**Description of the work in the portals**

1. **Publisher Portal**

-Change the word publisher to *partner* everywhere, inside and outside.

It will be named: Partner portal (instead of Publisher portal)

-The same applies to the designation (url) as a whole... always *contact*Finder.com/partnerportal

**Data list**

Change the menu line as follows:

-Remove Status completely; Data will be uploaded and changed in all portals simultaneously.

-Instead of the Edit button and the new popup window, all list entries should be changed directly in the dashboard (display list) (ads list).

Additional to this point:

\*Name - open as a text box (text field) to change/enter (register or insert);

\*Gender – pulldown (drop down) m/f/no entry;

\*Age - keep old selection window;

\*Location - text box to change/enter;

\*BL - Text box to change/enter;

\*Profile remains, No. and Messenger link remains;

\*Note box - text box for entry;

\*Edited - set hook (check mark) as an indication that editing is complete;

- Rename "Action” to “Retour" (Return) ????- Pull-down menu two choices: "don’t add", "not D/A/CH".

- "SAVE" button has to be set at the end.

-For saving to the rows of the results lists:

In order to save time on the changes in the database, the partner should have the option to edit all 10 entries in the view list and then, when completed, save all changes completely with just one click.

For this a button is needed at the bottom - under the line Save - "SAVE all entries".

Explanation:

-In the list, all additions are to be made directly.

-“Save” takes the changes to the database anywhere.

-By clicking Edited, the records go GREEN as a sign that it has been edited.

-And in the statistics, for example: admin portal - edited records.

As an edited record, the green ones are also dropped out of the list view. However, they are displayed later on in SEARCH (results).

A record is automatically edited even if it is saved as a "Retour" (Return).

-The *search box* allows you to search later for names, partials of words, or even self-set (personal) notes, such as VIP (for example). The search results show all contacts, including the Greens, who no longer appear in the list view.

-The result list of a search then contains only the found result entries.

-A “BACK” button should return to the exit page.

1. **Member’sPortal**

-To be able to create search lists...

-Gender - M/F/without entry (selection is mandatory)

-Age - voluntary

-Location - (selection is mandatory)

Input date:

This field makes little sense at the moment. Change the following:

-Every generated list of the user should be saved - he should be able to SAVE it.

These lists are stored below the date.

Then, using the Input Date field, ---Change to “List Creation”--- , he can filter them, display them, and select one at a time with a click.

-Each list shows the entries already edited - click on Profile as GREEN.

This allows the user to recognize which contact he has already visited.

-The results list should also show the “Notes” field. This should be a text field for the user to describe. He too can search for his entries later (like the partner).

Anyway, it would be good if by clicking on the menu (line point) after this point to be sortable.

On the topic of massive contacts in search lists

-The user can be told by the database that his list has over 2,000 entries (or specify exact number) ... and ask him to name initial letters A-Z so that the list shows maximum X results.

Can be offered to make the search faster.

-The user should therefore have the possibility to call up each list again in a search.

The view of the list results should show him:

Date (when generated), filter entries (as specified by him), number of results, open contacts (which are not green).

Note on color green: There is a difference between a record becoming green in the Publisher(Partner) Portal and the User Portal. And also what consequences it has. For the partner, the green record disappears from a list, but it is always visible to the member.

-If he displays a list, he should only see the open ones, by clicking on "open contacts ". Then he can easily edit them. By clicking on the complete list, then he should see all.

-"Input Date" also remove here. The search lists/list creation are stored and managed by date.

1. **AdminPortal**

Upload lists— always to a single database. The status of interested party no longer exists.

Change the menu on the left as follows:

at present

dashboard

Upload lists

Assign documents

Status Publisher

Add messages

Contacts returned

Individual lists

**new**

(dashboard)

Upload lists

Manage documents

Manage messages

Contact statistics

Partner statistics

contents

The word "dashboard" makes no sense. This is currently a search list in publishers and members.

This function can also be retained, but the menu item should be omitted – and the content / list should come as the first sub-item in the menu item "Partner Management".

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Upload list - here the admin should be able to upload contact lists.

Only the action is implemented, nothing is managed or displayed here. This is in the contact statistics point 4).

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"Manage Documents" - Content remains as it is with assigning documents, only rename menu item.

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“Manage Messages” - Content remains as it is with add messages, only rename menu item.

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"Contact Statistics":

**Explanation on contact assignment**

Each partner should be automatically assigned contacts in the portal for processing with approval (positively confirmed registration process). The portal gives the partner 1,800 contacts for 30 days in advance.

If all contacts have been set to "edited" and/or "return" after 30 days, the partner will be reassigned to 1,800 contacts. The decisive factor is the successful processing, so he gets the next contacts if the old assignment is fully processed [criteria is, with max. 100 open contacts come the next]. Thus, the 30 days are not decisive.

If the **partner** **is terminated** – should be released in the portal manually for the admin – the access for the partner is stopped. The partner is not assigned any more contacts.

The contacts that have been assigned to him and are still unprocessed will return to pot 1 and will be assigned at the next assignment. Explanation contact pots follows under C.

However, they retain the identification of the round as they were with the terminated partner (since they were still unprocessed).

Returned contacts who go back due to termination for further assignment to another partner appear in the statistics shown above under "Withdrawn".

The contacts should be assigned in **the following order:**

Priority should be given to contacts who identify a place but not a gender. In this way, we first create the contacts with the place to add a gender.

Then the rest.

**The following lists are desired**

**A.**

**Uploaded lists (from admin in the database)**

All lists that are uploaded to the database are to be managed here.

The list should show the following entries:

Uploaded contact lists

*Date selection from ... to...*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *date* | *Contacts* | *assigned* | *Open* | *Edited* | *Returns*  *Not adden* | *Returns*  *Not DACH*  (German speaking zone) |
|  |  |  |  |  |  |  |

Note on returns: Since editing has a pull-down response option to select from two different return reasons ("not adden" or "not DACH"), the statistics should also display them separately or allow a choice of display. A two-parting of the result field with abbreviations would be conceivable, dividing line in the middle, abbreviation A for "Adden negative" and "DACH" for non-German-speaking country.

**B.**

**Current status of contact assignment**

Selection of assignment round - "All/1/2/3/4/5"

(If a round is selected above the first one, only that selected round is rated;

When SELECTION ALL, the rounds are displayed continuously among each other;)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *round* | *Total contacts* | *assigned* | *Open* | *Edited* | *Returns*  *Not adden* | *Returns*  *Not DACH* |
|  |  |  |  |  |  |  |

**C.**

**Current status of contact-pots**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Number of contacts Pot I*  [Contacts to be assigned] | *Round 1* | *Round 2* | *Round 3* | *Round 4* | *Round 5* |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Number of contacts Pot II*  [Contacts already assigned] | *Round 1* | *Round 2* | *Round 3* | *Round 4* | *Round 5* |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Number of contacts Pot III*  [Contacts that have been edited] | *Round 1* | *Round 2* | *Round 3* | *Round 4* | *Round 5* |
|  |  |  |  |  |  |

**Explanation of contacts/pots**

The contacts should be internally in pots,

Pot I = Contacts to be assigned;

Pot II = Contacts already assigned;

Pot III = Contacts that have been edited;

Once all contacts have been assigned, pot III must become pot I again. Because the same contacts are then assigned a second time, the contacts should be marked as Contact 2 internally, visible only to Admin. The 2 refers to the round of allocation. Then 3, 4, etc.

Returns:

A) "Adden negative"

B) "Not D/A/CH"

Returned contacts A) returns go to pot 1. However, they are led as contact round 2.

So only after the end of round 1 assign again - for the second time.

Returned Contacts B) delete from all pots – and are stored separately by the admin.

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"Partner Statistics"

**A.**

**Assigned Contacts**

Related to a partner (each assignment is listed individually)

*Selection by ID/name and date selection from ... until... ; Processing and results status current day;*

*Without date, all are listed; The date field - normally for single listing, the date of the respective assignment then remains unfilled (alternatively, "all" could be set here)*

*offer the option of "individual list" and "total list"; in the second case, everything is cumulative in only one line.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***ID*** | ***Partner*** | ***date*** | ***Contacts*** | ***open*** | ***Returns***  ***A I DACH*** | ***Edited*** | ***Withdrawn/***  ***Revoked*** |
|  |  |  |  |  |  |  |  |

If "All Partner"is chosen, only one total view per row per partner takes place;

*Date selection from ... until...*

*At the same time, the selection should be given here, single listing (then a row for each partner) or total listing – then summary of all results in just one row.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ***ID*** | ***Partner*** | ***Contacts*** | ***open*** | ***Returns***  ***A I ROOF*** | ***Edited*** | ***Withdrawn /***  ***Revoked*** |
|  |  |  |  |  |  |  |

[Each list should be offered as an Excel for download;]

**Partner Monitoring**

The partners should be monitored automatically by the system.

The first question is whether the publisher has really edited the 50 contacts every day within 30 days. This is easily controllable, as he has to set them to "edited" or "return".

Taking into account a tolerance: In the event that the partner has not edited at least 1,250 contacts, the system automatically sends the following text via **pop-up** when entering the PartnerPortal after 30 days:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello dear partner,

"You did not meet our expectations of 50 contact operations per day.

We couldn't even find 1,250 contacts as edited, taking into account a tolerance.

We would like to ask you to comply with this as a matter of urgency, otherwise we will have to end the cooperation according to the Terms and Conditions."

We kindly ask for your understanding.

Best Regards and good luck

wishes

*Contact*Finder.com

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After a further 30 days, the check is repeated, in case minimum 1250 processed contacts (since the last reminder) are not fulfilled again, the partner is to be blocked. This time the portal sends an **email** to the partner:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello dear partner,

"since you were again unable to meet our expectations, we are hereby ending the cooperation regarding our partner program with you , according to the Terms and Conditions.

We ask for your understanding.

Best Regards

wishes

*Contact*Finder.com

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The partner is blocked, open contacts are returned to pot I and reassigned.

The partner loses any future financial entitlement. He/She is excluded from the partner program. Old payment entitlements remain valid.

[Submission to the Affiliate System???)

**B.**

**Reminder list**

*Search for "Name/ID/ALL Partners"*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ID** | **Partner** | **Reminder stage** | Edited | **Suspend follow-up action** | **Requirement NEW** |
| No | Name | Write Date | number | hook | Enter number |

In the Field Suspend Follow-up Action, the admin should be able to suspend the threatening termination with hook – i.e. active field - once hook and once text field – here digit.

With the Requirement NEW, he can enter a new number of contacts to be monitored, which are expected by this partner and are from now on controlled.

The first Reminder letter is created when the new requirement is not met again.

A termination does not go out as long as the hook is set.

If a partner is reminded multiple times, when selecting the search for partners, each date (all individually per row) must be displayed.

**C.**

**Termination list**

*Search for "Name/ID/ALL Partners"*

*Date setting allows from... until...*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ID** | **Partner** | **Termination** | **Termination Redemption** | **Requirement NEW** |
| No | Name | Write Date | hook | Enter number |

In the Follow-up field, the termination can be taken back (set hook).

With the Requirement NEW, he can enter a new number of contacts to be monitored, which are expected by this partner and are from now on controlled.

By saving the Redemption of the terminationtion, the partner should receive the following email:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello dear partner,

We had recently sent you the termination of our cooperation and participation in our partner program.

We would like to inform you that we expressly take back this termination and make you feel as if it never existed.

We look forward to winning you back as a partner.

Best Regards and good luck

wishes

*Contact*Finder.com

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**….**

Someone becomes a member...

* System gives him an ID, he assigns a password for himself;

Someone becomes a partner...

* System (now affiliate program) gives him ID, password?
* And how does he/she get login data for the Partner Portal (to edit the Contact Profiles)?

It would be good if everything has one access – i.e. the same data:

Whether he becomes a partner or a member, he is always managed with an ID and his own password.

And access to the PartnerPortal to work by logging into the affiliate – enter the link - to the PartnerPortal and automatically route through...