

Fortinet Demand Center User Guide



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Showcase Indication

Please follow the steps below to add the showcase script and embed the showcase within your website.

Once you are logged into the partner portal, go to the 'Content Center.'

There are 3 things you need to do:

1. Update partner settings (if needed)
2. Make your category selections and choose your entry point
3. Copy the code and embed it on your site

Partner Settings

1. Go to "Partner Settings."



2. Review and update the "Partner Settings" if needed.

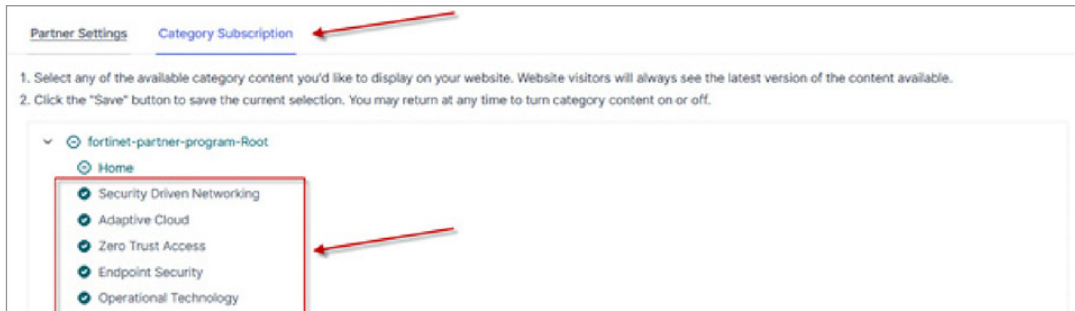
A screenshot of the 'Partner Settings' form. The left sidebar has a menu with 'Company Information', 'Advanced Settings', 'Co-Branding', and 'Email Settings'. A red box highlights this menu, and a red arrow points from the 'Co-Branding' option to the 'Co-Branding' section of the form. The 'Company Information' section is currently active, showing fields for 'Company Name *', 'Address *', 'City *', 'State *', 'Zip Code *', 'Country *', and 'Website Url *'. The 'Sync From Pdm' toggle is turned on.

2. Fill in all available co-branding information here. If the showcase allows co-branding, then the information you enter here will be populated within the showcase.

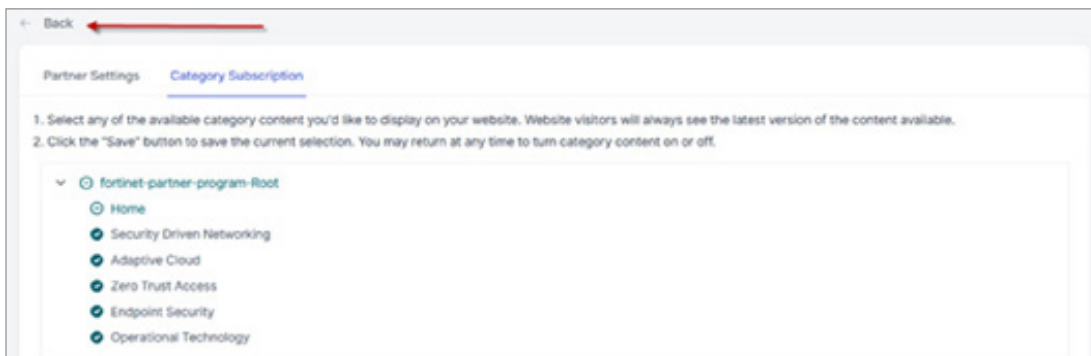
A screenshot of the 'Partner Settings' form showing the 'Co-Branding' section. The left sidebar has a menu with 'Company Information', 'Advanced Settings', 'Co-Branding', and 'Email Settings'. A red arrow points from the 'Co-Branding' option in the sidebar to the 'Co-Branding' section of the form. The 'Co-Branding' section has a 'Phone Number' field. At the bottom right, there are 'Back' and 'Save & Next' buttons.

Category Selections and Entry Points

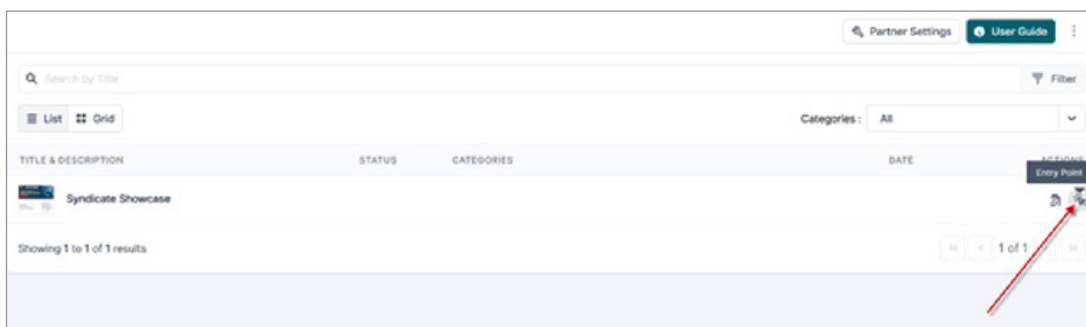
1. Go to the “Category Subscription” section. Select the categories that you would like to appear or highlight on your showcase syndication by checking and unchecking them. Save your selections.



2. Once you’ve saved, go back by clicking the “Back” button.

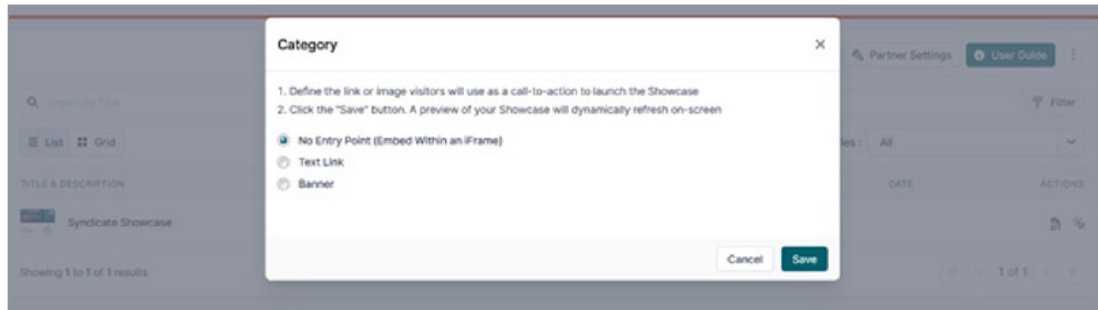


3. Once you’ve filled in your “Partner Settings” and updated your “Category Subscription”, you can choose your “Entry Point”. The “Entry Point”, as the name suggests, is a gateway/entry into your showcase syndication.



The “Entry Point” gives you 3 options to pick from: No Entry Point, Text Link, and Banner.

- * **No Entry Point:** Displays the showcase as an iframe within your site.
- * **Text Link:** Displays a text link on your site and clicking on it, opens the showcase within a lightbox.
- * **Banner:** Displays a banner on your site and clicking on it, opens the showcase within a lightbox.

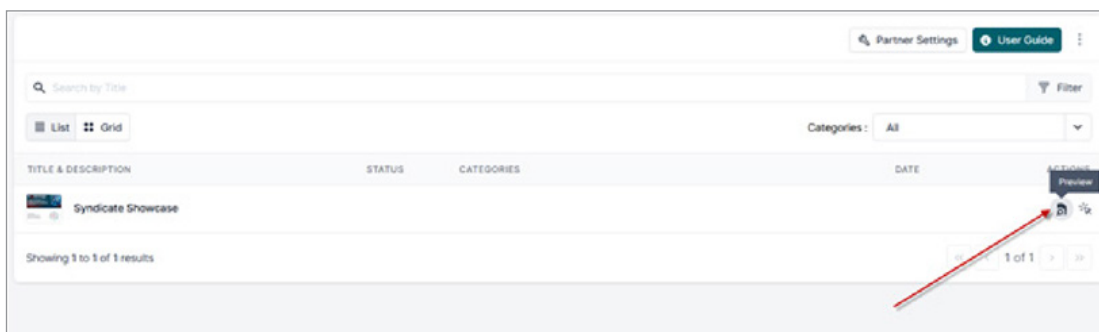


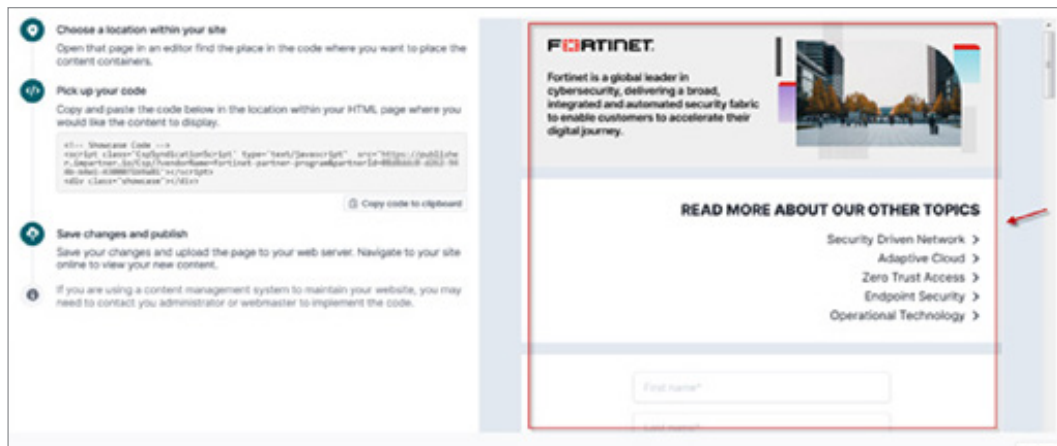
4. Select the appropriate “Entry Point” depending on the amount of space that you have available on your website. You can use an iframe, pick a text link, use a banner image, or upload a new image. Save your settings once you are done selecting your entry point.



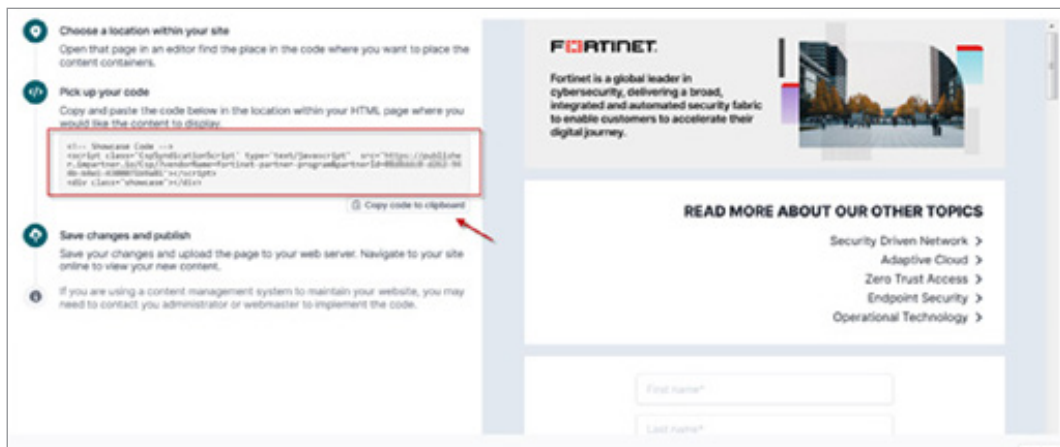
Copying and Embedding Showcase Script

1. Next you can preview your showcase to ensure it shows all the categories that you selected and also obtain the script.





- Once you are satisfied with your categories and entry points, you can get your embedding code by clicking on the button and copying it to your clipboard.



- Paste the script on your webpage where you want the showcase to display.



If at any time you would like to add/remove a category or update entry points, you can do so by going into the partner portal and updating them. Simply save your changes within the partner portal once you select your new categories and entry points. You do NOT have to paste your script again. The script automatically renders the updated categories and entry points once you refresh the webpage where the script has been embedded.

Execute a Co-branded Email Campaign

From the Demand Center, you can preview and edit emails, send test emails to yourself or your colleagues, and send or schedule the emails to the recipients on your mailing list(s). As we generate new emails, we'll make them available to you under the Emails tab.

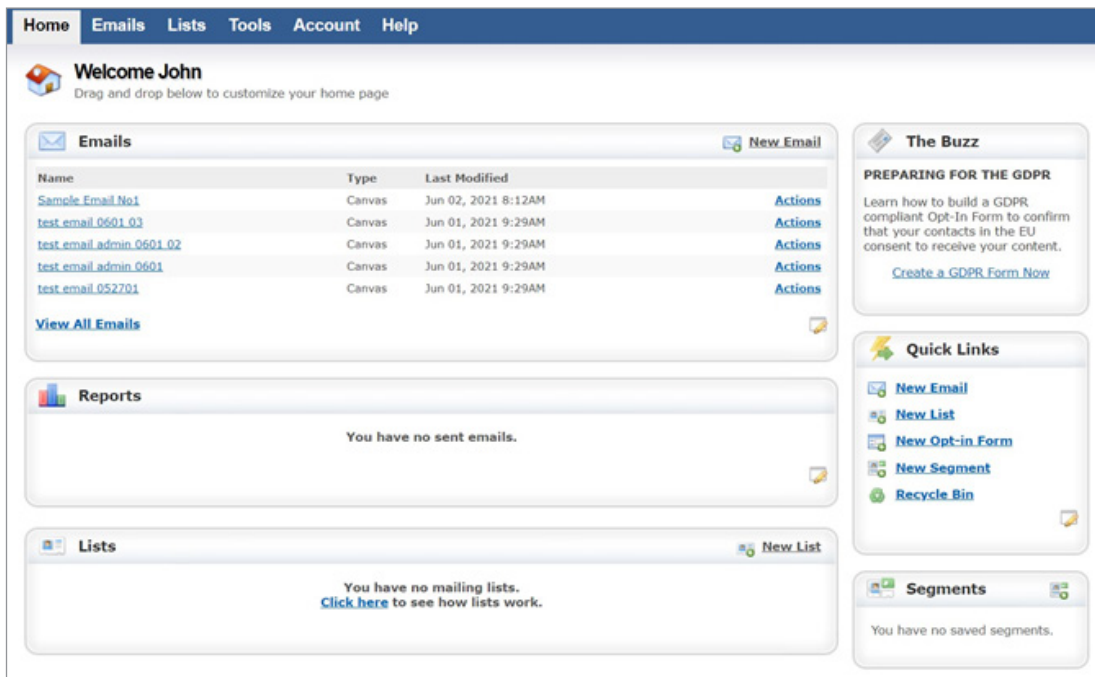
Before you can send an email, you need to create at least one mailing list.

Creating a Mailing List

You can create a mailing list by manually adding recipients, uploading a CSV file, or importing your contacts list from your email client.

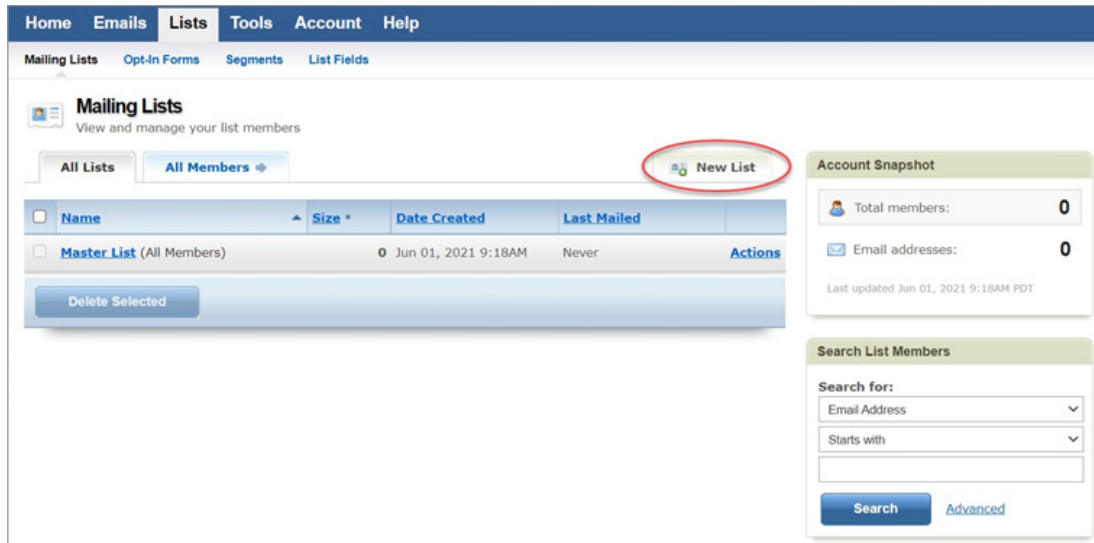
1. From the Demand Center main screen click the **Emails** tab.
2. Click  next to the Partner Settings button in the upper right corner of the screen.
3. From the menu that appears, click **Advanced Email**.

The advanced email interface opens in a separate tab in the browser.



4. Click the **Lists** menu at the top of the screen.

The **Lists** menu opens.



1. Click the **New List** tab (circled in the screenshot above).
The Data Import Policies and Terms of Service appears.
2. Read through the terms and check the three boxes at the bottom if you agree.
3. Click **Continue**.
The **New List** page appears.

The screenshot shows the 'New List' page. At the top, there are tabs: Home, Emails, Lists (selected), Tools, Account, and Help. Below these are sub-tabs: Mailing Lists, Opt-In Forms, Segments, and List Fields. The main heading is 'New List' with the subtitle 'Name your new list and decide how to add list members'. There are three steps: 1. Name It, 2. Add Members, and 3. Results. The '1. Name It' step is active. It has a text box for 'List Name:' and a text area for 'Description:'. There is a 'Help' icon. Below this is the 'Add List Members' section with three radio button options: 'Create a new list one member at a time.' (selected), 'Create a new list from an external file.', and 'Create a new list by importing list members from your web-based email client NEW!'. Below these options is a text box with the instruction: 'Build a new list using standard and custom fields, then choose to add data right away or at a later date.' At the bottom, there are 'Cancel' and 'Next >' buttons.

4. Type a name for the list in the **List Name** box.
5. Type a description for the list in the **Description** box.
6. In the **Add List** Members section, there are three ways to add list members, described below.

Create a new list one member at a time

1. To manually create a mailing list, select the **Create a new list one member at a time** option.
2. Click **Next**.

A new list member form appears.

Example Manual Mailing List
Add members to your new list

1. Name It 2. Add Members

Add new list members using the form below. As you add members, the totals on the right will be updated.

* Email Address:

First Name:

Last Name:

Address:

Optional address line 2

City:

State / Province:

Postal Code:

Country: None Selected

Work Phone:

Home Phone:

Mobile Phone:

Fax:

Company Name:

Title:

Marital Status: None Provided

Gender: None Provided

[Add custom field](#)

[Save & Add Another](#) [Save List Member](#) [Cancel](#)

List Snapshot

Total members: 0

Email addresses: 0

Last updated Jun 02, 2021 9:18PM PDT

Need to Add a Field?
Create custom fields at the [bottom of the page](#) using the "Add Custom Field" link.

3. Fill out each field in the form.
NOTE: **Email Address** is the only mandatory field.
4. (Optional) If you'd like to add a custom field, click **Add Custom Field** at the bottom of the form. Otherwise, skip ahead to step 9.
A line of text boxes appears: one with code for the new field, a blank one for the field name, and a field type drop-down list.

5. Type a name for the field you're creating in the blank second box.
6. Choose a field type from the **Field Type** drop-down list. If this will be a text field, choose one of the three options for a text-length limit (25, 125, or 255 characters max). Other possible field types are integer, decimal, and date.
7. To delete the custom field, click off to the right.
8. If you'd like to add another custom field, click Add **Custom Field** and repeat steps 5 and 6.
9. Click **Save & Add Another** to continue adding recipients.
10. Once you've added all of the recipients, click **Save List Member**.

The mailing list appears with all of the members added.

☐	Email Address	First Name	Last Name	Created Date	Record Status	Actions
☐	jonah.gomez@exampleco.com	Jonah	Gomez	Jun 03, 2021 11:31AM PDT	Mailable	Actions
☐	j.jefferson@email.com	Jake	Jefferson	Jun 03, 2021 11:31AM PDT	Mailable	Actions
☐	greg.stevens@company.com	Greg	Stevens	Jun 03, 2021 11:30AM PDT	Mailable	Actions
☐	amy.santiago@domain.com	Amy	Santiago	Jun 03, 2021 11:28AM PDT	Mailable	Actions
☐	rebecca.saton@samplecompany.com	Rebecca	Staton	Jun 03, 2021 11:22AM PDT	Mailable	Actions

11. To add any additional recipients to the list, click the **New List Member** tab (circled in the screenshot above). The mailing list appears with all of the members added.

Create a new list from an external file

1. To upload a CSV file, select the **Create** a new list from an external file option.
A **Choose File** button appears along with a small set of instructions for CSV file formatting.

NOTE: If you prepare your file with column headers that match the new list member form in the advanced email interface, the import process will be seamless. If you don't use column headers, you'll need to manually match your data to the fields. The form fields are, respectively: Email Address, First Name, Last Name, Address 1, Address 2, City, State/Province, Postal Code, Country, Work Phone, Home Phone, Mobile Phone, Fax, Company Name, Title, Marital Status, and Gender. You can also add a custom field, covered in steps 5–7 below.

2. Click **Browse**.

An operating-system-specific **Open** dialog box appears to let you choose a file.



3. Locate the file you want to use and then click **Open**.
4. Click **Next**.

A field mapping screen appears.

Example CSV Mailing List
Map uploaded list fields to standard or custom fields

Upload File | **Map Fields** | Results

We found **6** records and **16** fields in your uploaded list.

1 Map File Fields to List Fields

Map a field by selecting the appropriate name in the drop down menu, OR do not map a field by selecting "Do Not Import," OR create a custom field by selecting "New custom field."

Examples from file	Map to Field
1. s.valdez@mail.com, Jake.peralta@nypd.com, tiff.smith	-- Do Not Import --
2. Sadie, Jake, Tiffany, George, Meghan	-- Do Not Import --
3. Valdez, Peralta, Smith, Christiansen, Trent	-- Do Not Import --
4. 1112 Cherry Tree Lane, 235 First Ave.	-- Do Not Import --
5. no preview found	-- Do Not Import --
6. Los Angeles, Brooklyn	-- Do Not Import --
7. CA, NY	-- Do Not Import --
8. 90210, 12306	-- Do Not Import --
9. USA, USA	-- Do Not Import --
10. 801-123-1456, 555-123-4567	-- Do Not Import --
11. no preview found	-- Do Not Import --
12. no preview found	-- Do Not Import --
13. no preview found	-- Do Not Import --
14. Important Corp.	-- Do Not Import --
15. Manager	-- Do Not Import --
16. custom data 1, custom data 2, custom data 3, custom	-- Do Not Import --

2 Set Import Rules

In the event that the list you are loading contains records already found within your account, please select your preferred import rules below:

- ☐ Preserve older data - If a match is found reject the newer record
- ☒ Import newer data - If a match is found overwrite the older record
 - ☐ If the new record contains empty fields, then overwrite fields with empty values.
 - ☐ If the new record contains an incomplete postal address, then allow that incomplete postal address to overwrite existing address.

Cancel Back Next

5. In the **Map File Fields to List Fields** section, select the appropriate field to map each line of your data to from the **Map to Field** drop-down lists.

A NOTE: It's okay if there's no data for some fields. **Email Address** is the only required field.

NOTE: If you don't want to import a certain line of data, select the **-- Do Not Import --** Map to Field option.

(Optional) If you want to create a custom field for a line of data, select **New** custom field from the **Map to Field** drop-down list. Otherwise, skip ahead to step 8.

Two additional boxes appear next to the field type: One with the code/name for the new field and a field type drop-down list.



New custom field... ▼

NEW_FIELD

Type: Medium Text (125 max) ▼

- Type a name for the field you're creating in the code/name box.
NOTE: If the name is two words or more, they must be separated with an underscore. You cannot add spaces in this box.
- Choose a field type from the **Field Type** drop-down list. If this will be a text field, choose one of the three options for a text-length limit (25, 125, or 255 characters max). Other possible field types are integer, decimal, and date.
- In the **Set Import Rules** section, select an option for how the software should handle duplicate records.
- Click **Next**.

After the file uploads, the mailing list appears.

Example CSV Mailing List
View and manage your list members

[List Members](#)
[Properties](#)
[Tools](#)

[New List Member](#)
[Append File](#)

Search for:

[Search](#)
[Clear Search](#)
[Advanced](#)

As of Jun 03, 2021 1:44PM, this list has:

5 members
 [Help](#)

5 email addresses

Displaying 1 through 5 Results per page: 25 ▼

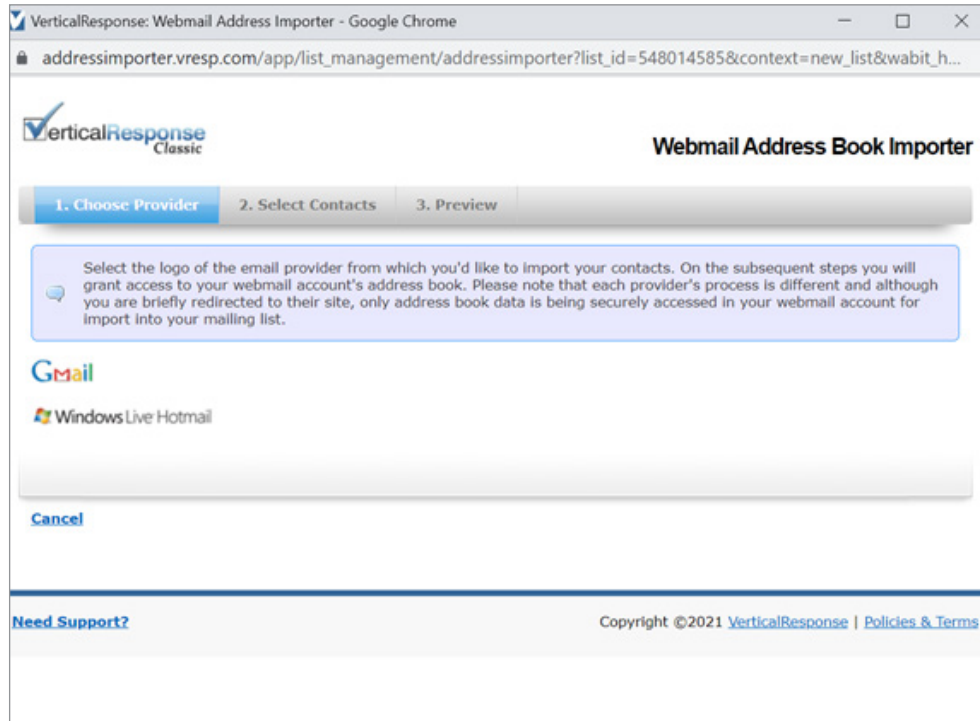
	Email Address	First Name	Last Name	Created Date	New Field	Record Status	
☐	tiff.smith@email.com	Tiffany	Smith	Jun 03, 2021 1:42PM PDT	custom data 3	Mailable	Actions
☐	s.valdez@mail.com	Sadie	Valdez	Jun 03, 2021 1:42PM PDT	custom data 1	Mailable	Actions
☐	meghan@xyzco.com	Meghan	Trent	Jun 03, 2021 1:42PM PDT	custom data 5	Mailable	Actions
☐	jake.peralta@nypd.com	Jake	Peralta	Jun 03, 2021 1:42PM PDT	custom data 2	Mailable	Actions
☐	g.christiansen@corp.com	George	Christiansen	Jun 03, 2021 1:42PM PDT	custom data 4	Mailable	Actions

[Submit](#)

- To manually add a few additional recipients to the list, click the **New List Member** tab (circled in the screenshot above).
- To upload the contents of an additional CSV file to this mailing list, click the **Append File** tab (circled in the screenshot above.)

Create a new list by importing list members from your web-based email client

- To import your contact list from your email client, select the **Create** a new list by importing list members from your web-based email client option.
A box containing a link to best practices when importing from an address book appears. We encourage you to read that.
- Click **Next**.
The Webmail Address Book Importer should open automatically.



NOTE: If your browser is configured to block pop-ups, click the **Open Web Address Book** Importer link on the screen.

3. Select the logo of the email provider from which you'd like to import your contacts.
4. Your email client log in screen appears.
5. Sign in to your account.

A permission prompt appears asking if you want to let the VRClassic Prod access your info.

6. Click **Yes**.

The email engine will attempt to import your contacts.

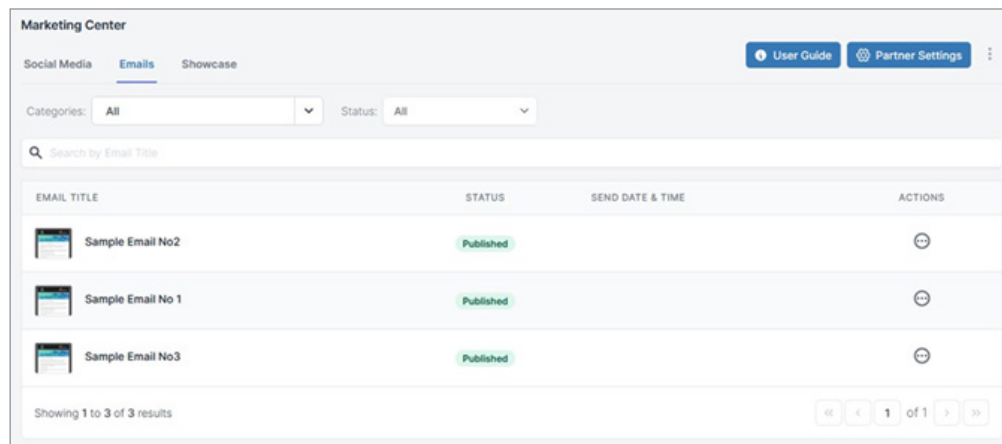
Previewing and Sending Test Emails

You can preview available emails in the Demand Center to determine whether you want to send them out to potential customers. You can also send yourself or your colleagues a test email to see how the information appears to a recipient.

To preview an email

1. From the Marketing Center main screen, click the **Emails** tab.
You'll see a list of emails available for sending.





- Click to the right of any available email (under Actions).
- From the menu that appears, click **Preview**.
A preview of the email appears in a pop-up window.
- Click **Close** when you're done viewing it.

To send a test email

- Click to the right of any available email (under Actions).
You'll see a list of emails available for sending.
- From the menu that appears, click **Test**.
A Test Campaign pop-up window appears.

The 'Test Campaign' pop-up window has a close button (X) in the top right corner. It contains two input fields: 'Name' and 'Email'. Below the 'Email' field is a teal 'Add' button. To the right of the input fields is a large text area labeled 'Email Added : 0/10'. At the bottom right, there are 'Cancel' and 'Test' buttons.

- Type the name of the test email recipient in the **Name** box.
- Type the email address of the recipient in the **Email** box.
- Click **Add**.
The recipient's name and email address move into the **Email Added** box.

6. (Optional) To add another test recipient, repeat steps 3–5. To delete a recipient, click **X** next to their name and email address.
7. When you're finished adding recipients, click **Test**.
The email is sent.
8. To cancel the test email without sending, click **Cancel**.

To download a copy of an email

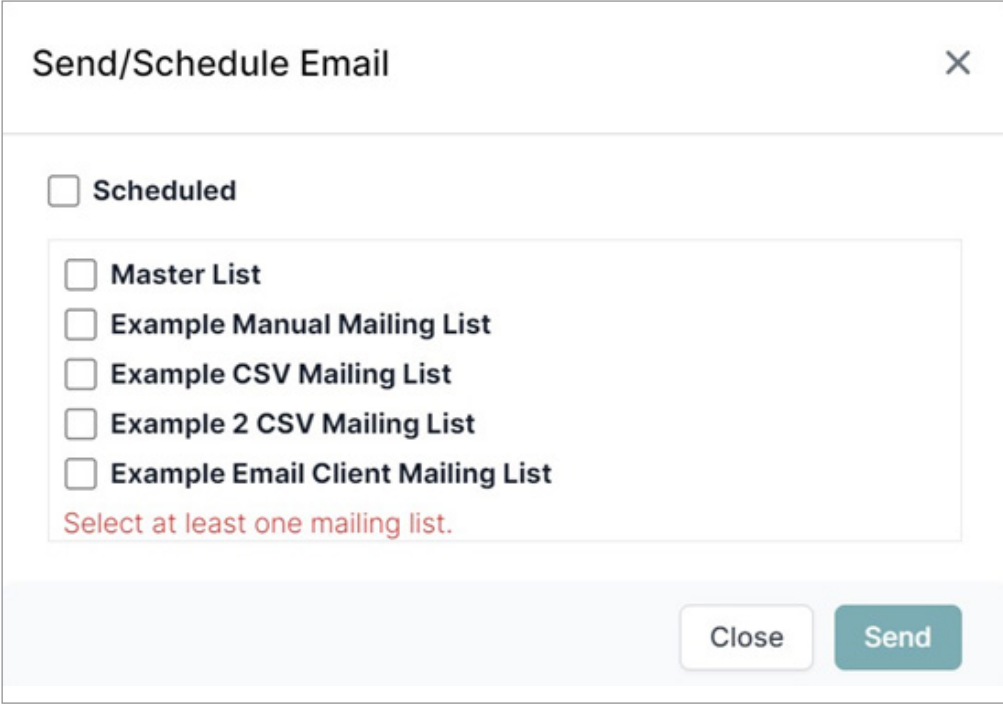
1. Click  to the right of any published email (under Actions).
2. From the menu that appears, click **Download HTML**.
A copy of the email is downloaded to your local drive.

Sending and Scheduling an Email

When you're ready to push out an email, you have two options: you can send immediately or schedule a future send date and time.

NOTE: If this is the first time you're sending an email to a new mailing list, you may receive an email notification from the email engine requesting a reply to provide opt-in verification.

1. From the Demand Center main screen, under the **Emails** tab, locate the email you want to send out.
2. Click  to the right of the email (under Actions).
3. From the menu that appears, click **Send/Schedule**.
A **Send/Schedule Email** pop-up window appears.



The image shows a 'Send/Schedule Email' pop-up window. At the top, there's a title bar with the text 'Send/Schedule Email' and a close button (X). Below the title bar, there's a section with a checkbox labeled 'Scheduled'. Underneath this, there's a list of mailing lists, each with a checkbox: 'Master List', 'Example Manual Mailing List', 'Example CSV Mailing List', 'Example 2 CSV Mailing List', and 'Example Email Client Mailing List'. Below the list, there's a red text prompt: 'Select at least one mailing list.' At the bottom right of the window, there are two buttons: 'Close' and 'Send'.

To send immediately

1. Select a desired mailing list (or several) from the options presented.
NOTE: You may need to refresh your browser to see any newly added mailing lists.
2. Click **Send**.
The email is sent immediately.



To schedule a date and time for sending

1. Check the **Scheduled** check box.
2. Enter a date in the **Date** box using the calendar feature.
3. Enter a time in the **Time** box using the clock feature.
4. Select a time zone from which to send out the email from the **Time Zone** drop-down list.
5. Select a desired mailing list (or several) from the options presented.

NOTE: You may need to refresh your browser to see any newly added mailing lists.

6. Click **Send**.

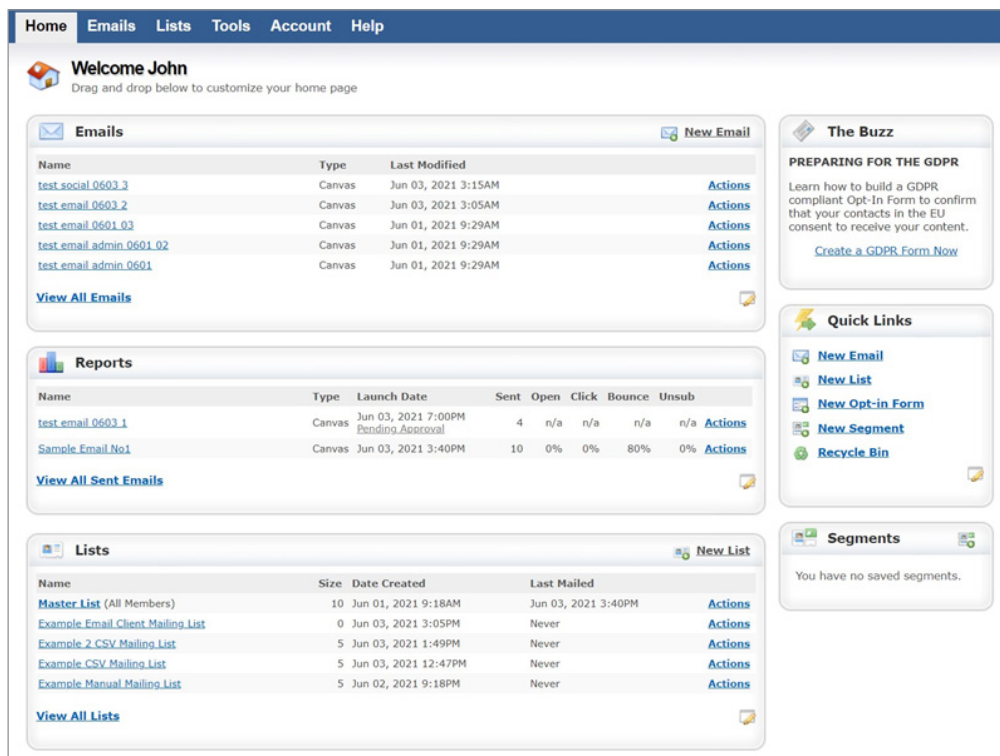
The email will be sent at the scheduled date and time.

Email Reporting Data

You can view the performance data of a particular email, such as open, click, bounce, and unsubscribe rates, in the reporting area of the advanced email interface. Reports also include an email's social response (Facebook likes, Twitter and LinkedIn shares) and the top performing links by click percentage. Additionally, this data can be compared against other recently sent emails to give you a snapshot of which ones have been the most effective.

1. From the Demand Center main screen (and from the Emails tab), click  next to the Partner Settings button.
2. From the menu that appears, click **Advanced Email**.

The advanced email interface opens in a separate tab in the browser. The **Home** menu contains three main sections: **Emails**, **Reports**, and **Lists**.



The screenshot shows the Fortinet Demand Center Home page. The top navigation bar includes Home, Emails, Lists, Tools, Account, and Help. The main content area is divided into three sections: Emails, Reports, and Lists. The Emails section shows a table of email campaigns with columns for Name, Type, Last Modified, and Actions. The Reports section shows a table of email reports with columns for Name, Type, Launch Date, Sent, Open, Click, Bounce, and Unsub. The Lists section shows a table of mailing lists with columns for Name, Size, Date Created, and Last Mailed. On the right side, there are three widgets: The Buzz (Preparing for the GDPR), Quick Links (New Email, New List, New Opt-in Form, New Segment, Recycle Bin), and Segments (You have no saved segments).

Name	Type	Last Modified	Actions
test social 0603_3	Canvas	Jun 03, 2021 3:15AM	Actions
test email 0603_2	Canvas	Jun 03, 2021 3:05AM	Actions
test email 0601_03	Canvas	Jun 01, 2021 9:29AM	Actions
test email admin 0601_02	Canvas	Jun 01, 2021 9:29AM	Actions
test email admin 0601	Canvas	Jun 01, 2021 9:29AM	Actions

Name	Type	Launch Date	Sent	Open	Click	Bounce	Unsub	Actions
test email 0603_1	Canvas	Jun 03, 2021 7:00PM Pending Approval	4	n/a	n/a	n/a	n/a	Actions
Sample Email No.1	Canvas	Jun 03, 2021 3:40PM	10	0%	0%	80%	0%	Actions

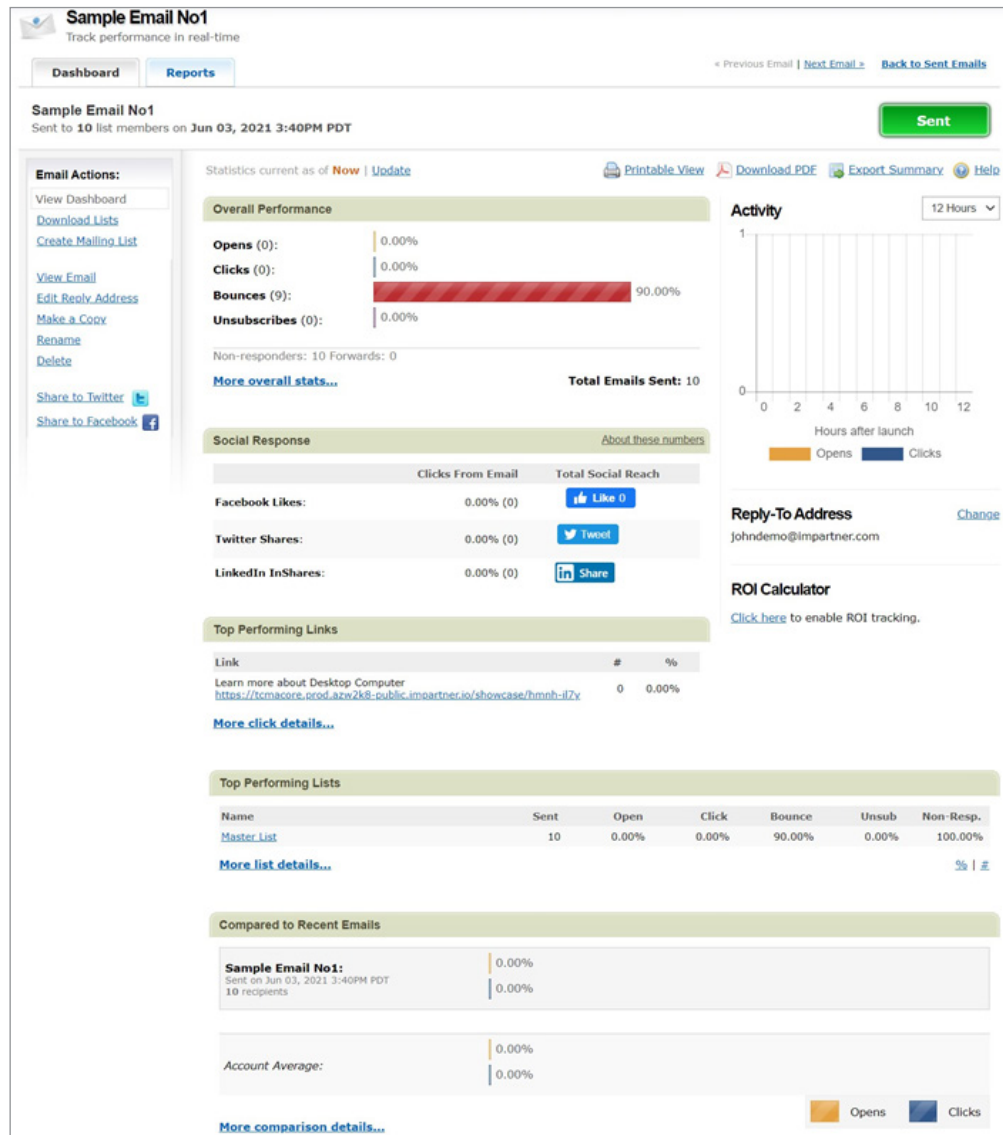
Name	Size	Date Created	Last Mailed	Actions
Master List (All Members)	10	Jun 01, 2021 9:18AM	Jun 03, 2021 3:40PM	Actions
Example Email Client Mailing List	0	Jun 03, 2021 3:05PM	Never	Actions
Example 2 CSV Mailing List	5	Jun 03, 2021 1:49PM	Never	Actions
Example CSV Mailing List	5	Jun 03, 2021 12:47PM	Never	Actions
Example Manual Mailing List	5	Jun 02, 2021 9:18PM	Never	Actions

3. From the **Reports** section, look for the name of the email you just sent.
4. Under the Launch Date header, you can see the date and time the email was sent. A "Pending Approval" status indicates that once an email is launched, it is sent into an Approval Process to ensure that the content of the email is compliant with CAN-SPAM law. The email and list will be reviewed, and if no problems are found, it will either be mailed immediately or set to a status of "Pending Launch" until the designated launch time/date arrive.



- Under the Sent header, you can see how many recipients were included on the mailing list. Open shows how many recipients opened the email. Click shows how many recipients clicked the links inside the email. Bounce shows how many emails bounced back (i.e. how many email addresses were undeliverable). Unsub shows how many recipients unsubscribed to the mailing list from the unsubscribe link in this particular email.
- To see additional performance data, click on the name of an email.

A dashboard of data for that email opens.



- Click the **Reports** tab at the top of the screen to see a bar graph of the performance data.