

## 1. Orientation

- a. Overall Account Structure
  - i. Agency Account: Premier Cellar
  - ii. Workspace(s): Client/Multi Property
  - iii. Projects
    1. \*Newsletters
      - a. Newsletters, Relational Content,
      - b. Goal: Build Relationship/Engagement (not necessarily click throughs and conversions)
    2. \*Club Only Communications
      - a. Shipment/Account Specific Club Communications Only
    3. \*Promotional Communications
      - a. New Releases, Special Offers
    4. \*Misc1
      - a. Customizable to your winery's needs
    5. \*Misc2
      - a. Customizable to your winery's needs
    6. \*Automation
      - a. A container/folder for your campaigns associated with triggered messaging or lifecycle marketing
  - iv. Campaigns
- b. Login Portal
  - i. <https://premier-cellar.email-manage.com/>
- c. Main Workspace Page
  - i. Multi Property Accounts
  - ii. Sidebar Links

### Inside a Workspace: Projects Page

- d. Navigation
  - i. Main Nav Bar (Staying within Campaign)
  - ii. Tab Nav Bar
  - iii. Sidebar
    1. Create
    2. Support and Recent Places

### Inside A Project: Project Associated Campaigns

- iv. Campaigns List (launched/Not Launched)
- v. Create a Campaign Button
- vi. Breadcrumbs
  1. Last breadcrumb is your the level you are on

### Inside a Campaign: Previously launched campaign

### Main Navigation Tab

1. Data
  - a. Lists and Sub Nav
2. Files
  - a. Account File Manager
  - b. User File Manager
3. Reports

### Architecture Review

1. Agency
2. Workspace
3. Projects
4. Campaigns