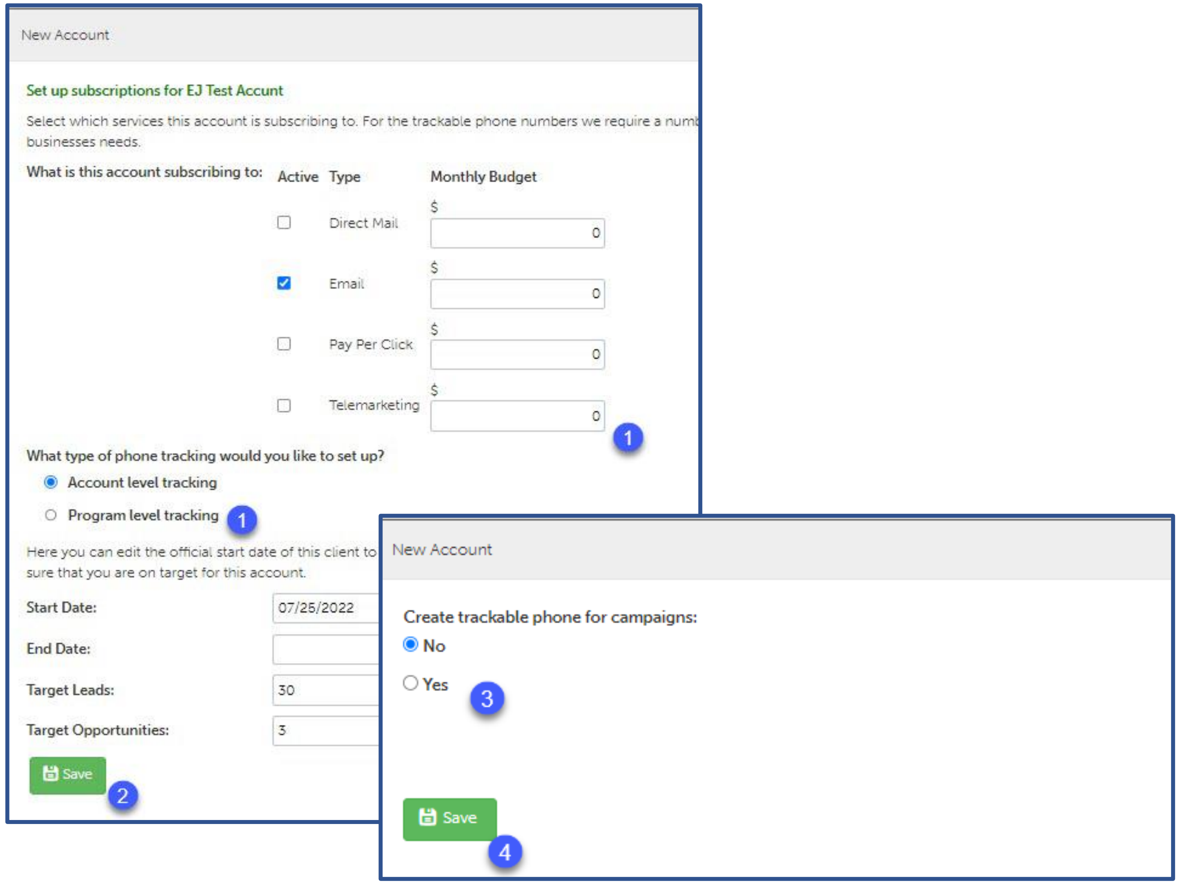
2. In the **Account Information** area, enter **all required fields**. (Note: Required fields contain a red asterisk.)

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**.



6. Create Manual Accounts

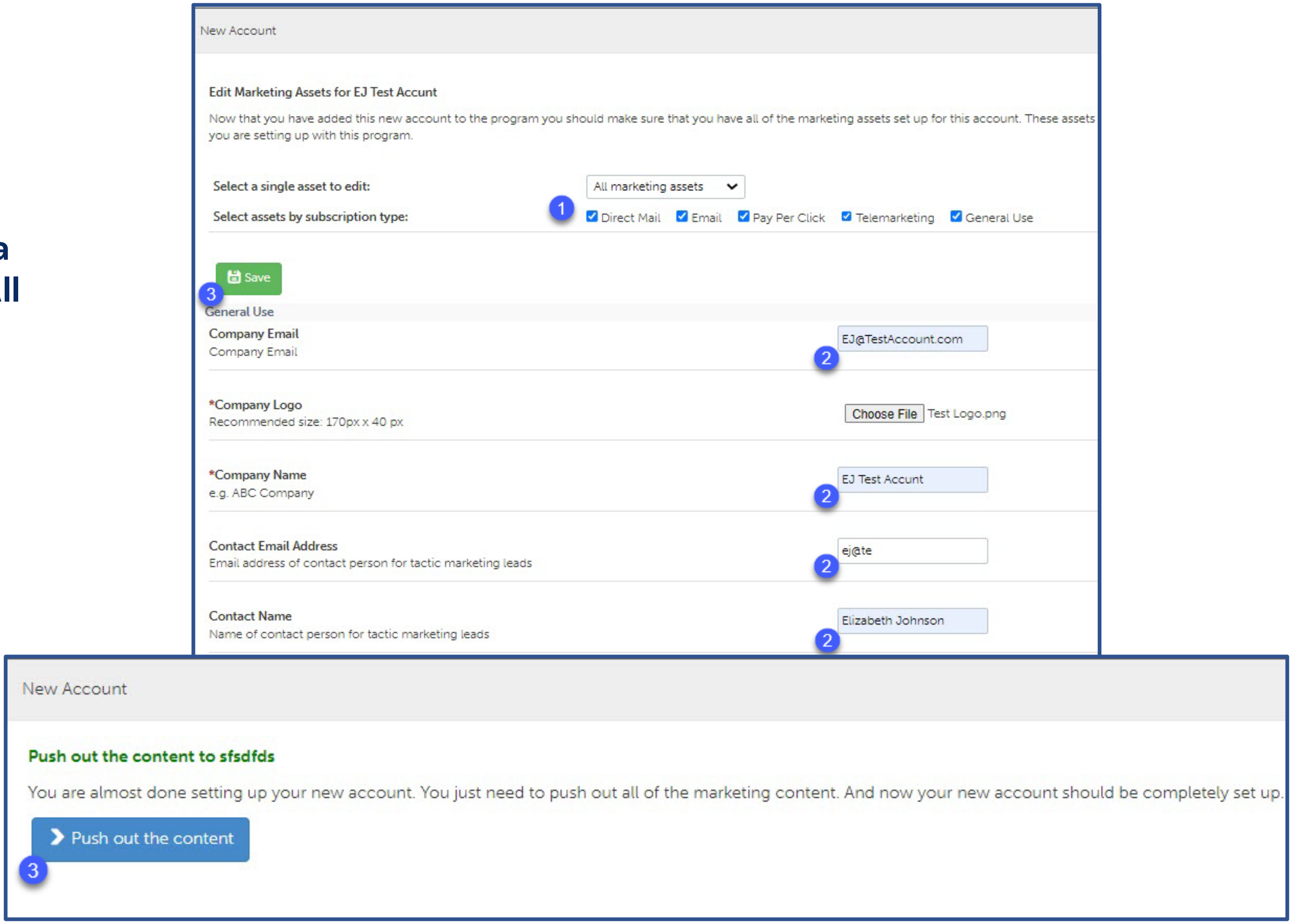
In the next box, enter generic marketing assets to test cobranding functionality from your instance. From there, push vendor content to the new teest account Do the following:

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.

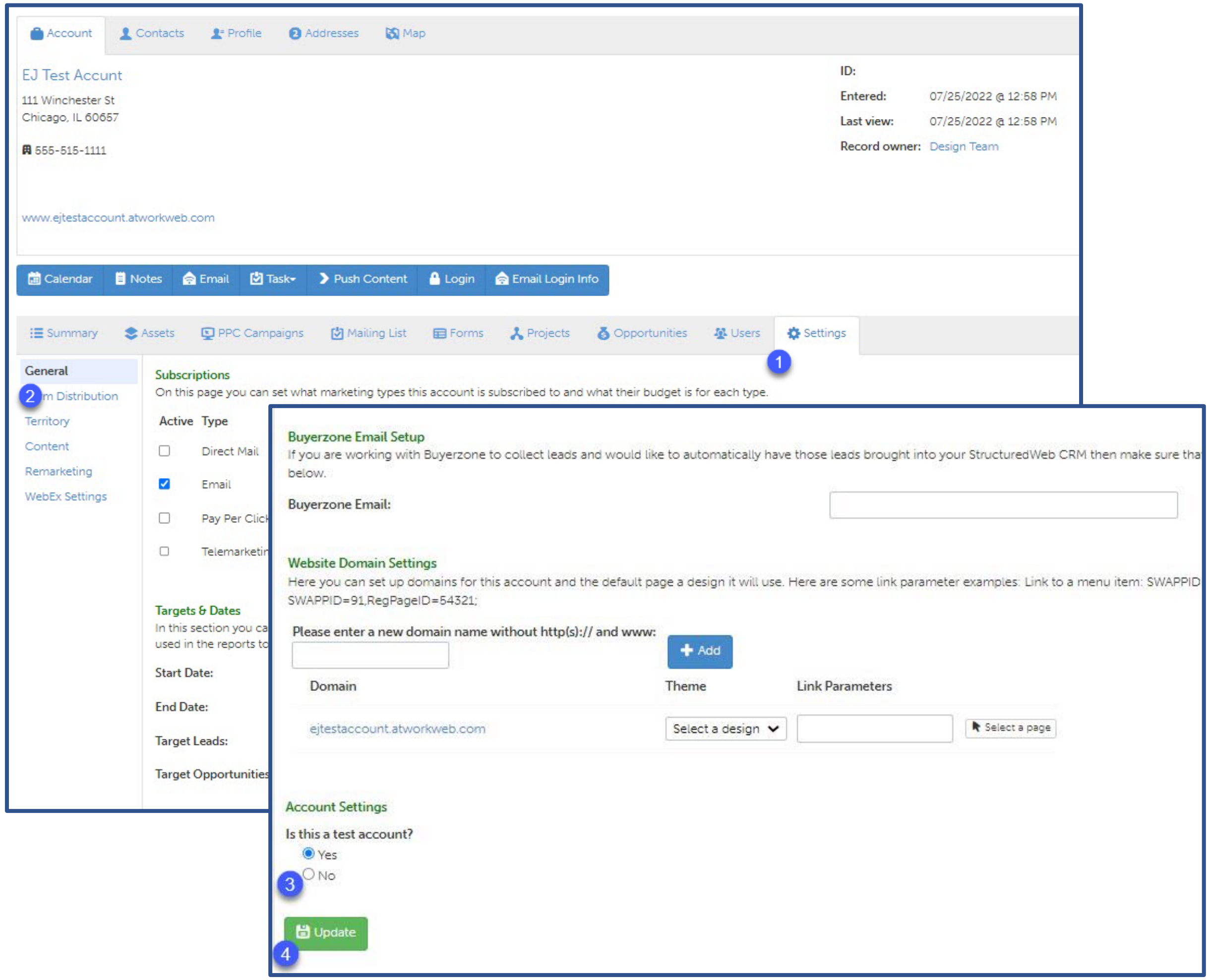
4. Click **Push out the content**. Your new test account is created.



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!