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Impact Marketing

User Guide

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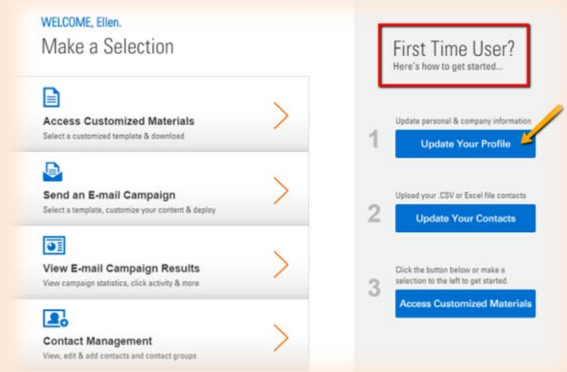
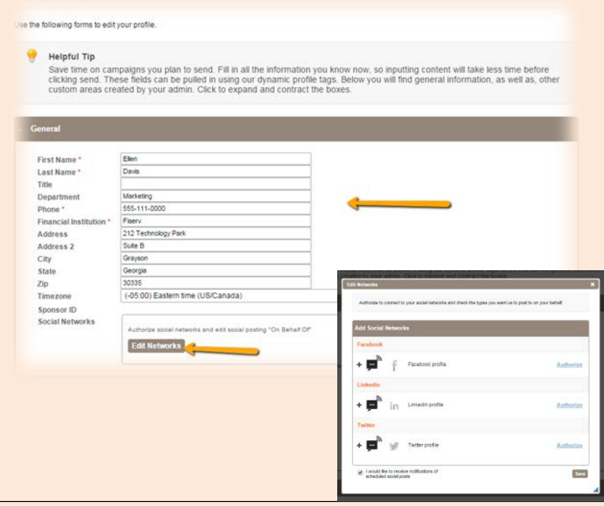
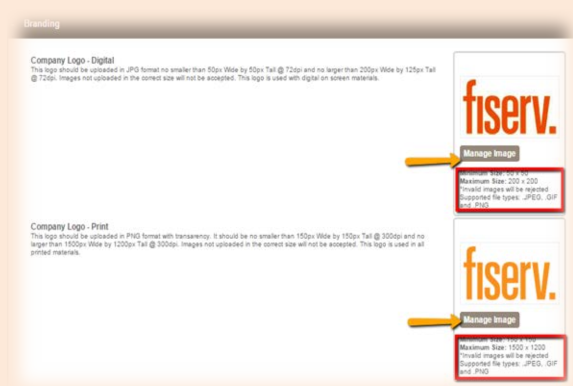
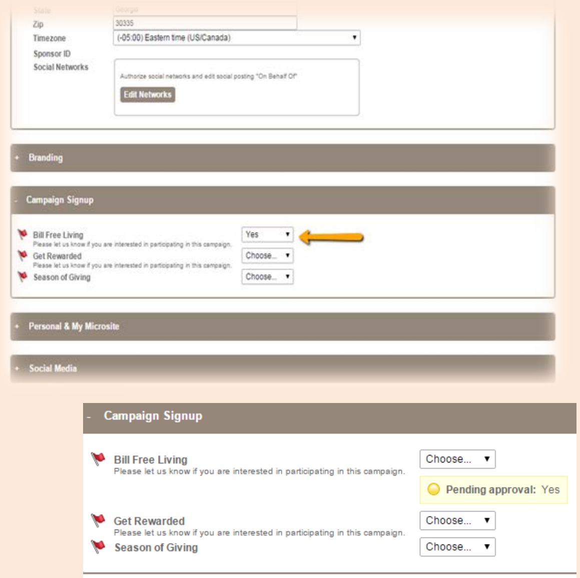
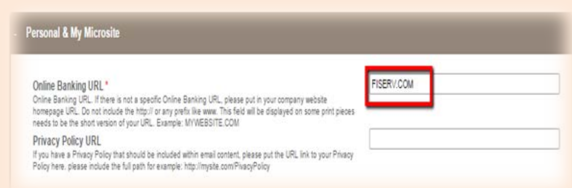
Impact Marketing User Guide

Table of Contents

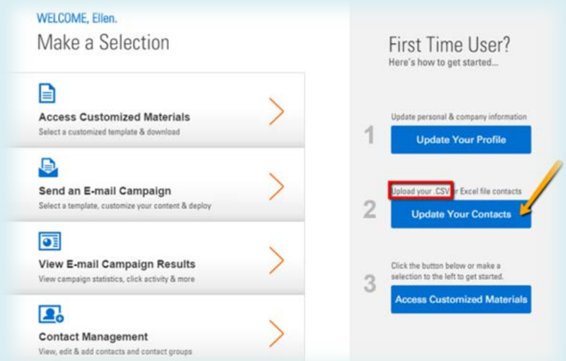
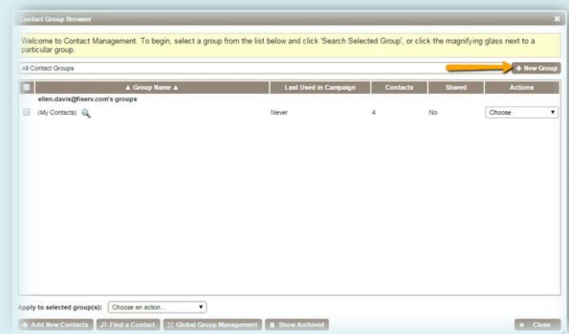
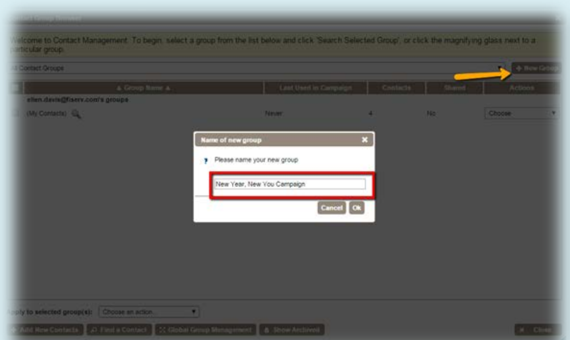
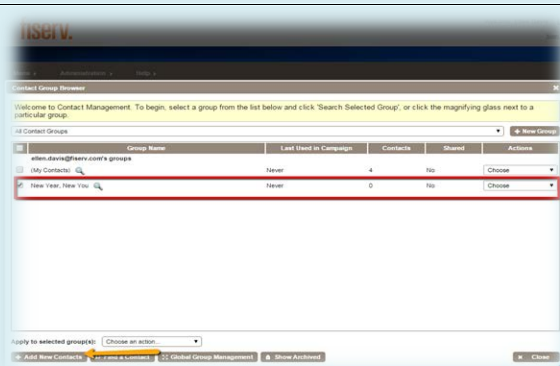
Updating Profile Information

Task	Step	Explanation	Demonstration	Notes
Profile – Beginning to Update Profile Information	**1**	- Log into the platform - Under 'First Time User' section Click 'Update Your Profile'		Material can be viewed but will not be personalized until profile is fully completed at this step.
Profile – Updating The 'General' Section	**2**	- Pre-registered information in the general section will already be completed, including sponsor ID -Click 'Edit Networks' to add Facebook, LinkedIn and Twitter profile information -Click 'Authorize'		Click the check box in the 'Edit Networks' pop up to receive notifications of scheduled social posts. 'Authorize' will direct you to the selected social networks login page for connection authorization.
Profile – Updating The 'Branding' Section	**3**	-Upload digital and print logos		The following guidelines **MUST** be strictly followed for digital: • JPG • No Smaller than 50px wide by 50px tall @ 72dpi • No larger than 300px wide by 125px tall @ 72dpi The parameters are slightly different for print.

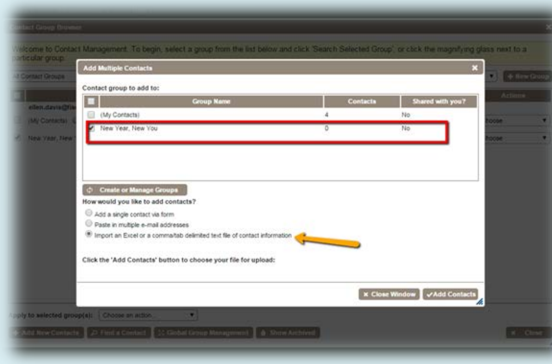
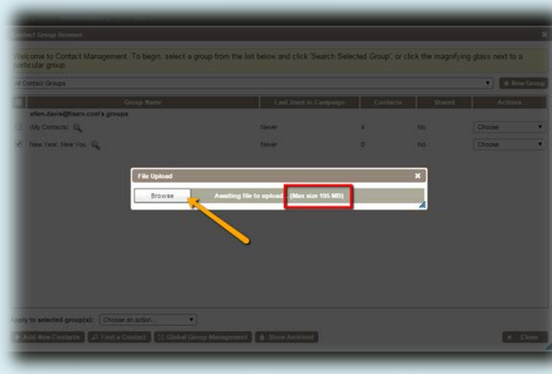
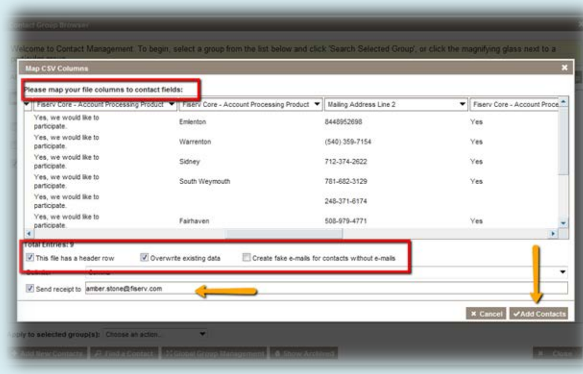
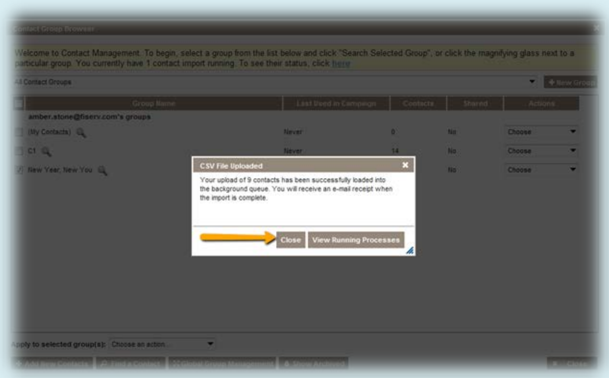
Updating Profile Information

Task	Step	Explanation	Demonstration	Notes
Profile – Updating the 'Campaign Signup' Section	**4**	-Use the drop down to confirm the campaigns that you enrolled in via the [Managed Programs Enrollment Form](#) -Election is approved by the Impact Marketing team	 *According to the managed campaign agreement, the enrollment form is the dominant data driver and all changes must be made on the [website](#).	After submitting platform updates, elections made previously in the campaign signup section will show 'pending approval: yes' (or no) status. An email is sent to the Impact Marketing mailbox that alerts us the new campaign status election update.
Profile – Updating the 'Personal & My Microsite' Section	**5**	-Enter the Online Banking URL -Enter the Privacy URL (not required)	 * The online banking URL is a required field since it is used on virtually every asset on the platform.	The 'www' in the URL **MUST** be omitted from the field.
Profile – Updating the 'Social Media' Section	**6**	-Add Facebook and Twitter handles		The 'www.facebook.com' and 'twitter.com' **MUST** be omitted from the fields.
Profile – Finish by Submitting the Updates	**7**	-Submit the profile updates -Return to the home page to upload contacts for emails and direct mail assets		The platform will auto-direct back to the homepage subsequent to submittal.

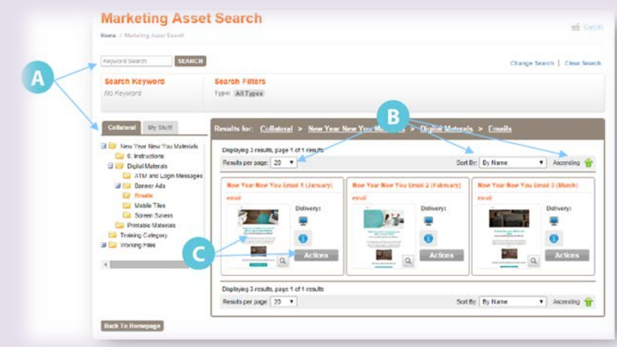
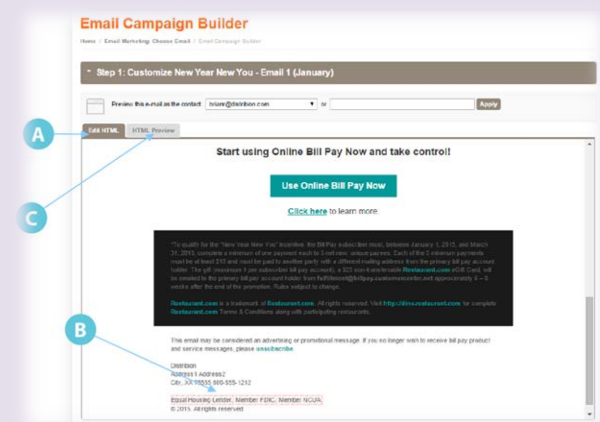
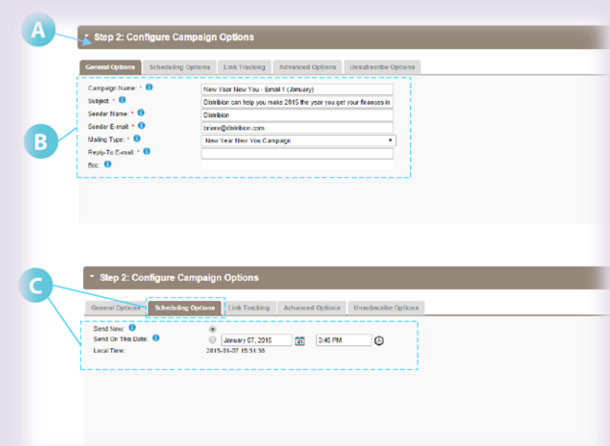
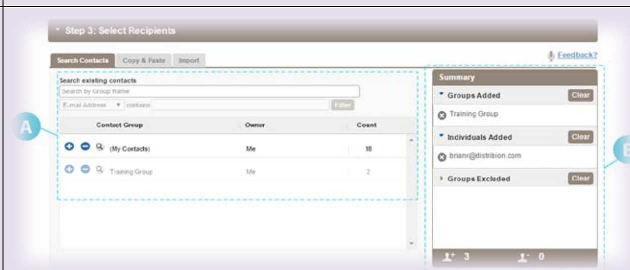
Uploading Contacts

Task	Step	Explanation	Demonstration	Notes
Contacts – Updating Contacts	1	-Upload contacts for email and direct mail assets		CSV files are preferred.
Contacts – Adding a New Campaign Group	2	-Click 'New Group'		New contacts can also be added to an existing group.
Contacts – Naming a New Campaign Group	3	-Enter the campaign the contact group in which they are associated -Click 'Ok'		
Contacts – Adding New Contacts to a Group	4	-Check the box next to the campaign -Click 'Add New Contacts'		

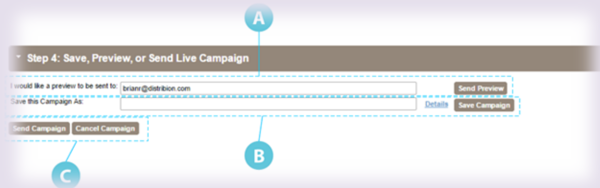
Uploading Contacts

Task	Step	Explanation	Demonstration	Notes
Contacts – Options to Add Contacts: Uploading Contacts with a CSV File	5	-Check the box next to the campaign -Click ‘ Import an Excel or a comma/tab delimited text file of contact information’ -Select ‘Add Contacts’		
Contacts - Uploading Contacts with a CSV File	6	-Click ‘Browse’ to access local files		The file size limit is 105 MB.
Contacts – Mapping Fields after CSV Upload	7	-Use the drop down menus on header row to map csv fields to platform fields -Check ‘this file has a header row’ and ‘overwrite existing data’ to update existing contact information		
Contacts – CSV File Upload and Mapping Confirmation	8	-Click ‘close’		Navigate to ‘Access Materials’ on Home Page or on menu.

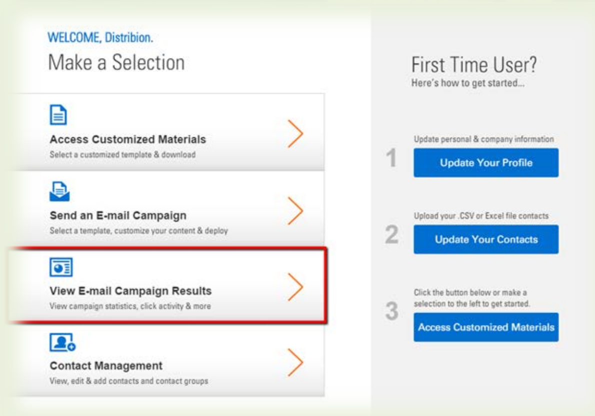
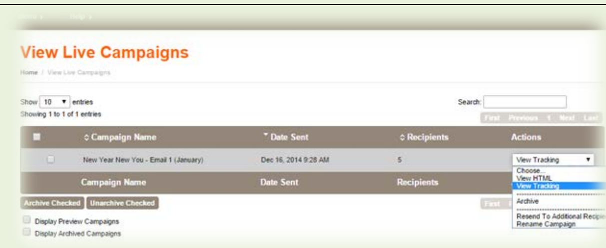
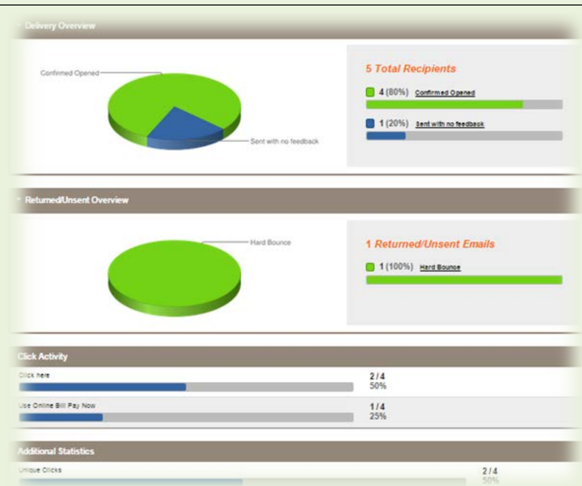
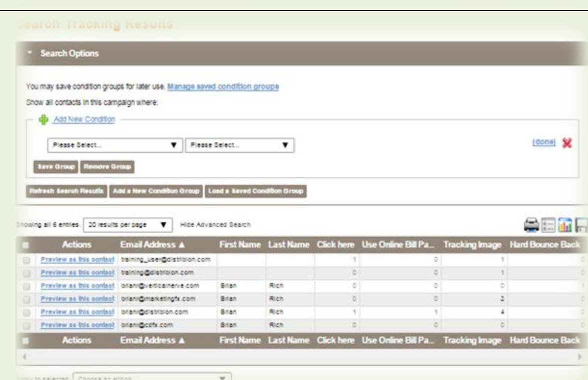
Sending Email Campaigns

Task	Step	Explanation	Demonstration	Notes
Emails-Access Materials	**1**	A&B – Search for specific material by keyword or by using the folders or filters within this Marketing Asset Manager view C – Access an email by clicking the Actions or Select button		
Emails-Edit an Email	**2**	A&B – select the Edit HTML tab to edit content within the email that has been allowed. Editable areas are shown in red outlined boxes C – Preview your edits by clicking the HTML Preview tab		
Emails-Configure Email Send Options	**3**	B – In this section, set campaign options like Campaign Name, Subject, Sender Name and Email and other fields C – You can also set scheduling options for the campaign		Not all options or tabs may be permissioned for you to view.
Emails-Select Email Recipients	**4**	A – Select from a list of contact groups you have already created or search for individuals within contact groups B – See a high level summary of what groups or contacts you've selected		

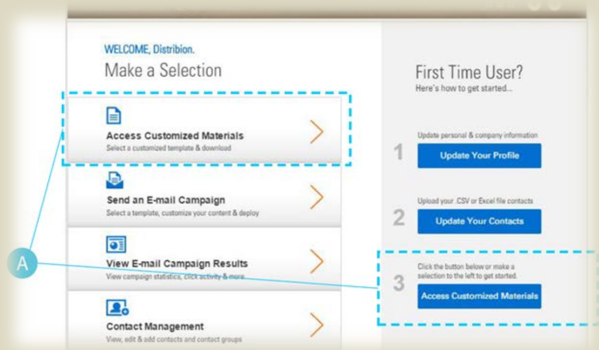
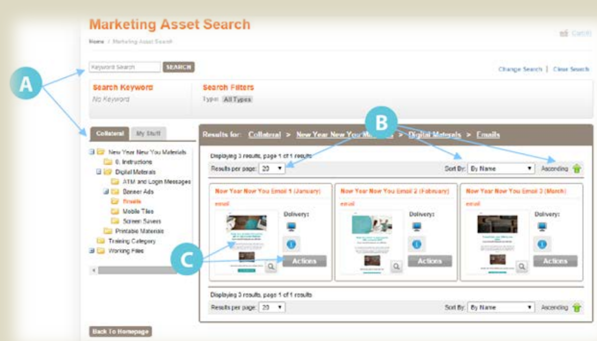
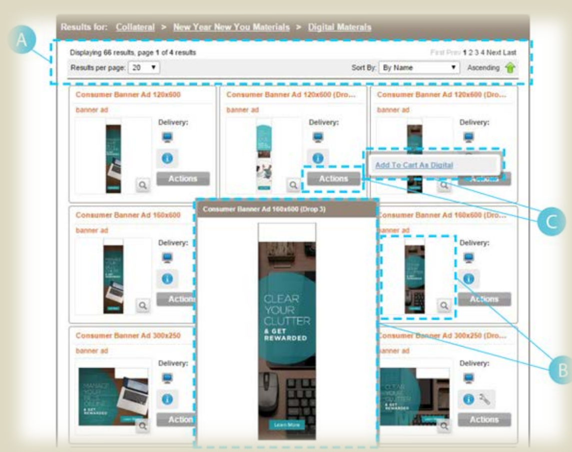
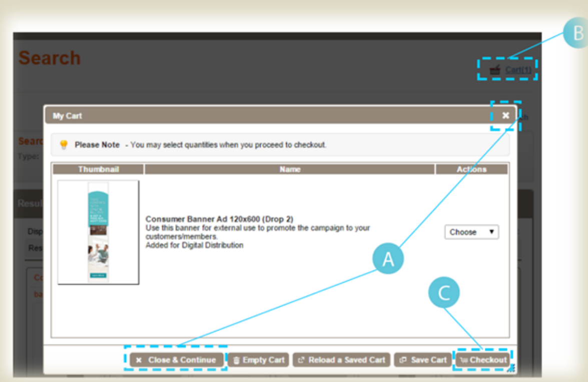
Sending Email Campaigns

Task	Step	Explanation	Demonstration	Notes
Emails- Preview or Send Email	**5**	A - Send yourself or another person a preview of the email B – Save the campaign to continue editing or send at another time C – Send or cancel the campaign		

Email Campaign Reporting

Task	Step	Explanation	Demonstration	Notes
Email Reporting- Access Email Reports	**1**	-From the home page, click the “View Email Campaign Results” button		
Email Reporting- Select to View Tracking	**2**	-Use the “Actions” menu on the right to select “View Tracking”		
Email Reporting- View Campaign Overview Information	**3**	-View delivery and click overview metrics		
Email Reporting- View Detailed Results	**4**	-Drill down and filter for more detailed results		

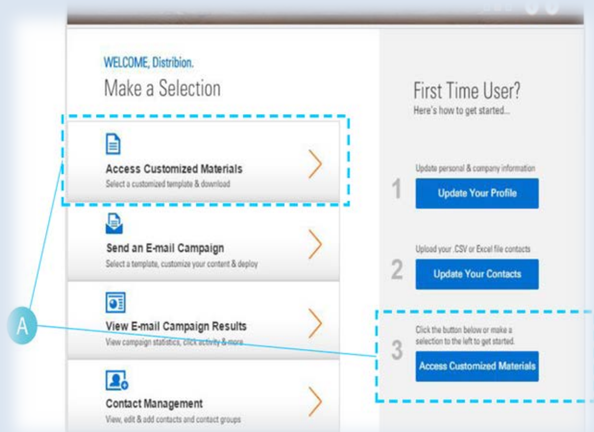
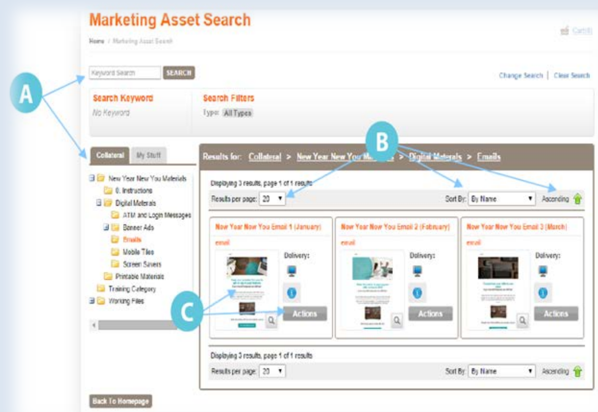
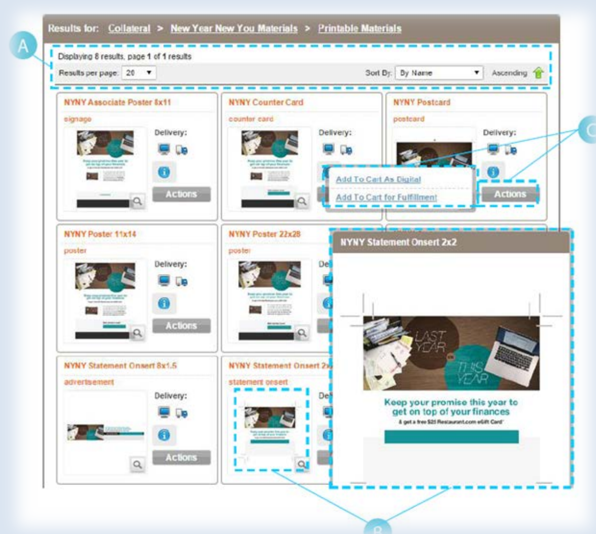
Downloading Materials

Task	Step	Explanation	Demonstration	Notes
Download Materials - Access Available Materials	**1**	A – Click on the "Access Customized Materials" link from the home page		
Download Materials - Search and Filter to Find Specific Materials	**2**	A&B – Search for specific material by keyword or by using the folders or filters within this Marketing Asset Manager view		
Download Materials - Download a Digital Item	**3**	B – Preview an item by hovering over the thumbnail C – Add the item to your cart for download by selecting "Actions > Add To Cart As Digital"		When an item is selected, the cart window will pop up automatically.
Download Materials - View and Access Your Cart	**4**	A – Close your cart to continue adding more pieces to download B – If you close your cart, you can access it again by clicking the Cart icon in the top right of the screen C – Once you are ready, access your cart and click "Check Out"		

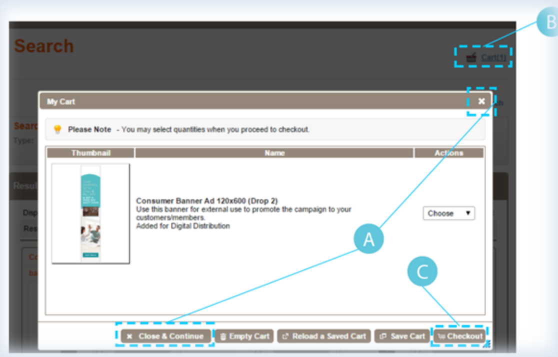
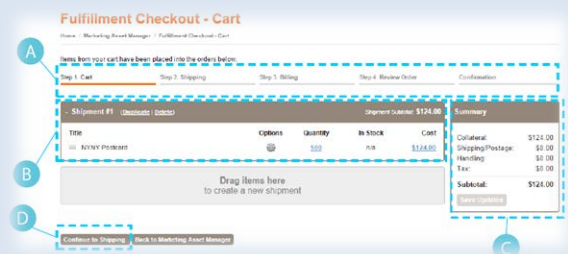
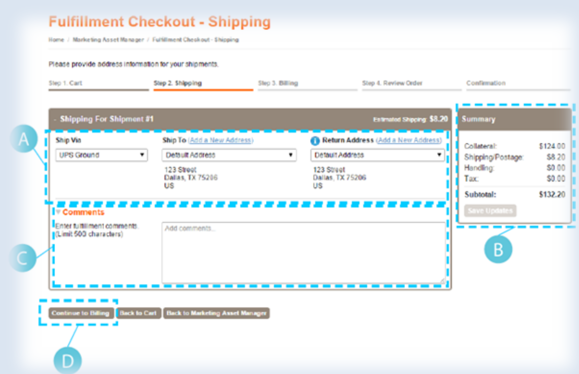
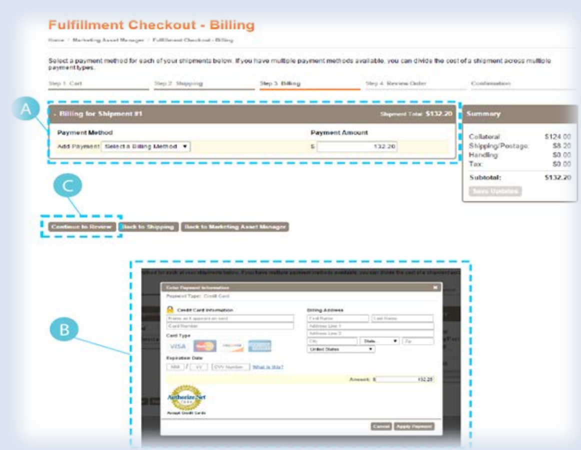
Downloading Materials

Task	Step	Explanation	Demonstration	Notes
Download Materials - Download Files	**5**	A – Download files individually. B – Download multiple files all at once as a .ZIP file		

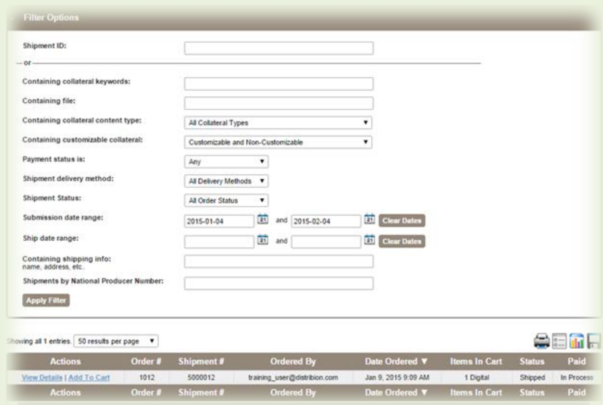
Ordering Print Materials

Task	Step	Explanation	Demonstration	Notes
Print Fulfillment- Access Available Materials	**1**	A – Click on the “Access Customized Materials” link from the home page		
Print Fulfillment- Search and Filter to Find Specific Materials	**2**	A&B – Search for specific material by keyword or by using the folders or filters within this Marketing Asset Manager view		
Print Fulfillment- Add Item(s) to Your Cart for Checkout	**3**	B – Preview an item by hovering over the thumbnail C – Add the item to your cart for print by selecting “Actions > Add To Cart for Fulfillment”		When an item is selected, the cart window will pop-up automatically.

Ordering Print Materials

Task	Step	Explanation	Demonstration	Notes
Print Fulfillment-View and Access Your Cart	**4**	A – Close your cart to continue adding more pieces to download B – If you close your cart, you can access it again by clicking the Cart icon in the top right of the screen C – Once you are ready, access your cart and click "Check Out"		
Print Fulfillment-Checkout Step 1 – Add Quantities	**5**	A – Go through the step – by-step checkout process B – Add quantities needed for each print piece C – Save updates and review costs on each page		
Print Fulfillment-Checkout Step 2 – Shipping Information	**6**	A – Select shipping method, ship to and ship from addresses B – Update cost summary to reflect shipping costs C&D – Add any comments to the print vendor and continue to billing step		
Print Fulfillment-Checkout Step 3 – Billing Information	**7**	A&B – Select billing method of Credit Card and enter your information C – Continue to order review and submit your order		Currently only Credit Card billing type is available.

Reviewing Order Reports

Task	Step	Explanation	Demonstration	Notes
Order Reports- Access Print Order Reports	**1**	-From the top navigation, click “Menu > Print & Fulfillment > View Orders”		
Order Reports- View Order Details for Print or Downloads	**2**	-Use the filters and order detail columns to see information about each order you’ve placed		Under the “Items in cart” column, this page will show “Digital” for downloaded items and “Fulfillment” for print order items.