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# **Partnership and Campaign Management**

## **Version 2.0**

### **Training and Reference Document**

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#### **Version Control**

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0.1			Review Draft for TIS
0.5			TIS Review and Edited
2.1			Revised & Updated

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**TABLE OF CONTENTS**

**1 INTRODUCTION..... 3**

**2 NAVIGATING ..... 5**

2.1 SILKNET MAIN SCREEN, PROFILES MENU ..... 5

2.2 ALL COMPANIES VIEW ..... 6

2.3 UPDATE AFFINITY GROUP ..... 7

2.4 FIND PARTNER GROUP / AFFINITY GROUP ..... 8

2.5 THE FIND RETURN RESULT ..... 9

2.6 DETAIL FIND RESULT RETURNED ..... 10

2.7 CAMPAIGN MANAGEMENT..... 11

Figure 1: Silknet Main Screen, Profiles Menu, Affinity Groups ..... 5

Figure 2: All Companies View, Affinity Group Profiles..... 6

Figure 3: Update Affinity Group ..... 7

Figure 4: Find Company ..... 8

Figure 5: Find Result Returned..... 9

Figure 6: Detailed Find Result Returned ..... 10

Figure 7: Campaign Management Screen..... 11

## 1 Introduction

HomeSpace enters into Affinity Marketing Partnerships to offer its services to large groups of consumers. Current partners include Costco, Farm Bureau and will soon include Starwood, Delta, and many others. For each partnership, a contract is written that dictates the value proposition of the opportunity or put another way, what events constitute a payment. In most cases, HomeSpace pays partners based on consumer registrations.

To promote our services, HomeSpace establishes campaigns, in connection with our partners and separately to build general awareness (for example, the million piece mailing with Starwood and Banner ads on Lycos, respectively).

This document describes how to set up a Partner and Campaigns in order to track and report on all opportunities. Tracking is the capability to recognize the source of a lead for all possible entry points.

HomeSpace has three entry points:

1. External Web Sites,
2. HomeSpace Web Site,
3. Response Center.

Each entry point requires specific tracking codes. Reporting is the capability to provide information on an activity. By including the tracking code, HomeSpace can compare the differences between two campaigns for the same partner or even compare two partners receiving a similar campaign.

For Version 2.0, the goal was to automate the current tracking on the web site and list all relationships for reporting purposes. For the release corresponding to the rollout to the Response Center, the goal is to provide a common database of partners and campaigns.

Note: Affinity and Partner are analogous within this document due to the current screen names indicating Affinity. Silknet terms this relationship as Company. The correct terminology is Partner. As we move towards customized screens these labels will be updated.

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## Glossary

Definition of terms used in the document.

Affinity Relationship	A business-to-business relationship between two companies that benefits both.
Affinity Marketing Partner	A business-to-business relationship between two companies that benefits both with joint marketing-advertising ventures.
Partner	A business-to-business relationship between two companies that benefits both with joint agreements on how to conduct and generate more business for each other.
Web Traffic/ Click-Through	Customers who come to HomeSpace from another web source such as Lycos.
Registration	Completing basic contact information on the HomeSpace web page to begin a customer profile within the Silknet system.

## 2 Navigating

### 2.1 Silknet Main Screen, Profiles Menu

The Partners Profile Menu (currently called: Affinity Group) screens are accessed through the Silknet Main screen by clicking on Profiles menu and selecting Affinity Groups (Figure 1, Silknet Main Screen, Profiles Menu, Affinity Groups). The purpose of this screen is to enable Marketing and Business Development Staff to add, edit, delete and maintain Partnerships and Campaigns. You can update Partner information or you can add new ones as they apply and are approved.

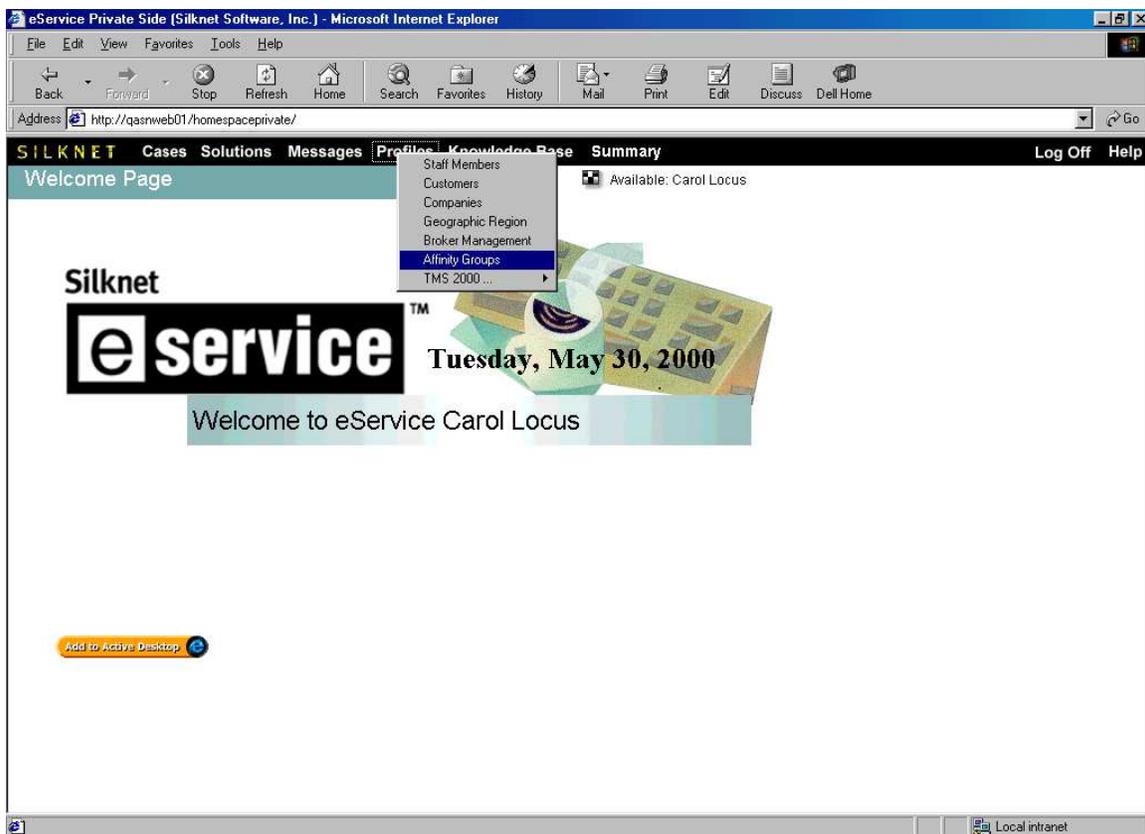


Figure 1: Silknet Main Screen, Profiles Menu, Affinity Groups

## 2.2 All Companies View

The Affinity Group Profiles screen opens with All Companies view by default, with a blank form (see the scroll down box just below the Silknet Main Menu, where the Affinity Groups companies are displayed. The screen title displayed is Affinity Group Profiles). All Companies view is already selected by default. You could add a new partner and click the **Add** button at the bottom of the screen in the center (Figure 2, All Companies View, Affinity Group Profiles).

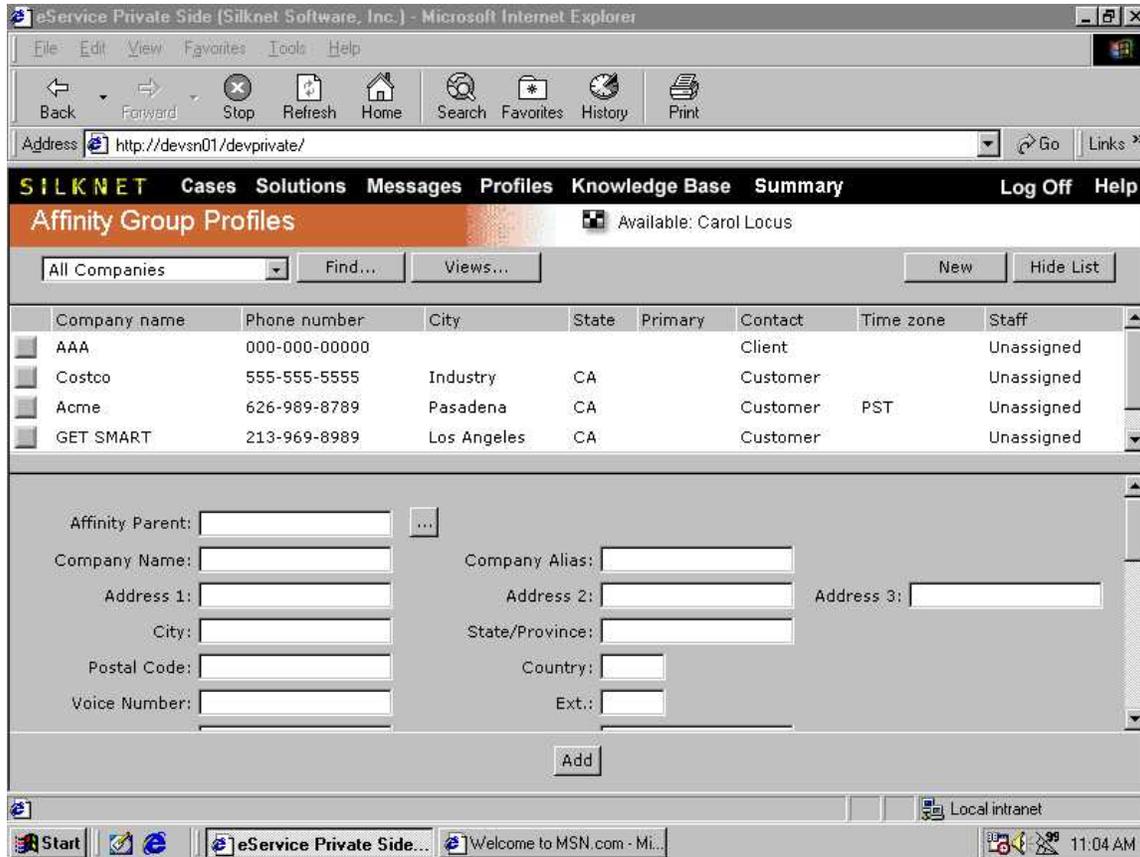


Figure 2: All Companies View, Affinity Group Profiles

### 2.3 Update Affinity Group

If you need to maintain an affinity group company, select the company from the company list in the All Companies View. Add or correct any needed information and click the Update button in the lower center of the screen. You will see a confirmation that you have successfully updated the record (Figure 3, Update Affinity Group). Clicking the ellipse (“...” selection box) will display the Find screen.

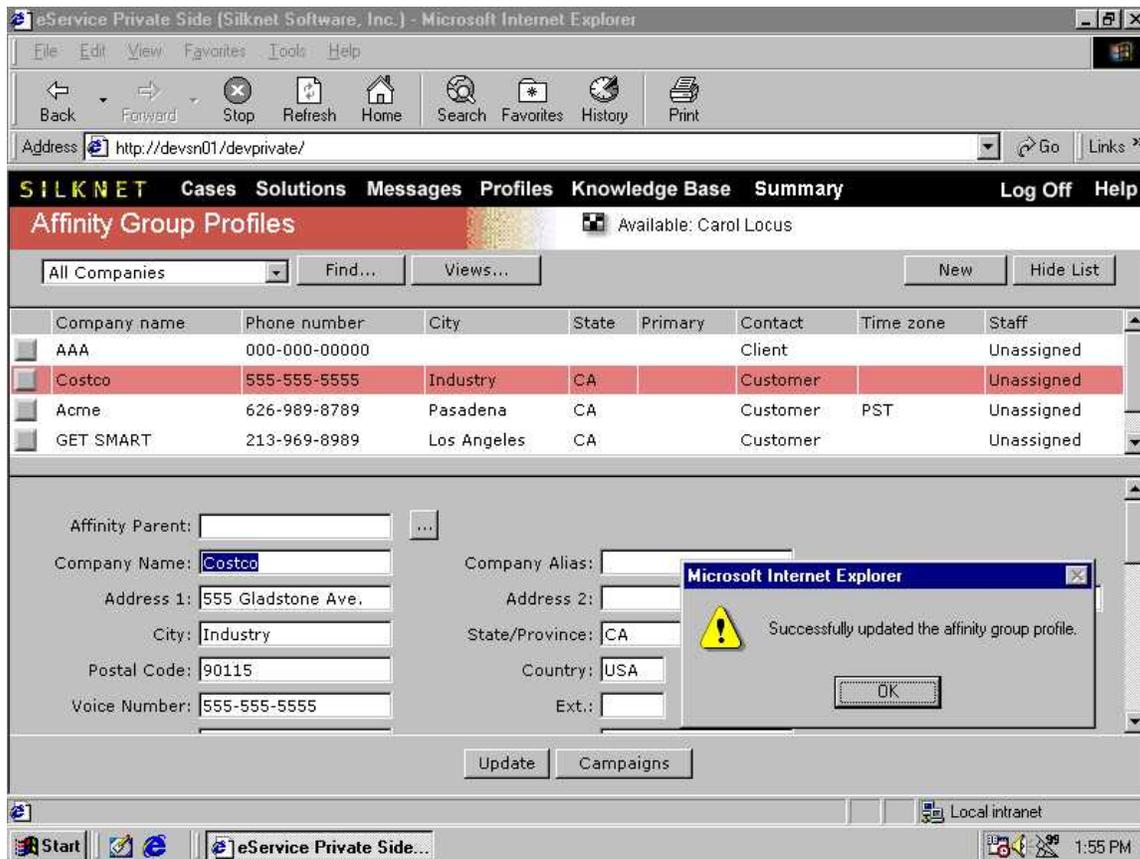
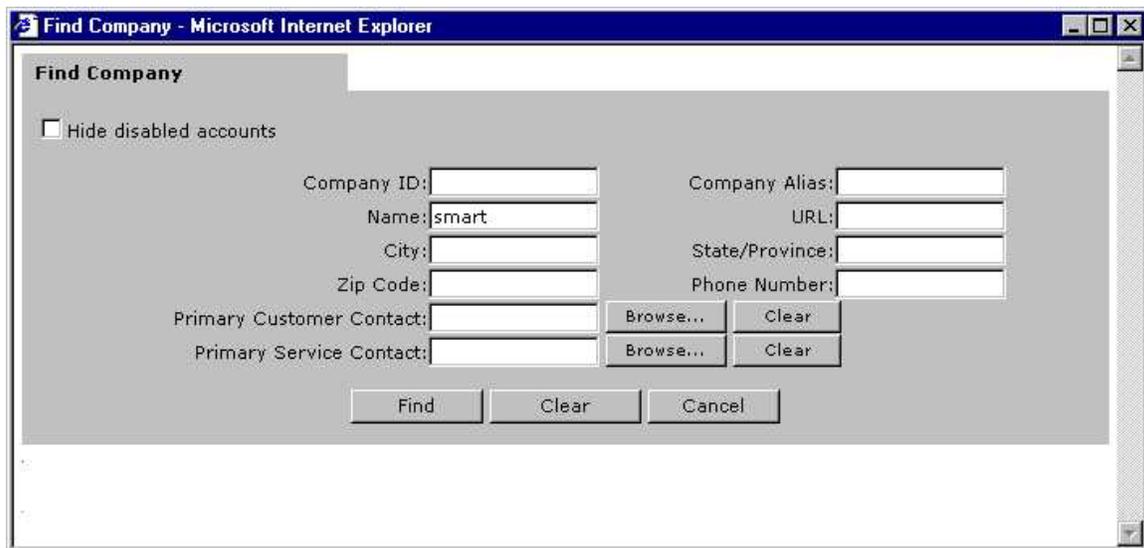


Figure 3: Update Affinity Group

## 2.4 Find Partner Group / Affinity Group

If you cannot find the Partner / Affinity Group you are looking for in the All Companies list, click the **Find** button next to the box that displays the view. All Companies appears by default when you first open the Affinity Groups Profiles screen. Fill out the information you are looking for (Example: smart) and click the **Find** button (Figure 4, Find Company).



**Find Company**

Hide disabled accounts

Company ID:

Name:

City:

Zip Code:

Primary Customer Contact:

Primary Service Contact:

Company Alias:

URL:

State/Province:

Phone Number:

Figure 4: Find Company

## 2.5 The Find Return Result

From the previous screen we see that there is one company called “Get Smart” in Los Angeles. (Figure 5, Find Result Returned).

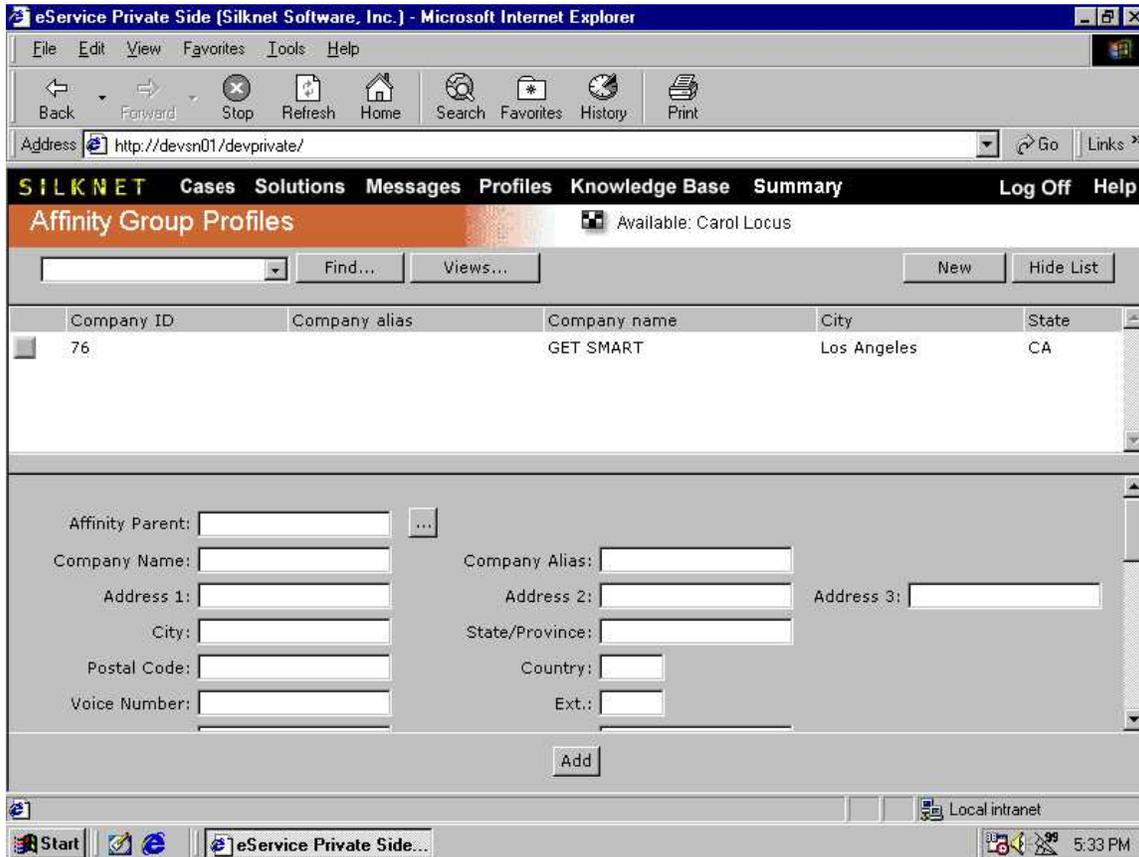


Figure 5: Find Result Returned

## 2.6 Detail Find Result Returned

When you click on the company name, the company information is displayed (Figure 6, Detail of Find Result Returned). To retrieve more detailed information about this company, click on the box to the left in the return results window, in the center of the screen.

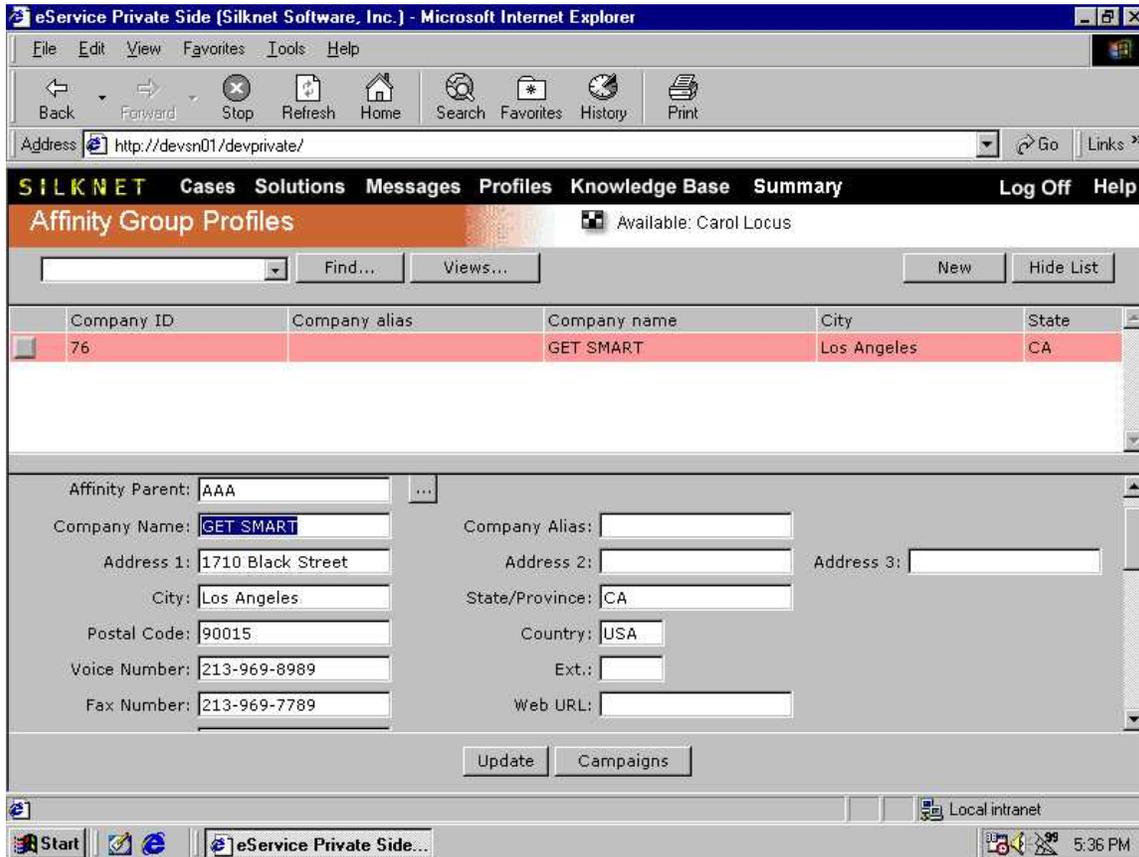


Figure 6: Detailed Find Result Returned

## 2.7 Campaign Management

When a Partner / Affinity Group is selected, a campaign management button is displayed. Click on button displays the Campaign Management Screen (Figure 7, Campaign Management Screen). For Version 2.0, the Campaign Management screen is used to track the 20-digit source ID associated with each Partner and Campaign.

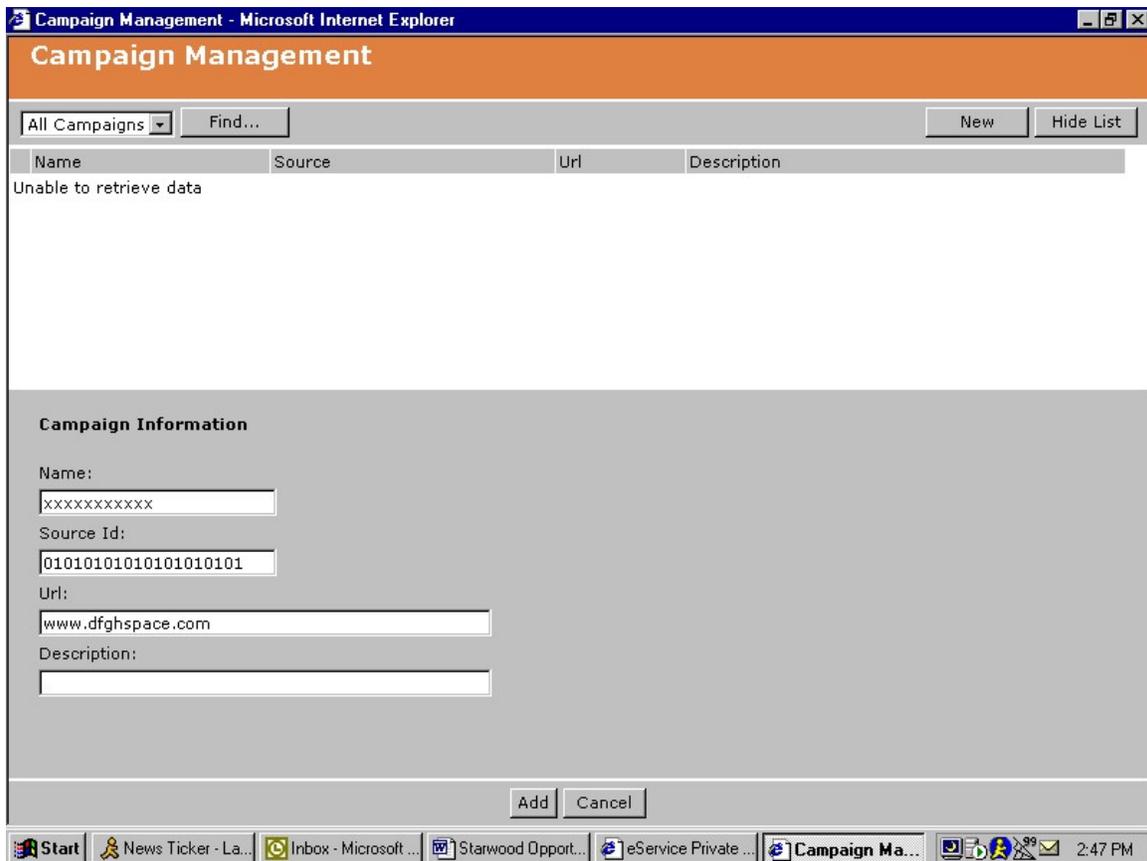


Figure 7: Campaign Management Screen