Affiliate Management Reference Guide

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Chapter One

Overview:

The Affiliate Management System was designed to give Affiliates the tools and flexibility needed to manage growth, and productivity at the local level.

Mission:

The mission statement of the AMS 2000 objective reads as follows:

To provide you with a management tool that will assist in the realization of your growth objectives.

Enhancements:

The Affiliate Management System provides several new enhancements that will directly benefit each Affiliate.

These enhancements include

- More control at the Affiliate level
    1. Contacts and sales persons
    2. Several domains
    3. Affinity groups and retail partners
    4. Affiliate Management Users
- Access Management – provides more flexibility
- Accounts
    1. Customer orders
    2. Several accounts per customer

- Service Marketing Options
    1. Affiliate
    2. Affinity Group
    3. Retail Partner
    4. Primary ISPA Customer
    5. A business that sells your service under your domain name or their own and develops their own customer base which pays you recurring fees
    6. A business or individual that distributes or re-sells your product for only the commission from each sale

These are just some of the many ways that the Affiliate Management System will benefit Affiliates.

The goals of this manual are to

- Give a brief overview of the enhancements of AMS 2000
- To explain the key features and options of the AMS system
- To provide a layout of each screen with descriptions and functions of each form
- To provide a glossary to define terms
- List a FAQ section that displays common questions asked
- To list internal ISPA contacts for use when needed

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Chapter Two

Description of Services / Operations

1. **Package/Product/Service Concept**

- A package is a set of products defined by an Affiliate that the affiliate can then resell to its customers. The products are not resold on an individual basis directly to the end-users, but they are contained in a package. For example, affiliates could define a User-Account deal to resell the End-user products (packages).

  Package Constants

  1. ISP Alliance defines services available.
  2. No billing is done at the service layer.

3. ISP Alliance defines products available.
4. Products are sets of services, and of services only
5. The billing to the affiliates is done at the product layer. That means that the only things billed to an affiliate are products, and neither services nor packages.
6. The amount billed is negotiated for each product and each affiliate. ISPA does not change the amount billed for a product depending on how an affiliate resells it.
7. A package is a set of products, and only of products.
8. For each product, ISPA should provide a suggested retail setup fee and a retail recurring fee (by default, it should be a suggestion for a monthly billing)

1. **Difference between Customer and Account**

The difference between a customer and an account was created to cancel one of the limitations discovered in the test version. Currently, the owner of the account is the one to be billed. However, the customer can buy additional internet accounts and have them listed under the main account Name / ID.

For example, a big company like *Coca-Cola* could contact ISPA to buy Internet accounts for its employees. In this case, we would have one customer buying several accounts. The only person to be billed for these accounts would be *Coca-Cola*, but not the account owners. But in most of the cases (for simple end-users), a customer will buy one account.

The new changes involve the following rules:

1. A customer can buy one or more packages
2. An account is bought by one and only one customer
3. A customer must provide a billing address, to which will be sent the bill for all the accounts he purchased.
4. All billing information, such as credit card number or expiration date, are provided for the customer only, and not for the account owners.
5. A customer purchases accounts via a customer order. These customer orders are made at a specific date. The accounts purchased are not necessarily activated at the time customer order was taken.
6. An account belongs to only one customer order.

7. The customer must provide a shipping address. The shipping address will default to the billing address
8. Each customer must provides a main contact

9. The billing period and the payment method should be recorded for each customer order. That means that all accounts purchased via a same customer order should be paid with a same payment method and during the same billing period.
10. We will be able to put an account on hold (e.g. for spamming, accounting reason…). The reason why the account was put on hold, who puts it on hold, and when should also be recorded.

11. We should be able to specify two dates between which an account would be put on hold. It would be used, for example, when a user leaves for vacation, or has a broken computer.
12. We should be able to provide a start date and an end date for a user account. The account will be automatically activated at the start date, and automatically terminated at the end date.

13. We should extend the options to call up a customer or an account, with selection, for example, by last name, address…

14. When querying (identifying) an account, we should have access to all logins and passwords for all the services contained in this account

15. When deleting an account, all its related services should be deleted

1. **Customer order**

1. A customer order is a group of accounts ordered at a particular date with only one payment method and one billing period. That means that, for example, if a customer order was done using a Visa card, all the accounts contained in this customer order will be billed via this Visa card.
2. The shipping address for the customer order will default to the customer's shipping address.

1. **Affiliate management user**

Employees ,or any person allowed to log on to the *Affiliate Management* system,

are called *Affiliate management users*.

1. To be able to register as an *Affiliate management user*, a person must already have an account registered in Affiliate management.
2. Each *AM user* will be assigned a role. This is this role that will determined which pages he will be allowed to browse, and which access rights he will be granted for this pages.

3. An *AM user* is allowed to take customer orders.
4. An *Affiliate management user* belongs to one affiliate and cannot access information for another affiliate.

5. An Affiliate Management User account does not include, nor is it connected

to, a full user account (ie.. an affiliate management user does not have modem access, e-mail, nor a personal website.)

1. **Role and access rights**

The access rights of each person who uses the Affiliate Management System will be governed by their role.

1. Each user is assigned one and only one role. Each role can correspond to a function in the company (e.g. accounting, technical support, development, administration …)
2. One role can encompass several users
3. For each role, there is defined a list of web pages the users will be able to access.
4. Each web page that someone with an assigned role gets access to will be specified according to their permissions. Those permissions are query, add, delete, and modify. For instance, we can specify that every system administrators can access the *Account manager* page with all permissions, whereas a simple technical support person should just be allowed to make some queries on this web page.

1. **Pricing plan**

A pricing plan is to define the different ways for an end-user to pay their bills. The differences are mainly in the billing period. For the moment, the different pricing plans are monthly billing, quarterly billing, semi-annually billing, and yearly billing.

2. **Marketing plan**

In the current system, the Marketing plan is called OLR plan. A marketing plan is a way for an affiliate to organize its deals depending on its different marketing targets. For instance, an affiliate could create a marketing plan for its American customers, another one for its Canadian customers, and another one specific for the student market.

1. A marketing plan is defined by and for one affiliate. The affiliate who created a marketing plan should be the only one to be able to delete it or modify it. No other affiliates should be able to browse through other affiliates' marketing plan.
2. A marketing plan is mainly a set of packages. A user will put in a marketing plan for all the packages it plans to offer for a specific target. For instance, it can offer more products for American customers than for Canadian ones, because of the location of its different servers.
3. The marketing plan is the way for the affiliates to assign a retail price for a package. The *student market* for example, could be a way to offer its products at a discount price, lower than for the other American customers.

4. The price for a package should be assigned depending on a marketing plan and a pricing plan. For instance, in the *American customers pricing plan*, the User Account could be available for $20 every months or $50 dollars every three months, but in the *Student marketing plan*, it could be available on a monthly basis only, for $15 dollars per month.
5. The marketing plan is also the way to specify the usage charges to apply when a user, for example, purchased a 20-hour-per-month Internet access, and used it during 25 hours. We will be able to specify different usage charges depending on the package purchased, the billing period chosen and the marketing plan the package belongs to.

6. The marketing plan is the way to specify which Pop servers are to be used by a specific market. Each marketing plan should be assigned a list of Pop servers. Like that, you can assign for Canadian, American, etc customers pop servers closer to their location.
7. A pop server can be used in several marketing plans

8. For each marketing plan, there should be a specified the list of payment methods allowed to purchase the products contained in this plan. For instance, *American Express* cards could be allowed for American customers, but not for student ones because of the high charges applied to this card and the discount prices granted to students.

1. **Pop numbers/Access locations**

In the test server, the Pop numbers are used only in OLR, but in the new *Affiliate Management*, this notion will be extended to the whole system.

1. The location of each pop number should be provided
2. We will store the information concerning the different companies providing pop services
3. One requirement can be used by several pop locations

4. In case of pop servers provided by external companies, these companies should provide, on a regular basis, a report with the list of persons who connected using their pop servers. The end-user will then be billed depending on their usage of the pop servers. For a same company, the usage charges are not dependant from the location

1. **Contacts**

1. Each affiliate must provide a list of contact.
2. Each contact must be given a category. Typically, for each affiliate, we should at least have an administrative

contact, a billing contact and a technical contact.

3. For each contact should be specified a work address, and eventually a home address. The cell phone and pager or other information could be recorded.

1. **Retail partner**

A retail partner is a company that can resell a product for an affiliate. This retail partner will then get a commission for each account created with their help.

1. Each retail partner can assign one more salesman to the affiliate he is reselling for. Each of these salesman get a commission on the products sold by the retail partner, and we will be able to record the percentage of commission by each salesman
2. A retail partner should be allowed to resell products for one affiliate

3. Each affiliate should be able to have several retail partners
4. The retail partners should be able to track the users created with their help. We store in the database which accounts the retail partner helped to create
5. If a partner manually signs up a user, he should be able to specify why the automatic signup failed. He should also enter the serial number of the user’s CD

6. Each retail partner is assigned one marketing plan. The deals resold by the retail partner will only be the ones contained in this marketing plan
7. The packages of a marketing plan can be resold by several retail partners. Like that, we can define a marketing plan for a whole chain of retail partner (such as *Barnes & Nobles*, for example), and every retail partners that belongs to the *Barnes & Nobles* chain would resell the deals contained in this unique marketing plan

8. The accounts created with a retail partner belong to and are billed by the affiliate

1. **Sales persons**

- A sales person is just a special kind of contact
- A sales person is not necessarily an employee.

1. **Usage charge for an affiliate**

The usage charge should be defined affiliate by affiliate, and product by product. That means that a usage charge is to be defined for one service, one affiliate and one product.

2. **Serial number and activation key**

1. A serial number should give access to one and only one marketing plan
2. A serial number can be used by one and only one account.

1. **Affiliate**

1. Each affiliate can have zero or several sales person
2. Affiliates’ employees can be given the following rules

- Administrator: can do anything, such as granting roles, create new affiliate management users for their company…
- Manager: can create or delete an account…
- Operator: can just query the accounts

1. An affiliate can have several domains, but must have at least one domain

1. **Transaction**

A transaction is a record of a modification brought to an affiliate. A transaction is logged each time an account is created, modified or delete.

1. A transaction concerns one account
2. When some data are modified in an account, the transaction should keep the old and new version of this data (before and after the transaction)

3. The person who caused the transaction should be recorded, or the transaction should specify if an account was created automatically with OLR
4. Should record the date and the time the transaction occurred

1. **Network session**

A network session is the space of time a user spent connected to the Internet for browsing. This information is used to calculate the usage for each customer, and eventually to bill him or her for extra usage.

1. A network session concerns only one account
2. The network session concerns only the network access service, and not other services such as newsgroups, mailbox.

3. The dates and times the user logged in and logged out should be recorded
4. The IP address, terminal and port used during this session should be recorded

1. **Affinity group**

An affinity group is a company that resells all deals offered by an affiliate. The main difference with a retail partner is that the Affinity group is not restricted to one single marketing plan

1. An affinity group works for one affiliate
2. An affiliate can have several affinity groups
3. An affinity group can resell all the packages for this affiliate
4. Track all the accounts created via a specific affinity group
5. An affinity group should be able to run reports on the accounts he helped to create
6. The accounts created via an affinity group belongs to the affiliate
7. An affinity group can have a domain name, but that’s optional. The accounts the affinity group helped to create will then be set up under this domain, but will still belong to and be billed by the affiliate
8. An affinity group cannot have more than one domain
9. An affinity must provide a list of contact. This list of contact can include an administrative contact, for example
10. An affinity group can resell products from several marketing plans

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Chapter Three

Screen Layouts

Once you login, you will be taken to a main menu section that will look like the outline below.

Affiliate Management

Main Menu

Screens

- Affiliate Management User
- Suggestions and Enhancements
- Send An Email
- Retail Partner
- Packages
- Sales Persons
- Affinity Group Management
- Marketing Plans
- Customer Screen

Reports

- Subscriber Base Report
- User Usage Report
- Transaction Report
- On Hold Account Report

Logout

From the Affiliate Management main screen, you have a variety of options available. From this screen you can

- Register as an Affiliate Management User (if they have an existing Affiliate Management Account)
- Manage Sales, Affinity Groups, Packages
- Add Customers
- Send group mails
- Assign or restructure Marketing Plans
- View Reports
- Logout

Screens:

Affiliate Management Users

Presentation

The aim of this screen is to manage the list of persons that are allowed to access the affiliate management system. This screen displays only the users for one affiliate at a time, either the current selected affiliate, or the affiliate of the person currently browsing this page.
The access rights in **Affiliate Management** are given by role. For each login is assigned a role. Each role gives access to a different list of screens in the system, with different access rights on this screens.

Description of the fields

First name	First name of the owner of this login
Middle name	Middle name of the owner of this login
Last name	Last name of the owner of this login.
Phone number	Contact phone number of the owner of this login
Login	Login name used to access the **Affiliate Management** system. This login must be unique for the entire system. It must contains at least 4 characters, at most 8 characters, and begins by a letter followed by alphanumeric characters (letter, digit or underscore sign '_')
Password	Password associated with the login name above. This password must absolutely be kept secret. The password must be between 8 and 16 character long, and me made of alphanumeric characters (letter, digit or underscore sign '_')
Role	Role associated with this login string. The role determines the list of pages this user will be allowed to access, along with the access rights associated to these screens.
Contact email	Given for information. This is the address email to use to contact the owner of this login name.
Report email	Email address to which will be sent the different reports and status generated by the **Affiliate Management** system. This is useful, for instance, if you want that the status of the creation of an account be sent to the head of the customer department, and not to the creator of the account.
Location	Used for organizational reason. Use this field to specify where the owner of this login is located.

Operations on this screen

Query an existing user

You can access to any **Affiliate Management** user of an affiliate directly, by filling some of the values in the form, and by clicking on the *QUERY* button. On screen will be displayed the user whose values for the fields are the same than those you entered. If more than one user correspond to the criteria you entered, then the first one found is displayed on screen, and the list of all the returned users is printed at the end of the screen. To select a user of the list, just click on the corresponding line. The information about this user will then be displayed in the form.
NOTE: this function allows you to use wildcard characters. Use % (percentage sign) to replace zero or several characters, and _ (underscore sign) to replace exactly one character.
Examples:
1. To get the user whose last name is *Johnson*, type *Johnson* in the *Last name* field, and then click on *Query*
2. To get the list of users in the 404 phone area, type `404%` in the *Phone number* field, and then click on *Query*.
3. To get the list of users whose role is *Development*, and whose login begins by B, type *B%*, and select *Development* in the role drop-down list.

Create a new user

Clicking on the *Create* button will create a new user with the data entered in the form. Please ensure that all mandatory fields (marked with a star) are entered.

Modify the properties of an existing user

You can modify the properties of an existing user, if and only if there is a user currently selected, i.e. you just queried or create a new user, and the corresponding data are still in the form. Then, just modify the data you wish on the screen, and click on the *Modify* button

Delete an existing user

You need first to select the affiliate you wish to delete. Then click on the *Delete* button.
NOTE: the user will not be deleted if the data on screen does not correspond to the data in the database. This was implemented for security reason, to be sure that what you delete actually corresponds to what is on disk.

Show all the existing users

This function works as a query, with no restrictions on the values of the form. Clicking on the *Show all* button will display in a list all the **Affiliate Management** users for the current affiliate, or for the affiliate of the users currently logged into in the system. You can then click on one of the items of the list, to select it and display its corresponding data in the form.

Reset the form

This button allows you to clear the form, that is to say, to empty all the field - no operation on the database is done if you press this button.

Screen sample

Affilliate Management Users

Affiliate Management Users for accucomm.net

Affiliate Management Users

Main Menu | Help

`First Name` [ ] *

`Middle Name` [ ]

`Last Name` [ ] * [ ]

Phone Number

Login *

Password *

Role *

Contact Email

Report Email *

Location/Department *

Query

Create

Modify

Delete

Reset

Show All

List of Affiliate Management Users

Send an email

Presentation

This screen provides a utility to broadcast emails to the account holders in **Affiliate Management**. These account holders can be selected according to the affiliate they belong to, the marketing plan, the package or the products they subscribes to.
IMPORTANT NOTE: sending an email with no restrictions at all can overload the **Affiliate Management** server, and could take a lot of time. So please avoid as much as possible such operations.

Description of the fields

Affiliate	Name of the affiliate to which the emailed persons belong to. If the user has super-user rights, the name of the affiliate can be selected in a drop-down list, or all affiliates can be selected by selecting **ALL**. If the user does not have super-user rights, then this field is read-only, and the value of this field is the name of the affiliate the current user belongs to.
Marketing plan	Marketing plan containing the packages of the users to email. Selecting a marketing plan prevents from selecting a product.
Package	Package purchased by the users to email. Selecting a marketing plan prevents from selecting a product.
Product	Product contained in the packages purchased by the users to email. Selecting a product prevents from selecting a marketing plan and a package.
From	Email address of the sender of the email.
Subject	Subject of the email.
Mail message	Body of the email.

Operations on this screen

Sending an email
To send an email, you need first to fill the values in the **From**, **Subject** and **Mail message** fields. You need then to select to which users this email will be sent. If you have sufficient access rights, you can select the name of the affiliate this users belong to, or select all the affiliate by clicking on **ALL** in the corresponding drop-down list. Then restrict the users to email by selecting a value in the **Marketing plan**, **Package** and **Product** drop-down list. Leaving the value of a drop-down list to blank means that this field will be ignored when selecting the users to email. Once all the required fields are entered, click on the **Send the email** button.

Reset the form

This button allows you to clear the form, that is to say, to empty all the field - no operation on the database is done if you press this button.

Screen sample

Send an email

Query Parameters

Main Menu | Help

Affiliate *accucomm.net*

Marketing plan

Package

E-mail Parameters

From *

Subject

Mail message *

Suggestions and Enhancements

Presentation

This screen is for users of the current affiliate management system to provide feedback and suggestions for the new system. If there is a particular screen that one feels may need to be changed or a particular action, please fill out the appropriate fields in the page and we will get to it as soon as possible.

Description of the fields

Full Name	The full name of the user
Email Address	Email address of the user
Subject	A **brief** description of the problem
Priority	How pressing is the problem in terms of the successful operation of the new system?
Problem Description	A **detailed** description of the problem. The more detailed the description the faster a resolution can be reached.

Operations on this screen

Send Email
Upon completion of the form, when you push this button the suggestion will be emailed automatically to the development group of affiliate management.

Screen Sample:

Suggestions and Enhancements

Suggestions & Enhancements

Main Menu | Help

Full Name [ ] * [ ]

Email Address [ ] *

Subject [ ]

Priority

Problem Description

Please be sure to specify the screen concerned, the action

That you are having a problem with and the error message that

Was displayed.

*

Retail Partner

Presentation

This screen is used to manage the retail partners working for an affiliate, and all the related data. You can therefore manage the address of a retail partner, as well as its assigned marketing plan and the sales representatives of the affiliate working with this retail partner.

Description of the fields

Company name	Name of the retail partner. For instance, **Barnes & Nobles**
Address line 1	Mandatory field. The first line of the address of the retail partner. Usually contains the street number
Address line 2	Second line of the address of the retail partner
City	Mandatory. City of the address of the retail partner

State	State of the address of the retail partner. Mandatory if the retail partner resides in the United States.
Zip code	Zip code of the address of the retail partner. Mandatory if the retail partner resides in the United States
Country	Country where the retail partner resides
Phone number	Main contact phone number for this retail partner
Fax number	Main contact fax number for this retail partner
Main contact	Name of the main contact for this retail partner
Marketing plan	Marketing plan assigned to this retail partner. This retail partner will therefore resell the products contained in this marketing plan
Notes	Notes about this retail partner. Can be used to contain any information that could not be stored in the above fields
Name	Name of a sales representative working with this retail partner
Commission	Percentage of commission given to this sales person for the sale of the products by the retail partner

Operations on this screen

Query an existing retail partner

You can access to any retail partner directly, by filling some of the values in the form, and by clicking on the *QUERY* button. On screen will be displayed the retail partners whose values for the fields are the same than those you entered. If more than one retail partner correspond to the criteria you entered, then the first one found is displayed on screen, and the list of all the returned retail partners is printed at the end of the screen. To select a retail partner in the list, just click on the corresponding line. The information about this retail partner will then be displayed in the form.
NOTE: this function allows you to use wildcard characters. Use % (percentage sign) to replace zero or several characters, and _ (underscore sign) to replace exactly one character.
Examples:
1. To get the retail partner called *Barnes & Nobles*, type *Barnes & Nobles* in the *Company Name* field, and then click on *Query*
2. To get the list of retail partners in the *404* area code, type *404%* in the *Phone Number* field, and then click on *Query*
3. To get the list of retail partners in Canada whose description contains the word 'IMPORTANT', select *Canada* in the country drop-down list, type *%IMPORTANT%* in the *Notes* field, and then click on the *Query* button

Create a new retail partner

Clicking on the *Create* button will create a new retail partner with the data entered in the form. Please ensure that all mandatory fields (marked with a star) are entered. A newly created retail partner does not have any sales representatives assigned yet.

Modify the properties of an existing retail partner

You can modify the properties of a retail partner, if and only if there is a retail partner actually selected, i.e. you just queried or create a new retail partner, and the corresponding data are still in the form. Then, just modify the data you wish on the screen, and click on the *Modify* button

Delete an existing retail partner

You need first to select the retail partner you wish to delete. Then click on the *Delete* button.
NOTE: the retail partner will not be deleted if the data on screen does not correspond to the data in the database. This was implemented for security reason, to be sure that what you delete actually corresponds to what is on disk.

Show all the existing retail partners

This function works as a query, with no restrictions on the values of the form. Clicking on the *Show all* button will display in a list all the retail partners working for an affiliate. You can then click on one of the items of the list, to select it and display its corresponding data in the form.

Add or modify a sales representative

The operation is the same to both add a new sales representative, or to update the commission for a sales representative. Select in the drop-down list a sales representative. Enter the commission in the corresponding field. Then click on the lower **Update** button.

Delete a sales representative

Select in the drop-down list the name of the sales representative you wish to delete. Then click on the lower **Delete** button.

Reset the form

This button allows you to clear the form, that is to say, to empty all the field - no operation on the database is done if you press this button.

Screen sample

Retail partners

Retail Partners Administration

Main Menu | Help

Company Name *

Address Line 1 *

Address Line 2

City *

Zip Code

State

Country *

Phone Number * Fax Number

Main Contact

Marketing plan

Notes

Query

Create

Modify

Delete

PACKAGES

Presentation

This screen allows you to manage the packages. It is divided in two parts. In the first one, you have access to the specific information about the packages. The second one is reserved for the products contained in the packages.

Description of the fields

Name	Address of the host. For example : atl1.america.net
Notes	Mandatory field. Ip address of the host. For example : 199.170.121.2
OLR Message	Description of the host (a reminder of the services installed on this server)
Product Name	Name of the product included in the package
Quantity	Quantity of the product

Operations on this screen

Query an Existing Package

You can access to an existing package directly, thanks to its name or any of its field. You can also mix several information, for example, you can enter a name and or an OLR Message etc …
Then press the **Query** button.

Create a New Package

You need to enter all the fields with the asterisk (*). All these fields are compulsory, then you just press the **Create** button.

Modify an Existing Package

First of all, you need to select the package you want to modify. To do that, you can either query the package you need or do a **Show All**.
Once this is done, just modify the field(s) you want to change and press the **Modify** button.

Delete an Existing Package

You need first to select the package you want to delete. To do that, you can either query the package you want or do a show all. Then, press the delete button.

Attention : in most of the operations - like modify or delete - you need to display all the information about the record you want, that is the reason why you need to query or select in a show all.

Tip : If you want to check, if have correctly created, modified or deleted the package, perform a query or a show all.

Clear the form

This button allows you to clear the form, that is to say, to empty all the field - no operation on the database is done if you press this button.

Show all the existing packages

This function displays all the packages already entered and some important information like the name or the OLR Message.
You can click on the package you want, and the form fields will be filled with the corresponding data. Then, you can do every operation you want on this record, you can also choose to select another record in the list.

In the second part of this screen, you will define the products that the package will contain. That is to say the product name and the quantity.

Add a product to an existing package

First of all, you need to query or select a package with the show all. Then you choose the product you want to add thanks to the drop-down-list and you press the **Add** button.

Delete a product already associated with an existing package.

As for the add, you need first to query or select a package with the show all. Then you choose the product you want to delete and you press the **Delete** button.

Show All the implementation information

This button allows you to see very simply which products are already associated to the package you have selected. If you click on one of these product, it will be displayed in the drop-down-list.
The result of the search will be displayed at the bottom of the screen.

Attention: To add or to delete any product, you must have a package displayed. So that you need to query or select a packege thanks to the show all button, and then you can do the operation you want about the product.

Screen sample

Packages

Packages

Main Menu | Help

Name *

Notes

OLR Welcome Message *

Query

Create

Modify

Delete

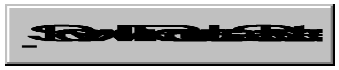
Products contained in the Package

Product Name

Quantity

Add

Delete



Sales Person

Presentation

This screen allows you to manage the sales persons for an affiliate or an affinity group.

Description of the fields

First Name	last name of the sales person
Middle Name	middle name of the sales person
Last Name	first name of the sales person
BUSINESS ADDRESS	
Address Line 1	first line of the business address of the sales person
Address Line 2	second line of the business address of the sales person
City	city of the address of the sales person
State	state of the address of the sales person
Zip Code	zip code of the address of the sales person
Country	Country of the work address of the sales person
Phone Number	Phone number of the sales person during business hours
Fax Number	fax number of the sales person during business hours
Email	Email address of the sales person during work hours
PERSONAL ADDRESS	
Address Line 1	first line of the personal address of the sales person
Address Line 2	second line of the personal address of the sales person
City	city of the personal address of the sales person
State	state of the personal address of the sales person
Zip Code	zip code of the personal address of the sales person
Country	Country of the personal address of the sales person
Phone Number	Phone number of the sales person outside business hours
Email	Email address of the sales person outside of business hours
MOBILE ADDRESS	
Cellular Phone	Number of the mobile phone of the sales person
Pager	Number of the pager of the sales person

Operations on this screen

Query an existing sales person

You can access to an existing sales person directly, thanks to his name or any other information. You can also mix several information, for example, you can enter a name or/and an address, phone number, etc.
Then press the **Query** button.

Create a new sales person

You need to enter all the field with the asterisk (*). All these fields are compulsory, then you just press the **Create** button.

Modify an existing sales person

First of all, you need to select the sales person you want to modify. To do that, you can either query the sales person you need or do a **Show All**.
Once this is done, just modify the field(s) you want to change and press the **Modify** button.

Delete an existing sales person

You need first to select the sales person you want to delete. To do that, you can either query the sales person you want or do a **Show All**. Then, just press the **Delete** button.

The deletion of a sales person from the system should be the last step in the procedure of the employee departure from the company (As by deleting its information we'll loose the data about the commissions, which should be paid to him).
Also, when deleting a particular sales person you need to ensure that another sales person is assigned to its retail partners.

Attention : in most of the operations - like modify or delete - you need to display all the information about the record you want, that is the reason why you need to query or select in a show all.

Tip : If you want to check if have correctly created, modified or deleted the sales person, perform a "Query" or a "Show All".

Clear the form

This button allows you to clear the form, that is to say, to empty all the field - no operation on the data base is done if you press this button.

Show all the existing sales persons

This function displays all the sales person already entered and some important information like pattern.

You can click on the sales person you want, and the form fields will be filled with the corresponding data. Then, you can do every operation you want on this record, you can also choose to select another record in the list.

Screen Sample

Identification

Main Menu | Help

First Name *

Middle Name

Last Name *

Business Address

Address Line 1 *

Address Line 2

City *

State

Zip Code *

Country *

Phone Number * Fax Number

Email

Personal Address

Address Line 1

Address Line 2

City

State

Zip Code

Country

Phone Number

Email

Mobile Address

Cellular Phone [ ] Pager [ ]

Query

Create

Modify

Delete

Show All

Affinity Group Administration

Presentation

This screen is the central point for the management of the affinity groups and their related data, i.e. their contacts and the implementation of their services (if you have the sufficient access rights to access these screens). You can access the data attached to an affinity group via this screen. First, you have to query or create an affinity group, and then you can access the other screens related to this affinity group, via the frame above.
With this screen, you can manage the data specific to an affinity group, such as its address, name and phone number.

Description of the fields

Company name	Name of the affinity group. For example: *USS*.
Address line 1	Mandatory field. The first line of the address of the affinity group. Usually contains the street number
Address line 2	Second line of the address of the affinity group
City	Mandatory. City of the address of the affinity group
State	State of the address of the affinity group. Mandatory if the affinity group resides in the United States.
Zip code	Zip code of the address of the affinity group. Mandatory if the affinity group resides in the United States
Country	Country where the affinity group resides
Phone number	Main contact phone number for this affinity group
Fax number	Main contact fax number for this affinity group
Description	Store here every data that cannot be stored in the above fields
Use affinity group's own domain	Specify if the affinity group use its own domain. If not, then the default domain of the affiliate is used.
Domain name	Domain name, if the affinity group uses its own domain
Server name	Server on which is implemented the domain server, if the affinity group uses its own domain

Operations on this screen

Query an existing affinity group

You can access to any affinity group directly, by filling some of the values in the form, and by clicking on the *QUERY* button. On screen will be displayed the affinity groups whose values for the fields are the same than those you entered. If more than one affinity group correspond to the criteria you entered, then the first one found is displayed on screen, and the list of all the returned affinity groups is printed at the end of the screen. To select an affinity group from the list, just click on the corresponding line. The information about this affinity group will then be displayed in the form.

NOTE: this function allows you to use wildcard characters. Use % (percentage sign) to replace zero or several characters, and **_** (underscore sign) to replace exactly one character.
Examples:
1. To get the affinity group called *USS*, type *USS* in the *Company Name* field, and then click on *Query*
2. To get the list of affinity groups in the *404* area code, type *404%* in the *Phone Number* field, and then click on *Query*
3. To get the list of affinity groups in Canada whose description contains the word 'IMPORTANT', select *Canada* in the country drop-down list, type *%IMPORTANT%* in the *Description* field, and then click on the *Query* button

Create a new affinity group

Clicking on the *Create* button will create a new affinity group with the data entered in the form. Please ensure that all mandatory fields (marked with a star) are entered.
If you specify that the affinity group use its own domain name, then a domain will be created in the database (please note that the domain name is not physically created). If you did not specify so, then the affinity group will be recorded as using the default domain of its affiliate.
Note that you cannot create an affinity group directly after a query or a creation. You must then reset the form before creating a new affinity group.

Modify the properties of an affinity group

You can modify the properties of an affinity group, if and only if there is an affinity group actually selected, i.e. you just queried or created a new affinity group, and the corresponding data are still in the form. Then, just modify the data you wish on the screen, and click on the *Modify* button
If you specified that the affinity group now use its own domain, whereas it didn't before, then a new domain is created for this affinity group. On the contrary, if you specified that the affinity does not use its own domain anymore, then its domain will be deleted from the database, and the affinity group will be recorded as using the default domain of its affiliate.

Delete an existing affinity group

You need first to select the affinity group you wish to delete. Then click on the *Delete* button. If the affinity group used its own domain, then its domain in the database will also be deleted.
NOTE: the affinity group will not be deleted if the data on screen does not correspond to the data in the database. This was implemented for security reasons, to be sure that what you delete actually corresponds to what is on disk.

Show all the existing affinity groups

This function works as a query, with no restrictions on the values of the form. Clicking on the *Show all* button will display in a list all the affinity groups working for an affiliate. You can then click on one of the items of the list, to select it and display its corresponding data in the form.

Reset the form

This button allows you to clear the form, that is to say, to empty all the fields - no operation on the database is done if you press this button.

Screen sample

Affinity Groups Administration

Company Name *

Address Line 1 *

Address Line 2

City *

State

Zip Code

Country *

Phone number * Fax number

Notes

Use affinity group's own domain

Note: if the affinity group has its own domain,

please check the box and fill the information below.

If not, the affinity's customers will be under the domain of accucomm.net.

Domain name

Query

Create

Modify

Delete

Show All

Show all marketing plans

1. Marketing Plan

Presentation

A marketing plan is a way for the affiliates to organize its deals depending on its different marketing targets. For instance, an affiliate could create a marketing plan for its American customers, an other one for its Canadian customers, and an other one specific for the student market.

Description of the fields

Name	Name of the marketing plan
Valid From	Mandatory field. Date from which this marketing plan can be accessed.
Valid Until	Date until which this marketing plan can be accessed.
Creation Date	Mandatory. Date Created
Configuration Set	Choice of different pop phone configurations for this marketing plan
Welcome e-mail	Welcome e-mail when a user select this marketing plan.
Note	Detailed description of this marketing plan

Operations on this screen

General use of this screen

Query an existing marketing plan

You can access to an existing marketing plan directly, thanks to its name or its validity date or any of its field. You can also mix several information, for example, you can enter a name and/or a creation date etc …
Then press the **Query** button.

Create a new marketing plan

You need to enter all the fields with the asterisk (*). All these fields are compulsory, then you just press the **Create** button.

Modify an existing marketing plan

First of all, you need to select the marketing plan you want to modify. To do that, you can either query the marketing plan you need or do a **Show All**.
Once this is done, just modify the field(s) you want to change and press the **Modify** button.

Delete an existing marketing plan

You need first to select the marketing plan you want to delete. To do that, you can either query the marketing plan you want or do a show all.
Then, press the delete button.

Attention : in most of the operations - like modify or delete - you need to display all the information about the record you want, that is the reason why you need to query or select in a show all.

Tip : If you want to check, if have correctly created, modified or deleted the marketing plan, perform a query or a show all.

Clear the form

This button allows you to clear the form, that is to say, to empty all the field - no operation on the database is done if you press this button.

Show all the existing marketing plans

This function displays all the marketing plans already entered and some important information like the name or the creation date, etc.
You can click on the marketing plan you want, and the form fields will be filled with the corresponding data. Then, you can do every operation you want on this record, you can also choose to select another record in the list.

Using the marketing plan frame

Query a Marketing Plan

You can access to an existing marketing plan directly, thanks to its name or its validity date or any of its field. You can also mix several information, for example, you can enter a name and/or a creation date etc …
Then press the **Query** button.

Create a Marketing plan

In order to create a new Marketing Plan, here are the guidelines

Step 1 - Create a new Marketing Plan

First, you need to specify the essential information for a Marketing plan. So that you must entered a name for this new plan, two dates for the start and the end of validity of this plan, the date of creation of this plan.
Then, you will need to choose a configuration set. A default one is always selected. If you have the right to change it, you need to select a configuration. After that, you need to write the welcome message (e-mail).
A "Note" field is here to write special comment if you need to. You need to enter all the fields with the asterisk (*), all these fields are compulsory.
Press the **Create** button, and go to the marketing plan deal screen.

Attention : to create a Marketing plan, you must enter data in ALL screens of the frame. Failing to do that, will not create your Marketing Plan.

Step 2 - Add the deals in your Marketing Plan.

You are now on the **Deals contained in the Marketing Plan** screen. For each deal chosen, you need to enter an address, a subject, and a content, which is a path for the specific file.
Checking this option allows you to send the e-mail directly, when the account is created.
After that you need to choose a payment term, that is to say how often the customer will pay.
You must precise how much the customer will be charge for the set up - set up fees, how much he will be charge regularly depending on which payment term you choose before.
You need to enter all the fields with the asterisk (*).
Press the **Create** button and go to the **Access Location** screen.

Step 3 - Specify the access locations

When entering this screen are displayed all the access location you can use. You just need to choose those you need.
Press the create button and go to payment method screen, the last one.

Step 4 - Specify the payment methods

Here you just need to choose the payment method, the customer will be authorize to use for this marketing plan.

Modify a Marketing Plan

First of all, you need to select the marketing plan you want to modify. To do that, you can either query the marketing plan you need or do a **Show All**. Once this is done, go to the screen where you want to modify the data and press the **Modify** button.

Delete a Marketing Plan

You need first to select the marketing plan you want to delete in the screen **Marketing Plan Administration**. To do that, you can either query the marketing plan you want or do a show all. Then, press the **Delete** button.You can do this operation ONLY from this screen.

Show All Marketing Plans

This function displays all the marketing plans already entered and some important information like the name or the creation date, etc.You can click on the marketing plan you want, and the form fields will be filled with the corresponding data. Then, you can do every operation you want on this record, you can also choose to select another record in the list.

Marketing Plans

MP Administration	Package contained	Access Locations	Payment Method

Marketing Plan Administration

Main Menu | Help

Name *

Valid From * Valid Until *

Creation Date *

Configuration Set *

Welcome Email *

Note

Query

Create

Modify

Delete

Reset

Show All

List of Marketing Plans

Customer Screen:

The customer screen is used to create / modify / delete customers. You can add accounts to their record, add / modify / delete customer orders (packages). You can change passwords, addresses, and add new options.

To get to the customer screen, you must go through this section.

Owner Choice

Main Menu | Help

Affinity ○

Affiliate ⦿

Retail Partner ○

Customer

Customer Screen

This is the screen where you can add, modify, or delete a customer record.

Identification

Customer Id

Associated Number

Company Name

First Name *

Middle Name

Last Name *

Refferal Source adder

Daytime Phone

Nightime Phone

Fax Number

Special Note

Billing Address

Address Line 1 *

Address Line 2

City *

State

Zip Code

Country

The billing address is different from the shipping address

Create

Modify

Delete

Reset

Query Customer

Main Menu | Help

Id Login Phone Number Query

Cust. ID	First Name	Last Name
7878	Admin	Admin

When an account has been created successfully, you will be able to query the customer by their ID, Login, or Phone Number field.

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Reports:

Subscriber Base Report

INFORMATION

Affiliate

Start Date

End Date

OPTIONS

SUMMARY

REPORT

BACKGROUND COLOR

Color

Summary

White

Marketing Plan / Deal Name

Quantity

This is the current "account reporter" in the existing

affiliate management. The results are more detailed than the current report and they include not only the login, name, and date created but also the marketing plan, the address, the company name, any Account number and the type of account. The entry fields are the start date and end date which are used to define the timeframe of the report. To get a full database, select your affiliate's opening date as the start date.

User Usage Report

Main Menu | Help

INFORMATION

Affiliate

Start Date **End Date**

OPTIONS

SUMMARY

REPORT

Background Color

Detail

Color

Summary

White and Black

Run Report

Clear Form

Return To Main Menu

This screen is used to obtain information on the network session of a particular account between any two specified dates. In addition you have the option to direct the report to either the screen, disk, or email.

Transaction Report

Main Menu | Help

INFORMATION

Affiliate

Start Date

End Date

OPTIONS

SUMMARY

REPORT

BACKGROUND COLOR

Detail

Color

Summary

White

Clear Form

Record Nbr

Date

Action

Login

Old Data

New Data

This is currently the Administration Transactions Report. Results

include all additions/deletions/modifications which occurred during the time frame defined by the start date and end date entries. Details include the customer login, name, what the effect was (added, deleted, modified) and the cause of the action (affiliate management user or OLR which affected this account). Summary detail includes only the totals of each action with no personal details of the customers.

On Hold Accounts Report

[Main Menu](#) | [Help](#)

INFORMATION

Affiliate

Start Date **End Date**

OPTIONS

SUMMARY

REPORT

BACKGROUND COLOR

◉

Detail

◉

Color

○

Summary

○

White

Clear Form

Record Nbr

Customer Id

Ass.
Acct#

Full Name

On Hold Date

Hold By

On Hold Reason

This screen is used to allow you to view a list of accounts that are on hold. Accounts can be on hold for a variety of reasons such as user request, usage time, or payment failure.

Chapter Five

Frequently Asked Questions

This list of frequently asked questions was generated during the beta testing phase of AMS 2000. As the system evolves, the FAQ section will be updated to incorporate new FAQ's that we encounter.

- What is the best browser to use?

Internet Explorer 4.5 or higher or Netscape 4.5 or higher

- How do I send an e-mail to all my customers (broadcast e-mail)?

Choose the "Send an E-mail" option from the main menu. Also, note that you will now be able to limit your broadcast to only the accounts in a certain Package or Marketing Plan as well as to send a full broadcast message to all your ustomers.

- Why can't I fill in or change the Customer ID field?

The Customer ID field is assigned/determined by the Affiliate Management System and cannot be modified. The Associated Number field is available to you for use in tracking and linking to your current internal billing systems.

- Which report will show me a list of all my customers?

The Subscriber Base Report will list all customers to an affiliate and can be listed in summary (type of account and number of subscribers in each account type) or detailed (customer information, account logins, marketing plan, etc..)

- How do I run my reports? There is not a "run" button.

Once you have entered the parameters for your report, "click" on the column header of the method of sorting you want for that report (ex: to run a report and sort by customer's full name, click on "Full Name") and the report will run and will be sorted by the heading you chose.

- What if I am unsure of what a screen is used for?

Each screen has a corresponding "help" screen which details not only the purpose of the screen, but also the formats which are required for each field. Just "click" on the word "Help" in the upper right hand corner of the screen (not the browser window, but the Affiliate Management Screen itself). And, of course, you can always contact your Affiliate Services Representative for any assistance you may need.

- Why do I sometimes get an error that starts with: HAHTsite 4.0 webapp Server reports the following:The requested application has timed out. Please restart the application by browsing to its home page.

The increased efficiency and speed of this program is due in part to the use of a "time out" function which allows for the decrease of inactive connections affecting the processing for the active sessions. When you do not interact with the server for a period of time, your session is canceled. You need only to re-enter the system at http://develop.america.net/ProjectAffMgt/entryPoint.html

Annex A

Glossary of Terms:

This glossary of terms will continue to grow. Many of these terms or definitions of functions or fields that you may need can be found by using the "**Help**" link at the top right of your page from within the Affiliate Management Site.

- **Customer-** the person or company that receives the bill for each of the products they have purchased from you. **Note: a customer can buy one or more products for one or more accounts, but an account is owned by only one customer.*
- **Customer Order-** how products are added to the customer's accounts; using only one payment method and one billing period**.**
- **Marketing Plan**- currently OLR plans, a way to organize packages depending on different marketing targets. (example: promotions, specials, student plans, employee plans, etc.)
- **Retail Partner-** company that can resell product(s) for an affiliate, and will receive a commission for each account added.
- **Products**- set of services defined by ISPA and resold to the end user by the Affiliate. (example: user accounts, email accounts, Value + Web Hosting, dedicated connection, etc.)
- **Package-** a set of Products defined by the Affiliate and resold to the end user. This can include one Product or many. (example: user account plus two email accounts can be a Package). ISPA will not determine the cost of a package, only the cost of the Product to the Affiliate.
- **Associated Number-** a non-required field that can be used by the Affiliate to record and track accounts by the Affiliate's internal tracking/billing method. (formerly Account Number.)
- **Referral Source-** advertising form that brought the customer to the Affiliate. (example: newspaper, radio, billing inserts, etc.)
- **Last Renewal Date-** Date service began or was renewed, determined by the Affiliate**.**
- **Access Location-** POP location/dialup number, customers can be restricted to certain POP/dialup numbers, or allowed to use all. The Affiliate will determine Access Location in the Marketing Plan.
- **Sales Percentage-** percentage of commission assigned to an Affiliate's salespeople. Not required, determined by the Affiliate.

Annex B

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