



# Partner Onboarding User Guide

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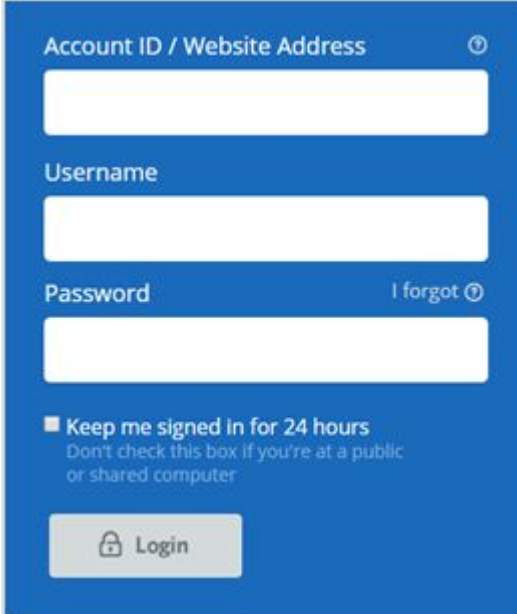
- Getting Started
- Account Creation
- Uploading Assets
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# Getting Started

- Go to structuredweb.com and click **Login**.
- Enter your **Account ID, Username** and **Password**.

**Note:** If you forget your login information you can reset it by selecting the **I Forgot** link above the password field.



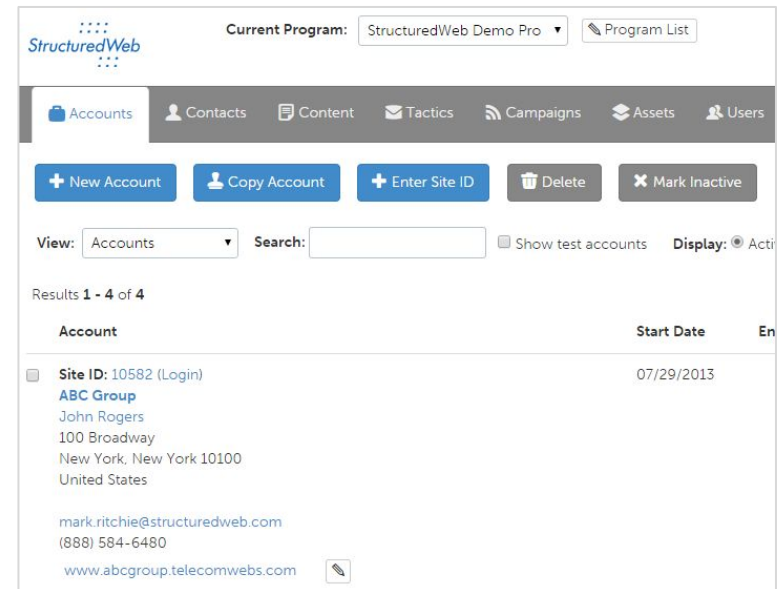
The image shows a login form with a blue background. It contains the following elements:

- A text input field labeled "Account ID / Website Address" with a small circular icon to its right.
- A text input field labeled "Username".
- A text input field labeled "Password" with a link "I forgot" and a small circular icon to its right.
- A checkbox labeled "Keep me signed in for 24 hours" with the subtext "Don't check this box if you're at a public or shared computer".
- A "Login" button with a lock icon.

# Getting Started

- After logging in you are brought to the **Program Manager**.
- The Program Manager is where you can create and manage content and partner accounts.

**Note:** If you are not in the Program Manager, select it from the drop down menu in the upper right hand corner.

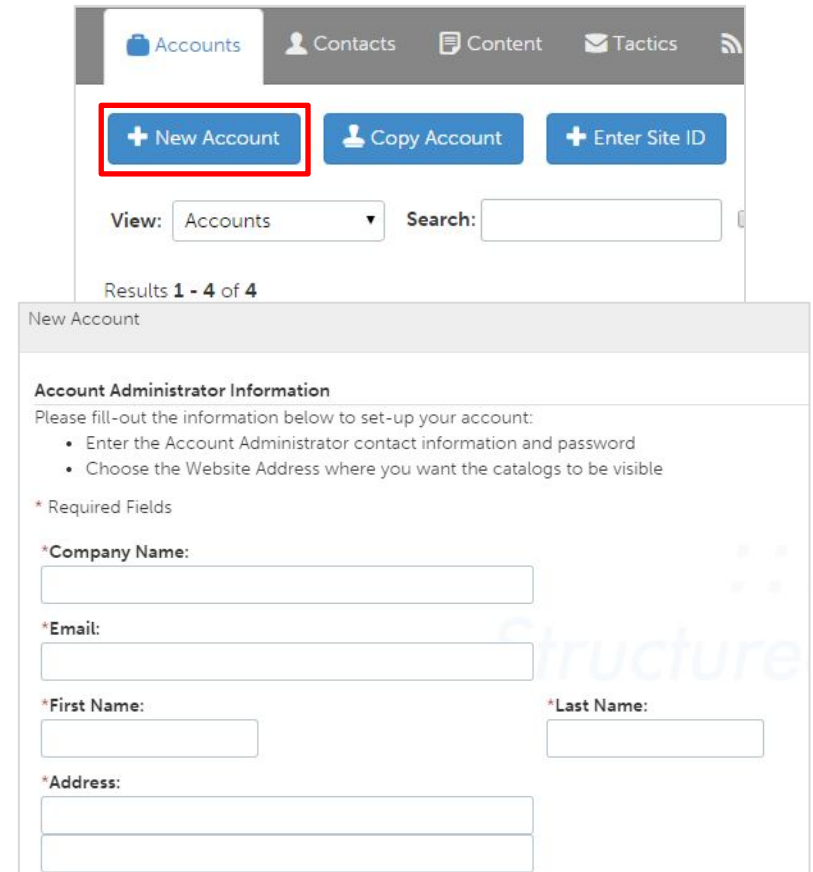


The screenshot displays the StructuredWeb Program Manager interface. At the top, the current program is set to "StructuredWeb Demo Pro". A navigation bar includes tabs for Accounts, Contacts, Content, Tactics, Campaigns, Assets, and Users. Below the navigation bar, there are action buttons: "+ New Account", "Copy Account", "+ Enter Site ID", "Delete", and "Mark Inactive". A search bar and a "View" dropdown menu are also present. The main content area shows a table of accounts with columns for "Account" and "Start Date". The first account listed is "ABC Group" with a start date of "07/29/2013".

Account	Start Date
Site ID: 10582 (Login) ABC Group John Rogers 100 Broadway New York, New York 10100 United States  mark.ritchie@structuredweb.com (888) 584-6480 www.abcgroup.telecomwebs.com	07/29/2013

# Account Creation

- By default, your account list is displayed.
- To add a partner to the program, click **New Account**.
- This begins the account creation wizard. In the fields provided enter the account's contact information and click **Save**.



The screenshot shows a web application interface with a top navigation bar containing 'Accounts', 'Contacts', 'Content', and 'Tactics'. Below the navigation bar, there are three buttons: '+ New Account' (highlighted with a red box), 'Copy Account', and '+ Enter Site ID'. Below these buttons, there is a 'View: Accounts' dropdown menu and a 'Search:' input field. Below the search field, it says 'Results 1 - 4 of 4'. Below this, there is a 'New Account' form with the following sections:

**Account Administrator Information**  
Please fill-out the information below to set-up your account:

- Enter the Account Administrator contact information and password
- Choose the Website Address where you want the catalogs to be visible

\* Required Fields

\*Company Name:

\*Email:

\*First Name:  \*Last Name:

\*Address:

# Account Creation

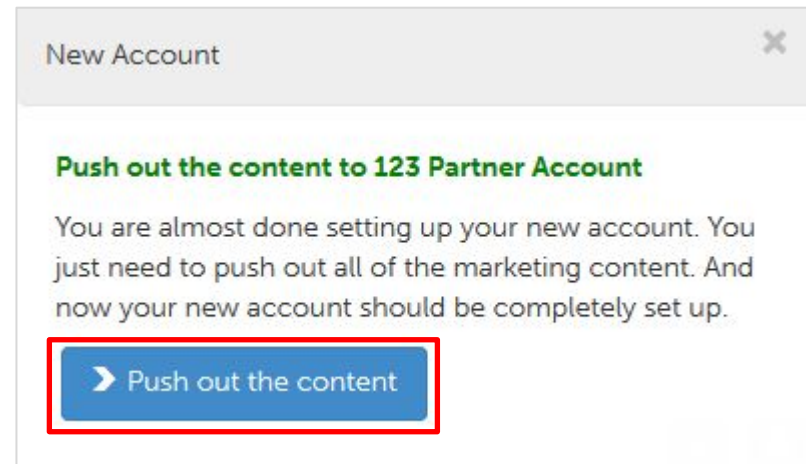
- This loads the subscription settings. Subscriptions ensures that when content is made available, the partner will have access to it.
- By default, the account is subscribed to email. Check off additional tactic types the partner will be subscribed to and click **Save**.

**Subscriptions**  
On this page you can set what marketing types this account is subscribed to.

Active	Type	Monthly Budget
<input type="checkbox"/>	Direct Mail	\$ <input type="text"/>
<input checked="" type="checkbox"/>	Email	\$ <input type="text" value="0"/>
<input type="checkbox"/>	Pay Per Click	\$ <input type="text"/>
<input type="checkbox"/>	Telemarketing	\$ <input type="text"/>

# Account Creation

- Follow the steps within the wizard for the rest of the account creation process.
- The last step of the wizard is to push the content to the partner. This applies marketing material and program settings to the partner account.
- Click **Push out the content** to complete the account creation process.



# Partner Summary

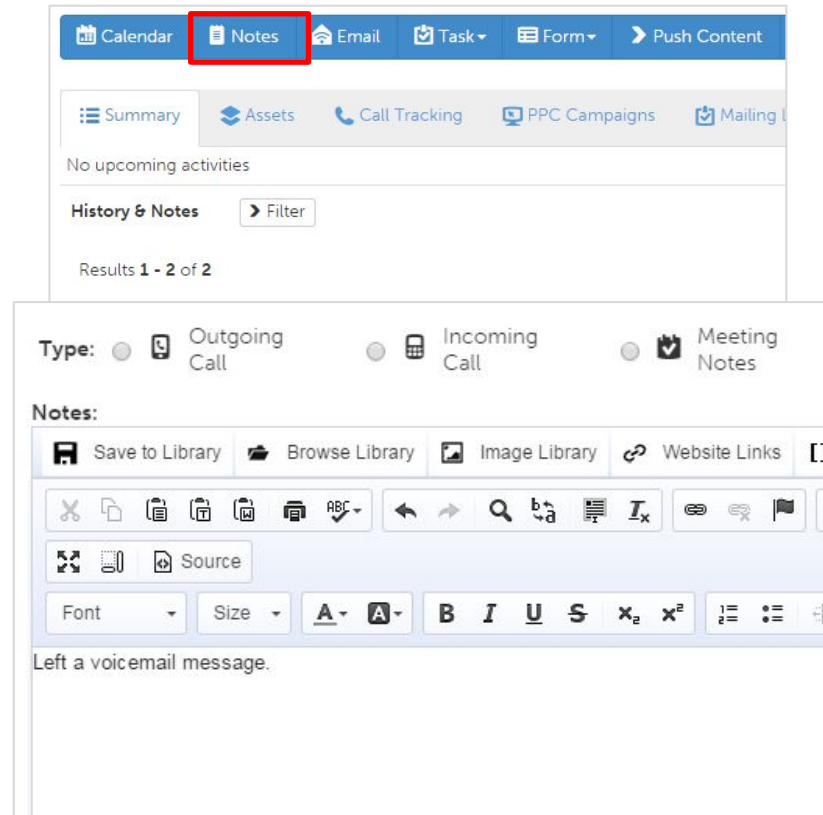
- If you are not currently on your account list, click the **Accounts** tab.
- Use the search box at the top of the page to locate partner accounts.
- Click the **partner name** to bring up their details.
- This load the partner account summary.

The screenshot displays the account management interface. At the top, there are four buttons: '+ New Account', 'Copy Account', '+ Enter Site ID', and 'Delete'. Below these is a 'View:' dropdown menu set to 'Accounts' and a search box containing 'abc'. A red box highlights the search box. To the right of the search box is a checkbox labeled 'Show test acc...'. Below the search bar, it says 'Results 1 - 1 of 1'. The main content area shows a table with columns 'Account' and 'Start D'. The first row is for 'Site ID: 10582 (Login)' with a 'Start D' of '07/29'. The 'Account' column contains 'ABC Group' (highlighted with a red box), 'John Rogers', '100 Broadway', 'New York, New York 10100', 'United States', 'mark.ritchie@structuredweb.com', '(888) 584-6480', and 'www.abcgroup.telecomwebs.com'.



# Partner Summary

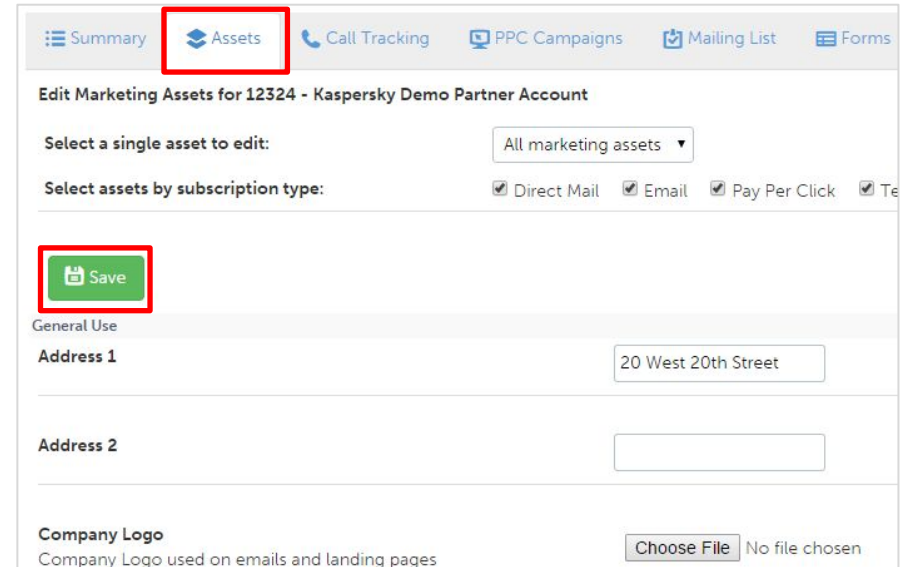
- If you were unable to **Push Content** before, you are able to do so from this page as well.
- By default history and notes are displayed at the bottom of the page.
- To record conversations with partners, click **Notes**.
- In the editor provided enter the note. When finish click **Save**.



The screenshot displays the Partner Summary interface. At the top, a navigation bar includes 'Calendar', 'Notes' (highlighted with a red box), 'Email', 'Task', 'Form', and 'Push Content'. Below this, a secondary navigation bar shows 'Summary', 'Assets', 'Call Tracking', 'PPC Campaigns', and 'Mailing'. The main content area shows 'No upcoming activities' and a 'History & Notes' section with a 'Filter' button. Below this, there are radio buttons for 'Type' with options: 'Outgoing Call', 'Incoming Call', and 'Meeting Notes'. The 'Notes' section features a rich text editor with a toolbar containing icons for 'Save to Library', 'Browse Library', 'Image Library', and 'Website Links'. The editor also includes a 'Source' button and a rich text toolbar with options for 'Font', 'Size', 'A', 'A', 'B', 'I', 'U', 'S', 'x', 'x', and list/bulleted list icons. The text area contains the message 'Left a voicemail message.'

# Uploading Assets

- The system requires basic information about the partner including the business name, address and logo. Partners will typically input this information themselves when they login.
- To upload this information for the partner, click **Assets**.
- Enter the required information in the fields and click the **Save** when finished.



The screenshot shows a web interface for editing marketing assets. At the top, there are navigation tabs: Summary, Assets (highlighted with a red box), Call Tracking, PPC Campaigns, Mailing List, and Forms. Below the tabs, the page title is "Edit Marketing Assets for 12324 - Kaspersky Demo Partner Account". There are two dropdown menus: "Select a single asset to edit:" with "All marketing assets" selected, and "Select assets by subscription type:" with checkboxes for "Direct Mail", "Email", "Pay Per Click", and "Te". A green "Save" button with a floppy disk icon is highlighted with a red box. Below this, the "General Use" section contains "Address 1" (20 West 20th Street) and "Address 2" (empty). The "Company Logo" section has a "Choose File" button and "No file chosen" text.

# Mailing Lists

- Mailing lists are needed to execute email campaigns.
- To upload a list for the partner select the **Mailing List** tab. Previously uploaded list will display.
- Click **New Mailing List** and select the **Importing from CSV** option.
- Follow the wizard to complete the import.

Summary Assets Call Tracking PPC Campaigns **Mailing List**

**New Mailing List**

Mailing List Name: Prospects

Create list by:

- Purchasing from InfoUSA
- Importing from CSV
- Searching through account database

Save

CustomerCenter Fields	Fields to be Imported
Title	None
Salutation	None
First Name	First Name <Field No: 1>
Last Name	Last Name <Field No: 2>
Company Name	Company Name <Field No: 3>
Address 1	Address <Field No: 4>
Address 2	Address <Field No: 4>
City	City <Field No: 5>
State	State <Field No: 6>
Zip	None
Country *	None

# Partner Login

- To create and manage marketing content for the partner, login to their account.
- Select the **Login** button and enter your credentials. You can use the same username and password you used to enter the Program Manager.



A screenshot of a user interface showing a list of partner accounts. The first entry is selected, indicated by a grey square checkbox. The text for this entry is: "Site ID: 10582 (Login)", "ABC Group", "John Rogers", "100 Broadway", "New York, New York 10100", "United States". Below this, there is contact information: "mark.ritchie@structuredweb.com", "(888) 584-6480", and "www.abcgroup.telecomwebs.com". A small edit icon (pencil) is visible to the right of the website URL. The "(Login)" text is highlighted with a red rectangular box.

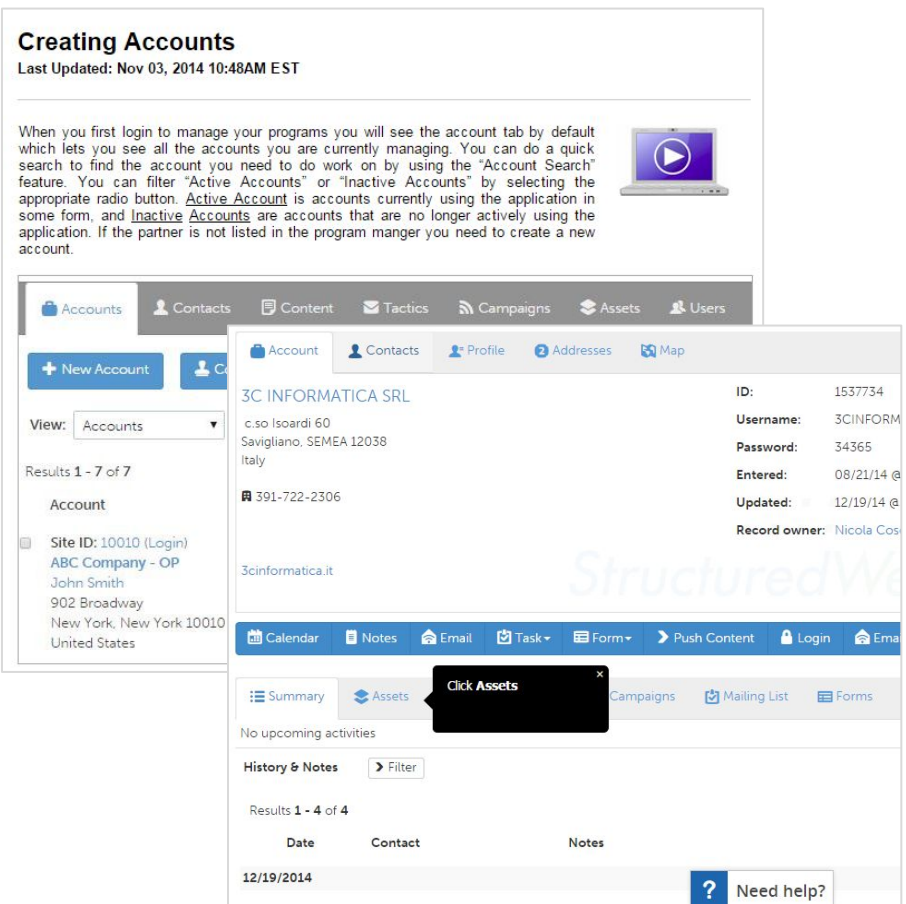
# Additional Help

- Email
  - ✓ [service@structuredweb.com](mailto:service@structuredweb.com)
- Call - 24/5 Support
  - ✓ US: 1-888-584-6480
  - ✓ UK: +44 2035141806
  - ✓ Australia: +61 280155849
  - ✓ Germany: +49 32221090193
  - ✓ France: +33 975181385
  - ✓ Japan: +81 345781761
- Live Chat - 24/5 Support
- Visit our online Support Center
  - ✓ [support.structuredweb.com](http://support.structuredweb.com)

### Creating Accounts

Last Updated: Nov 03, 2014 10:48AM EST

When you first login to manage your programs you will see the account tab by default which lets you see all the accounts you are currently managing. You can do a quick search to find the account you need to do work on by using the "Account Search" feature. You can filter "Active Accounts" or "Inactive Accounts" by selecting the appropriate radio button. Active Accounts is accounts currently using the application in some form, and Inactive Accounts are accounts that are no longer actively using the application. If the partner is not listed in the program manger you need to create a new account.



The screenshot displays the 'Accounts' section of the StructuredWeb application. The main navigation bar includes 'Accounts', 'Contacts', 'Content', 'Tactics', 'Campaigns', 'Assets', and 'Users'. A 'New Account' button is visible. The 'View' dropdown is set to 'Accounts', showing 'Results 1 - 7 of 7'. A list of accounts is shown, with the first one selected: '3C INFORMATICA SRL'. The account details include: ID: 1537734, Username: 3CINFORM, Password: 34365, Entered: 08/21/14 @, Updated: 12/19/14 @, and Record owner: Nicola Cos. The account address is 'c.so Isoardi 60, Savigliano, SEMEA 12038, Italy' and the phone number is '391-722-2306'. The website '3cinformatica.it' is also listed. A 'Click Assets' tooltip is visible over the 'Assets' button in the top navigation bar. The bottom of the page shows a 'History & Notes' section with a table of results for 12/19/2014, and a 'Need help?' button.