



## 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

Elizabeth Johnson  
Customer EDUCATION MANAGER

# 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



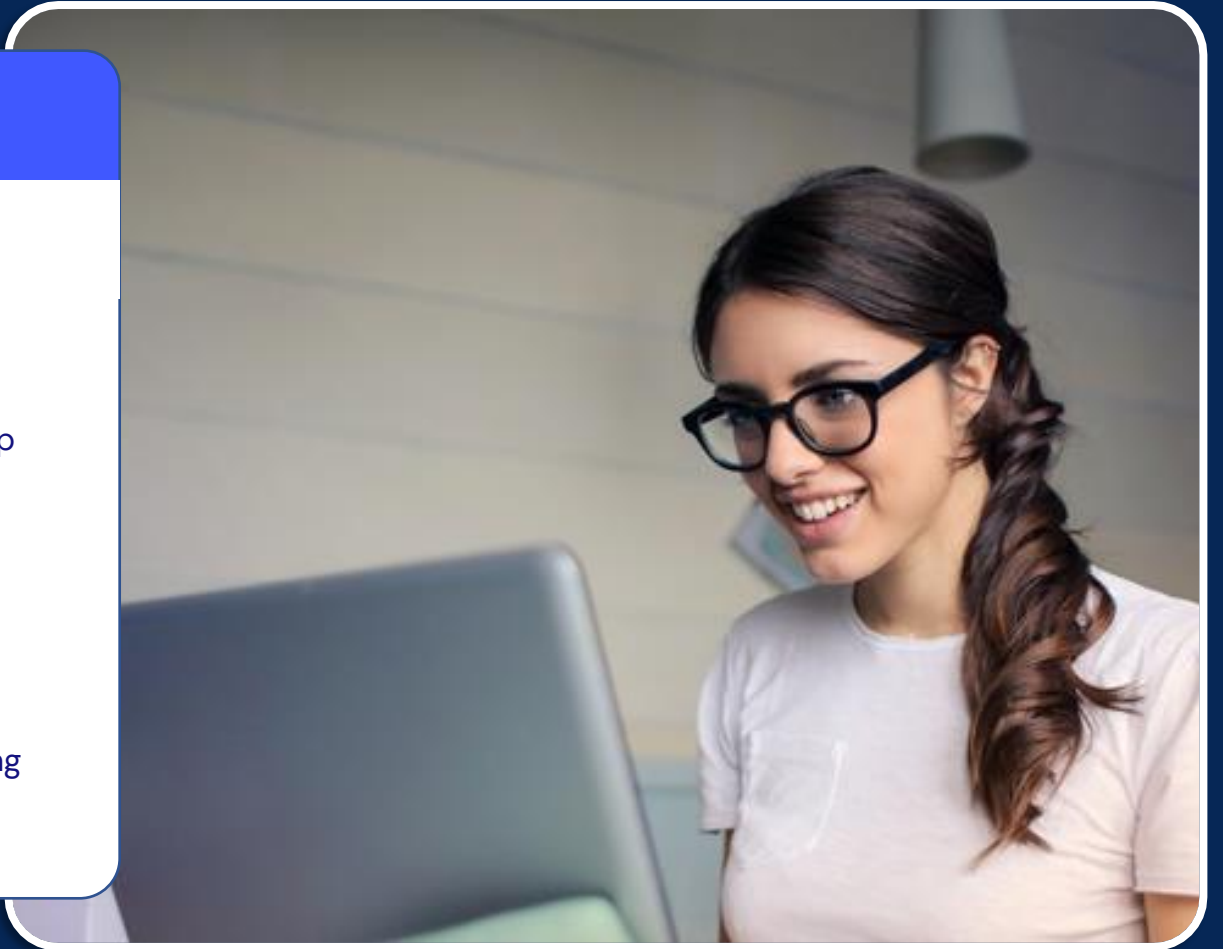
Lesson 4: Reviewing  
reporting options



Lesson 5: Reviewing  
contact management  
capabilities



Lesson 6: Introducing  
lead management



## Lesson 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?](#)



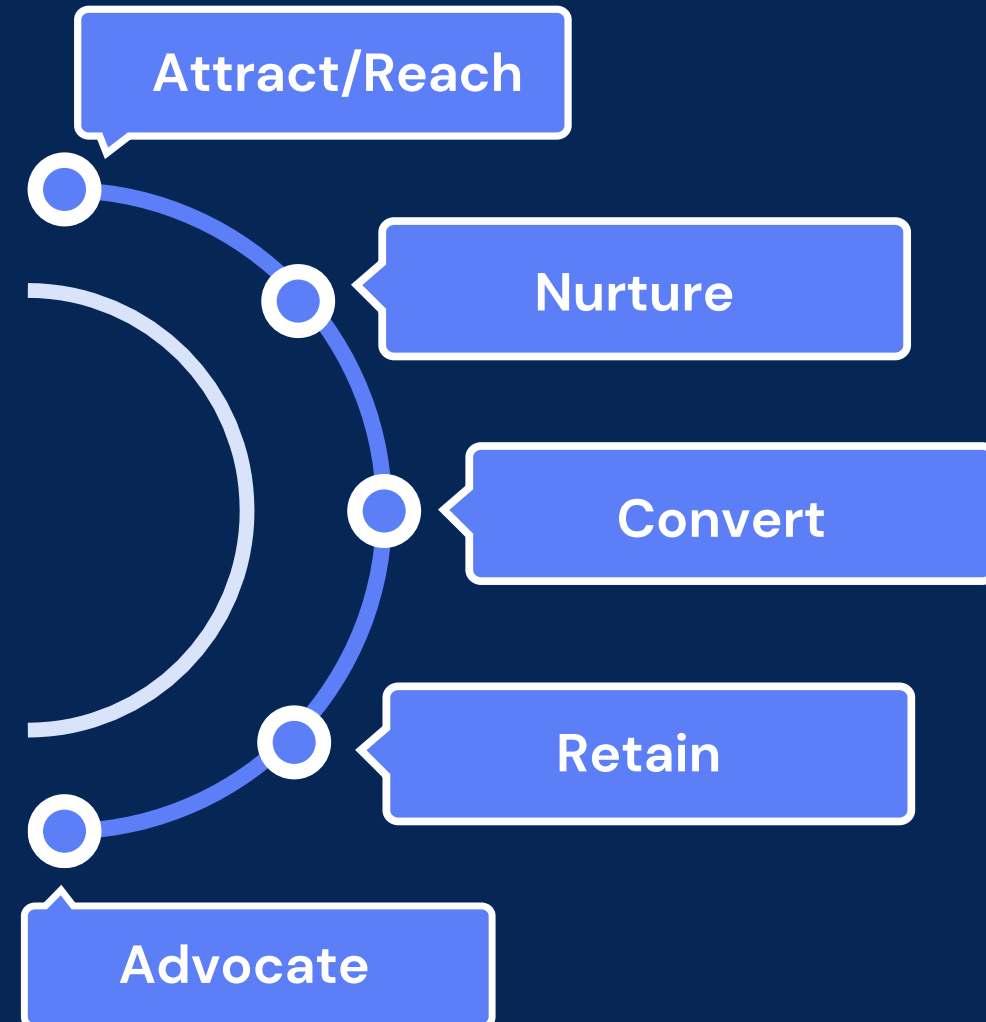
# What is Partner Marketing Center?

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

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?](#)

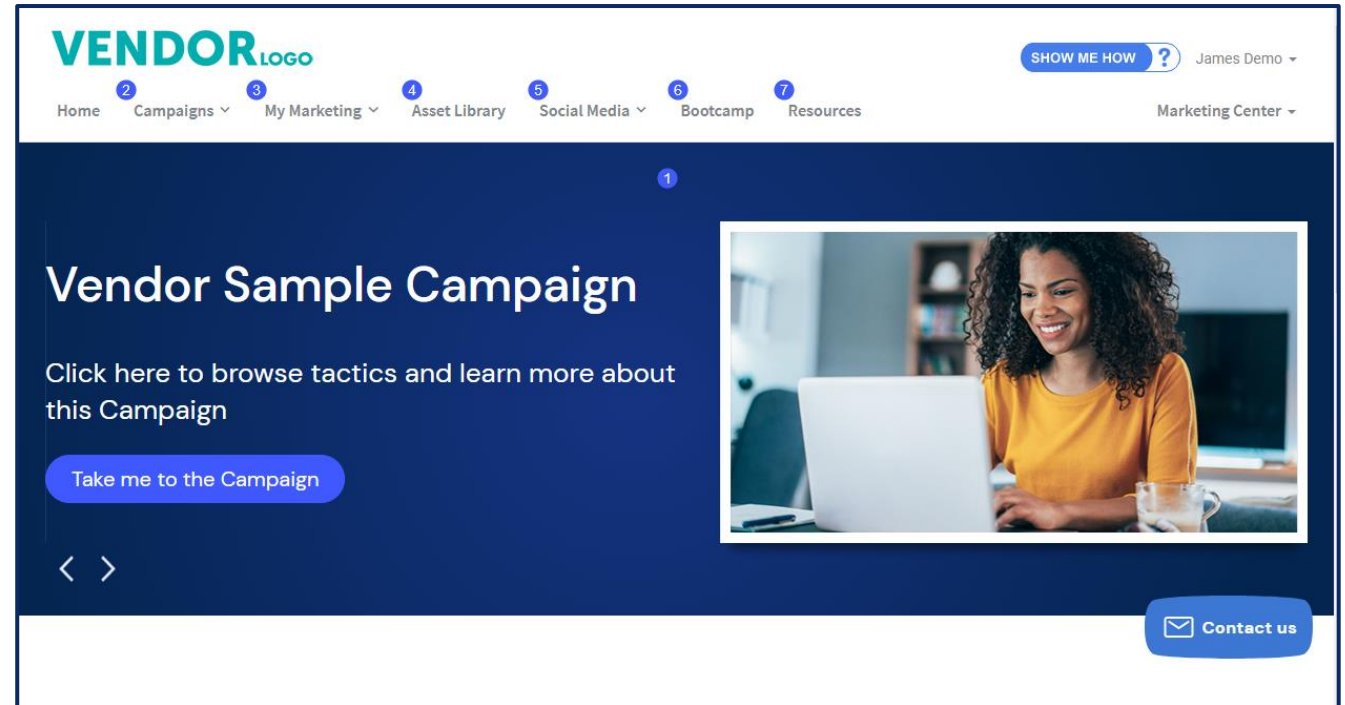




# How do I navigate Partner Marketing Center?

[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



# How do I create my profile?

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

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**.

2 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.

4 Save

**General Use** 3

**Company Email**  
Company Email dnr@structuredweb.com

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

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

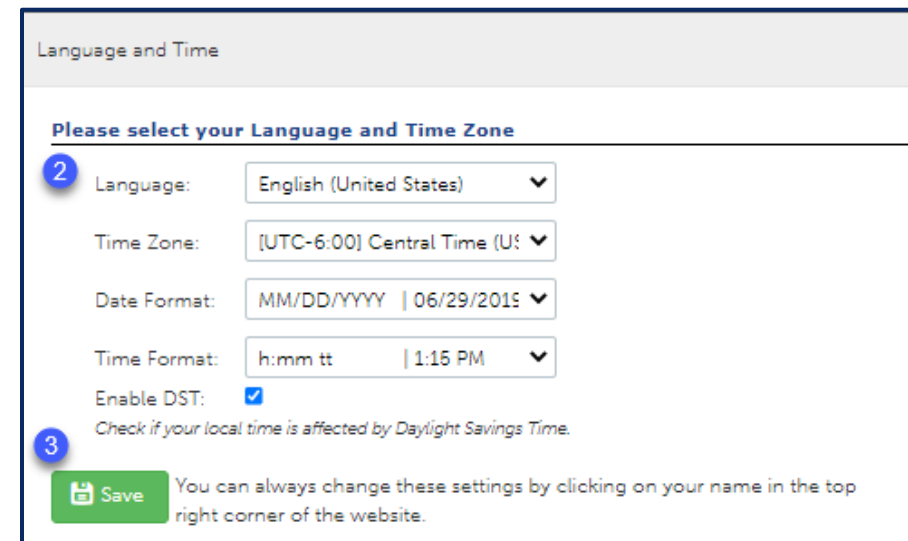
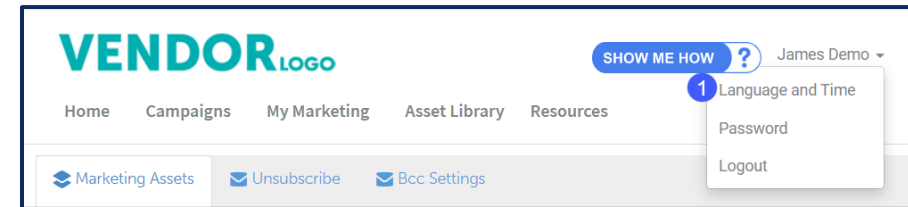
**Contact Email Address**  
Email address of contact person for tactic marketing leads hello@partnerco.com

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

# 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**.

A screenshot of the 'Language and Time' settings page. The title 'Language and Time' is at the top. Below it is a section titled 'Please select your Language and Time Zone'. There are four dropdown menus: 'Language' (set to 'English (United States)'), 'Time Zone' (set to '[UTC-6:00] Central Time (U...)', 'Date Format' (set to 'MM/DD/YYYY | 06/29/2015'), and 'Time Format' (set to 'h:mm tt | 1:15 PM'). Below these is a checkbox for 'Enable DST' which is checked. A note says 'Check if your local time is affected by Daylight Savings Time.' At the bottom left is a green 'Save' button with a floppy disk icon. At the bottom right is a message: 'You can always change these settings by clicking on your name in the top right corner of the website.' A blue circle with the number 2 is next to the 'Language' dropdown, and a blue circle with the number 3 is next to the 'Save' button.

## 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](#)

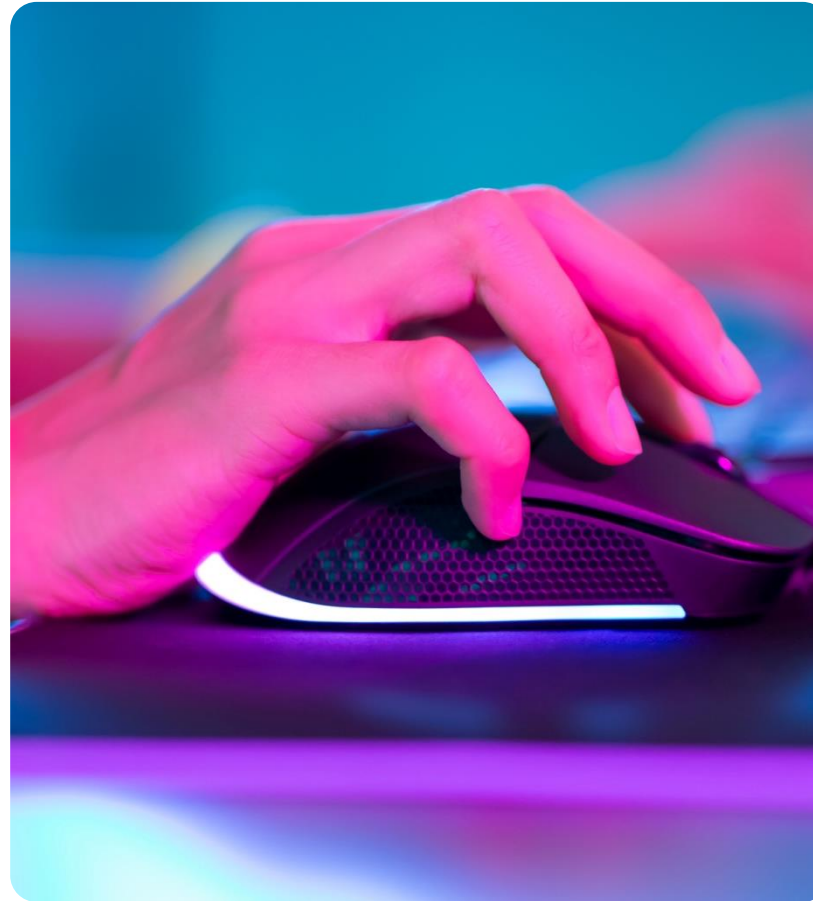
## Downloadable

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.

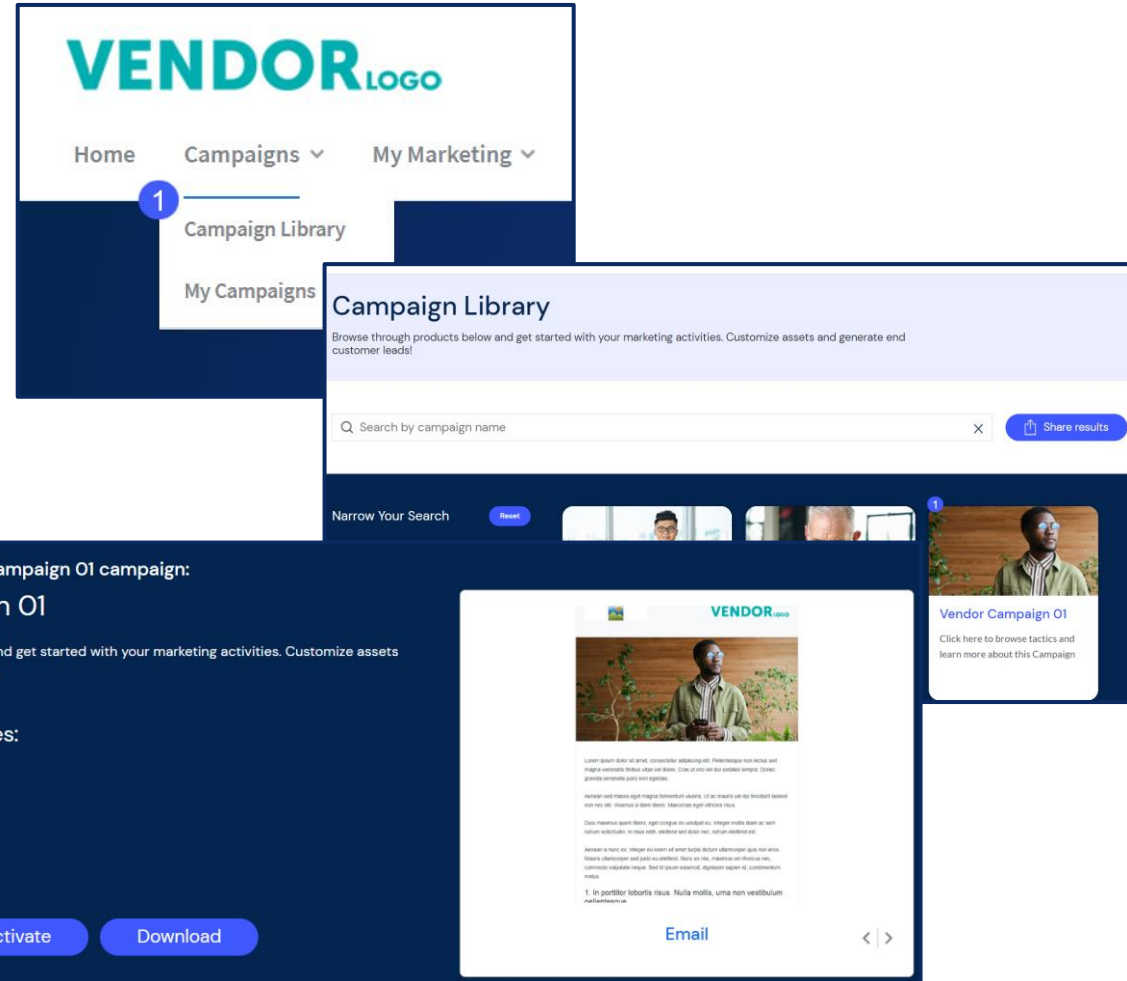
### Examples:

- 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 campaign setup process with four numbered steps:

- Step 1:** 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".
- Step 2:** A blue button labeled "Yes, proceed" is highlighted.
- Step 3:** The main campaign page is shown. At the top, it says "Campaign Name: Vendor Campaign 01 #2" with an "Edit" link. Below this is a section titled "Your landing page(s)" with a description: "Landing pages help your prospects discover more about your offering and can be a way to promote and nurture tactics below, but can also be used as standalone pages." Below the text is a preview of a landing page with the heading "VENDOR" and a placeholder image.
- Step 4:** At the bottom of the landing page preview, there is a green checkmark, the text "Vendor Campaign 01 Landing Page", and an "Edit" link.



# How do I set up a landing page?

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

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.

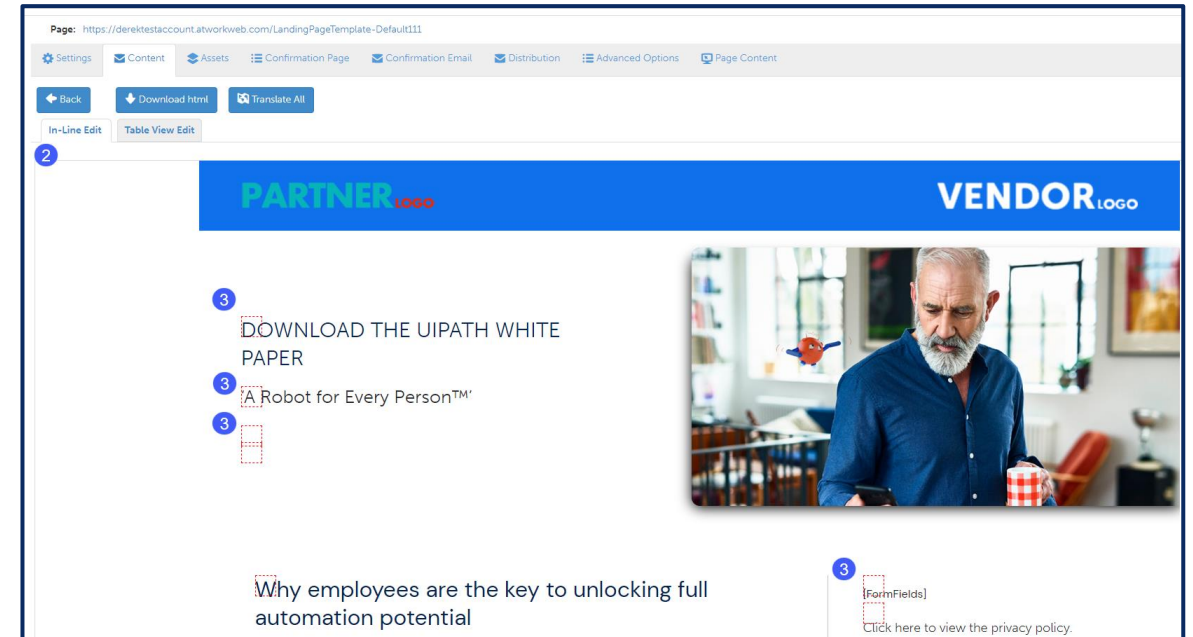
**When setting up a landing page, complete the following steps:**

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)

Main Menu | Return to Lesson 3 | How do I set up a landing page?

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**.

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

Back

**Edit Marketing Assets for Vendor Co - Olli Test**

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 test@test.com

**\*Company Logo**  
Recommended minimum size: 170px X 40px  
Choose File No file chosen  
PartnerCompany Delete Image

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

**Partner logo**  
Partner logo Choose File No file chosen

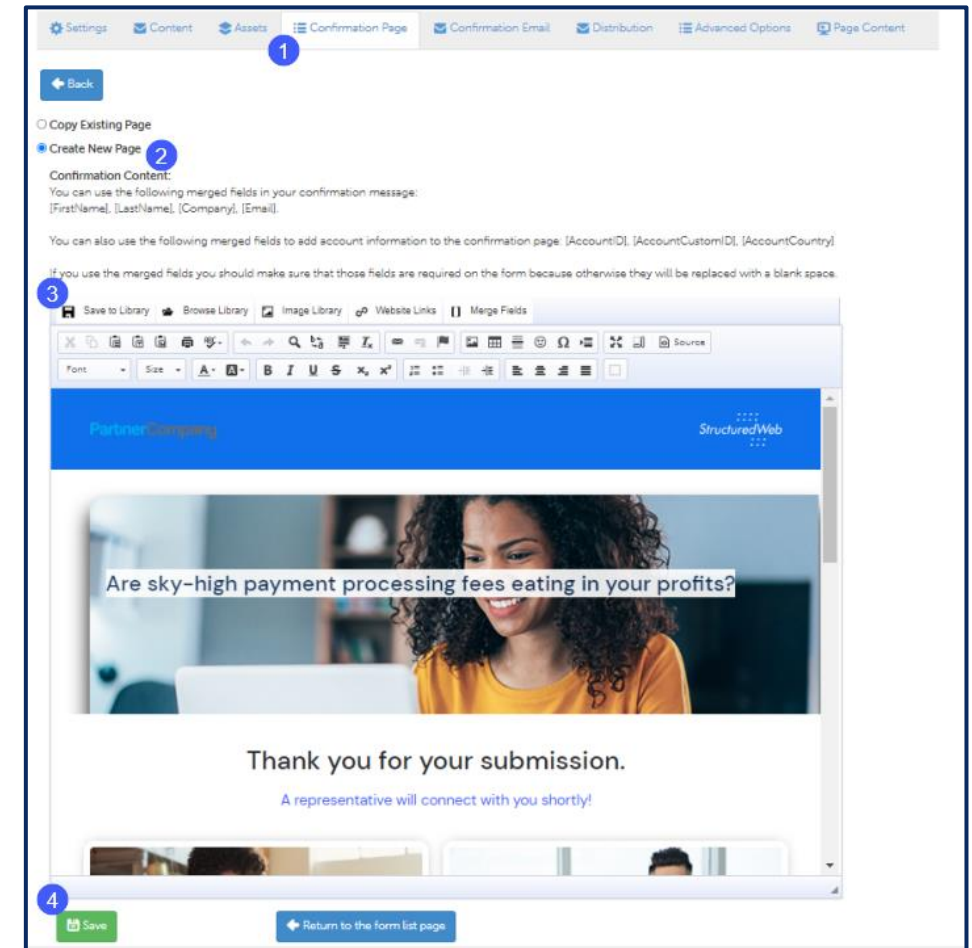
**Phone Number**  
Phone Number 6465555555

# 3. Setup Confirmation Page

Main Menu | Return to Lesson 3 | How do I set up a landing 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

[Main Menu](#) | [Return to Lesson 3](#) | [How do I set up a landing page?](#)

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**.

The screenshot shows the 'Confirmation Email' setup page in the StructuredWeb interface. The page title is 'Page: https://vendorcooltest.atworkweb.com/Vendor-Campaign-04-Landing-Page'. The top navigation bar includes 'Settings', 'Content', 'Assets', 'Confirmation Page', 'Confirmation Email' (highlighted with a blue circle 1), 'Distribution', 'Advanced Options', and 'Page Content'. Below the navigation bar is a 'Back' button. The main content area contains instructions on using merged fields for contact and user information. It includes a section 'Would you like to send an email confirmation to the customer that filled out this form?' with radio buttons for 'Yes' and 'No' (selected with a blue circle 2). Below this is a 'Send HTML Email' option (selected with a blue circle 2) and a 'Send Text Only Email' option. The 'Email Subject' field is labeled with a blue circle 3 and contains the text 'Thank you for submitting your request'. Below the subject field is the 'Page Content' section, labeled with a blue circle 4, which contains a rich text editor with a toolbar and the following content: 'Dear [FirstName],', 'Thank you for taking the time to fill out our form.', 'Sincerely,', and '[UserFirstName] [UserLastName]'. At the bottom of the page, there is a 'Save' button (highlighted with a blue circle 5) and a 'Return to the form list page' button.

## 5. Edit Distribution Assignment (1)

[Main Menu](#) | [Return to Lesson 3](#) | [How do I set up a landing page?](#)

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**.

Page: <https://vendorcooltest.atworkweb.com/VendorCampaign03LandingPage>

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

Back

Assign the form and new contacts to users based on the distribution rules.

☒ Assign all form submissions and new contacts to a single user.

Edit

Assign to user: Hunke, Oliver

Send email notification: Yes

Send copy to:

Email Subject: Customer information from the '[PageName]' page

Create task: Yes

Task Subject: [Name]

Return to the form list page

## 5. Edit Distribution Assignment (2)

[Main Menu](#) | [Return to Lesson 3](#) | [How do I set up a landing page?](#)

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 the 'Edit Distribution Assignment' form with the following elements and numbered callouts:

- 1**: A dropdown menu labeled 'Assign this form submission and new contacts to:' with 'Darek Rensing' selected.
- 2**: A text input field labeled 'Send a copy of the email notification to:'.
- 3**: A blue button labeled 'Select a different email or create a new email'.
- 4**: A radio button labeled 'Yes' for the question 'Would you like to create a task when this form is submitted?'. Below this is a 'Define this task' section with a 'Subject' field containing '[Name]'.

Other visible text in the form includes:

- Navigation tabs: Settings, Content, Assets, Confirmation Page, Confirmation Email, Distribution, Advanced Options.
- Instructions: 'You can use the following merged fields to add contact information to the email: [Email], [FirstName], [LastName], [Company].'
- Instructions: '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'.
- Instructions: 'You can also use the following merged fields to add user information to the email: [UserFirstName], [UserLastName], [UserEmail].'
- Instructions: 'You can also use these fields to merge the form data: [FormSubmissionContent], [PageName]'
- Current Email section: 'Customer information from the '[PageName]' page'.



# How do I set up an email?

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

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.

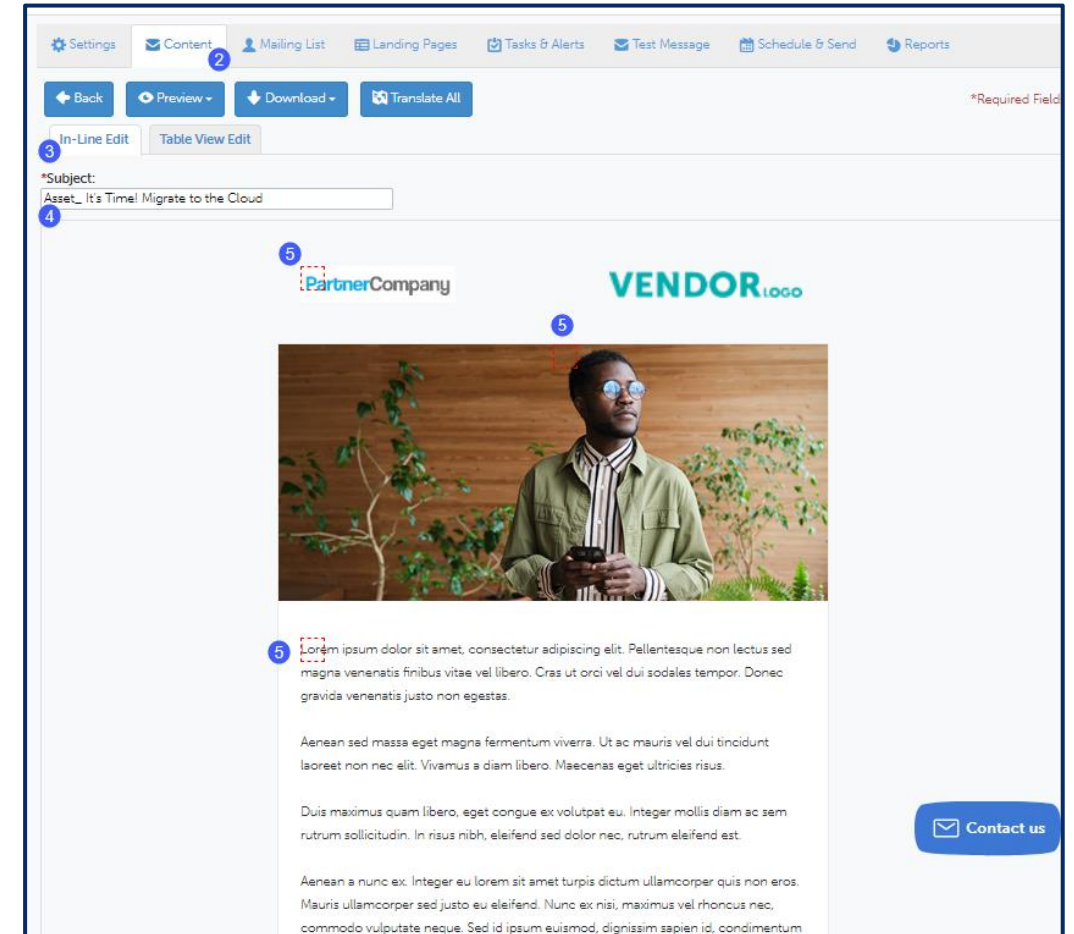
**When setting up an email campaign, complete the following steps:**

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**.



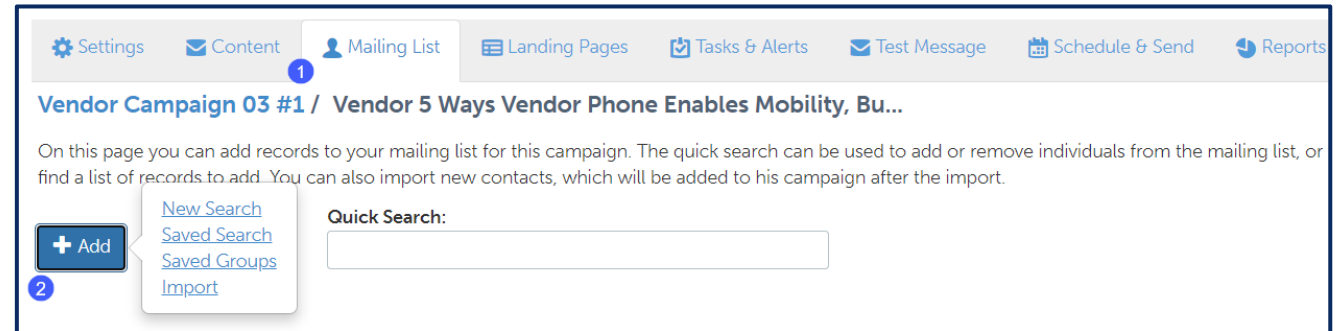
## 2. Mailing List

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:

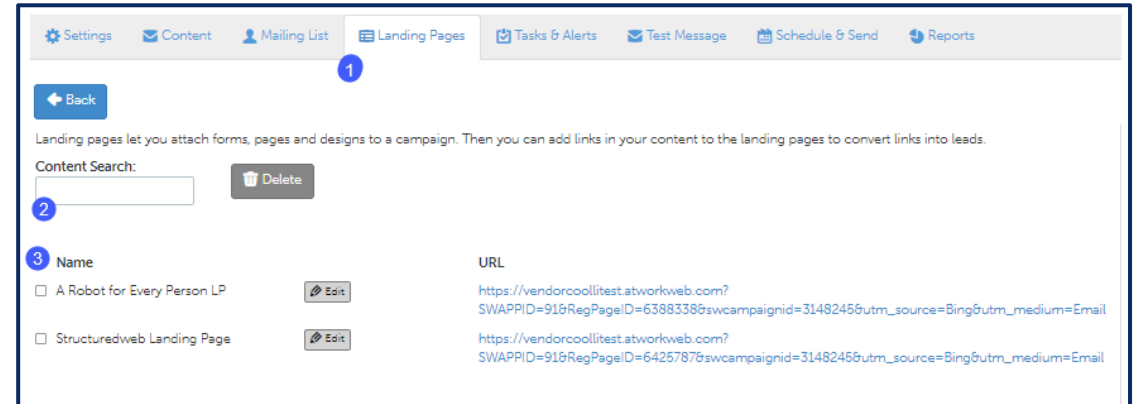
1. From the toolbar, select **Mailing List**.
2. Click the **Add** button. Then select **Import**. A box opens.



# 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 the 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

**2** All record owners of cont

Send a copy to:

**3**

When an email is opened:

Lead Score Points:  **4**

☐ Send an email alert

☐ Create a new lead

When a link in the email is clicked:

Lead Score Points:

☐ 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:

**5** 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**.

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

Back

To send a test email, specify the email address(es) in the field below and/or select an email by checking the box in the left column, then click Send Test Message.

**2** Select email address(es) for test:

<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

**3** Add additional email address(es):

Please separate the email addresses with a semicolon (;). You should enter address with the following format:  
John.Doe@abccompany.com

☐ Include "TEST:" in the subject line

**4** 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.



The screenshot displays the 'Schedule & Send' interface. At the top, a navigation bar includes links for Settings, Content, Mailing List, Landing Pages, Tasks & Alerts, Test Message, and Schedule & Send (1). Below the navigation bar is a 'Back' button. The main section is titled 'Distribution Schedule'. It contains the following fields and options:

- Status:** A dropdown menu showing 'New - Not Scheduled' (2).
- Date:** A text input field containing '05/22/2022' (3).
- Time:** A time selection area with dropdowns for hours (7), minutes (15), and a 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.' (selected) and 'Limit daily distribution.' (4).
- Agreement:** A checkbox labeled '\* Check here to indicate that you have read and agree to the following terms.' followed by a scrollable text area containing the 'Data Processing and Privacy Agreement' (5).
- Action:** A green 'Schedule' button at the bottom (5).



# How do I set up a Banner Ad?

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

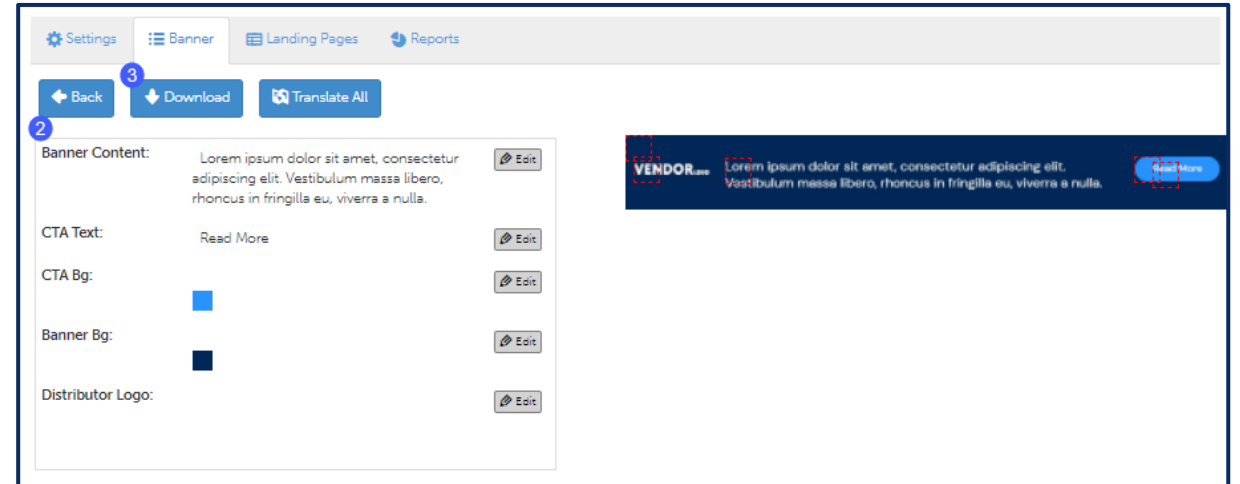
Unlike an email, which is limited to a single use, banner ads are a flexible asset type that allows you to expand your reach across multiple mediums. Banner ads can be added to your website and used in digital advertising; and they are adaptable to mobile devices. Banner ads can attach a landing page,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

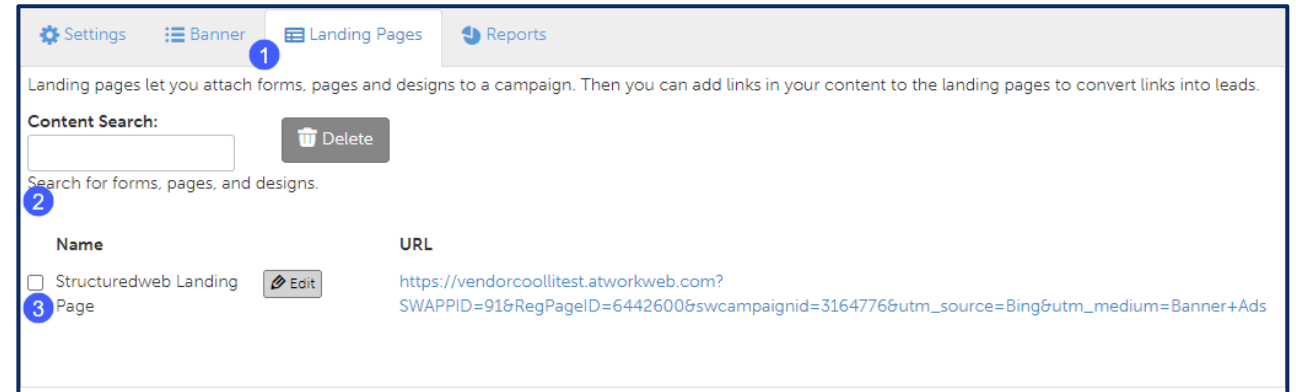
1. From the **Campaign Page**, select the **banner ad** you want to set up. Then click **Edit**. (Review [How do I select a campaign?](#))
2. In the **Banner Content** area, next to the **field** you want to edit, click the **Edit**. (Or, on the banner, click directly on the red boxes to edit).
3. Click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

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

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.

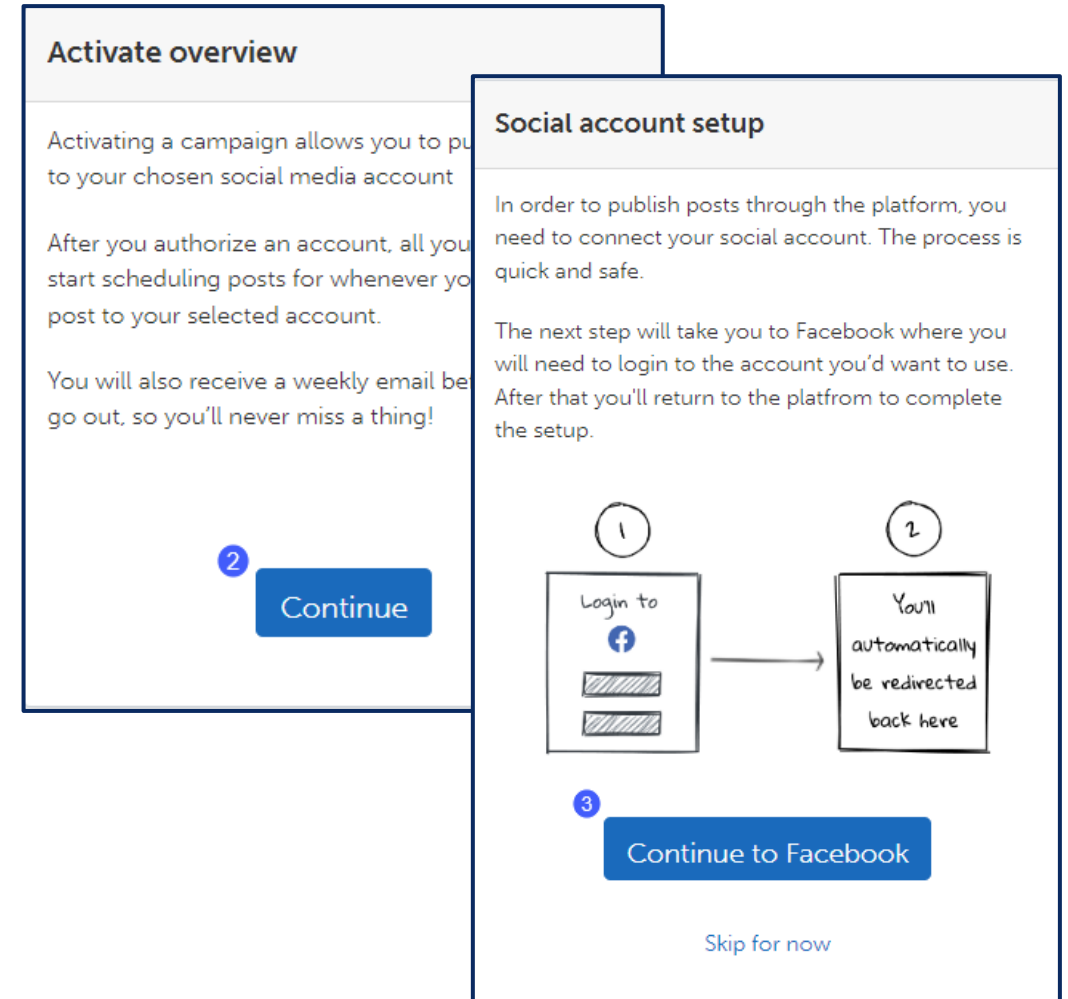
When setting up a social campaign, complete the following steps:

1. [Activate social media account](#)

# 1. Activate Social Media campaign (1)

[Main Menu](#) | [Return to Lesson 3](#) | [How do I activate a social campaign?](#)

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.

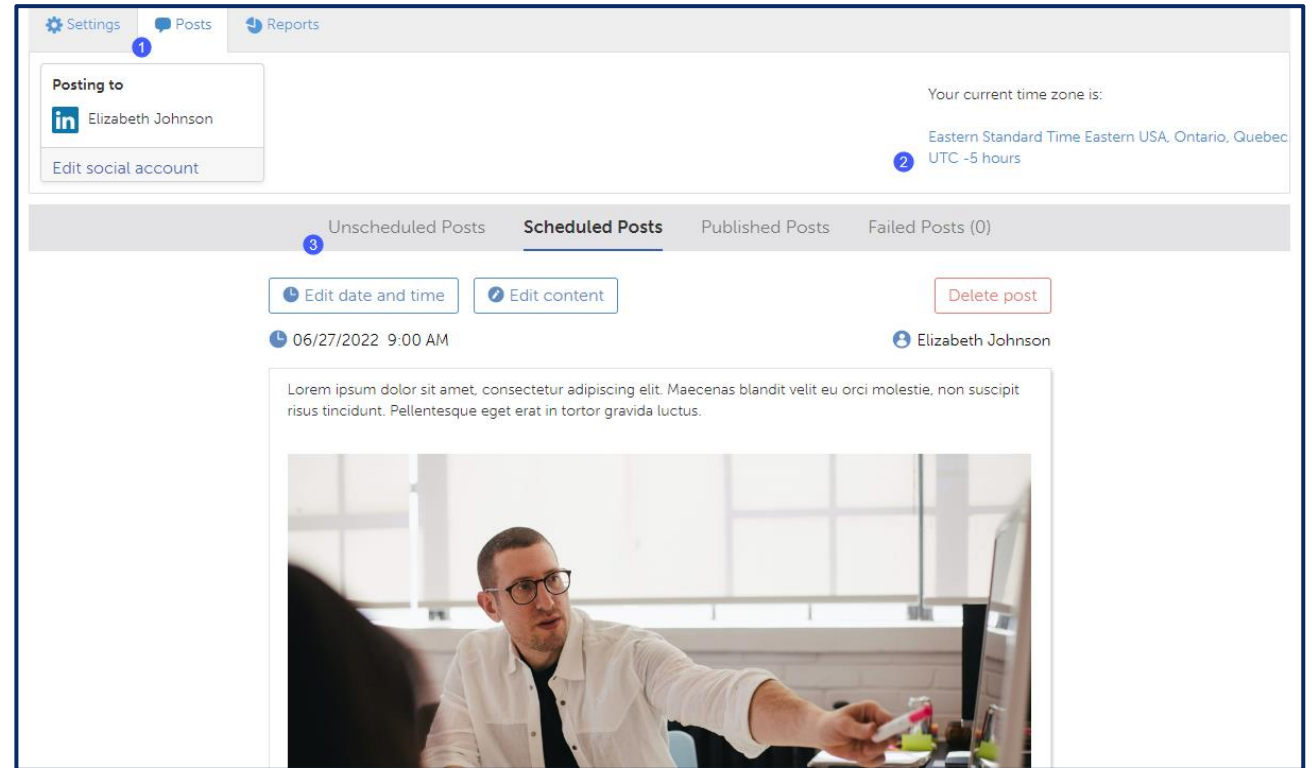


# 1. Activate Social Media campaign (2)

[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**.

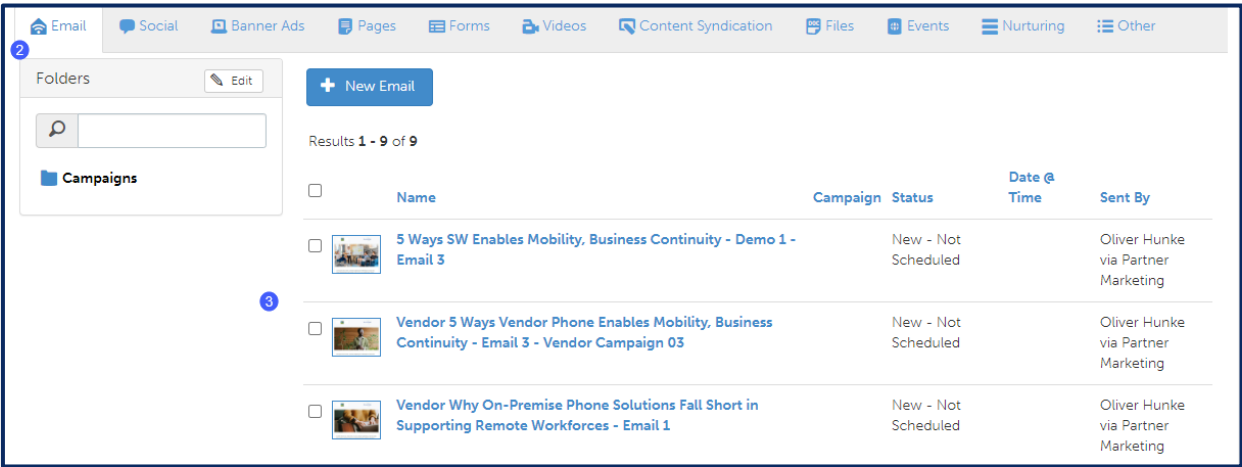
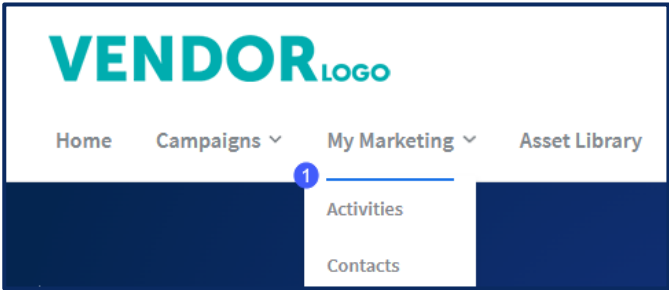
In some cases, your initial subscription may expire, and you may need to resubscribe to the social network. (This will be indicated by a red box appearing around the connect account tab)



# 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**.

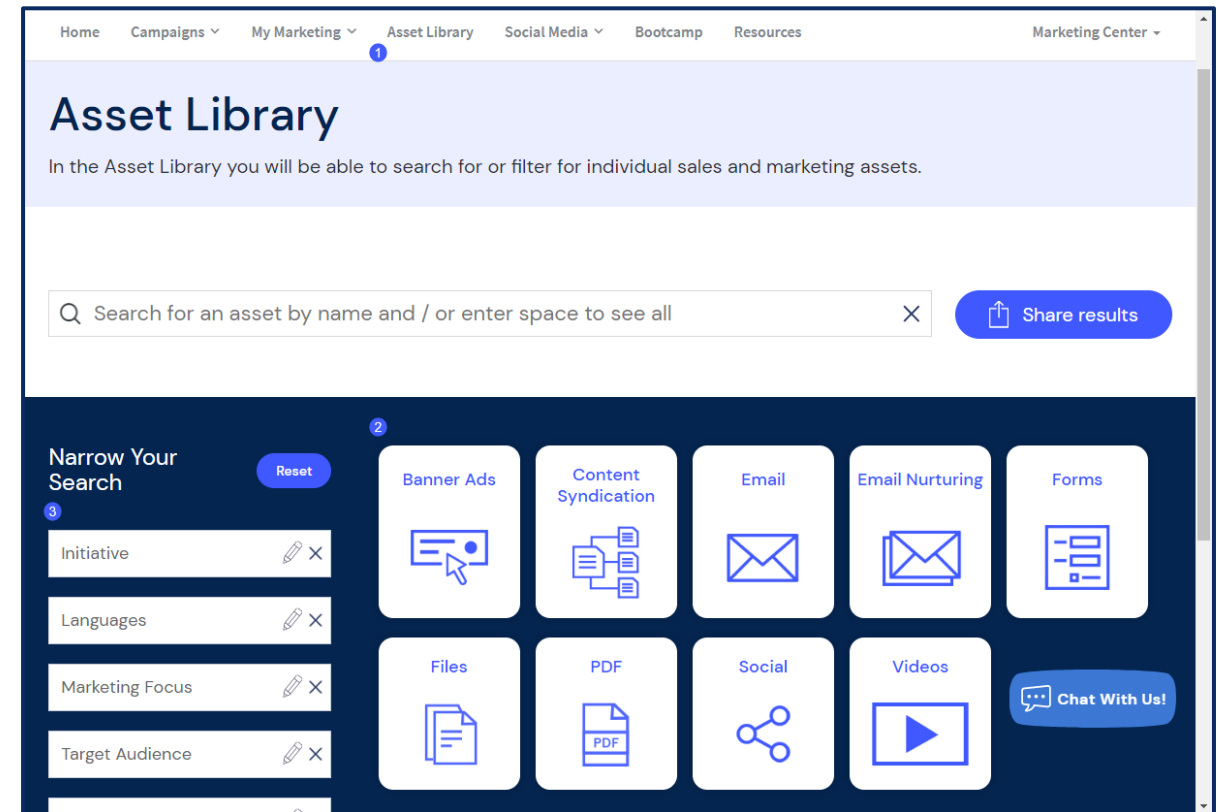


# How do I access other asset types?

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?

[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.

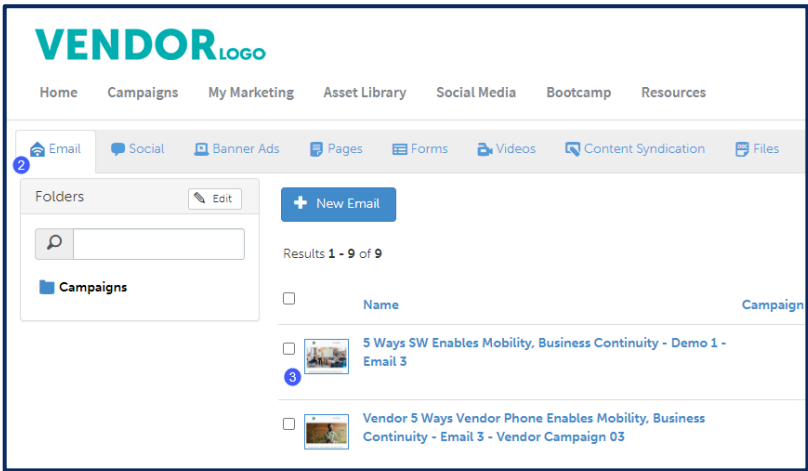
Reports can be generated for a variety of campaign activities. This lesson describes how to access reports for the following campaign types:

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.



Settings

Content

Mailing List

Landing Pages

Tasks & Alerts

Test Message

Schedule & Send

4Reports

Print

Export

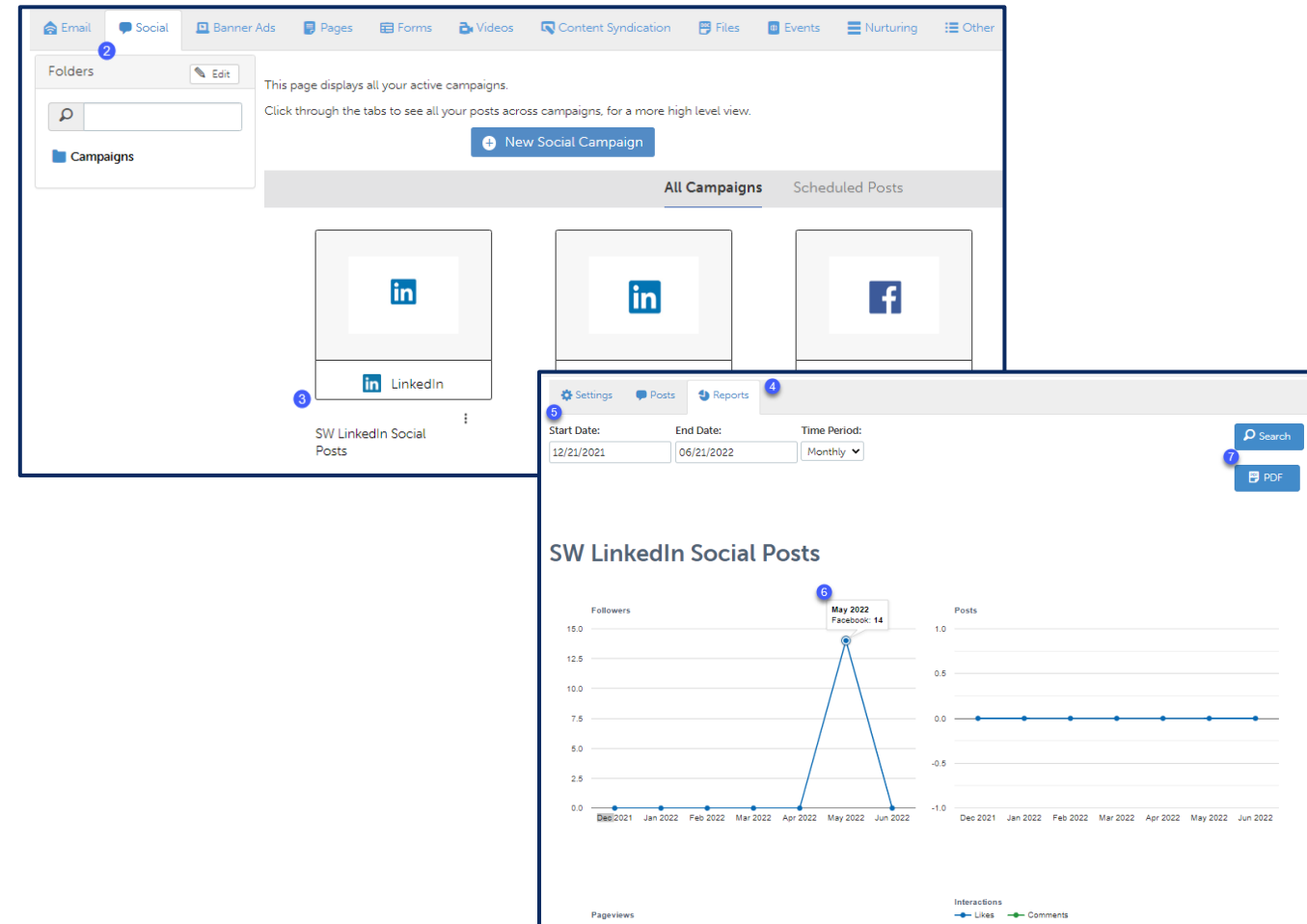
Campaign Summary

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%
URL											Clicks		Percent	
<a href="https://partnername210105628328.partnermarketingstudio.com/ReimagineManufacturingsalesofferkit-LandingPage">https://partnername210105628328.partnermarketingstudio.com/ReimagineManufacturingsalesofferkit-LandingPage</a>											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

[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.

The screenshot shows the 'My Marketing' section of the Partner Marketing Center. The 'Current Report' dropdown menu is open, displaying a list of reports. The 'Email Marketing List' 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. To the right of the table, there are buttons for 'Export to CSV', 'Export to Excel', and 'PDF'. The table displays aggregate data for the 'Email 2 - [ITDM] How it's done' report, showing static values for various metrics.

Name	List		Sent		Opened		Clicks		Unsubscribed		Rejected		Leads		Opportunities	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	\$	
Email 2 - [ITDM] How it's done 23/03/2022	165	8	4.85%	4	50.00%	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	99.44%	123	73.65%	11	8.94%	3	1.70%	9	5.11%	0	0%	0	0%	\$0.00
Total:																
Count 2	342	184	53.80%	127	72.57%	13	10.24%	3	1.63%	9	4.89%	1	0.79%	0	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?

[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](#)



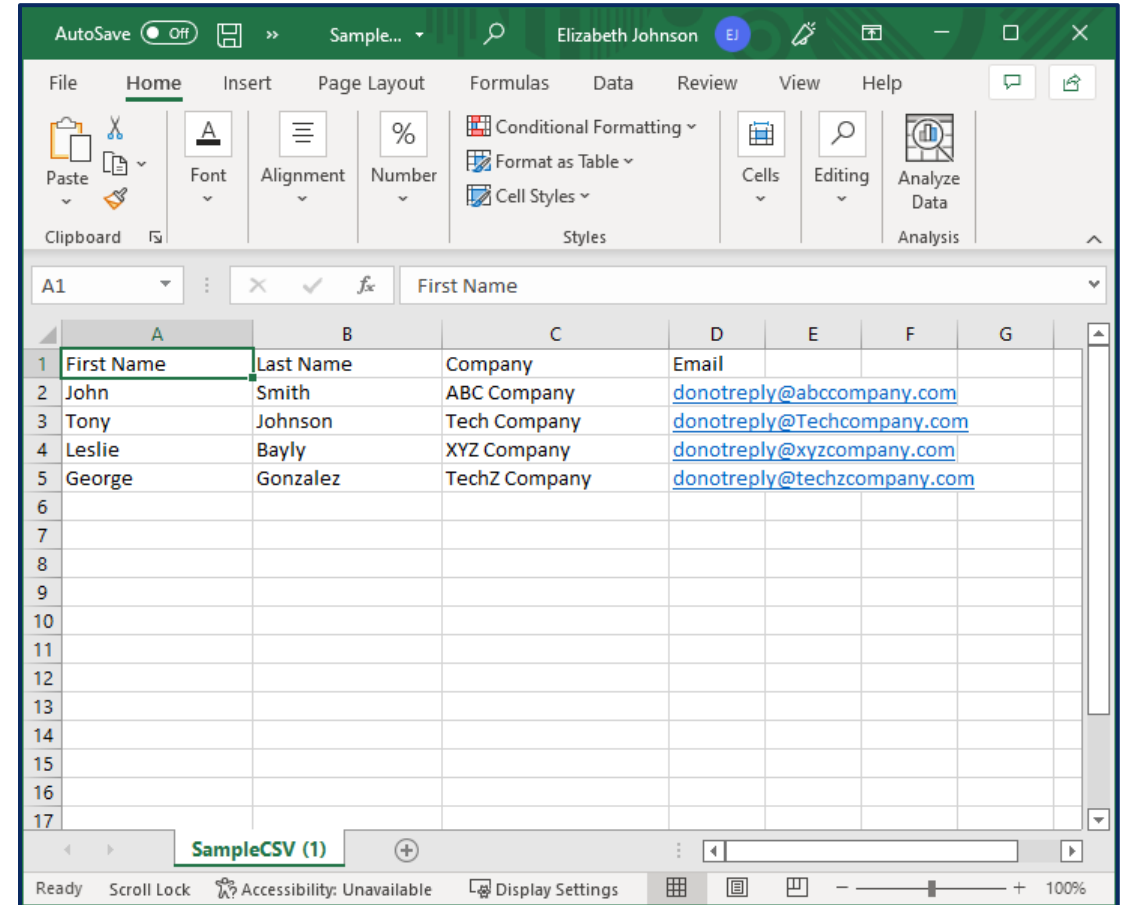
# 1. Setting up CSV files

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.



The screenshot shows a Microsoft Excel spreadsheet titled "SampleCSV (1)". The spreadsheet has four columns: "First Name", "Last Name", "Company", and "Email". The data is as follows:

	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)

[Main Menu](#) | [Return to Lesson 5](#)

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**.

The screenshot shows the 'Import Contacts' dialog box in the StructuredWeb Partner Marketing Center. The dialog box is titled 'Import Contacts' and has a close button (X) in the top right corner. Inside the dialog, it says 'Select the CSV file you would like to import.' with a link 'More info on CSV files'. Below this, there is a 'Choose File' button and a text input field containing 'SampleCSV.csv'. There are two checkboxes: 'First row contains field names' (checked) and '\* Check here to indicate that you have read and agree to the following terms.' (checked). Below the second checkbox is a scrollable text area containing the 'Data Processing and Privacy Agreement' text. At the bottom right of the dialog is an 'Upload' button. Numbered callouts 1 through 5 are present: 1 points to the 'New Contact' button in the background, 2 points to the 'Import' option in the dropdown menu, 3 points to the 'Choose File' button, 4 points to the agreement checkbox, and 5 points to the 'Upload' button.

## 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.

**Import Contacts and Add to Campaign**

**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): Column 1: First Name

☐ Create new groups from unrecognized group names

Multiple values, separated by: None

[Go back](#) [Run Import](#)

### 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**.

The screenshot shows a web interface for searching contacts. At the top, there is a toolbar with 'Search', 'Views', and 'Tools' tabs. Below this, there are input fields for 'Last Name:', 'Company:', and 'Email:'. The 'Last Name' field contains the text 'Johnson'. To the right of these fields are two buttons: 'Search' and '+ New Search'. Below the input fields, there are three dropdown menus: 'User:' with 'All Contacts' selected, 'Groups:' with 'All Groups' selected, and 'Record Type:' with 'All records' selected. Below these dropdowns, there are two buttons: '+ New' and 'Delete'. At the bottom, there is a table with columns for 'first', 'last', and 'Company'. The first row shows 'Elizabeth' under 'first' and 'Johnson' under 'last'. The second row shows 'Elizabeth' under 'first' and 'Johnson' under 'last', with an additional 'Account:' label to the right. There are blue circular callout numbers 2, 3, and 4 pointing to the 'Search' tab, the 'Search' button, and the first row of the table, respectively.

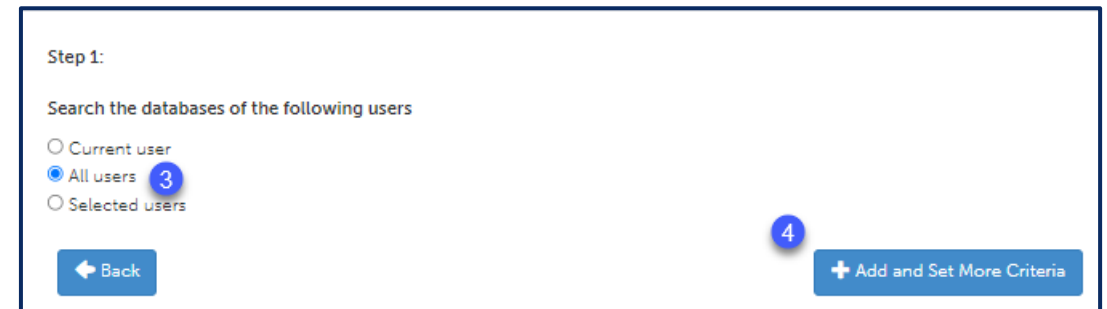
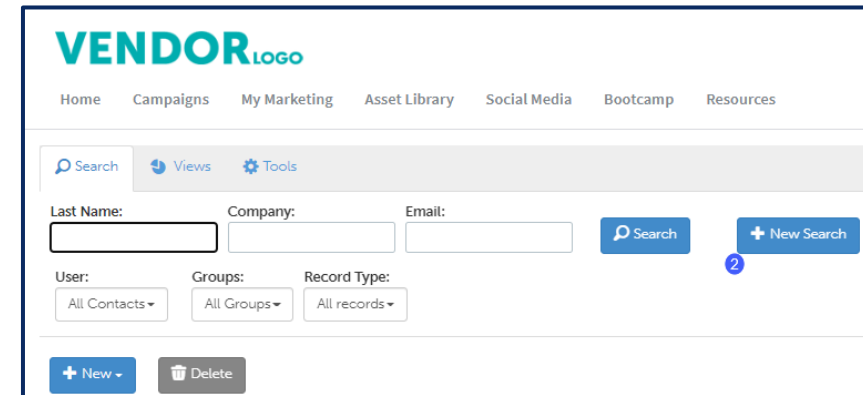
	first	last	Company
<input type="checkbox"/>	Elizabeth	Johnson	Account:

## 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)

[Main Menu](#) | [Return to Lesson 5](#)

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:** The first screenshot shows the 'Select the search criteria category' section. The 'Contact Information' category is selected, indicated by a blue circle with the number 1. The 'Current search criteria' panel is visible on the right.

**Step 2:** The second screenshot shows the 'Select the contact field that you would like to search on' section. The 'City' field is selected, indicated by a blue circle with the number 2. The 'Current search criteria' panel is visible on the right.

**Step 3:** The third screenshot shows the 'Where City:' section. The 'Exactly Matches' dropdown is selected, and 'New York' is entered in the text box, indicated by a blue circle with the number 3. The 'Current search criteria' panel is visible on the right, and the 'Save the Search' button is highlighted with a blue circle with the number 4. The 'Back' and 'Add and Set More Criteria' buttons are also visible at the bottom of the form.

### 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.

The image shows two screenshots from a software interface. The top screenshot is the 'Save Advanced Search' dialog. It has a text box labeled 'Save this search as:' with the value 'New York City Contacts' and a blue circle '1' next to it. Below it is a dropdown menu 'Which folder would you like to place this search in?' with 'My Searches' selected and a blue circle '2' next to it. At the bottom is a green button 'Save and then Run the Search' and a grey 'Cancel' button. On the right, there are buttons for 'Run the Search', 'Save the Search', and 'Remove Checked Search Criteria', along with checkboxes for 'The following users' databases: All' and 'AND Where City:'. The bottom screenshot is the 'Contacts' window. It has a search bar with 'Last Name:', 'Company:', and 'Email:' fields, a 'Search' button, and a 'Saved Searches:' dropdown with a blue circle '4' next to it. Below the search bar are filters for 'User:', 'Groups:', and 'Record Type:'. At the bottom left is a '+ New' button and a 'Delete' button, with a blue circle '3' next to the '+ New' button. The main area shows a table of contacts with columns: first, last, Company, ID, Email, Phone, Next Activity, and Owner. The table has 5 rows of data. At the bottom right, it says '< Page 1 of 1 > 15 customers found.' and '< Page 1 of 1 > 4 customers found.'

first	last	Company	ID	Email	Phone	Next Activity	Owner
Leslie	Bayly	XYZ Company		donotreply@xyzcompany.com			Kreiser, Kevin
George	Gonzalez	TechZ Company		donotreply@techzcompany.com			Kreiser, Kevin
Tony	Johnson	Tech Company		donotreply@Techcompany.com			Kreiser, Kevin
John	Smith	ABC Company		donotreply@abccompany.com			Kreiser, Kevin

# 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.

+ New

Delete

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

ContactProfileAddressesGroups1 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?

[Main Menu](#) | [Return to Lesson 6](#)

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.

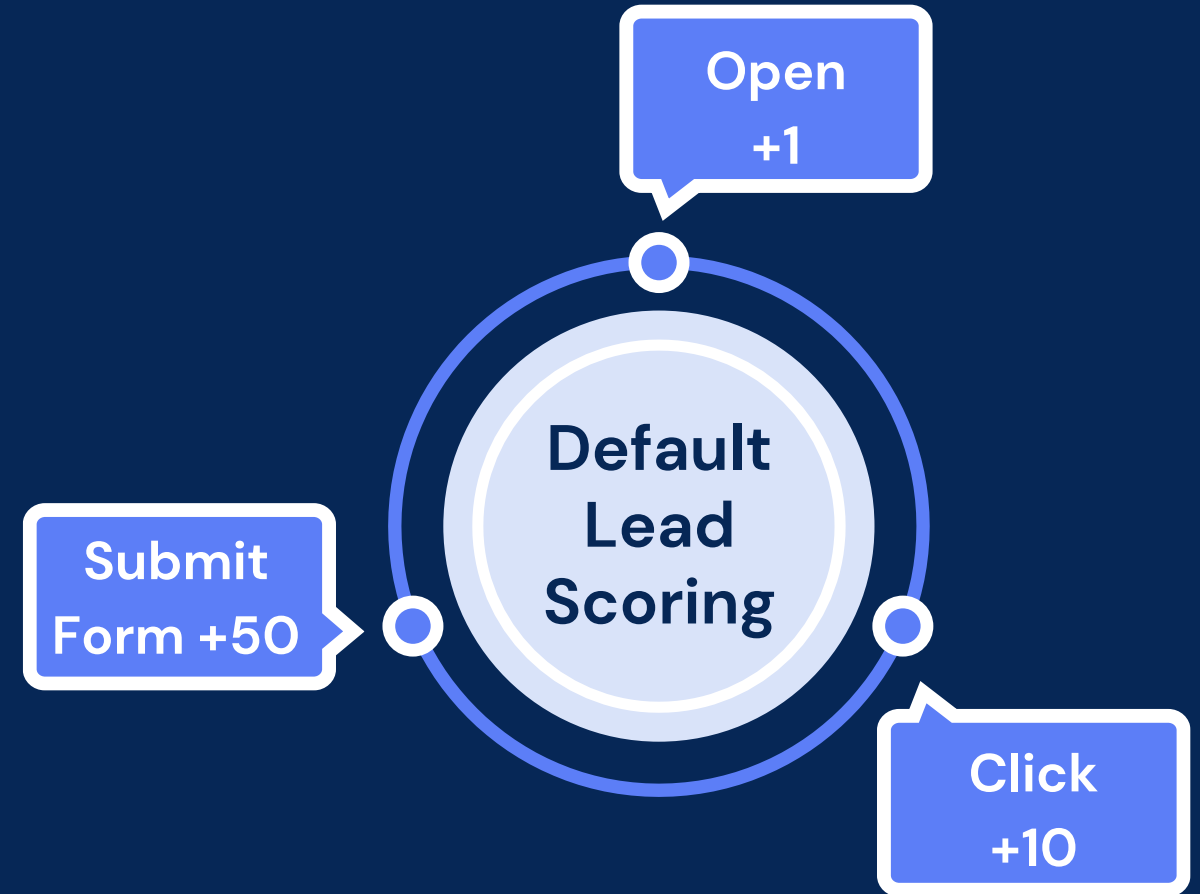
Leads are contacts who have interacted with a campaign by either opening an email, clicking on a link, or filling out a form.



# 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.

ContactProfileAddressesGroups

Leslie BaylyXYZ CompanyNew Yorkdonotreply@xyzcompany.com

Account: NoneID:Entered: 06/21/2022 @ 3:57 PMLast view: 06/21/2022 @ 4:19 PMRecord owner: Oliver Hunke

Notepad

Campaigns

61Lead Score

This is a list of all messages that have been sent to this contact and activity information for each campaign.

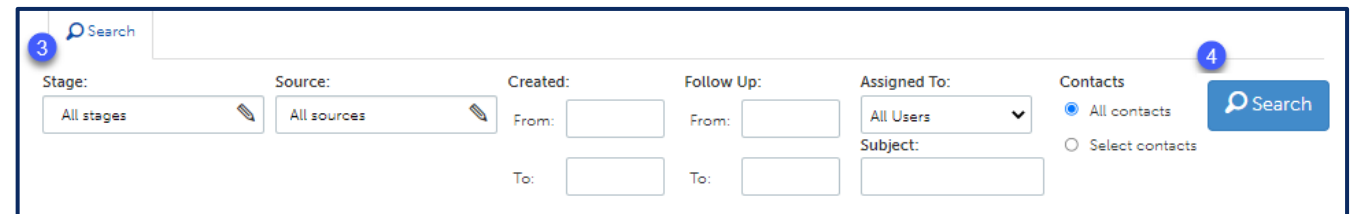
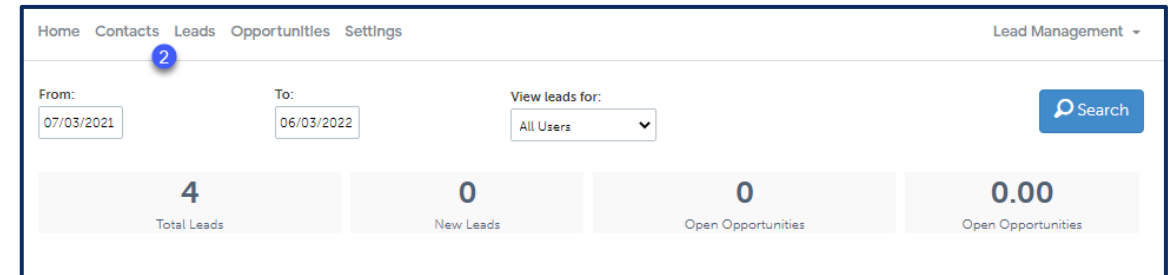
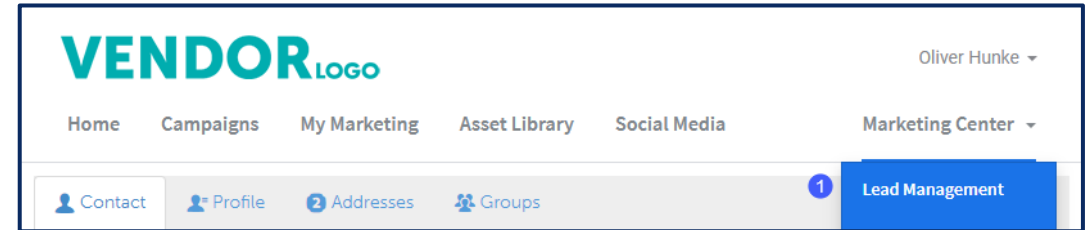
Name	Sent	opened	linked	Unsubscribe	Rejected
Email for CXOs	06/03/2022	06/03/2022 4:06 PM	06/03/2022 4:05 PM		

# Where do I locate Lead Management (1)?

[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)?

[Main Menu](#) | [Return to Lesson 6](#)

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

Home Contacts Leads Opportunities Settings Lead Management

**Task Details**

Gated Download Landing Page: Google's Guide to Innovation whitepaper

Follow Up: 06/03/2022

Stage: New

Assigned To: Kreiser, Kevin

Source: Forms

Lead Cost:

Created: 06/03/2022 (0 days ago) by an automatic process

Rating: ☆☆☆☆☆

Marketing Campaign: Email for CXOs - "Google's Guide to Innovation"

**Contact** Profile

Elizabeth Morgan  
123 Company

lizgmorgan@gmail.com

Record owner: Kevin Kreiser

Change contact  
Add a new contact  
Edit this contact

Save Save & Next Save & Close Convert to New Opportunity Delete Return to list \* Required

Calendar Notes Email

Summary Forms Campaign

Gated Download Landing Page: Google's Guide to Innovation whitepaper - Form Submission View  
Form filled out on 06/03/2022 at 4:06 PM.

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





**Thank You!**