



# Uploading Files

## What is the purpose of uploaded files?

Uploaded files allow you to provide additional resources to your partners and include a variety of different file types, including eGuides, whitepapers, infographics, and much more.

Not only do files provide your partner's end customers with the necessary information to make purchasing decisions, but they also provide partners with deeper education about your products and services, strengthening your brand recognition and relationship with partners.

## How do I upload them?

Before you upload files, be sure to select the file types you want to include. (This step was completed during [Block 1: Preparing the Platform](#)). From there, simply upload a physical file to download or a link to a website where the file is stored.

(**Note:** you can add multiple files or multiple links at once, however you cannot combine files and links in a single upload).

## What will I do in this lesson?

By the end of this lesson, you will be able to do the following:

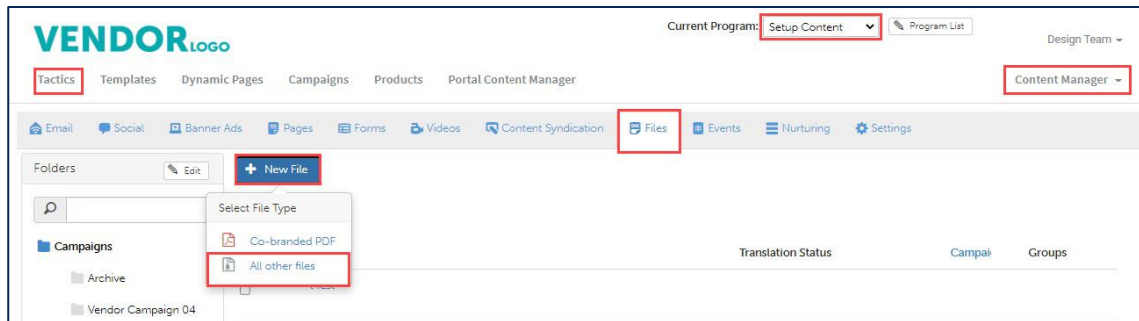
- [Create File Settings](#)
- [Upload a thumbnail](#)
- [Add a physical file](#)
- [Add a link](#)
- [Publish file](#) (This step is for **reference only**. Publish posts for partner use. **Do not publish practice content created during this onboarding program.**)

To complete this lesson, you must download the assets located within the [Building your Content](#) Block. Once downloaded, save each item to your local drive.

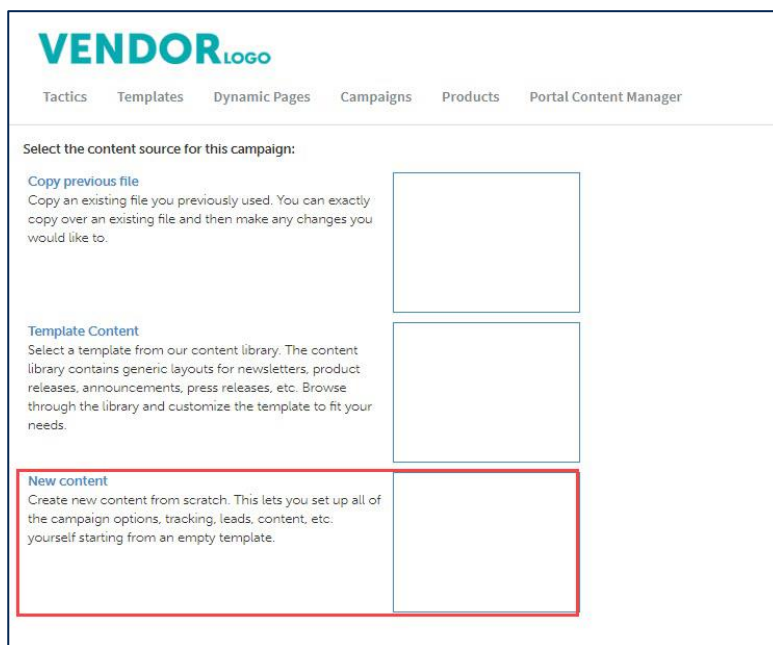
## Steps

### CREATE FILE SETTINGS

- 1 In **Content Manager**, from **Current Programs**, select **Setup Content**.
- 2 From the toolbar, select **Tactics > Files**.
- 3 Click **New File > All Other Files**.



- 4 In **Select a content source for this campaign**, click **New Content**. The Settings page opens.



- 5 In the **Name** text field, type **My Practice File Upload**.
- 6 In the **Assigned to** field, select your **name**.
- 7 In the **File type** field, select **One-pager**.
- 8 From **Would you like to make this available for pulling from the managed library**, select **Yes**. Additional Setting options open.

The screenshot shows a web interface for configuring a campaign. At the top, there is a navigation menu with items: Tactics, Templates, Dynamic Pages, Campaigns, Products, and Portal Content Manager. The main form area contains the following fields:

- \* Name:** A text input field containing "My Practice File Upload".
- Description:** A large empty text area.
- Assigned To:** A dropdown menu showing "Johnson, Elizabeth".
- File Type:** A dropdown menu showing "One-Pager".
- Would you like to make this available for pulling from the managed library:** A radio button group with "No" and "Yes" options. The "Yes" option is selected and highlighted with a red box.

- 9 From **What programs would you like to use this campaign in?**, select **Setup content**. (Note: when you are ready to publish this file, return to settings and select Partner Marketing.) Leave all other settings as is.

The screenshot shows the advanced settings for the campaign. The form contains the following sections:

- Enable testing mode:** (Note: Make sure you copy all accounts)
  - Yes, I am still testing this message.
  - No, disable test mode I am sending the campaign out.
- When would you like this to be available in the managed library?**
  - Always
  - Only during the following period
- Feature Campaign:**
  - Feature this campaign in the library
- What programs would you like to use this campaign in:**
  - CMS-Live
  - CMS-Setup
  - Partner Marketing
  - Setup Content (highlighted with a red box)
- Would you like to limit access based on account profile fields:**
  - No
  - Yes

- 10 From **What attributes would you like to set for this asset?**, from **Languages**, select **English**. Then from **Market Focus**, select **All**.

What attributes would you like to set for this asset:

\* Languages

All

English (United States)

English (United Kingdom)

Spanish

\* Marketing Focus

All

Prospects

Existing Customers

Enterprise

SMB

- 11 Click **Save**. The Content Tab opens.

## UPLOAD A THUMBNAIL

- 1 In **Upload a thumbnail image**, click **Upload a thumbnail image**. (Note: this image is included in your download package.)

Settings Content Related Tactics

### Add file(s)

1. Upload a thumbnail image

This thumbnail will display when viewed in the gallery, and when the tactic is previewed

(jpg, jpeg, gif, png, recommended size 640x820)


- 2 Navigate to where the **image** is stored, then select the **image**.

### Add file(s)

1. Upload a thumbnail image

This thumbnail will display when viewed in the gallery, and when the tactic is previewed

(jpg, jpeg, gif, png, recommended size 640x820)



## ADD A PHYSICAL FILE

- 1 In **Add content**, click **Upload file(s)**. (Note: this image is included in your download package.)
- 2 From **Add Files**, in **Upload file(s)**, click and drag the **file** into the box from your desktop or local drive.
- 3 Click **Download** to test the file. The file is saved to the system automatically.

**2. Add content**  
You can upload multiple files or add links to multiple resources within one tactic

Upload file(s)  
Users will be able to download these files directly

OR

Link to file(s)  
Add links to files on the cloud and other external resources

**Add file(s)**

Upload file(s)

Drop file(s) or click to upload

File Name	Type	Size	
SW-Increasing Value from Exis		200.84 KB	<a href="#">Download</a> <a href="#">Remove</a>

- 4 To publish the file to Partner Marketing, select the **Settings** tab. Then, in **What Programs would you like to use this campaign in**, click Partner Marketing.

**Settings** | Content | Related Tactics

[Save](#) [Cancel](#) [Share](#)

\* Name:

Description:

Assigned To:

File Type:

Would you like to make this available for pulling from the managed library:

No  
 Yes

What programs would you like to use this campaign in:

CMS-Live  
 CMS-Setup  
 Partner Marketing  
 Setup Content

- 5 Click **Save**.

## ADD A LINK

- 1 Complete the steps in [Initiate Other File Types](#) and [Upload a Thumbnail](#) (Note: This time, name your file My Practice File Link)
- 2 In **Add content**, click **Link to file(s)**.
- 3 In **Add link(s)**, in the **URL** text box, enter <https://www.structuredweb.com>.
- 4 In the **Name** text box, type **My Practice Link**.
- 5 Click **Add Link**. Then click **Save**

### 2. Add content

You can upload multiple files or add links to multiple resources within one tactic

Upload file(s)  
Users will be able to download these files directly

OR

Link to file(s)  
Add links to files on the cloud and other external resources

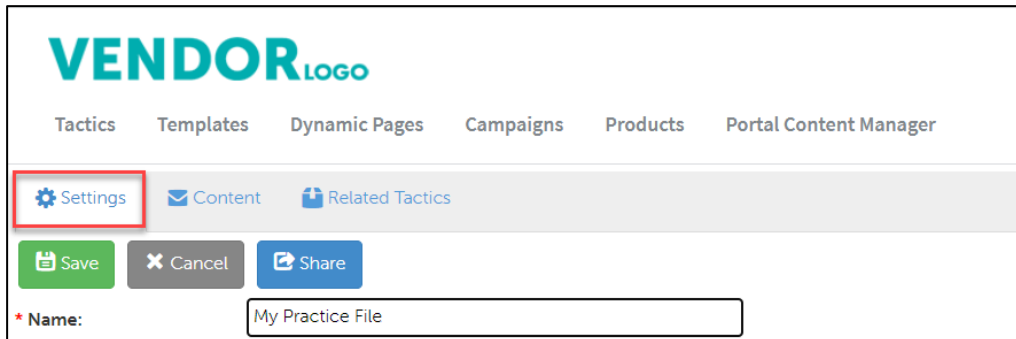
#### Add link(s)

URL	Name
<input type="text" value="https://www.structuredweb.cc"/>	<input type="text" value="My Practice Link"/>
<input type="text" value="Enter link here"/>	<input type="text" value="Name your resource"/>

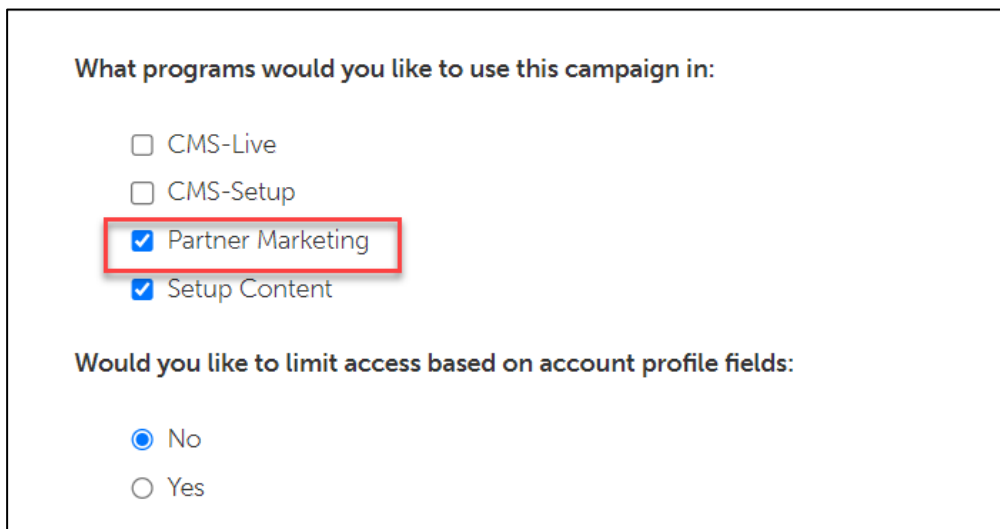
**PUBLISH FILES (THIS STEP IS FOR REFERENCE ONLY)**

1 Return to **Content Manager > Tactic > Email > My Practice Email**.

2 From the **Email** toolbar, click **Settings**.



3 From **What programs would you like to use this campaign in**, select the **appropriate program**. (in most cases, this will be Partner Marketing).

A screenshot of a form titled 'What programs would you like to use this campaign in:'. It contains four checkboxes: 'CMS-Live', 'CMS-Setup', 'Partner Marketing' (checked and highlighted with a red box), and 'Setup Content'. Below this is another section titled 'Would you like to limit access based on account profile fields:' with two radio buttons: 'No' (selected) and 'Yes'.

4 Click **Save**.