Tip Sheet: How to Manage Partners in Seamless WBL

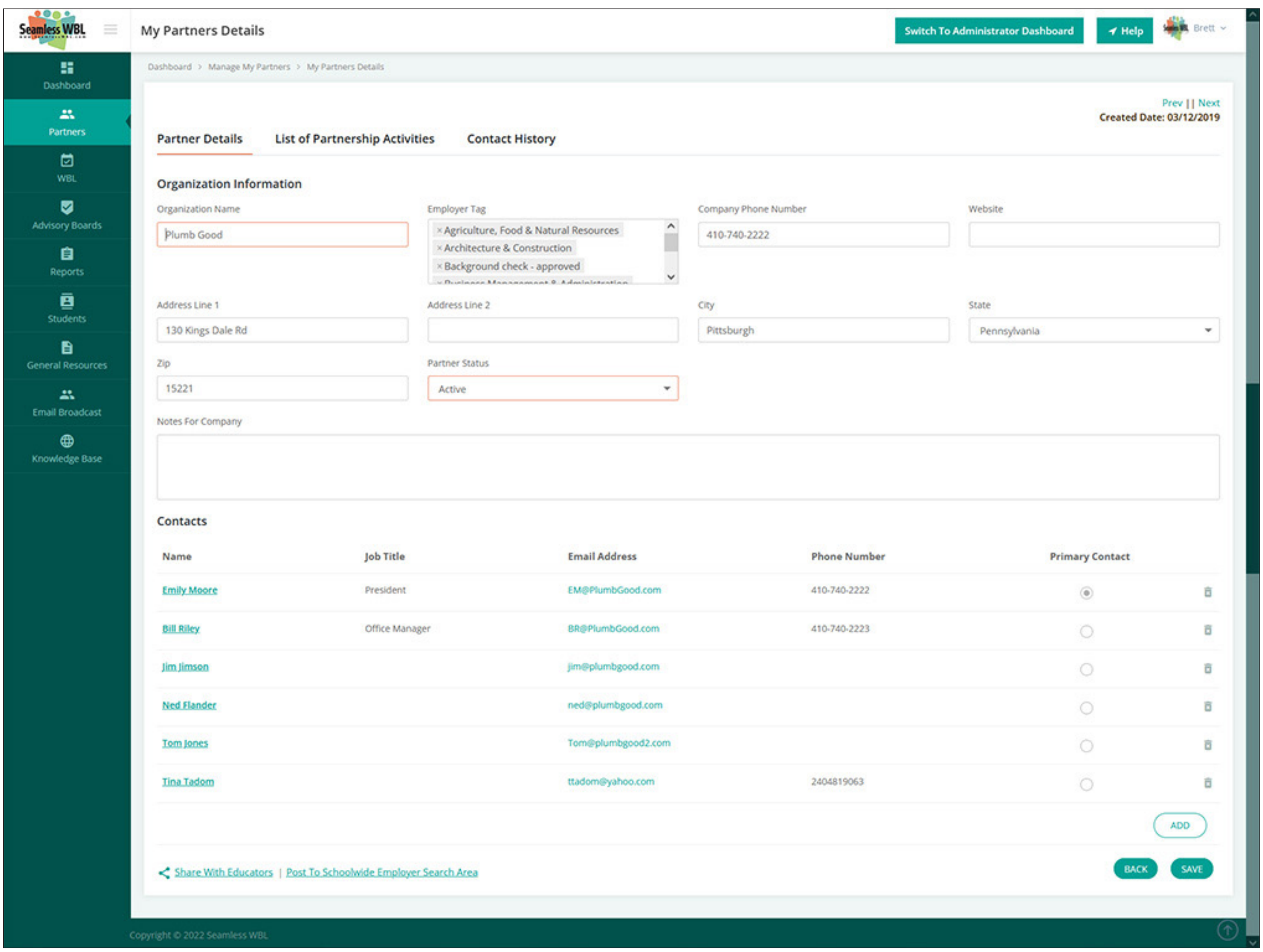
About partners, and the My Partners area

What are partners? In Seamless, anyone who participates in work-based learning, and anyone who sits on an advisory board, is considered to be a partner. You can find the My Partners area of Seamless by going to the Partners button on the left-hand menu and selecting My Partners. Your partners must be entered into this area before you can invite them to work-based learning activities or add them to your advisory boards.

What's in a Partner record?

There are three tabs at the top of a Partner record: Partner Details, Partnership Activities, and Contact History.

My Partners Listing - Partner Details



Some of the key things you can do under the **Partner Details** tab are:

- ◊ Post basic information about your partner organization
- ◊ Assign partners Employer Tags (read more on these HERE) (Add Link or direct to knowledge base)
- ◊ Add individual users to the partner organization by clicking at the bottom of the page.

From the **Partner Activities** tab you can see any work-based learning activities connected to this organization.

The **Contact History** tab has a Customer Relationship Management (CRM) tool to help you keep track of the contacts you've had with your partners and set reminders of things you need to do. All of this can be done in the Contact History tab in your records from the My Partners area.

Adding a new partner organization

To add a new partner, click the Add Partner button at the top right while in list view. You'll create a new, blank record, and can fill out information on the organization. To do a bulk import, click the Import button and click Download Sample to access an Excel file with instructions, field definitions, and a template. See the Knowledge Base in Seamless to find more support materials on doing a bulk import.

Sharing a partner

To share a partner with fellow educators, or to request they be posted to the public Employer Search area, go to the Partner Details tab and scroll to the bottom. To share the record with other educators, click the Share with Educators link; to post to the Employer Directory select the other link.

Giving login access to your partners

Although it is not required for partners to log into Seamless WBL, there are some benefits to giving them this access. Inviting them to log in will give them the ability to:

- ◊ View information on the work-based learning activities and advisory boards.
- ◊ Upload comments and documents.
- ◊ Sign off on student hours.

To invite a partner to the system, click on their individual name and scroll down to the bottom of the page. Click on the Invite button. This will send the partner an email inviting them to log in to the Employer Portal.

Partner reports

Reports can be found by going to the Reports icon on the left side of your screen. Available reports include:

- ◊ Activity Reports
  - ◊ Partner Activity Report
  - ◊ Board Activity Report
- ◊ Contact Reports
  - ◊ Partner Contact Report
  - ◊ Partner Reminder Report