Portal Prodigy™

Contacts, Members, Vendors & Companies Feature in Detail

Chapter Excerpt from Software User & Administration Guide
January 2007 Update
www.portalprodigy.com

1.1 Introduction

PortalProdigy allows you to maintain detailed records on individual contacts such as prospects, customers, members, employees, etc. The individual Contact Records serve not only as a place to record and lookup contact information such as addresses and phone numbers but also a link into other features related to individual contacts including event registration records, contact management, advocacy participation, contributions, purchases, exchanges and more. The Contact database further serves as a data merge source for message broadcasting via email, fax or printed communication features.

When you manage interactions on the internet you are managing relationships and conversations with people. So it makes sense that practically every PortalProdigy feature works in conjunction with the Contacts database. Contact information may be imported from external data sources, input manually via an Internet browser or collected online from website visitors. You decide how much and what information to collect based on the needs of your organization.

An assortment of relationships are maintained between contact records and other data components of the system such as Companies, Special Interests, Sales Opportunities, Campaigns, Requests for Quotes, Help Desk, Orders, Biographies, Registrations, Notes and Ticklers, etc. For back office administration, jumping quickly from one related record to another and to related lists and archives is simple and quick either by clicking on a link or submitting search criteria into efficient search templates.

Contacts benefits include:

- Central database for creating, updating and reporting information on all sorts of contacts including visitors, users, members, employees, customers, vendors, prospects, regulators, constituents and staff.

- Create custom contact data collection forms for visitor signup.

- Organize contacts into Special Interest Groups, Roles, Security Groups and Types.

- Select and export data for use in external databases and mail-merge software.

- Create login and password entry into site features.

- Search and sort contacts on all data fields

- Integrates with PortalProdigy Sales Opportunity Management, Events Management, Help Desk, Catalog and Shopping Cart, Order Management, Billing and Payment, Tasks Ticklers & Notes, and other features for contact management purposes.

- Provides administrators with quick link access from individual contact records to accounts of contact’s action in other features.

- Used by broadcaster to merge data into copy and automatically deliver notifications to members of a specific security group, interest group or type.

- Import utility makes it quick and easy to add data from external sources and list companies.

Some of the components of the Contacts feature, discussed in detail in this chapter, are:

Login Name Field
Password Field
Confirm Password Field
Contact ID Field
Title Field
Profession Field
Company Name
Company ID Field with link to search interface -
Contact Preference By: Lookup Field
Send To Home Radio Button
Send To Office Radio Button
Remove from Mailing List Radio Button -
Source Field
Billable Radio Button
Active Field
Chapter ID
Contact Types Checkboxes
Contact Types Employee Checkbox
Contact Types LRCA Checkbox and Link
Contact Types Media Checkbox and Link
Contact Records Tickler/Notes Link .
Contact Records Biography Link
Contact Records Orders Link
Contact Records Security Groups Link
Contact Records Company Link
Company ID Field
Company Name Field
Password Field
Confirm Password Field
Parent Company ID Field
Main Contact ID Field
Federal ID Field
Bill Name Field
Social Security # Field
Credit Status Field
Credit Limit Field
Terms Field

View Employees
Copy from Mailing
Comments Field
Created By
Modified By
Active
ChapterID
Company Types Checkboxes

- Client
- Contractor
- Contributor
- LRCA
- Manufacturer
- Media
- Member
- NonProfit
- Prospect
- Vendor

The Contacts Feature is used to maintain records on individual contacts, including their website login information when applicable. Member data, Customer data, Vendor data and Contact data actually store in the same tables but we have separated the features to simplify certain administrative procedures specific to membership type organizations such as trade and professional organizations. The individual Contact Records serve not only as a place to record and lookup contact information such as addresses and phone numbers but also a link into other features related to individual contacts such as event registration records, advocacy participation, contributions, purchases, help desk requests, quotes, billing, shipping, and more. The Contact database further serves as a data merge source for message broadcasting via email, fax or printed communication features.

The Members Feature is actually part of the Contacts feature and operates in exactly the same way except that data for individual records entered under this function automatically defaults to Member status values which are relevant to certain reporting and signup features. Individual record entered under the Member feature can be amended to eliminate such default values.

The Vendors Feature is actually part of the Contacts feature and operates in exactly the same way except that data for individual records entered under this function automatically defaults to Vendor status values which are relevant to certain reporting and signup features. Individual record entered under the Vendor feature can be amended to eliminate such default values.

The Companies Feature is used to maintain records on individual companies, including their relationship to individual contacts when applicable. The individual Company Records serve not only as a place to record and lookup contact information such as addresses and phone numbers but also a link into other features which relate to individual companies such as orders and contacts.

This chapter presents a detailed explanation of the Contacts, Members, Vendors & Companies Feature including Signup and Login.

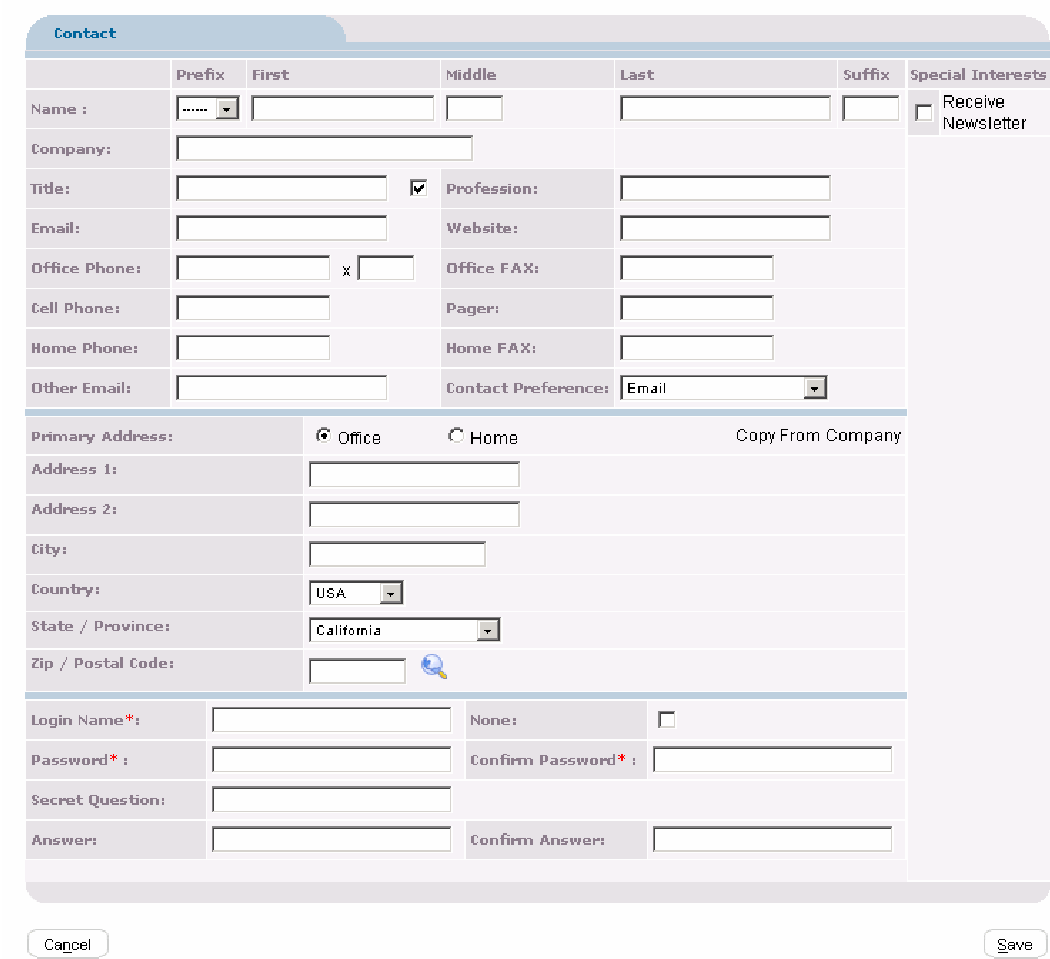
1.2 The Visitor Experience

Visitors encounter the Contact Records feature upon initial signup, login and record update. Often initial sign-up or login is triggered when a visitor uses a peripheral feature of the site such as making a purchase, joining a discussion, searching the document or resource library, submitting a support request, etc. Contact records can be created by a visitor from the Home page, provided the signup feature is activated. Contact records can also be created, updated and deleted by a permitted Administrative visitor by accessing the Contacts, Member or Vendor feature of the Administration Menu or by importing a batch from a list.

1.2.1 Signup and login

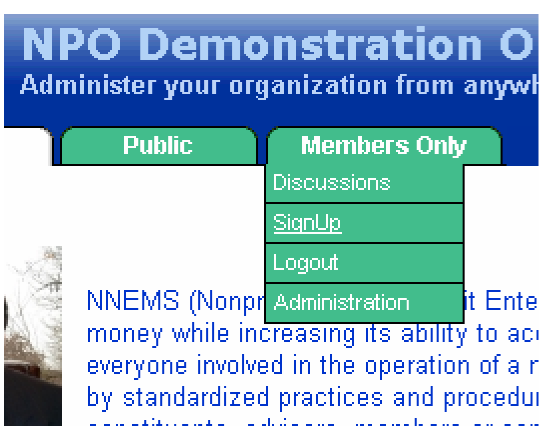
Attempting to access a password secured feature or clicking on Login presents the login and signup page.

First time users can click on "Sign up here" and are presented with a form. The form may be short or long depending on the requirements set up by Administration in the Features Management User Signup configuration page. In the following pages we use the default login configuration, which is a little longer than customary, for demonstration.



1.2.2 Contact Record Update

Logged in visitors can update their Contact Record by clicking on Signup. The logged in visitor will only have access to those Contact Record fields activated for Signup by Administration in the Features Management User Signup configuration page.

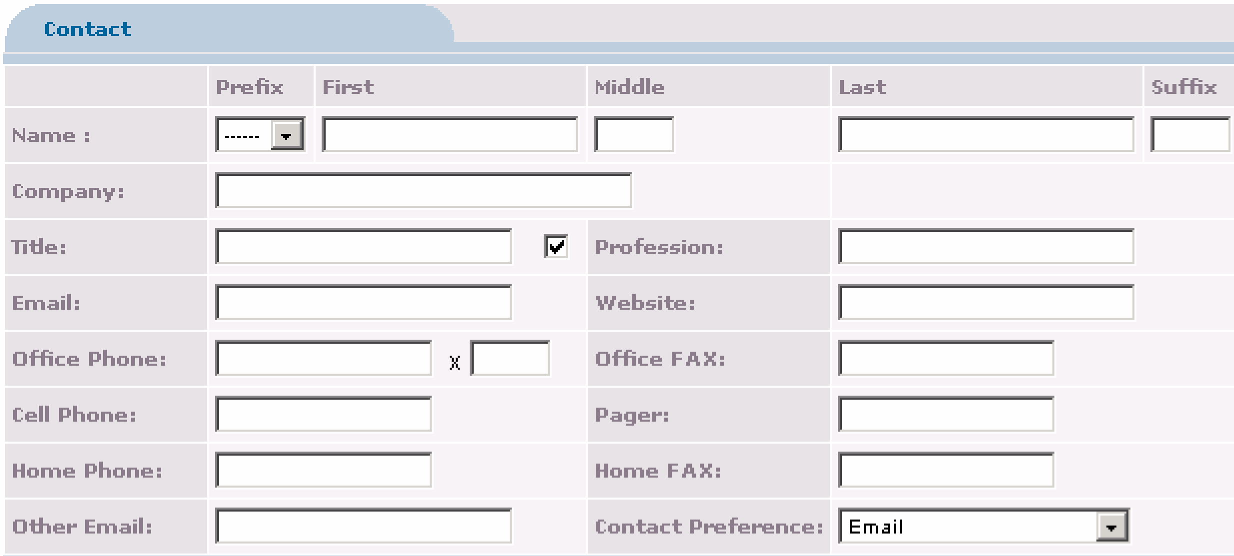


Permitted Administrative visitors may update all Contact Record fields by accessing individual Contact Records from the Contacts feature on the Administration Menu (Ctrl-Alt-m).

1.3 Components

The Contact, Member, Vendor and Company records can be accessed from the Administration Menu (Ctrl-Alt-m). by clicking on the appropriate icon in the Contact Management column.

1.3.1 Login Contact Record Fields



- **Prefix Selection Entry Field** - Used to indicate the contact's prefix such as Ms., Mr., Dr., etc.

- **First Name Entry Field** - Used to indicate the contact's first name.

- **Middle Entry Field** - Used to indicate the contact's middle name initial.

- **Last Name Entry Field** - Used to indicate the contact's last name.

- **Suffix Entry Field** - Used to indicate the contact's suffix such as M.D., Ph.D, etc.

- **Company Name -** Data can be entered into this field without linking it to a company record. However, it may be desirable to have a Contact Record related to a specific Company Record. In such a case, the search icon should be clicked to activate the company search interface. The Company Record should be located and selected. Once selected the visitor will be returned to the Contact Management page and the Company field and Company ID field will auto fill.

- **Company ID Field with link to search interface –** the ID of a Company record may be entered here. The  option can be used to select a Company and the Company Name and Company ID field will auto fill. See the Chapter on Companies Management for additional information about Company Search.

- **Title Field –** Used to indicate the contact's professional title

- **Profession Field –** Used to indicate the contact's profession.

- **Email Address Field -** Data entered into the Email Address field becomes the visitor's login ID. Visitors are required to login if they wish to enter password protected pages and functions of the website.

- **Website Entry Field –** Used to indicate the contact's website address.

- **Office Phone Entry Field –** Used to indicate the contact's Office Phone Number

- **Office Phone Extension Entry Field -** Used to indicate the contact's Office Phone Extension Number

- **Office FAX Entry Field -** Used to indicate the contact's Office Fax Phone Number

- **Cell Phone Entry Field -** Used to indicate the contact's Mobile Phone Number

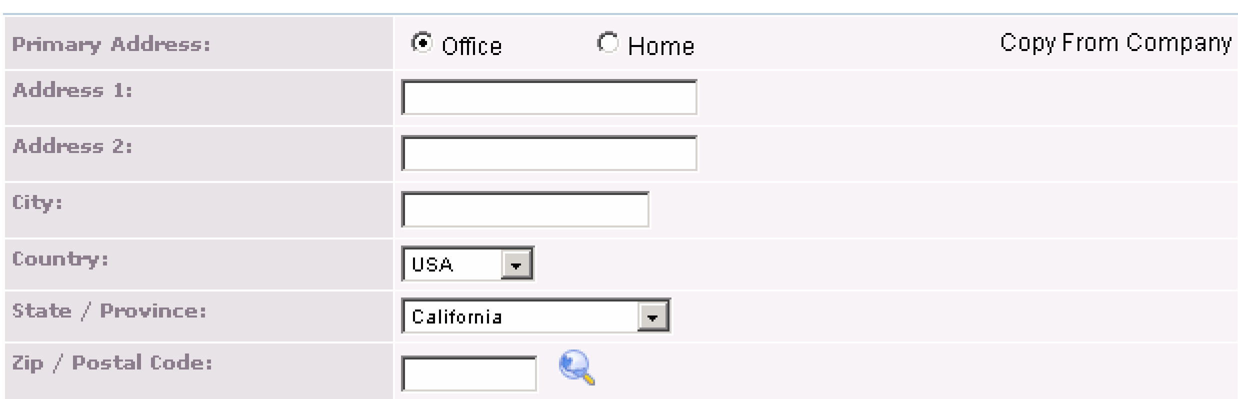
- **Pager Entry Field -** Used to indicate the contact's Pager Phone Number

- **Home Phone Entry Field -** Used to indicate the contact's Home Phone Number

- **Home FAX Entry Field -** Used to indicate the contact's Office Fax Phone Number

- **Other Email Entry Field –** Used to indicate secondary email address.

- **Contact Preference By: Selection Field -** The Contact Preference By: field is used to indicate a contacts preferred method of communication. Selections include Email, Fax, Postal Mail and Remove from Mailing List.



- **Primary Address Radio Button –** Allows visitor to identify Primary (contact) Address as Home or Office

- **Address 1 Entry Field –** Used to indicate the contact's Street Address

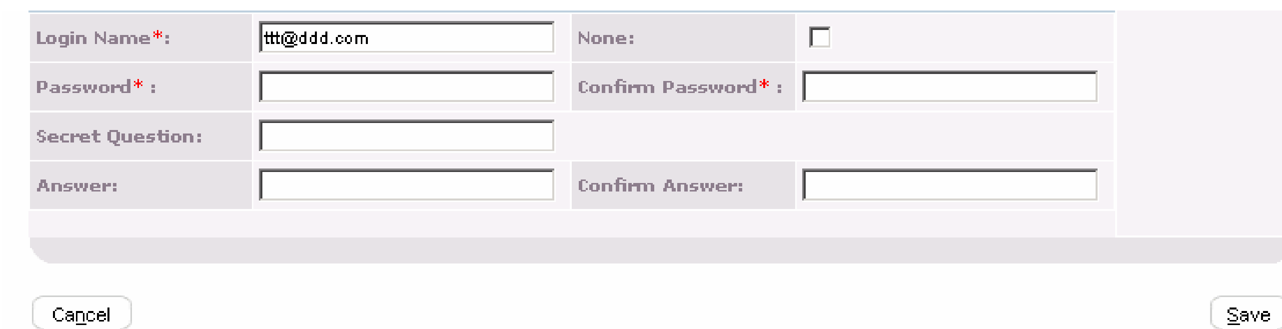
- **Address 2 Entry Field –** Used to indicate the contact's additional address information such as apartment or suite.

- **City Entry Field –** Used to indicate the contact's City

- **Country Entry Field –** Used to indicate the contact's Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features Features icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp UserSignUp button the click on the **Countries** link

- **State or Province Entry Field –** Used to indicate the contact's State or Province. The State or Province selections available are based on the Country field selection.

- **Zip / Postal Code Entry Field –** Used to indicate the contact's Postal Code



- **Login Name Field -** Data entered into the Email Address field defaults to this field to become their login. It may be edited and changed. Visitors are required to login if they wish to enter password protected pages and functions of the website.

- **Password Entry Field -** Data entered into the Password field becomes the visitor's password. Visitors are required to input a password when they log into the site if they wish to enter password protected pages and functions of the website.

- **Confirm Password Entry Field -** The Password field is encrypted so it may not be reviewed visually to confirm accuracy. Therefore, a second field requires that the password be typed again for confirmation of accuracy.

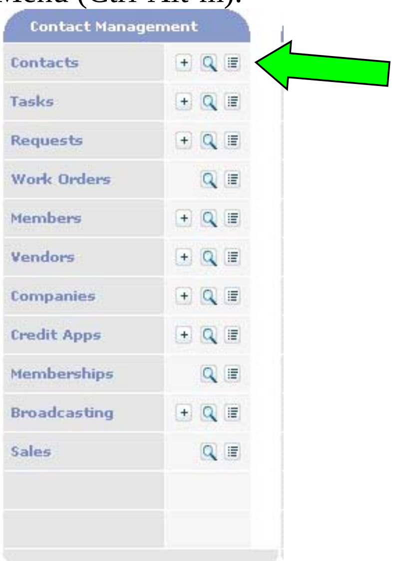
- **Secret Question Field –** PortalProdigy provides an automated password retrieval for users who have lost their password. By answering the secret question provided by the user, with the exact answer also provided by the user, the system will provide the password via email.

- **Answer Field** – Enter answer to Secret Question.

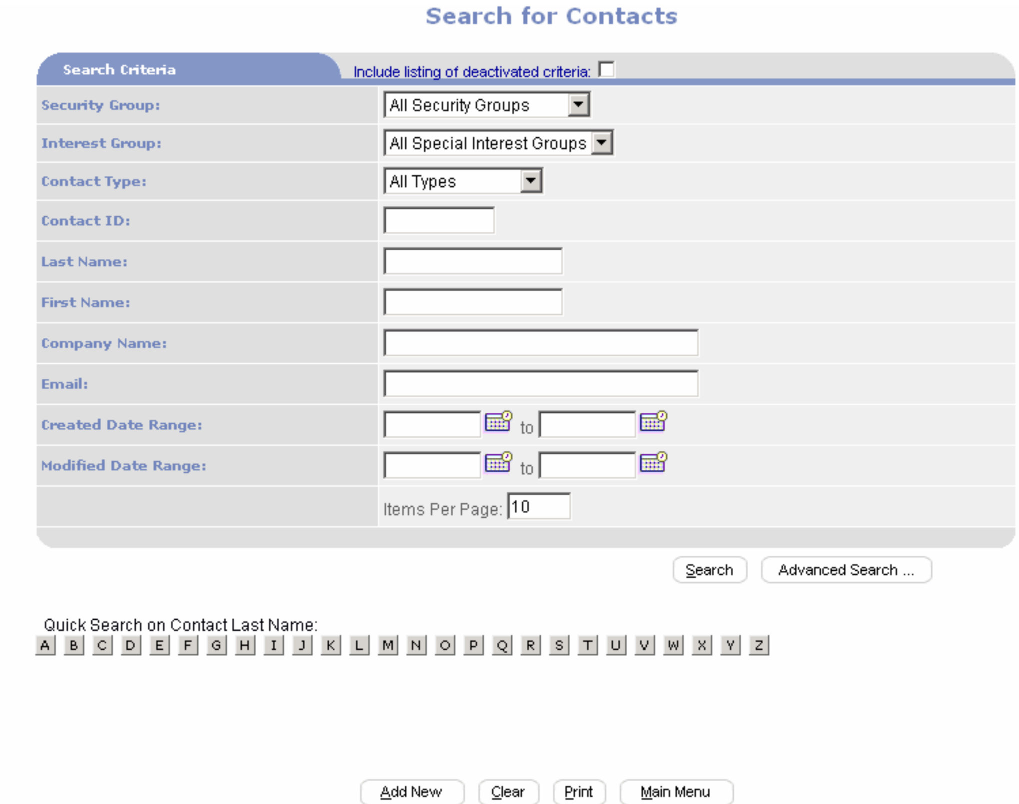
- **Confirm Answer Field** - Enter answer to Secret Question.

1.3.2 Administration Contact Record Fields

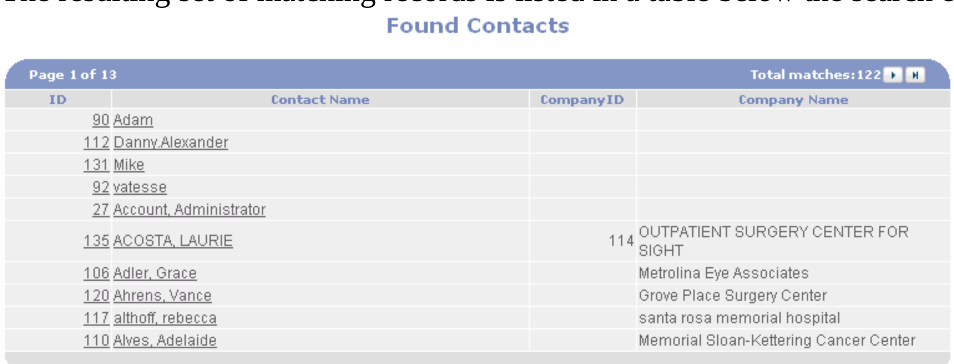
The Administration Contact Management page is reached by clicking the “Contacts” Browse button located in the Contact Management menu of the Main Administration Menu (Ctrl-Alt-m).



The Search for Contacts page provides several filters by which to search for contact(s) record(s). Enter characters into one or more fields and then click on the Search button to locate records.

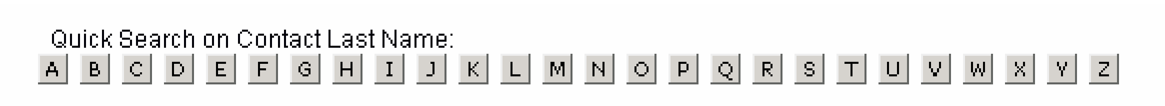


The resulting set of matching records is listed in a table below the search entry form.



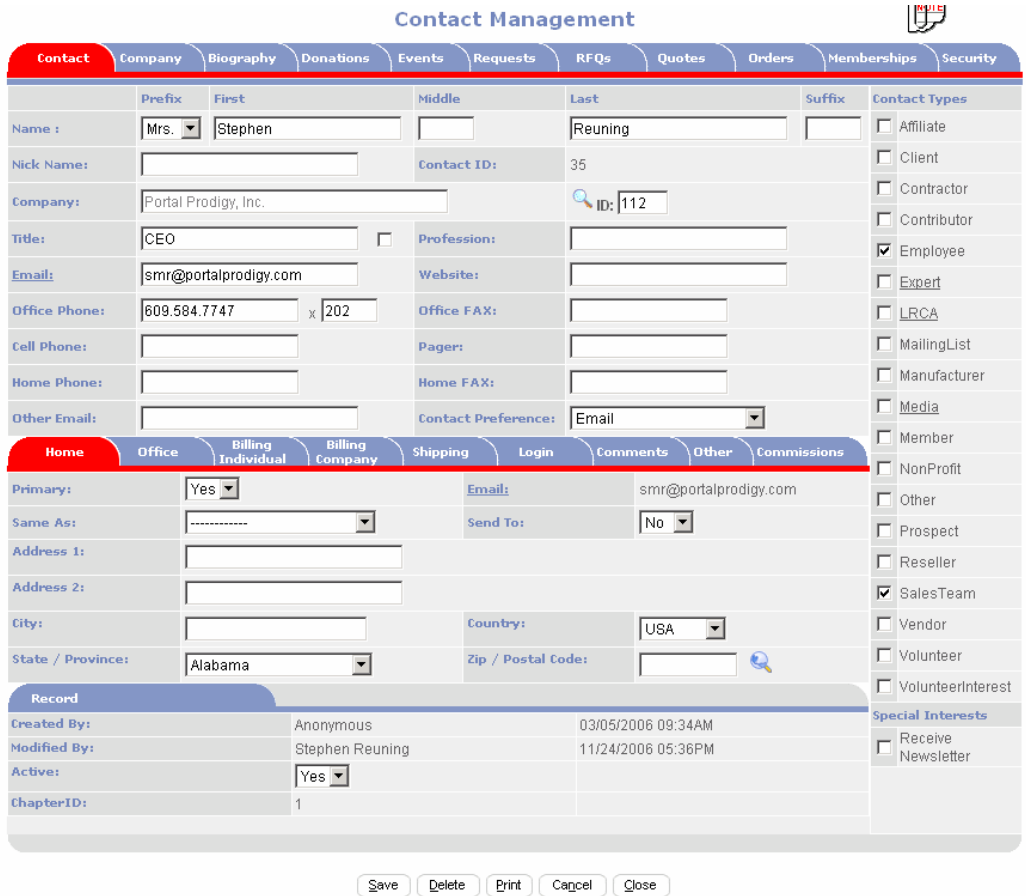
ID	Contact Name	CompanyID	Company Name
90	Adam		
112	Danny Alexander		
131	Mike		
92	vatesse		
27	Account, Administrator		
135	ACOSTA, LAURIE	114	OUTPATIENT SURGERY CENTER FOR SIGHT
106	Adler, Grace		Metrolina Eye Associates
120	Ahrens, Vance		Grove Place Surgery Center
117	althoff, rebecca		santa rosa memorial hospital
110	Alves, Adelaide		Memorial Sloan-Kettering Cancer Center

Clicking on an ID links into the corresponding record.



Using the Quick Search tool, the user can locate records by last name by clicking on a letter.

The Administration Contact Management page can also be reached by clicking the "Contacts" Add button located in the Contact Management menu of the Main Administration Menu (Ctrl-Alt-m). In which case a blank Add New Contact page is presented.



The Contact Management Page provides access to the different components of the Contact Management System via clickable tabs. Upon clicking a tab, the system refreshes the page to present the corresponding search, add or report interface. From the Contact Management Interface one can access the following types of records: contact information; company information, biographical information: donations history; events attendance, signup and payment records; help desk and support chronicle; requests for quotes and proposals; quotes and proposals; orders and purchases; memberships and subscription records and security settings.

Actions that can be performed from Contact Management include:

1. View and update contact information.
2. Delete contacts.
3. View and update company information.
4. View and update biographical information.
5. View contacts' donations history.
6. View event attendance and payment history.
7. Add and Edit RFQs
8. Price RFQs and convert to Quotes
9. Convert Quotes to Orders

10. View Orders
11. Add and Edit Orders
12. View a contacts memberships and subscriptions
13. Update a user's security settings and website access rights
14. Set a user's Sales Team(s) role(s)

- **Contact Management Page Contact Tab** – Displays Contact's contact information.

Prefix Selection Entry Field - Used to indicate the contact's prefix such as Ms., Mr., Dr., etc.

First Name Entry Field - Used to indicate the contact's first name.

Middle Entry Field - Used to indicate the contact's middle name initial.

Last Name Entry Field - Used to indicate the contact's last name.

Suffix Entry Field - Used to indicate the contact's suffix such as M.D., PhD, etc.

Company Name - Data can be entered into this field without linking it to a company record. However, it may be desirable to have a Contact Record related to a specific Company Record. In such a case, the search icon should be clicked to activate the company search interface. The Company Record should be located and selected. Once selected the visitor will be returned to the Contact Management page and the Company field and Company ID field will auto fill.

Company ID Field with link to search interface – the ID of a Company record may be entered here. The option can be used to select a Company and the Company Name and Company ID field will auto fill. See the Chapter on Companies Management for additional information about Company Search.

Title Field – Used to indicate the contact's professional title

Profession Field – Used to indicate the contact's profession.

Email Address Field - Data entered into the Email Address field becomes the visitor's login ID. Visitors are required to login if they wish to enter password protected pages and functions of the website.

Website Entry Field – Used to indicate the contact's website address.

Office Phone Entry Field – Used to indicate the contact's Office Phone Number

Office Phone Extension Entry Field - Used to indicate the contact’s Office Phone Extension Number

Office FAX Entry Field - Used to indicate the contact’s Office Fax Phone Number

Cell Phone Entry Field - Used to indicate the contact’s Mobile Phone Number

Pager Entry Field - Used to indicate the contact’s Pager Phone Number

Home Phone Entry Field - Used to indicate the contact’s Home Phone Number

Home FAX Entry Field - Used to indicate the contact’s Office Fax Phone Number

Other Email Entry Field – Used to indicate secondary email address.

Contact Preference By: Selection Field - The Contact Preference By: field is used to indicate a contacts preferred method of communication. Selections include Email, Fax, Postal Mail and Remove from Mailing List.

- **Contact Management Page Contact Tab Home Sub Tab Page –**

Primary Address Selection Field – Select yes or no to identify Primary (contact) Address as Home or Office

Address 1 Entry Field – Used to indicate the contact’s Home Street Address

Address 2 Entry Field – Used to indicate the contact’s additional Home address information such as apartment or suite.

City Entry Field – Used to indicate the contact’s Home City

Country Entry Field – Used to indicate the contact’s Home Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

button the click on the **Countries** link

State or Province Entry Field – Used to indicate the contact’s Home State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the contact's Home Postal Code

- **Contact Management Page Contact Tab Office Sub Tab Page**

Primary Address Selection Field – Select yes or no to identify Primary (contact) Address as Home or Office

Address 1 Entry Field – Used to indicate the contact's Home Street Address

Address 2 Entry Field – Used to indicate the contact's additional Home address information such as apartment or suite.

City Entry Field – Used to indicate the contact's Home City

Country Entry Field – Used to indicate the contact's Home Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

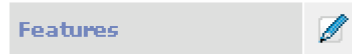
button the click on the **Countries** link

State or Province Entry Field – Used to indicate the contact's Home State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the contact's Home Postal Code

- **Contact Management Page Contact Tab Billing Individual Sub Tab Page**

Date Opened - This date is auto-filled to the date that Credit Status is set to *approved*, when approval is made using the credit application approval process or it may be filled in manually.

Credit Terms Field - Used to assign credit terms to an individual. Terms selections such as *Net 10*, *Net 30*, etc. are defined in Features Management. To edit selection list, click on 

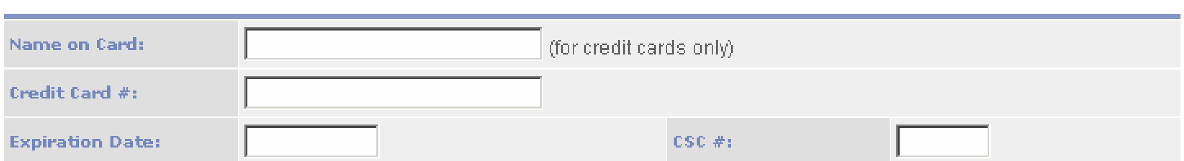
edit button located in Site Management menu column of Main Administration page (Ctrl-Alt-m). Then click on **Companies** link then Click on **Terms** link.

Credit Application – The **Credit Application** link initiates the Credit Application Management page which provides an application approval process that can be used to verify credit, rate credit history, enter administrative comments, set credit terms and set a credit limit. (See the chapter titled, Credit Applications Features in Detail of the Administration Manual for details)

Credit Status Field - Provides three possible selections; *Approved*, *Declined* and *Pending*. Affects certain logical decisions in features that involve ordering, purchasing, invoicing and payments. For example, Individuals with *approved* credit status may be permitted to place orders and pay by mail while those with *declined* credit status may be required to submit credit card information before an order is accepted or processed.

Credit Limit Field - Certain features involving ordering, purchasing, invoicing and payments verify that the individual does not have outstanding accounts receivable beyond the credit limit before processing orders. Individuals that exceed their credit limit may be required to submit credit card information before an order is accepted or processed.

Credit Card Information – Credit card data may be entered here and it will auto-fill when the contact makes purchases using the PortalProdigy payment features OR the fields on this page will auto-fill with information the visitor inputs during an online purchase process.



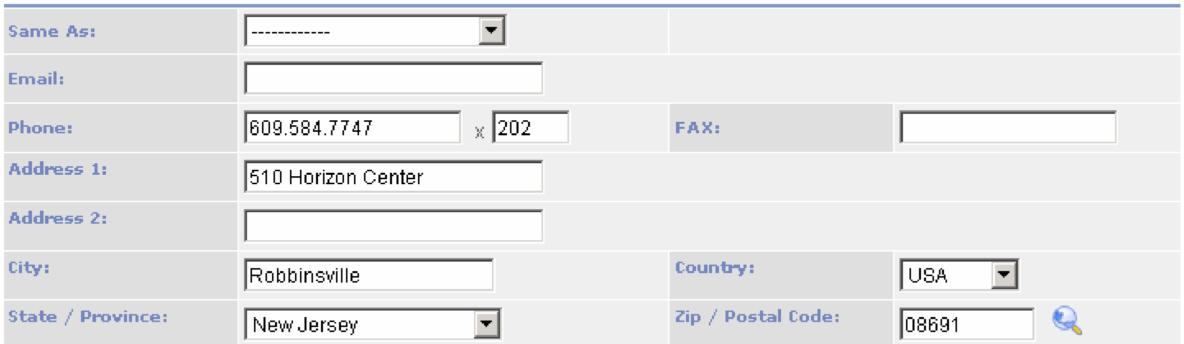
Name on Card - Always enter the exact name as it is displayed on the customer's credit card.

Credit Card Number - input for credit card number.

Expiration Date - input for credit card expiration date.

CSC Number - input for credit card security code.

Billing Address Information –



The Billing Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Address 1 Entry Field – Used to indicate the contact's Home Street Address

Address 2 Entry Field – Used to indicate the contact's additional Home address information such as apartment or suite.

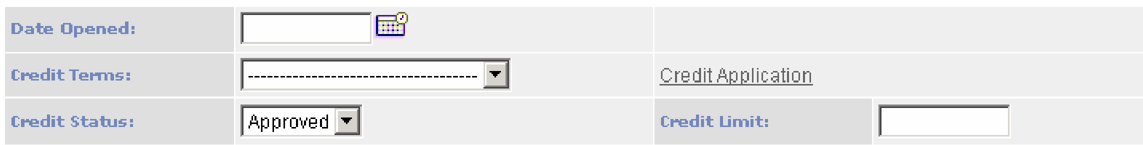
City Entry Field – Used to indicate the contact's Home City

Country Entry Field – Used to indicate the contact's Home Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features Features icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp UserSignUp button the click on the **Countries** link

State or Province Entry Field – Used to indicate the contact's Home State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the contact's Home Postal Code

- **Contact Management Page Contact Tab Billing Company Sub Tab Page**



Date Opened - This date is auto-filled to the date that Credit Status is set to *approved,* when approval is made using the credit application approval process or it may be filled in manually.

Credit Terms Field - Used to assign credit terms to a company. Terms selections such as *Net 10*, *Net 30*, etc. are defined in Features Management. To edit selection list, click on

edit button located in Site Management menu column of Main Administration page (Ctrl-Alt-m). Then click on **Companies** link then Click on **Terms** link.

Credit Application – The **Credit Application** link initiates the Credit Application Management page which provides an application approval process that can be used to verify credit, rate credit history, enter administrative comments, set credit terms and set a credit limit. (See the chapter titled, Credit Applications Features in Detail of the Administration Manual for details)

Credit Status Field - Provides three possible selections; *Approved, Declined* and *Pending*. Affects certain logical decisions in features that involve ordering, purchasing, invoicing and payments. For example, companies with *approved* credit status may be permitted to place orders and pay by mail while those with *declined* credit status may be required to submit credit card information before an order is accepted or processed.

Credit Limit Field - Certain features involving ordering, purchasing, invoicing and payments verify that the company does not have outstanding accounts receivable beyond the credit limit before processing orders. Companies that exceed their credit limit may be required to submit credit card information before an order is accepted or processed.

Credit Card Information – Credit card data may be entered here and it will auto-fill when the contact makes purchases using the PortalProdigy payment features OR the fields on this page will auto-fill with information the visitor inputs during an online purchase process.

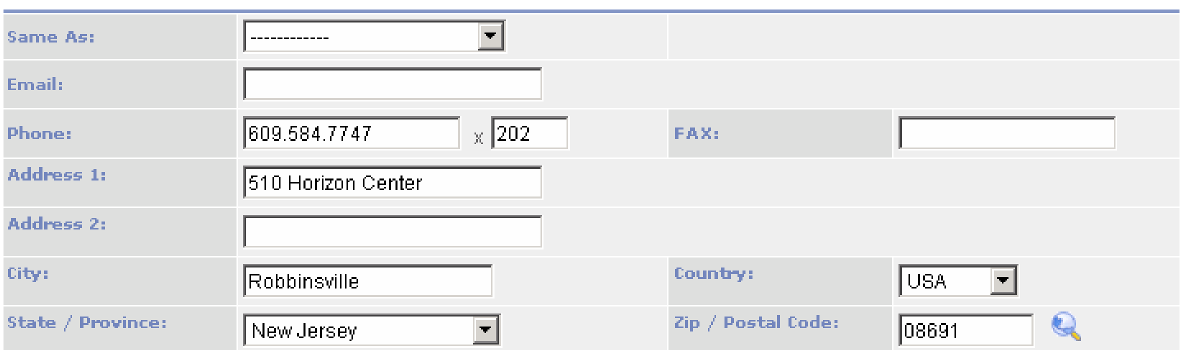
Name on Card - Always enter the exact name as it is displayed on the customer's credit card.

Credit Card Number - input for credit card number.

Expiration Date - input for credit card expiration date.

CSC Number - input for credit card security code.

Billing Address Information –



The Billing Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Address 1 Entry Field – Used to indicate the contact's Company Street Address

Address 2 Entry Field – Used to indicate the contact's additional Company address information such as apartment or suite.

City Entry Field – Used to indicate the contact's Company City

Country Entry Field – Used to indicate the contact's Company Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

button the click on the **Countries** link

State or Province Entry Field – Used to indicate the contact's Company State or Province. The State or Province selections available are based on the Country field selection.

- **Zip / Postal Code Entry Field –** Used to indicate the contact's Company Postal Code

- **Contact Management Page Contact Tab Shipping Sub Tab Page**

The Shipping Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Address 1 Entry Field – Used to indicate the contact's Shipping Street Address

Address 2 Entry Field – Used to indicate the contact's additional Shipping address information such as apartment or suite.

City Entry Field – Used to indicate the contact's Shipping City

Country Entry Field – Used to indicate the contact's Shipping Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features Features icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp UserSignUp button the click on the **Countries** link

State or Province Entry Field – Used to indicate the contact's Shipping State or Province. The State or Province selections available are based on the Country field selection.

- **Zip / Postal Code Entry Field –** Used to indicate the contact's Shipping Postal Code

- **Contact Management Page Contact Tab Login Sub Tab Page**

Login Name Field - Data entered into the Login Name field becomes the visitor's login ID. Visitors are required to login if they wish to enter password protected pages and functions of the website.

Password Field - Data entered into the Password field becomes the visitor's password. Visitors are required to input a password when they log into the site if they wish to enter pass-word protected pages and functions of the website.

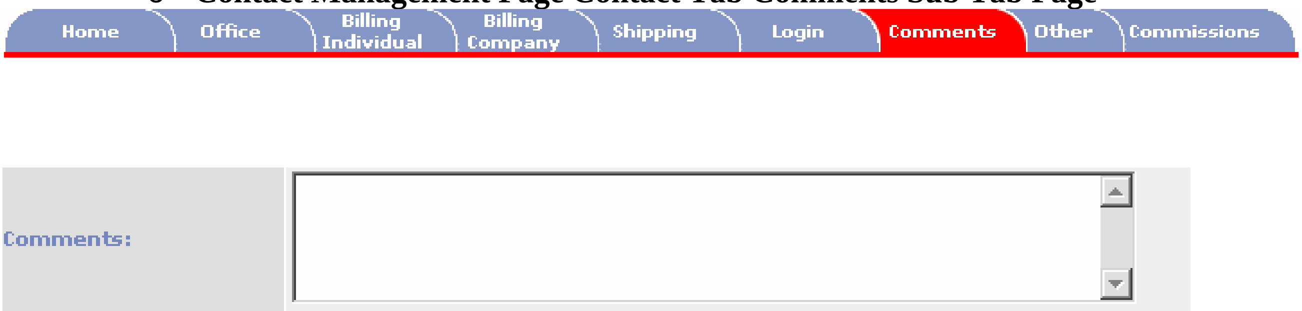
Confirm Password Field - The Password field is encrypted so it may not be reviewed visually to confirm accuracy. Therefore, a second field requires that the password be typed again for confirmation of accuracy.

Secret Question Field – PortalProdigy provides an automated password retrieval for users who have lost their password. By answering the secret question provided by the user, with the exact answer also provided by the user, the system will provide the password via email.

Answer Field – Enter answer to Secret Question.

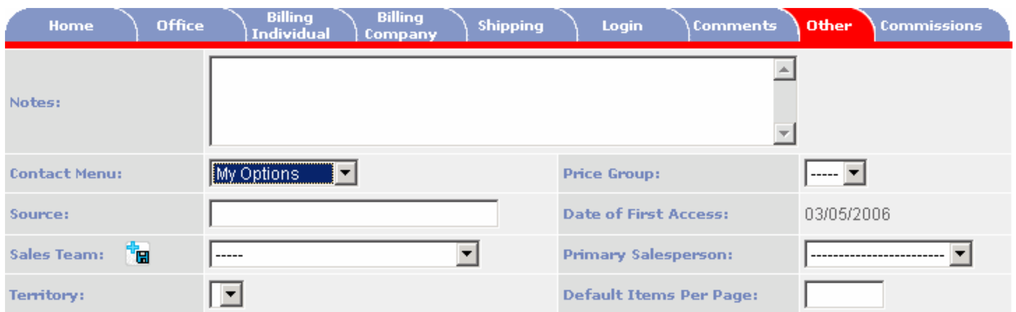
Confirm Answer Field - Enter answer to Secret Question.

- **Contact Management Page Contact Tab Comments Sub Tab Page**



Comments Field – This field displays on the Contact Profile page and the contact may use this field to enter comments and requests.

- **Contact Management Page Contact Tab Other Sub Tab Page**



Notes – This field only displays on the Contact Management page and is not available in the visitor portion of the site. It may be used to enter notes about the Contact that are not viewable by the Contact.

Contact Menu – this list box field is used to assign a Contact Menu to the contact. It defaults to the Contact Menu assigned as the Default in User Signup Features Management. A different Contact Menu can be selected for each Contact using Contact Management. Contact Menus are used to provide links to features and content applicable to specific Contacts or groups of Contacts. E.g. Media Type Contacts could be assigned a Contact Menu containing links to Media Information, News, etc; Customer Contacts could be assigned a Contact Menu containing links to their Orders, Order Policies, Return Policies, RMA Desk, etc. Contact Menus are created and maintained using the Menu Builder Feature. (See the chapter titled, Features Management Menu in Detail)

Price Group – this list box field is used to select a special pricing group for the customer. Price Groups are used to create specific Product Item pricing for select groups of customers. E.g. “Wholesale”, “Retail”, “Members”, etc. Price Groups are created and maintained using

Source Field - The Source field is used to indicate the source of the contact record. This is especially helpful when importing prospects from different lists if you wish to track prospecting result or campaign each list separately.

Date of First Access Report Data - a date that can be used for tracking the success of prospecting campaigns is inserted into this field the first time this user logs into your Portal Prodigy Website.

Sales Team Selection Entry Field - The 'Sales Team' are members of the sales staff, typically your employees. This field is used to indicate the team responsible for the selling process. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Sales Team selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Sales Team)

Primary Salesperson Selection Entry Field - When contact records for your sales staff are created in PORTALPRODIGY, the "Sales Team" Contact Type box should be selected. If it is selected and Sales Teams have been created in Sales & Opportunity Feature Management, then Sales Team roles will be assignable under the security tab of the contact record. When a Sales Team is selected in the prior Sales Team Selection Entry Field, all contacts with roles on the selected team are made available in the Primary Salesperson Selection Entry Field.

Territory Selection Field – Indicates that this contact is within a specific sales territory. (See the chapter titled Sales Management Feature in Detail for more information.) The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Territory selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Territories)

- **Contact Management Page Contact Tab Commissions Sub Tab Page – Commissions Management Under Development – Coming Soon!**

- **Contact Management Page Company Tab -**

The Company Tab provides access to the related Company Record if one exists.

Company ID Field - Each Company Record is assigned a unique numerical identification number automatically.

Company Name Field – Enter the name of the organization. This can be the legal name or the common name used for the organization, e.g. "International Business Machines, Inc" vs. "IBM". A value is required. Click on the Edit 

icon to access Company Management to review the Company's details or manage it.

Password Field - Data entered into the Company Password field becomes the password into certain functions related to the Company. For example, certain items may be purchases by a logged in user and billed to their company provided they submit the correct company password.

Confirm Password Field - The Password field is encrypted so it may not be reviewed visually to confirm accuracy. Therefore, a second field requires that the password be typed again for confirmation of accuracy.

Primary Contact Field – Indicates your organization's primary contact at the company.

Primary Contact ID – Use the lookup icon to locate a new primary contact record or to add one.

Entity Type Selection Field – Unlike many of the selection lists used in PORTALPRODIGY, the Entity Type selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. Either "Corporation", "Government Agency", "Nonprofit (501(c)(3))", "Partnership", or "Sole Proprietorship" may be selected.

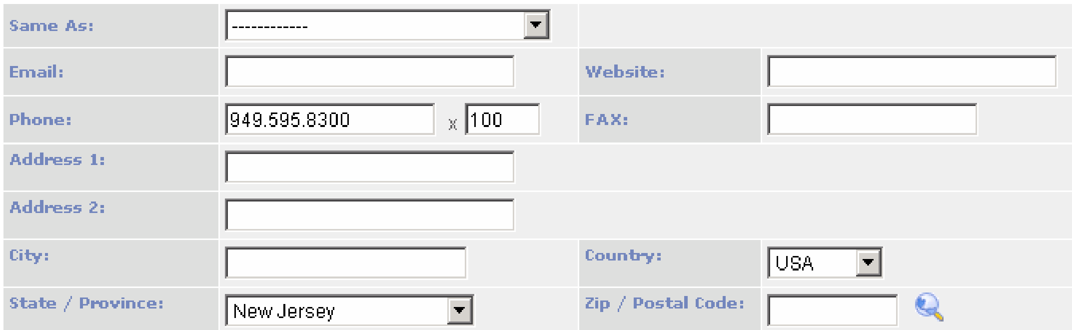
Reseller Number Text Entry Field – In many cases, you may not charge your resellers Sales Tax as they are exempt. If the Company of Record is a reseller of your products, it may have a state or other government issued Tax ID which you'll need to record for your tax records.

Price Group – this list box field is used to select a special pricing group for the customer. Price Groups are used to create specific Product Item pricing for select groups of customers. E.g. "Wholesale", "Retail", "Members", etc. Price Groups are created and maintained using

Sales Team Selection Entry Field - The 'Sales Team' are members of the sales staff, typically your employees. This field is used to indicate the team responsible for the selling process. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Sales Team selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Sales Team)

Primary Salesperson Selection Entry Field - When contact records for your sales staff are created in PORTALPRODIGY, the "Sales Team" Contact Type box should be selected. If it is selected and Sales Teams have been created in Sales & Opportunity Feature Management, then Sales Team roles will be assignable under the security tab of the contact record. When a Sales Team is selected in the prior Sales Team Selection Entry Field, all contacts with roles on the selected team are made available in the Primary Salesperson Selection Entry Field.

- **Contact Management Page Company Tab Mailing Sub Tab**



The Mailing Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Email Address Field – Used to indicate the mailing contact's email address

Website Entry Field – Used to indicate the mailing contact's website address.

Phone Entry Field – Used to indicate the mailing contact's Phone Number

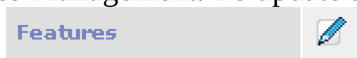
Phone Extension Entry Field - Used to indicate the mailing contact's Phone Extension Number

FAX Entry Field - Used to indicate the mailing contact's Fax Phone Number

Address 1 Entry Field – Used to indicate the company's mailing Street Address

Address 2 Entry Field – Used to indicate the company's additional mailing address information such as apartment or suite.

City Entry Field – Used to indicate the company's mailing City

Country Entry Field – Used to indicate the company's mailing Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

button the click on the **Countries** link

Company's State or Province - The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the company's mailing Postal Code

- **Contact Management Page Company Tab Billing Sub Tab**

Date Opened - This date is auto-filled to the date that Credit Status is set to *approved*, when approval is made using the credit application approval process or it may be filled in manually.

Credit Terms Field - Used to assign credit terms to a company. Terms selections such as *Net 10*, *Net 30*, etc. are defined in Features Management. To edit selection list, click on 

edit button located in Site Management menu column of Main Administration page (Ctrl-Alt-m). Then click on **Companies** link then Click on **Terms** link.

Credit Application – The **Credit Application** link initiates the Credit Application Management page which provides an application approval process that can be used to verify credit, rate credit history, enter administrative comments, set credit terms and set a credit limit. (See the chapter titled, Credit Applications Features in Detail of the Administration Manual for details)

Credit Status Field - Provides three possible selections; *Approved*, *Declined* and *Pending*. Affects certain logical decisions in features that involve ordering, purchasing, invoicing and payments. For example, companies with *approved* credit status may be permitted to place orders and pay by mail while those with *declined* credit status may be required to submit credit card information before an order is accepted or processed.

Credit Limit Field - Certain features involving ordering, purchasing, invoicing and payments verify that the company does not have outstanding accounts receivable beyond the credit limit before processing orders. Companies that exceed their credit limit may be required to submit credit card information before an order is accepted or processed.

Credit Card Information – Credit card data may be entered here and it will auto-fill when the company makes purchases using the PortalProdigy payment features OR the fields on this page will auto-fill with information the visitor inputs during an online purchase process.

Name on Card:	(for credit cards only)		
Credit Card #:			
Expiration Date:		CSC #:	

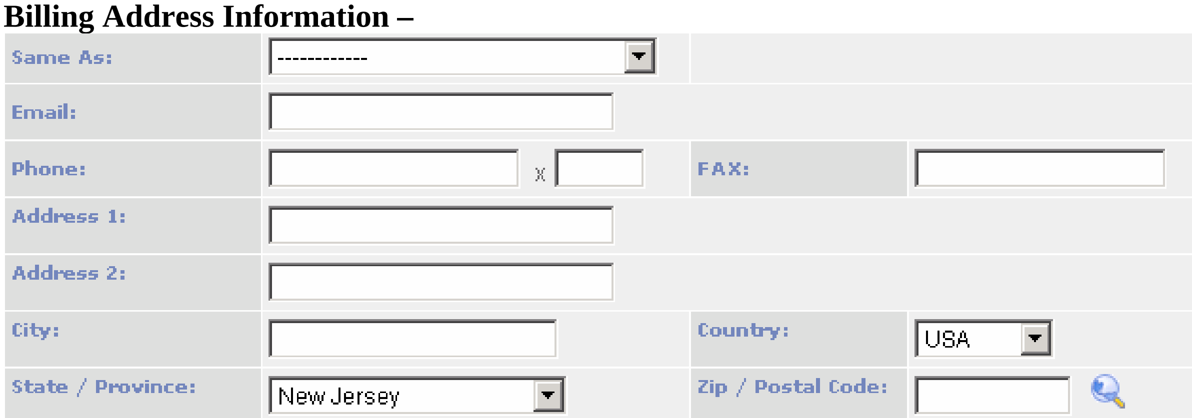
Name on Card - Always enter the exact name as it is displayed on the customer's credit card.

Credit Card Number - input for credit card number.

Expiration Date - input for credit card expiration date.

CSC Number - input for credit card security code.

Billing Address Information –



Same As:	------------		
Email:			
Phone:	x	FAX:	
Address 1:			
Address 2:			
City:		Country:	USA
State / Province:	New Jersey	Zip / Postal Code:	

The Billing Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Email Address Field – Used to indicate the billing contact's email address.

Phone Entry Field – Used to indicate the billing contact's phone number.

Phone Extension Entry Field - Used to indicate the billing contact's phone extension number.

FAX Entry Field - Used to indicate the billing contact's fax phone number.

Address 1 Entry Field – Used to indicate the company's Billing Street Address

Address 2 Entry Field – Used to indicate the company's additional billing address information such as building or suite.

City Entry Field – Used to indicate the company's Billing City

Country Entry Field – Used to indicate the company's Shipping Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

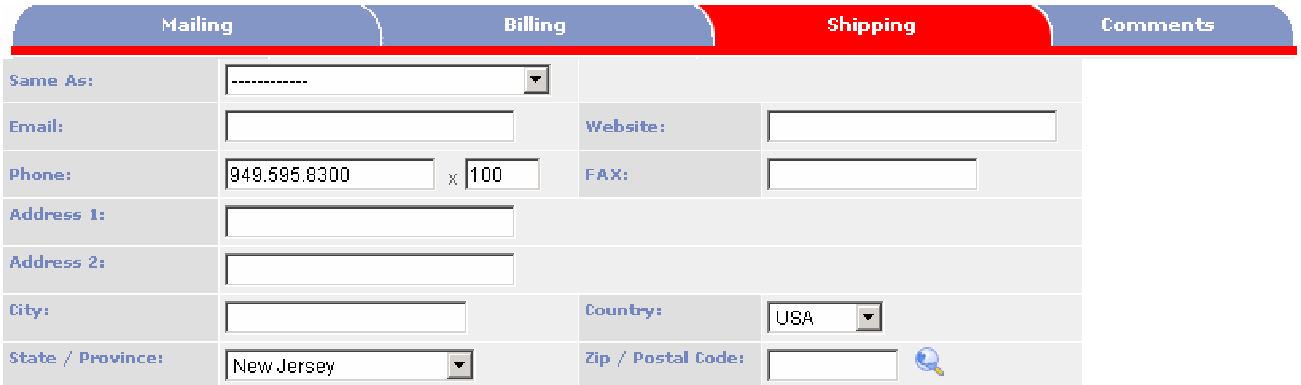
icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

button the click on the **Countries** link

State or Province Entry Field – Used to indicate the company's Billing State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the company's Billing Postal Code

- **Contact Management Page Company Tab Shipping Sub Tab**



The Shipping Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Email Address Field – Used to indicate the shipping contact's email address

Website Entry Field – Used to indicate the shipping contact's website address.

Phone Entry Field – Used to indicate the shipping contact's Phone Number

Phone Extension Entry Field - Used to indicate the shipping contact's Phone Extension Number

FAX Entry Field - Used to indicate the shipping contact's Fax Phone Number

Address 1 Entry Field – Used to indicate the company's shipping street address.

Address 2 Entry Field – Used to indicate the company's additional shipping address information such as building or suite.

City Entry Field – Used to indicate the company's shipping city.

Country Entry Field – Used to indicate the company's shipping country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

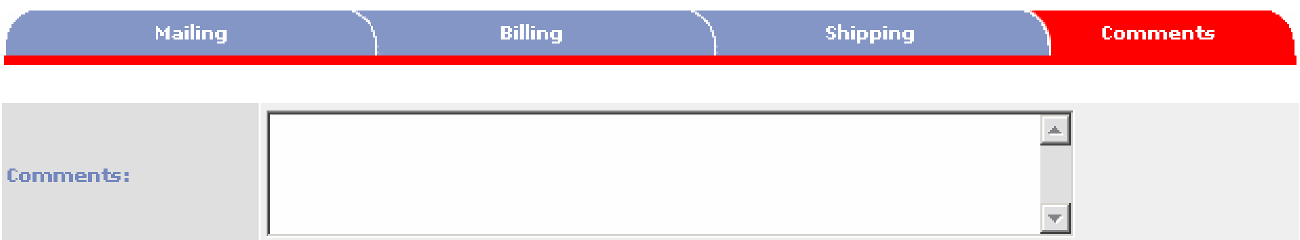
icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

button the click on the **Countries** link

State or Province Entry Field – Used to indicate the company's Shipping State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the company's billing postal code.

- **Contact Management Page Company Tab Comments Sub Tab**



Comments Field – this field may be used to enter any form of comments or additional information about the organization. Note that this field is not searchable.

- **Contact Management Page Biography Tab** -

The Biography link provides access to the Press Release interface where the contacts Biography, press release Closing Statement, and Biography query indexes are entered and updated. The Biography page data is used by the Press Release feature and the Media Contact Biography Search function. See the chapter titled, Press Release Feature in Detail of the PortalProdigy Administration Manual.

Biography Field - The Biography field stores the data that is presented when a visitor conducts a biography search or when a press release recipient clicks on the biography link in the release.

Bio Key Words Field - The words or phrases entered into the Bio Key Words field are the indexes which determine if the biography record will be returned as a result in a search.

Closing Statement Field - The Closing Statement field stores the data that is inserted in the press release after the notification text.

- **Contact Management Page Donations Tab -**

The Donations feature allows PortalProdigy websites to accept online credit card donations. It provides a simple easy to use donations entry form where contributors can specify the amount they wish to donate and provide payment information. The visitor provides basic contact information, enters the dollar amount they want to donate, and enters their credit card information. After submission a confirmation page is displayed and PortalProdigy automatically sends the contributor a thank you by email. Administrators can review donations from the Contact Management Page Donations Tab search page.

View Radio Selection Buttons – "My Donations" and "All Donations for My Company" are the two search criteria selections for this field allowing filtering accordingly. My Donations filters for donation records belonging to activated contact record. All Donations for My Company filters for donation records belonging to the company that activated contact's record is linked.

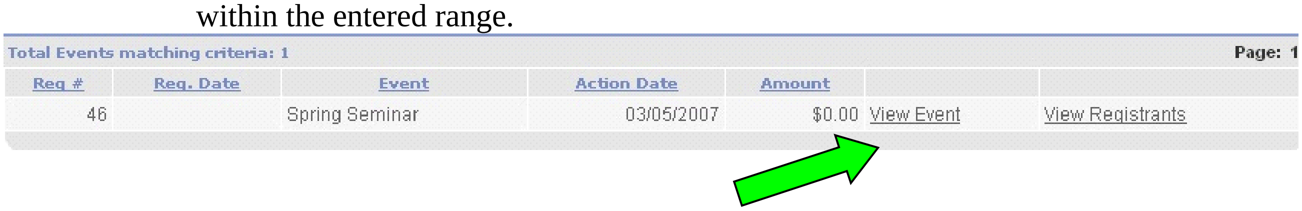
Date Range – Enter a date range to search for donation records created within the entered range.

- **Contact Management Page Events Tab** -

The Events feature allows PortalProdigy websites to display event calendars, accept online registrations, and generally administer events for the organization. Administrators can review and update event records from the Contact Management Page Events Tab search page. See the Chapter titled, Events Feature in Detail of the PortalProdigy Administration Manual for more information.

View Radio Selection Buttons – "My Events" and "All Events for My Company" are the two search criteria selections for this field allowing filtering accordingly. My Events filters for donation records belonging to activated contact record. All Events for My Company filters for event records belonging to the company that activated contact's record is linked.

Date Range – Enter a date range to search for donation records created within the entered range.



View Event Link – Clicking on the View Event link accesses the visitor page event detail dialog.

View Registrants Link - Clicking on the View Event Registrants link accesses the View Registrants page which lists all attendees registered for an event.

- **Contact Management Page Requests Tab -**

The Requests feature provides PortalProdigy websites with a complete request management system for capturing, processing and managing a variety of interactions including general information requests, warranty claims, maintenance service requests, maintenance and support contracts, product information requests, project requests, requests for quotes, consulting requests, training requests, resource requests, research requests, event planning, questions and assistance with problems and more.

Administrators can review and update request records from the Contact Management Page Requests Tab search page. See the Chapter titled, Requests and Help Desk Feature in Detail of the PortalProdigy Administration Manual for more information.

View Radio Selection Buttons – "My Requests" and "All Requests for My Company" are the two search criteria selections for this field allowing filtering accordingly. My Requests filters for request records belonging to activated contact record. All Requests for My Company filters for request records belonging to the company that activated contact's record is linked.

Request Type Search Selection Field - Request Types are used to classify requests. (See Request and Help Desk Features in Detail chapter of PortalProdigy Administrator's Manual for more details on request types.). Request types selections are customizable and setup by the site administrator in advance of using Sales Management. Request Types are created by clicking on the Request Types Add Icon 

located in the Content Management menu of the site's main Administration Menu (Ctrl-Alt-m).

When request types are setup using Request Type Management, one of several feature components is assigned to each request type record. Selected Request Types can be designated to relate logically to the *Opportunity* feature. By selecting the Opportunities 

radio button, the user can further filter the search to sales opportunity related requests.

The user can search for a request records of a specific Request Type by clicking on a selection in the Request Type Search Selection Field.

Date Range – Enter a date range to search for donation records created within the entered range.

Details Link – Clicking on the Details link accesses the Request Management page for the corresponding request.

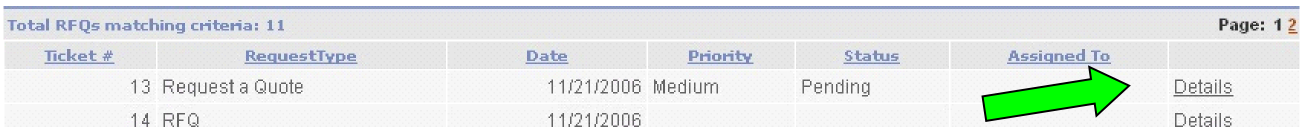
- **Contact Management Page RFQs Tab -**

The Requests feature provides PortalProdigy websites with a method for capturing Requests for Quotes and Requests for Proposals. Requests for Quotes (RFQ's) enter the system in many ways. One way to add an RFQ is to click the Add New button located at the bottom of the Opportunity Management RFQ page. Other ways include from the Request Management page and by visitors to the catalog or a Request for Quote link on the website. (See the chapter titled "Requests and Help Desk Feature in Detail in the Portal Prodigy Administrator's Manual.)

Administrators can review and update RFQ records from the Contact Management Page RFQs Tab search page.

View Radio Selection Buttons – "My RFQs" and "All RFQs for My Company" are the two search criteria selections for this field allowing filtering accordingly. My RFQs filters for RFQ records belonging to activated contact record. All RFQs for My Company filters for RFQ records belonging to the company that activated contact's record is linked.

Date Range – Enter a date range to search for RFQ records created within the entered range.


Total RFQs matching criteria: 11 — Page: 1 2

Ticket #	RequestType	Date	Priority	Status	Assigned To	
13	Request a Quote	11/21/2006	Medium	Pending		Details
14	RFQ	11/21/2006				Details

Details Link – Clicking on the Details link accesses the Request Management page for the corresponding RFQ.

- **Contact Management Page Quotes Tab -**

The Orders feature provides PortalProdigy websites with a method for providing Quotes. RFQs can be converted to Quotes. An automated email notification can be sent to the customer notifying them that their price quotes is ready and include a link back to your website where the customer can place an order for the quoted items and complete the required payment process.

Administrators can review and update Quote records from the Contact Management Page Quotes Tab search page. (See the chapter titled "Requests and Help Desk Feature in Detail" and chapter titled "Orders Feature in Detail" in the Portal Prodigy Administrator's Manual.)

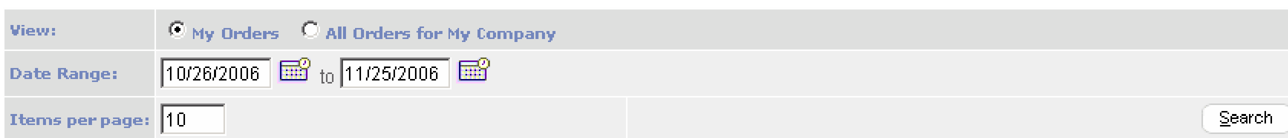
View Radio Selection Buttons – "My Quotes" and "All Quotes for My Company" are the two search criteria selections for this field allowing filtering accordingly. My Quotes filters for quote records belonging to activated contact record. All Quotes for My Company filters for quote records belonging to the company that activated contact's record is linked.

Date Range – Enter a date range to search for Quote records created within the entered range.

- **Contact Management Page Orders Tab -**

The Orders feature provides PortalProdigy websites with a method for managing and fulfilling orders for products as well as events, exchanges, membership, press releases, etc.

The Contact Management Page Orders Tab provides access to all Order Records related to the Contact that have been stored during operation of any of the features which create Order Records such as event registrations, purchases and membership dues.



View Radio Selection Buttons – "My Orders" and "All Orders for My Company" are the two search criteria selections for this field allowing filtering accordingly. My Orders filters for order records belonging to activated contact record. All Orders for My Company filters for order records belonging to the company that activated contact's record is linked.

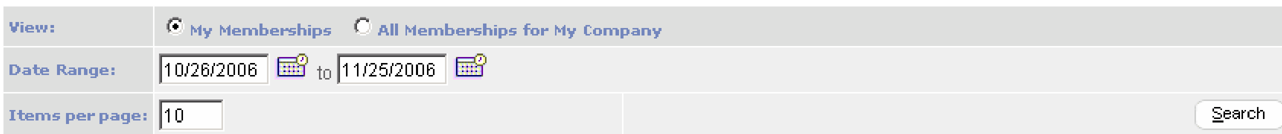
Date Range – Enter a date range to search for Order records created within the entered range.

View link – Click on view link to see corresponding Order Receipt.

- **Contact Management Page Memberships Tab -**

The Memberships feature provides PortalProdigy websites with a method for classify and managing groups of contacts in order to *sell* access to specific website functionality such as events, subscriptions, resources and support and to trigger events specific to given membership types -- events such as billing, program notifications, surveys, news delivery, exchange announcements, press releases, etc. See the chapter titled, “Membership Features in Detail” in the Portal Prodigy Administration Manual for complete details.

The Contact Management Page Memberships Tab accesses the membership records search page for the specifically activated contact.



View Radio Selection Buttons – “My Memberships” and “All Memberships for My Company” are the two search criteria selections for this field allowing filtering accordingly. My Memberships filters for membership records belonging to activated contact record. All Memberships for My Company filters for membership records belonging to the company that activated contact’s record is linked.

Date Range – Enter a date range to search for Membership records created within the entered range.

Options link – Clicking on the Options link accesses the Membership Options page for the corresponding membership where Membership information may be reviewed and payments made.

- **Contact Management Page Security Tab -**

The Security Groups Tab provides access to the Security Groups and Special Interest Groups selection list. By checking specific Security Group boxes, an Administrator provides the contact with access to password protected pages and functions. By checking specific Special Interest Group boxes, an Administrator prepares the Contact Record to be filtered by features such as Directories, Broadcasting, Discussions, Exchanges, etc

See the chapter titled, "User Groups and Security in Detail" to learn more about security groups and read chapter titled "Sales management Feature in Detail" to learn more about Sales Teams and Roles.

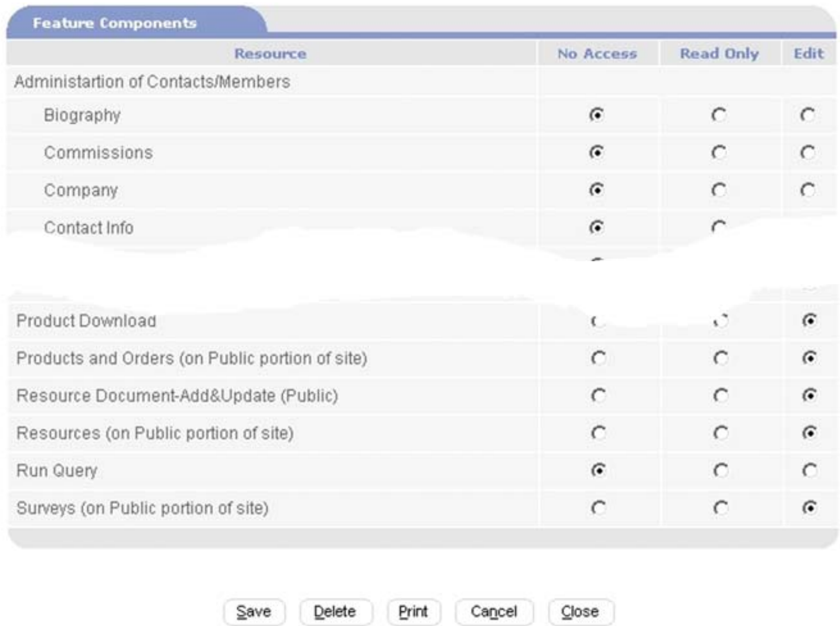
Clicking a security checkbox provides the activated contact with the corresponding Security Rights.

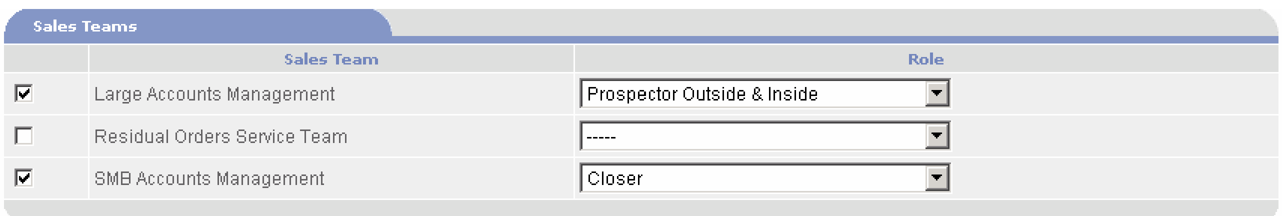
To view the rights of a specific security group, select the Security Edit

icon on the Site Management menu column of the Main Administration page (Ctrl-Alt-m), activate the Security Radio

button.

Select a Security Group by clinking on its link and the Security Group Management page will be accessed.





Each member of your sales organization can be assigned to one or more Sales Teams and assigned to a different Role on each Sales Team.

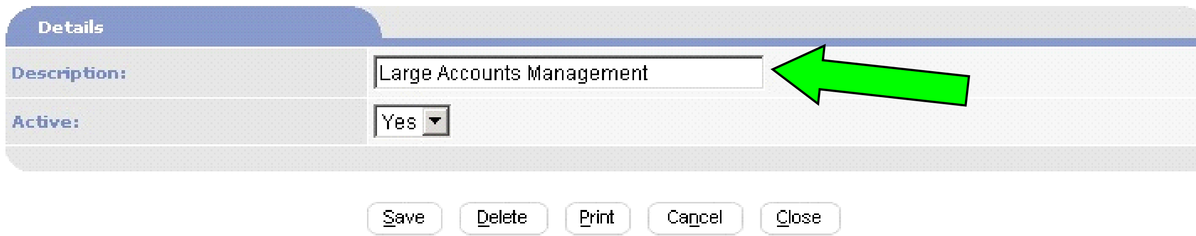
The Sales Team section of the Contact Management Page Security page provides a list of Sales Teams that have been created in the system.

To Create Sales Teams

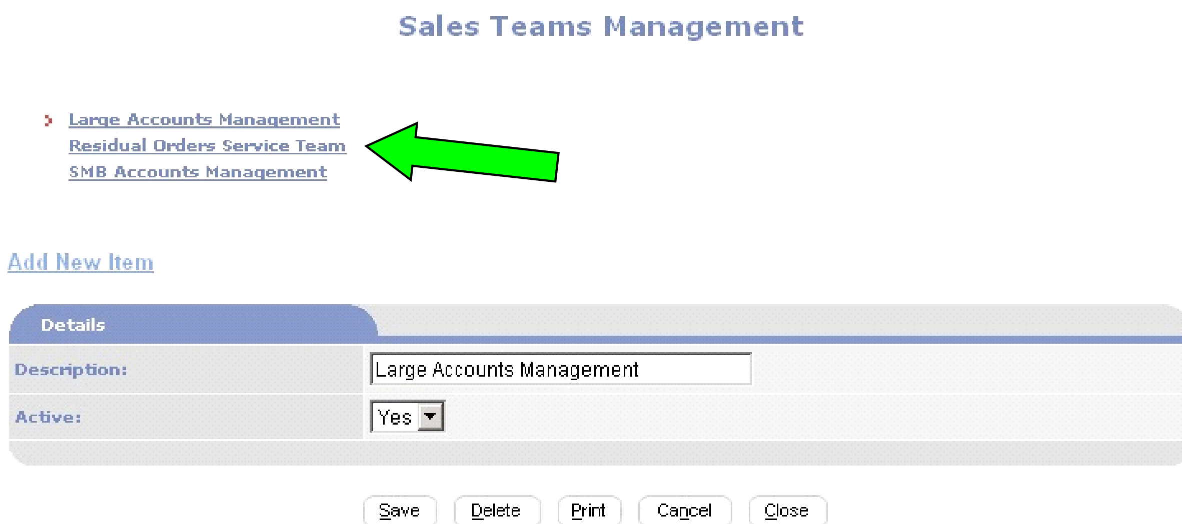
Click on the **Sales Teams** link of the Sales & Opportunity Features Management page to access the Sales Teams Management page.

Click on the **Add New Item** link to add a Sales Team. Enter a Description (For example, Large Accounts Management) and click on the Save 

button.



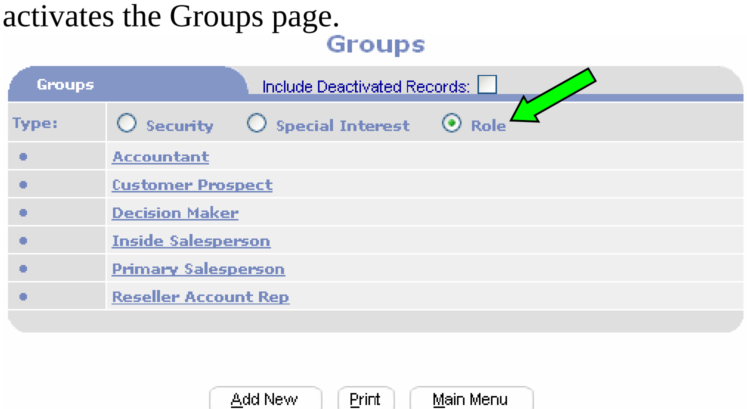
Continue process until you've added all the sales teams required.



Create New Roles

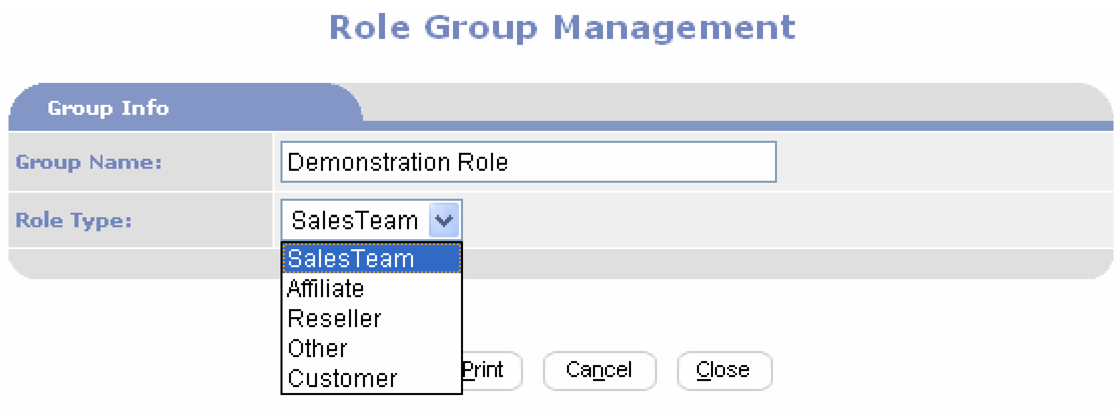
The site administrator can set up an unlimited number of Roles by clicking on Security edit icon 

located in the Site Management Menu of the site's Main Administration Menu page which activates the Groups page.



Clicking the Role Radio button to active refreshes the page to display all previously created roles and provides an opportunity to create a new role by clicking on the Add New 

button. The Role Group Management page is presented where the administrator can enter the name of the new role and select a Role Type from the Role Type selection list.



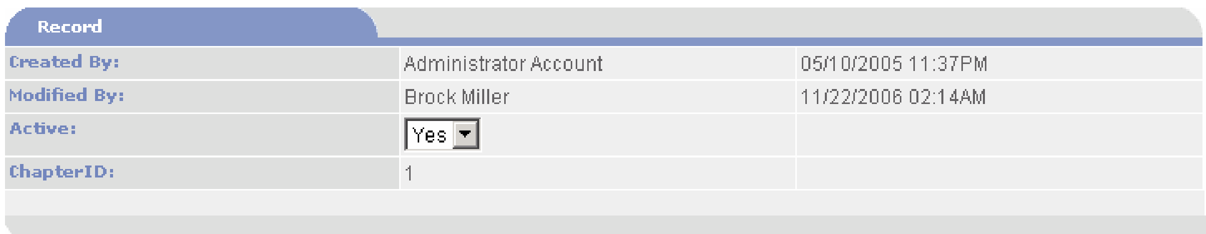
Generally, an '**Affiliate**' is a company or individual that is getting paid to refer business.. A **'Reseller'** is a *separate* company or individual that sells your products or services. The '**Sales Team**' are members of the sales staff, typically your employees.. A '**Customer**' is a contact who may purchase, i.e. a prospect or a contact that has purchased or any individual influencing the prospects purchase. The '**Other**' Role Type is used to designate all other individuals involved in the Opportunity such as an "Attorney", "Consultant", etc.

When a Contact is added from Contact Management, a Primary Salesperson and a Sales Team can be assigned to the Contact. All orders for that Contact are then assigned by default to the Contact's specified Primary Sales Rep and Sales Team. Note that these values may be overridden (changed) in Order Management. When an Opportunity is created it shall default the Primary Sales Rep and Sales Team. How this is done is described later on in the spec.

Roles, Security and Privacy - Each role may be assigned different access rights. The Sales Rep, Inside Sales Rep and Sales Manger may be assigned add and edit rights to all records for Sales Team except credit and commissions, with view only rights assigned to credit and commissions. The Finance Manger may be assigned view only rights to everything accept credit and commission, with add/edit rights assigned to credit and no access assigned to commissions. The Payroll Manger may be assigned view only rights to everything except credit and commission, with add/edit rights assigned to commissions and no access assigned to credit.

When using **Sales Teams and Roles**, sales staff should not be assigned to standard Security Groups that grant access rights to the sales related feature components such as Administration of Contacts, Administration of Companies, etc. Instead they should be assigned to Sales Teams and corresponding Roles. Doing this limits their rights to only those records assigned to them via Primary Sales Rep and Sales Team. When a Role has Edit rights to a Resource (feature component), the user may add new records. If they are assigned as a Primary Sales Rep or Role in a Sales Team that does not have access rights, they shall not be able to access the record once saved. This prevents Sales Reps and other staff from accessing records they do not have rights to access.

Standard Footer –



Active Field - The Active Field can be set to Yes or No. When set to No, the discussion will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search results box is checked. It does not delete the record but tags the record so it will be filtered from display.

Chapter ID - Indicates the chapter of the user who entered the contact record. This field is applicable on multi-chapter versions of PORTALPRODIGY.

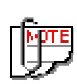
- **Contact Types Checkboxes -** Contact Types Checkboxes are used in conjunction with many of the special functions of PORTALPRODIGY where Contact Type is specific to the function. For example, LRCA Type is used to indicate that a contact is a legislative, regulatory, judicial or executive branch contact to be accessed by the Legislative and Regulator Call to Action feature. Not only should the box be checked for such a contact but the LRCA link next to the box should be clicked so the LRCA contact's Level, Government Branch and Geographic information can be entered.

- **Contact Types Employee Checkbox -** Employee Type is used to indicate that a contact is a member of the organization's staff. It is used in conjunction with some of the special functions of PORTALPRODIGY where Contact Type is specific to the function. For example, the Assign To selection field in the Tickler/Note selection filed only displays contacts with Employee Contact Type checked.

- **Contact Types Expert Checkbox and Link -** Expert Type is used to indicate that a contact is an Expert contact to be accessed by the Ask the Expert feature. Not only should the box be checked for such a contact but the Expert link next to the box should be clicked so the Expert contact's Expertise Topics can be entered. The information saved in the Expert linked record will determine whether this contact receives an email from a visitor sending a request using the Ask the Expert feature. Expertise Topics can be added, modified and removed using Expertise Topics Management which is accessed from the Ask the Expert Features Management page.

- **Contact Types LRCA Checkbox and Link -** LRCA Type is used to indicate that a contact is a legislative, regulatory, judicial or executive branch contact to be accessed by the Legislative and Regulator Call to Action feature. Not only should the box be checked for such a contact but the LRCA link next to the box should be clicked so the LRCA contact's Level, Government Branch and Geographic information can be entered. The information saved in the LRCA linked record will determine whether this contact receives an email from a visitor responding to an issue.

- **Contact Types Media Checkbox and Link -** Media Type is used to indicate that a contact is a media contact to be accessed by the Press Release feature. Not only should the box be checked for such a contact but the Media link next to the box should be clicked so the Media contact's Type (newspaper, radio, television, business editor, health editor, etc.) can be entered. The information saved in the Media linked record will determine whether this contact receives an email from a visitor sending a press release using the Press Release feature. Media Types can be added, modified and removed using PR Media Types Management which is accessed from the Press Release Manager Features Management page.

- **Contact Records Tickler/Notes Link**  - The Tickler/Notes Link provides access to all ticklers and notes related to the Contact that have been stored during operation of any of the features which use Tickler/Notes. Ticklers and Notes related to the active Contact Record can also be added from this link.

Contact Record Page Buttons

Saves the data entered into the Contact Record fields.

Deletes the Contact Record

Prints the website page to the visitor's local printer.

Closes the page without saving or updating values.

Closes the page and prompts the visitor to save the data.

1.3.3 Batch Import Utility for Contact Records

There are many reasons for importing large quantities of contact records in a single batch: transferring data from a legacy system to your new PortalProdigy system, loading newly purchased data as in the form of purchased prospecting lists, etc. The batch import utility makes importing new contact records and updating existing records a fairly simple, quick and easy procedure.

The common format for importable records is called a CSV file. CSV stands for "Comma Separated Values". In computer professional speak, the comma used to separate values is called the *delimiter*. Characters other that commas are often used as delimiters. For example, *tabs* are generally the default delimiter for Microsoft Excel spread sheets saved to a text file. Since PortalProdigy's import utility only recognizes commas as delimiters, one must export or save a Microsoft Excel file as a CSV format file before it can be imported into Portal Prodigy.

The content of a CSV file might look like the following:

FirstName,LastName,Street,City,State,Zip,Phone
Stephen,Reuning,510 Horizon Center,Robbinsville,NJ,08691,609-584-4474
John,Jones,2 Smith Street,Perth Amboy, NJ,07728

In such a case, the top row is called the header row and it is used to designate the field name of the data between delimiters.

The order of the field names is important because it is used to map the fields in the CSV file to the fields of the PortalProdigy Contacts Database in what is called a *CSV file to Contact Database Map*. For our example above, the fields shall be numbered and mapped as follows:

FirstName = 1

LastName = 2

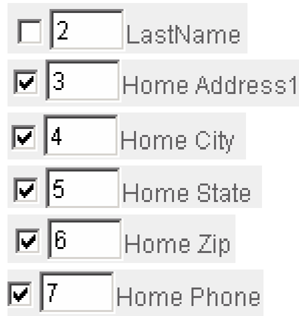
Street = 3

City = 4

State = 5

Zip = 6

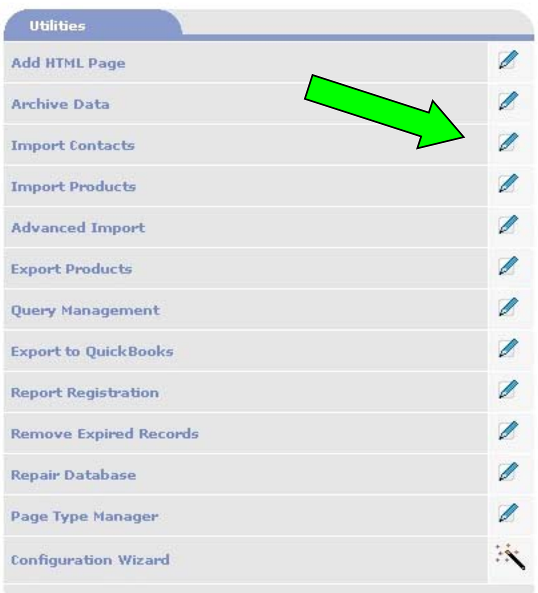
Phone = 7



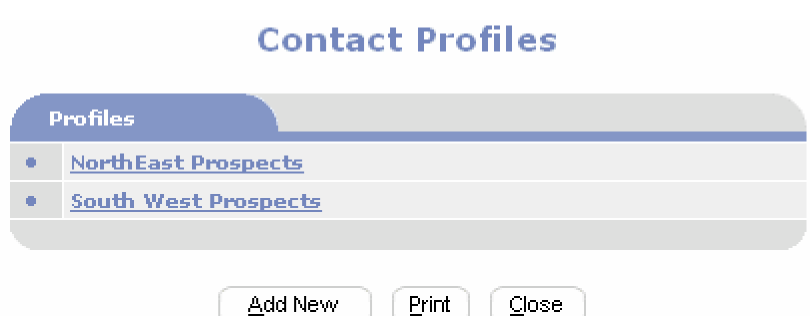
The Import Contacts Data Management Page –

Select the Utilities Access Icon 

located in the Site Management menu column of the Main Administration menu (Ctrl-Alt-m) to view the Utilities Menu page.

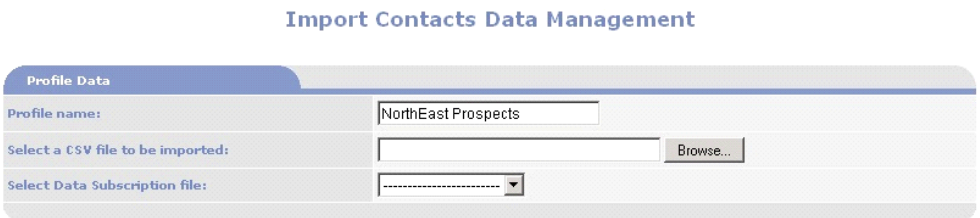


Clicking on the Utilities Menu Import Contacts Edit  button accesses the Contact Profiles page.



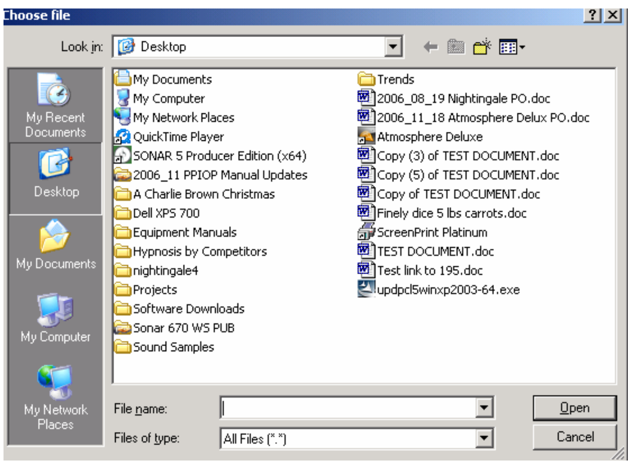
Contact Profiles are records used to store the CSV file to Contact Database Maps created for use with specific data sources.

One can review or edit a CSV file to Contact Database Map by clicking on its label or add a new one by clicking on the Add New button.



Profile Name Entry Field – Enter a descriptive name here. It will be displayed in Contact Profiles page selection list.

Select a CSV file to be imported Browser – Used to browse the user's wok station in order to locate the CSV file to be imported.



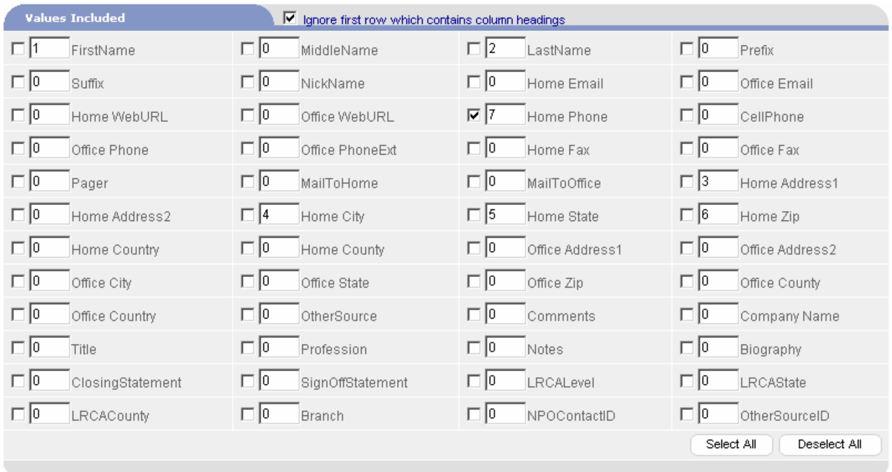
Select Data Subscription File Field - For each field included in the CSV file, enter the number corresponding to the order of the field in the CSV file. A zero is used to indicate that the field is not in your CSV file.

Values Included Section

If the import file contains a header row, then check the *Ignore first row which contains column headings* checkbox ☑ Ignore first row which contains column headings .

Check all fields that should have their existing value replaced by the imported value if a record already exists for a contact in the import list.

Empty fields in existing contacts records will always be updated with the import value. All fields will be imported for new contact records.

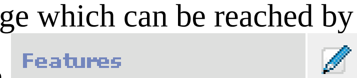


Automated Login Name Creation - For new contact records the program will automatically assign the contact's email address as the Login Name. If there is no email address for the imported record, the Login Name will be set to the contact's First Name plus Last Name without a space between them. If the First Name plus Last Name Login Name already exists, a number will be added to make the Login Name unique. For new contact records the password will automatically be set to the First name plus the Last Name.

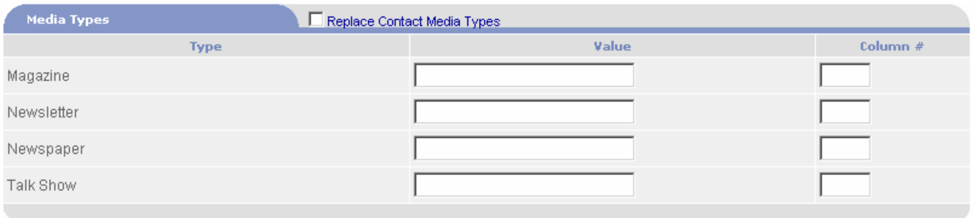
The import always preserves the Login Name and Password for contact records that already exist. If the imported record does not contain a contact's name, the Company Name will be used instead.

Importing Media Types

The Press Release Feature provides for delivery of press releases to its internal database of media contacts. In order to send a press release PORTALPRODIGY needs target recipients. Those recipients are identified in the Contact Database by a checked *Media* Contact Type box. The media contacts may be further classified into PR Media Types such as Magazine, Newsletter, Newspaper, etc.

> Media types is a customizable list that can be modified by at the PR Media Types Management page which can be reached by clicking on the Features Edit Icon 
>
> located in the Site Management menu column of the Main Administration Menu and then clicking the **PressRelease** link and then clicking the PR Media Types link 
>
> of the Press Release Manager Features Management page.

The Media Types section of the Import Contacts Data Management page is used to designate contacts that are bulk imported as Media Types and load their PR Media Type classification..



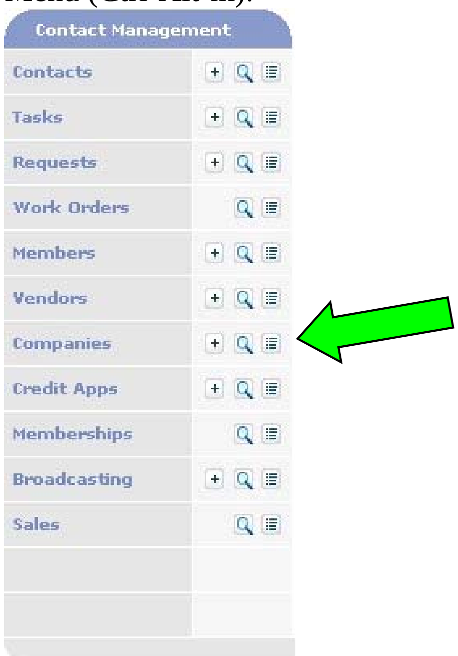
Replace Contact Media Types Checkbox - Check the Replace Contact Media Types box when you want existing Media Contacts to be have their old Media Type assignments replaced by imported values. When left unchecked, new media type assignments are added in addition to the existing ones.

Column # Field - For each Media Type field (column) in the imported CSV file, enter the column number in the Column # text box of the corresponding Media Type listed on the on the Import Contacts Data Management page along with the value that is used to indicate that the Media Contact belongs to that Media Type (such as "X" or "Yes").

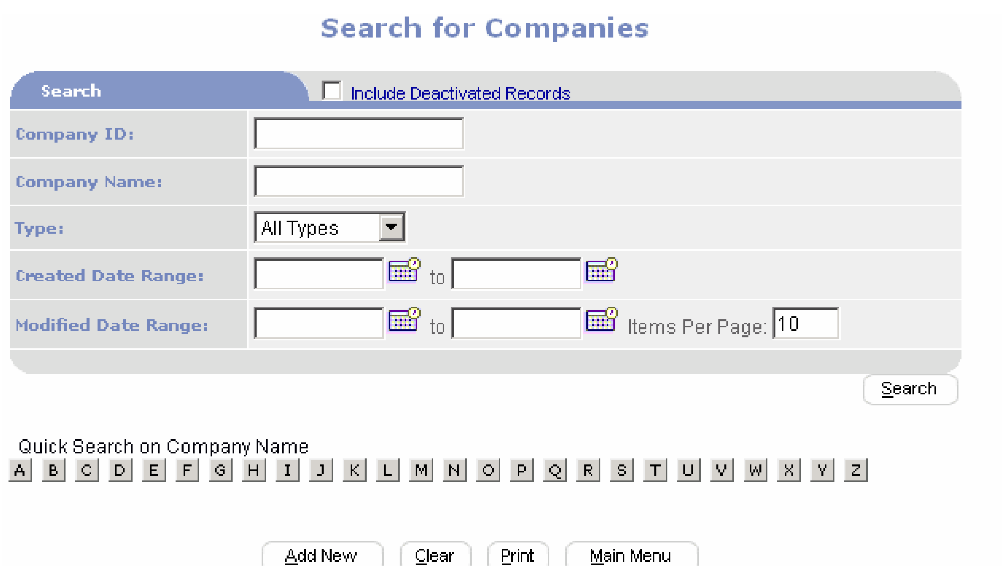
Value Field - For each Media Type value used in the Media Types field (column) in the imported CSV file, enter the column number in the Column # text box (note that all the Media Types will share the same column number) along with the value that is used to indicate the Media Type (such as "Periodical", "Radio", etc.).

1.3.4 Administration Company Record Fields

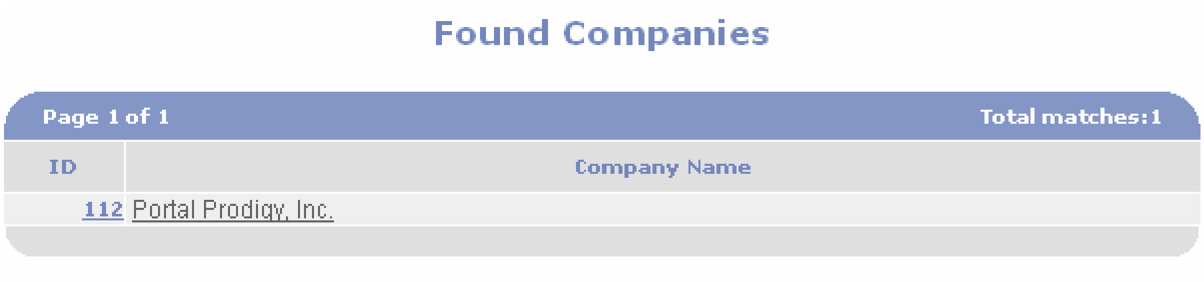
The Administration Company Management page is reached by clicking the "Companies" Browse button located in the Contact Management menu of the Main Administration Menu (Ctrl-Alt-m).



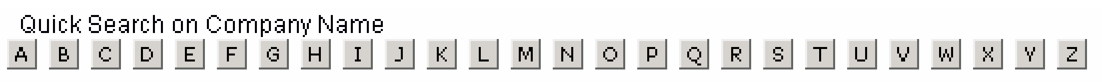
The Search for Companies page provides several filters by which to search for company(ies) record(s). Enter characters into one or more fields and then click on the Search Search button to locate records.



The resulting set of matching records is listed in a table below the search entry form.

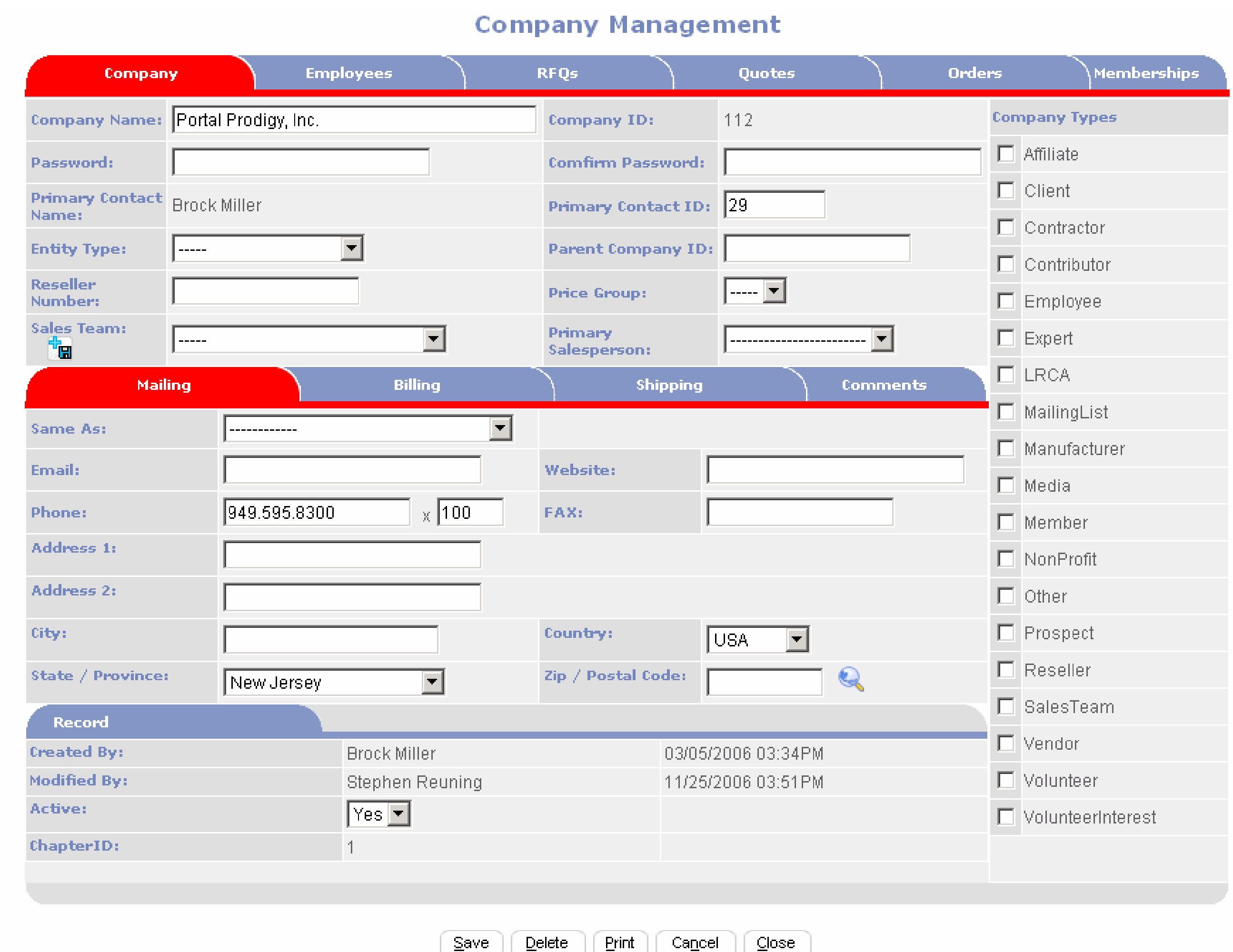


Clicking on an ID links into the corresponding record.



Using the Quick Search tool, the user can locate records by clicking on a letter.

The Administration Contact Management page can also be reached by clicking the "Companies" Add button located in the Contact Management menu of the Main Administration Menu (Ctrl-Alt-m). In which case a blank Add New Company page is presented.



The Company Management Page provides access to the different components of the Company Management System via clickable tabs. Upon clicking a tab, the system refreshes the page to present the corresponding search, add or report interface. From the Company Management Interface one can access the following types of records: Company contact information, employees, Reequests for Quotes, Quotes, Orders Memberships, mailing address, billing address, shipping address and commentary..

Actions that can be performed from Contact Management include:

1. View and update contact information.
2. Delete companies.
3. View and update company information.
4. View and update employee information.
5. Add and Edit RFQs
6. Price RFQs and convert to Quotes
7. Convert Quotes to Orders
8. View Orders
9. Add and Edit Orders
10. View a company's memberships and subscriptions

- **Company Management Company Tab Page**

Company Name Field – Enter the name of the organization. This can be the legal name or the common name used for the organization, e.g. "International Business Machines, Inc" vs. "IBM". A value is required.

Company ID Field - Each Company Record is assigned a unique numerical identification number automatically.

Password Field - Data entered into the Company Password field becomes the password into certain functions related to the Company. For example, certain items may be purchases by a logged in user and billed to their company provided they submit the correct company password.

Confirm Password Field - The Password field is encrypted so it may not be reviewed visually to confirm accuracy. Therefore, a second field requires that the password be typed again for confirmation of accuracy.

Primary Contact Field – Indicates your organization’s primary contact at the company.

Primary Contact ID – Use the lookup icon to locate a new primary contact record or to add one.

Entity Type Selection Field – Unlike many of the selection lists used in PORTALPRODIGY, the Entity Type selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. Either “Corporation”, “Government Agency”, “Nonprofit (501(c)(3))”, “Partnership”, or “Sole Proprietorship” may be selected.

Reseller Number Text Entry Field – In many cases, you may not charge your resellers Sales Tax as they are exempt. If the Company of Record is a reseller of your products, it may have a state or other government issued Tax ID which you’ll need to record for your tax records.

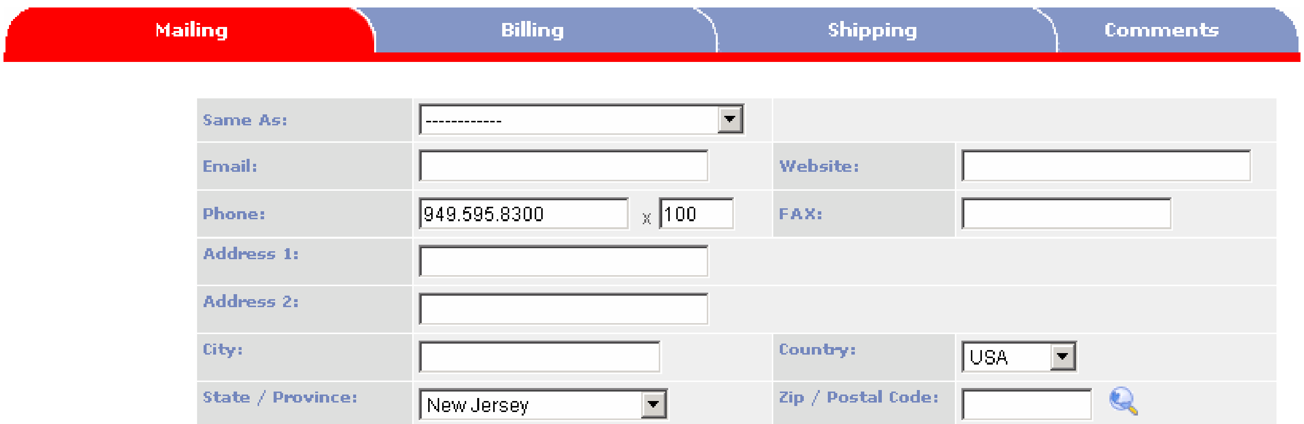
Price Group – this list box field is used to select a special pricing group for the customer. Price Groups are used to create specific Product Item pricing for select groups of customers. E.g. “Wholesale”, “Retail”, “Members”, etc. Price Groups are created and maintained using

Sales Team Selection Entry Field - The ‘Sales Team’ are members of the sales staff, typically your employees. This field is used to indicate the team responsible for the selling process. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Sales Team selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Sales Team)

Primary Salesperson Selection Entry Field - When contact records for your sales staff are created in PORTALPRODIGY, the “Sales Team”

Contact Type box should be selected. If it is selected and Sales Teams have been created in Sales & Opportunity Feature Management, then Sales Team roles will be assignable under the security tab of the contact record. When a Sales Team is selected in the prior Sales Team Selection Entry Field, all contacts with roles on the selected team are made available in the Primary Salesperson Selection Entry Field.

- **Company Management Company Tab Page Mailing Sub Tab**



The Mailing Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Email Address Field – Used to indicate the mailing contact's email address

Website Entry Field – Used to indicate the mailing contact's website address.

Phone Entry Field – Used to indicate the mailing contact's Phone Number

Phone Extension Entry Field - Used to indicate the mailing contact's Phone Extension Number

FAX Entry Field - Used to indicate the mailing contact's Fax Phone Number

Address 1 Entry Field – Used to indicate the company's mailing Street Address

Address 2 Entry Field – Used to indicate the company's additional mailing address information such as apartment or suite.

City Entry Field – Used to indicate the company's mailing City

Country Entry Field – Used to indicate the company's mailing Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp button the click on the **Countries** link.

Company's State or Province - The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the company's mailing Postal Code

- **Company Management Company Tab Page Billing Sub Tab**

Date Opened - This date is auto-filled to the date that Credit Status is set to *approved*, when approval is made using the credit application approval process or it may be filled in manually.

Credit Terms Field - Used to assign credit terms to a company. Terms selections such as *Net 10, Net 30*, etc. are defined in Features Management. To edit selection list, click on edit button located in Site Management menu column of Main

Administration page (Ctrl-Alt-m). Then click on **Companies** link then Click on **Terms** link.

Credit Application – The **Credit Application** link initiates the Credit Application Management page which provides an application approval process that can be used to verify credit, rate credit history, enter administrative comments, set credit terms and set a credit limit. (See the chapter titled, Credit Applications Features in Detail of the Administration Manual for details)

Credit Status Field - Provides three possible selections; *Approved*, *Declined* and *Pending*. Affects certain logical decisions in features that involve ordering, purchasing, invoicing and payments. For example, companies with *approved* credit status may be permitted to place orders and pay by mail while those with *declined* credit status may be required to submit credit card information before an order is accepted or processed.

Credit Limit Field - Certain features involving ordering, purchasing, invoicing and payments verify that the company does not have outstanding accounts receivable beyond the credit limit before processing orders. Companies that exceed their credit limit may be required to submit credit card information before an order is accepted or processed.

Credit Card Information – Credit card data may be entered here and it will auto-fill when the company makes purchases using the PortalProdigy payment features OR the fields on this page will auto-fill with information the visitor inputs during an online purchase process.

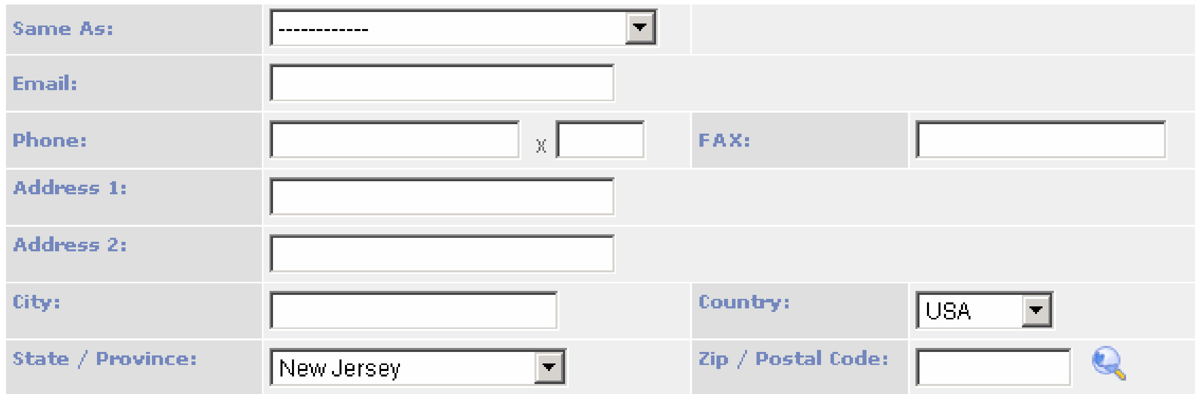
Name on Card - Always enter the exact name as it is displayed on the customer's credit card.

Credit Card Number - input for credit card number.

Expiration Date - input for credit card expiration date.

CSC Number - input for credit card security code.

Billing Address Information –



The Billing Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.

Email Address Field – Used to indicate the billing contact's email address.

Phone Entry Field – Used to indicate the billing contact's phone number.

Phone Extension Entry Field - Used to indicate the billing contact's phone extension number.

FAX Entry Field - Used to indicate the billing contact's fax phone number.

Address 1 Entry Field – Used to indicate the company's Billing Street Address

Address 2 Entry Field – Used to indicate the company's additional billing address information such as building or suite.

City Entry Field – Used to indicate the company's Billing City

Country Entry Field – Used to indicate the company's Shipping Country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

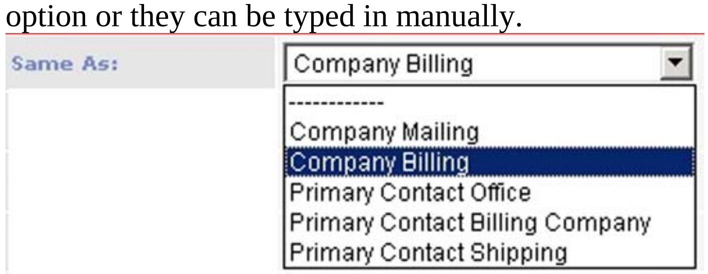
icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp UserSignUp button the click on the **Countries** link.

State or Province Entry Field – Used to indicate the company's Billing State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the company's Billing Postal Code

- **Company Management Company Tab Page Shipping Sub Tab**

The Shipping Address Fields can be quick-filled by selecting the *Same As* option or they can be typed in manually.



Email Address Field – Used to indicate the shipping contact's email address

Website Entry Field – Used to indicate the shipping contact's website address.

Phone Entry Field – Used to indicate the shipping contact's Phone Number

Phone Extension Entry Field - Used to indicate the shipping contact's Phone Extension Number

FAX Entry Field - Used to indicate the shipping contact's Fax Phone Number

Address 1 Entry Field – Used to indicate the company's shipping street address.

Address 2 Entry Field – Used to indicate the company's additional shipping address information such as building or suite.

City Entry Field – Used to indicate the company's shipping city.

Country Entry Field – Used to indicate the company's shipping country. Note: The selections in this field are limited to the countries activated in Countries Management. To update the Country Selection List click on the features 

icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the UserSignUp 

button the click on the **Countries** link.

State or Province Entry Field – Used to indicate the company's Shipping State or Province. The State or Province selections available are based on the Country field selection.

Zip / Postal Code Entry Field – Used to indicate the company's shipping postal code.

- **Company Management Company Tab Page Comments Sub Tab**

Comments Field – this field may be used to enter any form of comments or additional information about the organization. Note that this field is not searchable.

- **Company Management Employees Tab Page**

The Company Management Employees Tab Page lists all contacts that are linked to the company record.

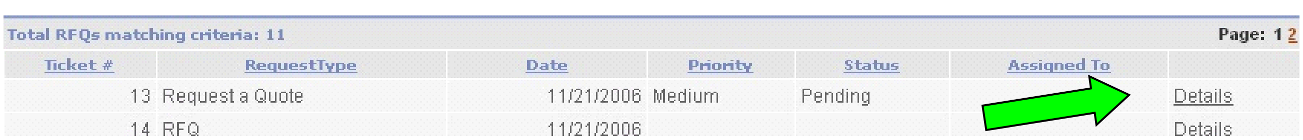
SignUp Link – Accesses corresponding employee's Contact Record where it may be viewed and updated.

Product Orders link – Accesses corresponding employee's Orders Search page.

Add Employees Link – Accesses the Add a Contact page permitting user to add new contact records for additional employees.

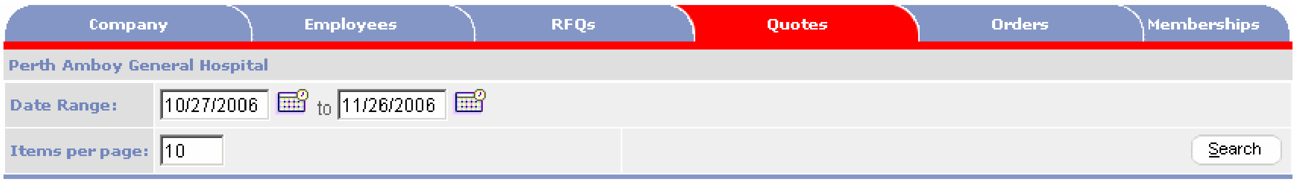
- **Company Management RFQs Tab Page**

Date Range – Enter a date range to search for RFQ records created within the entered range.

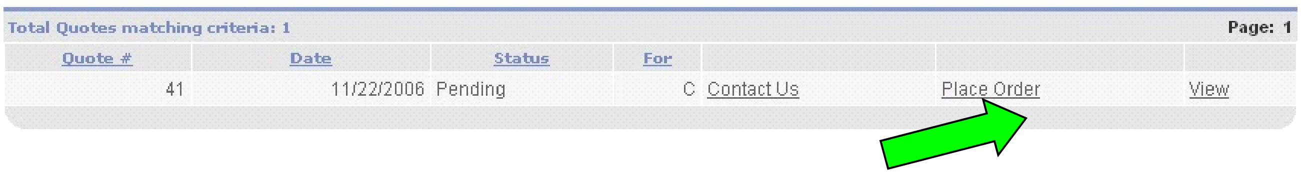


Details Link – Clicking on the Details link accesses the Request Management page for the corresponding RFQ.

- **Company Management Quotes Tab Page**



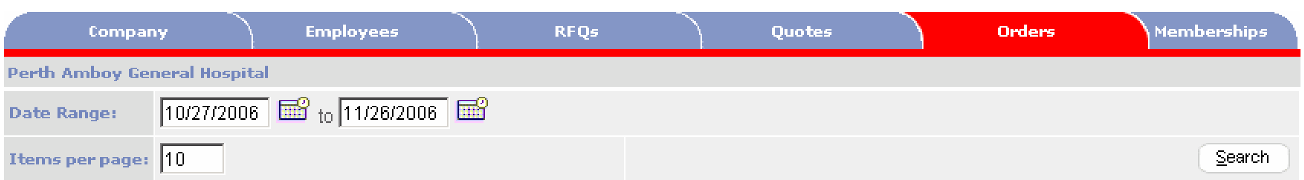
Date Range – Enter a date range to search for Quote records created within the entered range.



Place Order Link – Accesses form to convert quote into an Order

View Link – Clicking on View link accesses the corresponding Order Receipt.

- **Company Management Orders Tab Page**

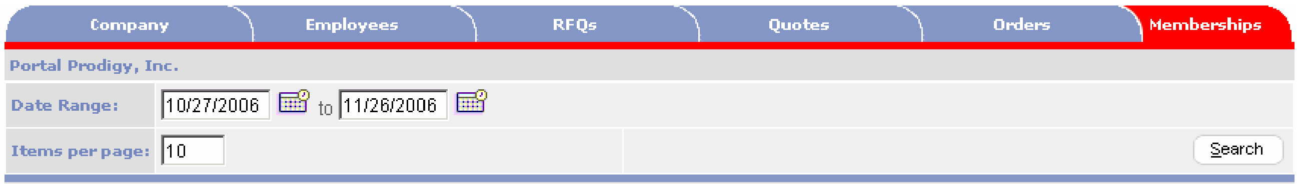


Date Range – Enter a date range to search for Order records created within the entered range.

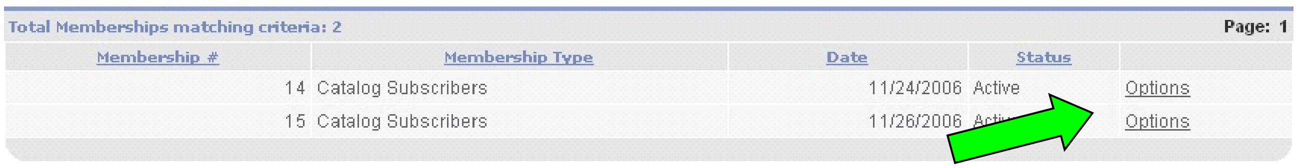
Copy as New Order Link – This link is used when customers reorder. It clones the Order.

View Link – Clicking on View link accesses the corresponding Order Receipt.

- **Company Management Memberships Tab Page**



Date Range – Enter a date range to search for Membership records created within the entered range.


Total Memberships matching criteria: 2 Page: 1

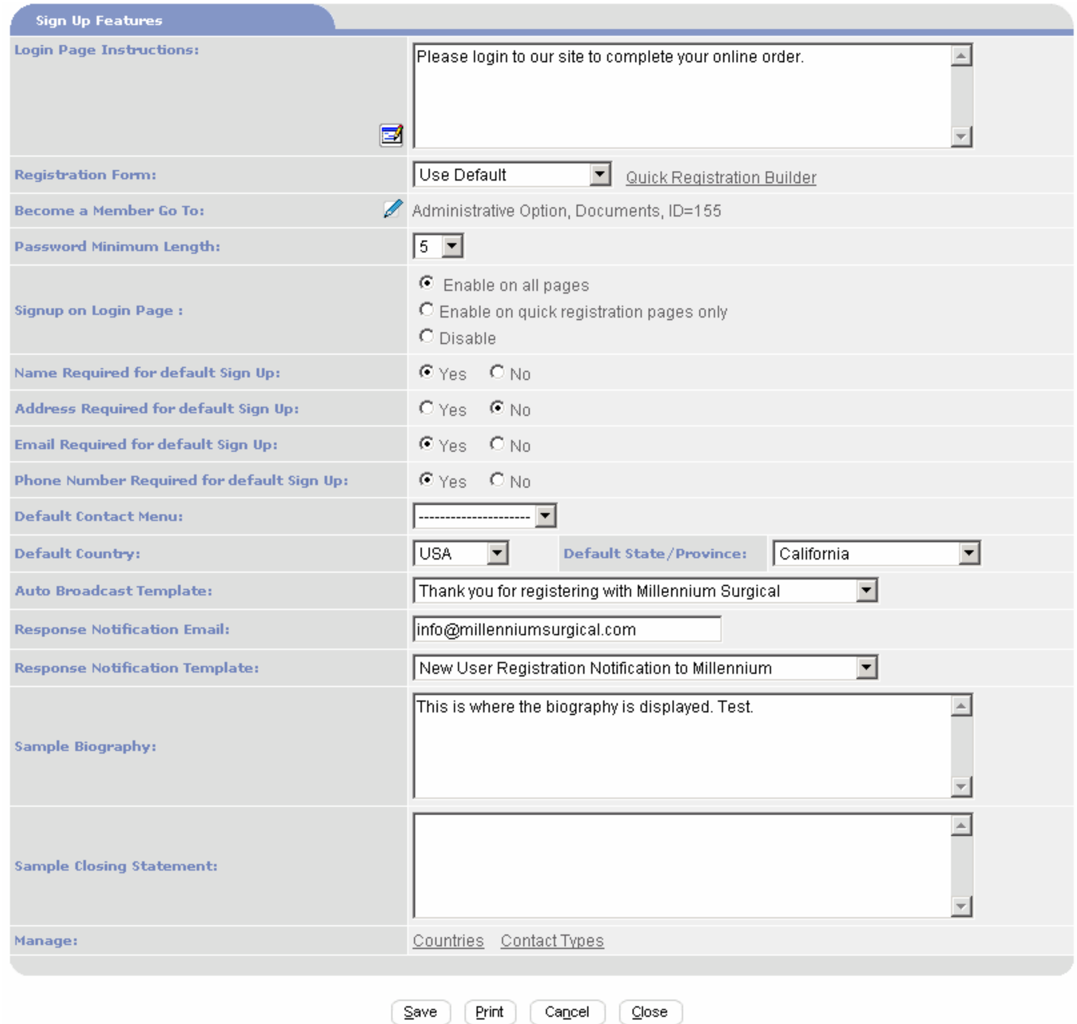
Membership #	Membership Type	Date	Status	
14	Catalog Subscribers	11/24/2006	Active	Options
15	Catalog Subscribers	11/26/2006	Acti...	Options

Options Link – Clicking on the Options link accesses the Membership Options page for the corresponding membership where Membership information may be reviewed and payments made.

1.4 Feature Administration

The Contact Feature is setup and configured from the User Sign Up Feature Management page which is accessed from the Administration Menu by clicking on Features and then clicking on UserSignUp on the Feature Management page.

1.4.1 User Signup Feature Setup and Configuration



- **Login Page Instructions Field** - used to define instructions that are displayed on the Login Signup page. The HTML Editor option can be used to create and edit the instructions.

- **Registration Form Selection Field** - The Registration Form Selection Field allows Administration to select the Signup pages that will be used for the site. When PORTALPRODIGY is first installed, the only selection available in this field is Default Registration. Administration can add to the selection list by clicking on the Quick Registration Builder Link and creating a new signup type.

- **Default Registration versus Quick Registration -** PORTALPRODIGY provides for two different approaches to new visitor signup: a single step rapid signup method, called Quick Registration, which requests a limited amount of information or a two step process, called Default Registration, which obtains a small amount of personal information in the first step then significant amounts in the second step. When PORTALPRODIGY is first installed, the only type of registration active is the Default Registration.

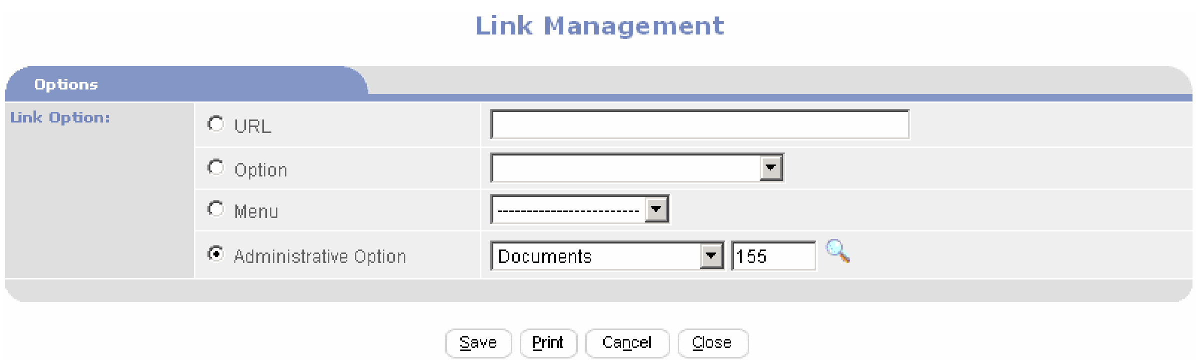
- **Quick Registration Builder Link -** Clicking the Quick Registration Builder Link accesses the Quick Registration Builder interface where a new Quick Registration can be added or an old one updated.

- **Become a Member to Go To:** - When Registration Form is set to "Become a Member" then clicking on Sign Up Here icon at login will drive visitor to option

set for this field.

Click on the Edit 

icon to access the link management page. Select an option and then click on the Save button.



- **Password Length Selection Field -** The Password Length Selection Field determines the number of characters a login password requires before it is allowed to be saved when a new user signs up or when a Contact Record is updated..

- **Enable Signup on Login Page:** this is used to enable or disable the Signup option on the Login Page. The default is *Enable on all pages*, which causes the Signup as New User to always be displayed on the Login page. The Login page is displayed anytime a user clicks on an option that requires the user to be logged in. Set to *Enable on quick registration pages only* to cause the Signup as New User to be displayed only on the Quick Registration Login pages. Set to *Disable* to remove the Signup as New User option from the Login page.

- **Name Required for Default Signup Radio Button -** If clicked to *No*, then a Contact Record can be saved with a blank Name Field. If clicked to *Yes*, then a Contact Record cannot be saved with a blank Name Field.

- **Address Required for Default Signup Radio Button -** If clicked to *No*, then a Contact Record can be saved with a blank Address Field. If clicked to *Yes*, then a Contact Record cannot be saved with a blank Address Field.

- **Email Required for Default Signup Radio Button -** If clicked to *No*, then a Contact Record can be saved with a blank Email Field. If clicked to *Yes*, then a Contact Record cannot be saved with a blank Email Field.

- **Phone Number Required for Default Signup Radio Button -** If clicked to *No*, then a Contact Record can be saved with a blank Phone Field. If clicked to *Yes*, then a Contact Record cannot be saved with a blank Phone Field.

- **Default Contact Menu –** this list box field is used to select a special options Contact Menu assigned to new Contacts. A different Contact Menu can be selected for each Contact using Contact Management. Contact Menus are used to provide links to features and content applicable to specific Contacts or groups of Contacts. E.g. Media Type Contacts could be assigned a Contact Menu containing links to Media Information, News, etc; Customer Contacts could be assigned a Contact Menu containing links to their Orders, Order Policies, Return Policies, RMA Desk, etc. Contact Menus are created and maintained using the Menu Builder Feature.

- **Default Country Selection Field -** If a Country is selected here, then that Country will always appear in the Country field of all features including new Contact Records and signup page by default.

- **Default State Selection Field -** If a State is selected here, then that state will always appear in the State field of all features including new Contact Records and signup page by default.

- **Auto Broadcast Template Selection Field -** The template selected in the Auto Broadcast Template Selection Field indicates the message to be sent to a contact when her Contact Record is first submitted to PORTALPRODIGY. Typically, this is used to automatically send *Welcome!* letters to individuals that have just signed up. No selections will appear in this field until message templates have been created using the Broadcast Feature.

- **Response Notification Email Field -** The Response Notification Email Field is used to indicate the email address of the individual that should be automatically notified of each new signup. For example, the membership chairperson. Each time a new signup occurs, an email message based on the selection in the Response Notification Template Field will be sent to the email address entered into the Response Notification Email Field.

- **Response Notification Template -** The template selected in the Response Notification Template Selection Field indicates the message to be sent to the email address entered into the Response Notification Email Field when a Contact Record is first submitted to PORTALPRODIGY. Typically, this is used to automatically send *New Member Notification* letters to staff or membership committees upon a new member signup. No selections will appear in this field until message templates have been created using the Broadcast Feature.

- **Sample Biography Field -** The Sample Biography Field stores sample data that is used in conjunction with the Press Release Feature. Permitted visitors can use the Press Release Feature to send press releases and to participate in the Media accessed biography data base where media contacts search for contacts such as experts for interviews and comments. Administration enters a sample biography here as a guide to visitors in creating there own biography record. When a permitted visitor is entering their own biography, they can click on a link to view the sample biography that was entered here.

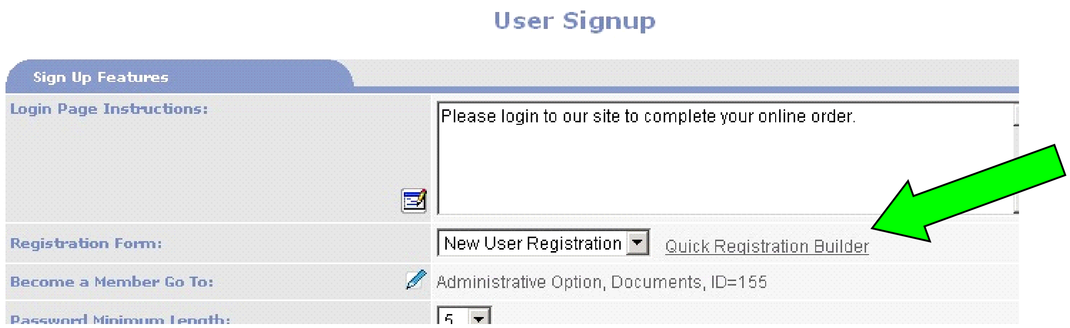
- **Sample Closing Statement Field -** The Sample Closing Statement Field stores sample data that is used in conjunction with the Press Release Feature. Permitted visitors can use the Press Release Feature to send press releases. The Press Release Feature requires that a permitted visitor set up their Press Release Closing Statement before using the feature. Administration enters a sample closing statement here as a guide to visitors in creating there own closing statement record. When a permitted visitor is entering their own closing statement, they can click on a link to view the sample closing statement that was entered here.

- **Server Contact Data Subscription Folder -** PortalProdigy provides certain contact data on a subscription basis. For example, media contacts for the Press Release Feature and Legislative, Regulatory, Judicial and Executive contacts for the LRCA Feature. The server path to that subscription path is entered here.

- **Countries link –** used to access Countries Management. Countries Management is used to specify which Countries are listed in the Countries list box for all features. This feature allows your organization to limit your mailing list and shipping to specific countries.

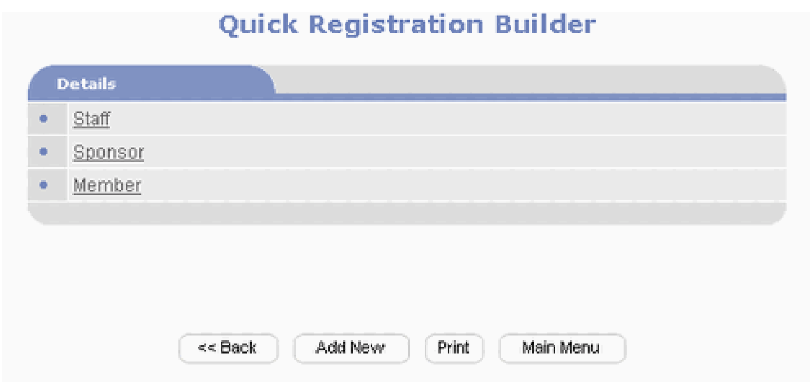
1.4.2 Quick Registration Builder

Click on Quick Registration link on the User Signup feature management page. (Ctrl-Alt-m => Features => UserSignUp => **Quick Registration Builder** .

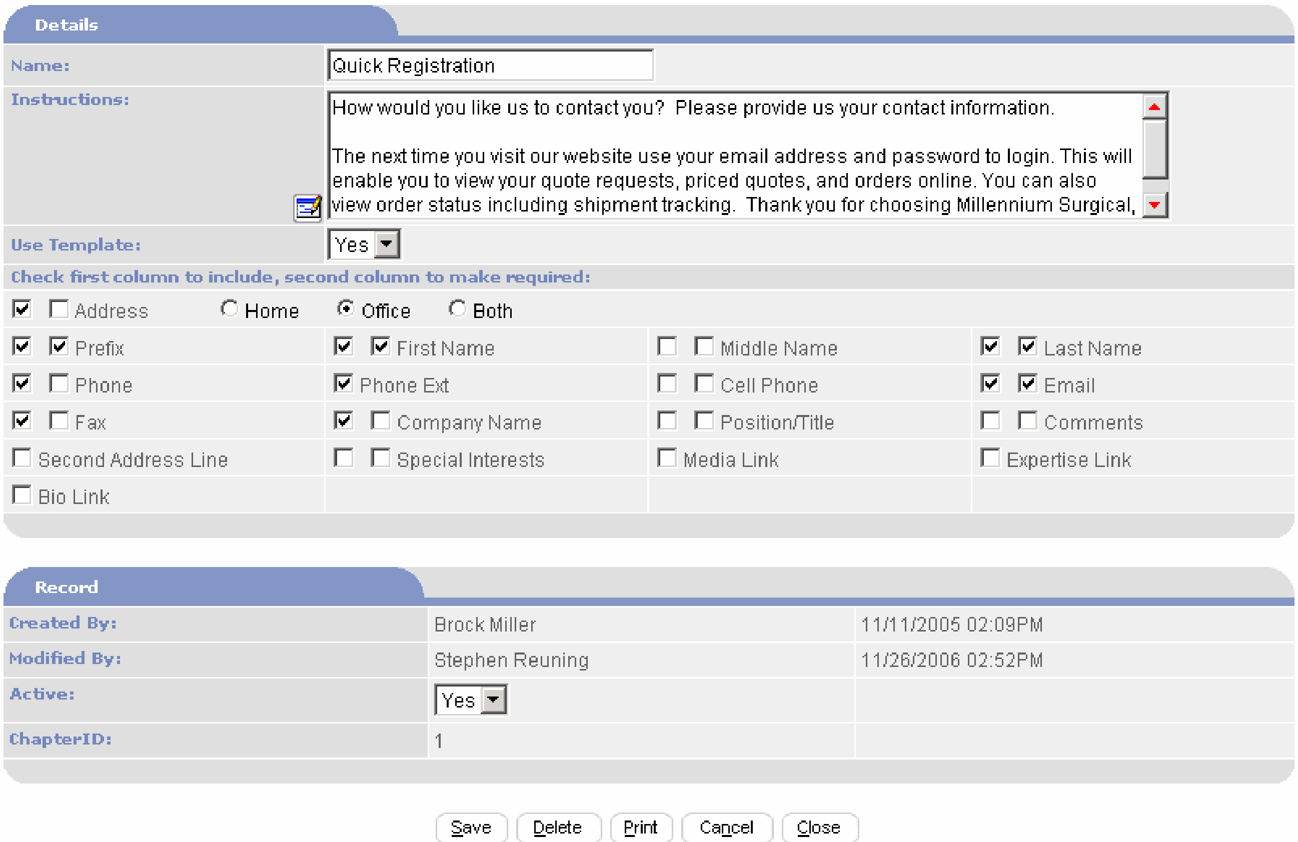


An organization might wish to gather different information for differing memberships, subscriptions, events, purchasing, etc. Hence, the website can use an unlimited number of different quick registration forms.

Update a Quick Registration by clicking on its name or create a new one by clicking on the New button.  on the Quick Registration Builder page



On the Quick Registration Builder page, Administration should click the boxes next to the fields which are to appear on the Quick Registration visitor signup page. Clicking the first box next to a field label will cause the field to appear on the signup page. Clicking the second box requires the visitor to enter data into the field before it will save the Contact Record. For additional instructions see the Features Management chapter, Quick Registration Builder section.



Name Entry Field – The name entered here will show up as a selection in the Registration Form Selection Field of the User Signup feature management page.

Instructions Memo Field - . The HTML Editor feature may be used to create and edit the Instructions as HTML. The instructions entered here will appear at the top of the customized Quick Registration page, when a visitor signs up for a related activity.

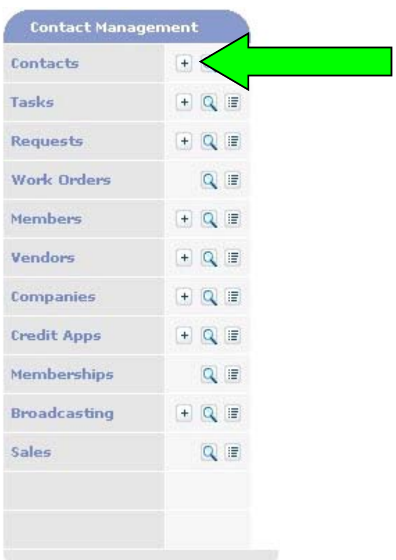
Save	Saves the data entered into the Quick Registration Builder fields.

Delete	Deletes the Quick Registration Builder Record
Print	Prints the website page to the user's local printer.
Cancel	Closes the page without saving or updating values.
Close	Closes the page and prompts to save the data.

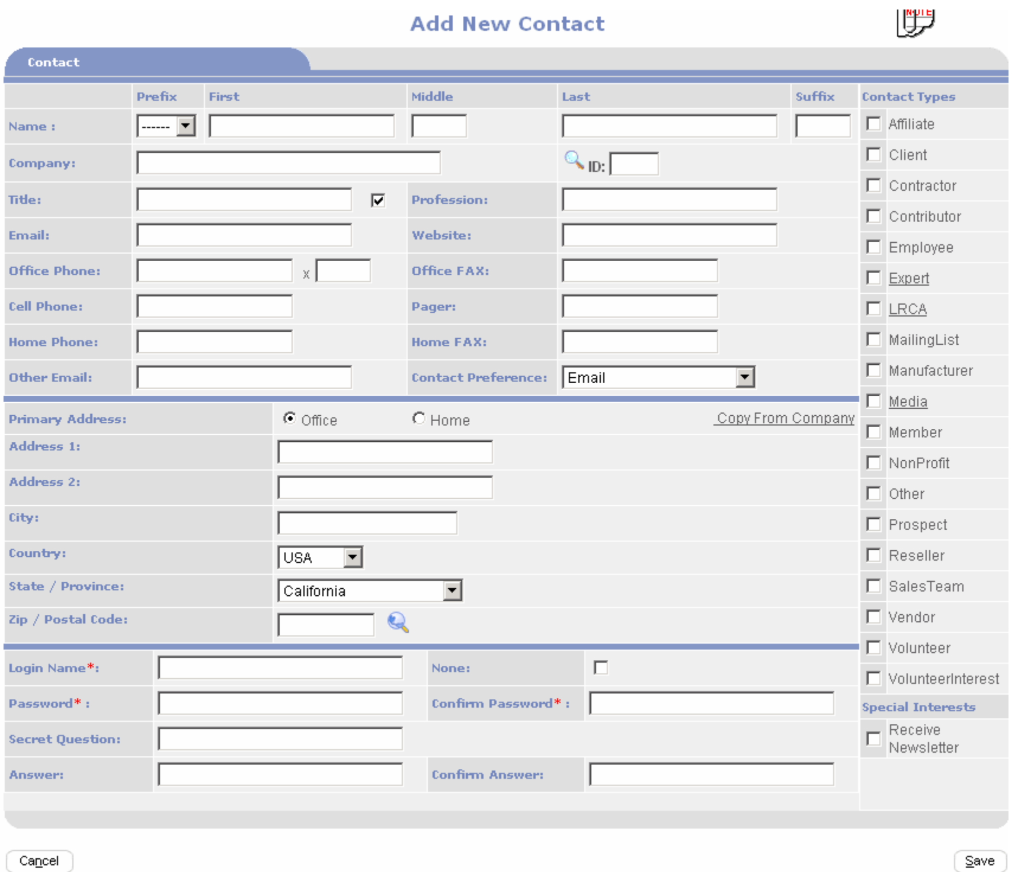
1.5 Tutorials

The following tutorials explain how to use the Contact and Company Management features within PORTALPRODIGY.

1.5.1 How to Add a New Contact



Click the Contacts add icon on the Site Administration Menu page (Ctrl-Alt-m).

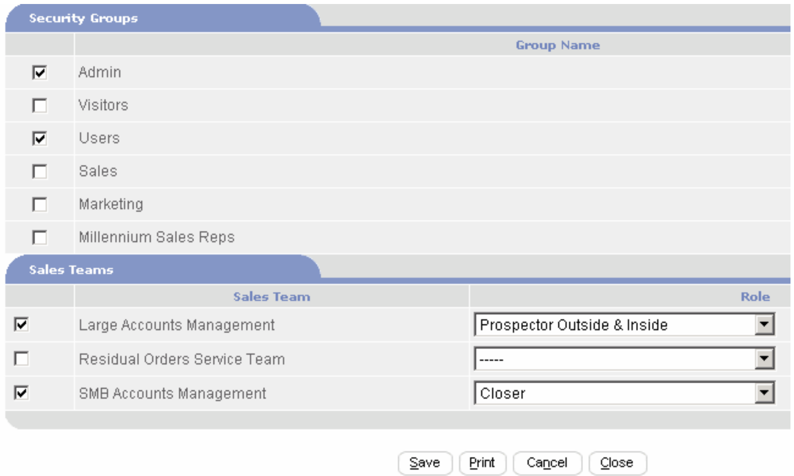


The Add New Contact page is the default New Record entry page.

When visitors return to edit and view the contact they will NOT be taken to this form. Instead they will be taken to the Contact Management page described earlier in this chapter under the *Components* section.

Fill out the data fields you want to collect. Some fields may be required as per settings in User Signup Features Management. See the Component's section of this chapter for a description of each field.

To assign special access rights (other than default rights), Click on the Security Tab located near the upper right hand corner of the Contact Management page to display the Security form shown below:



Check each Security Group that you want the Contact to belong to.

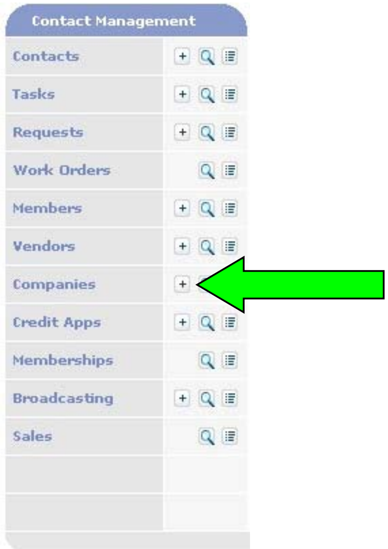
When finished click on Close and confirm save.

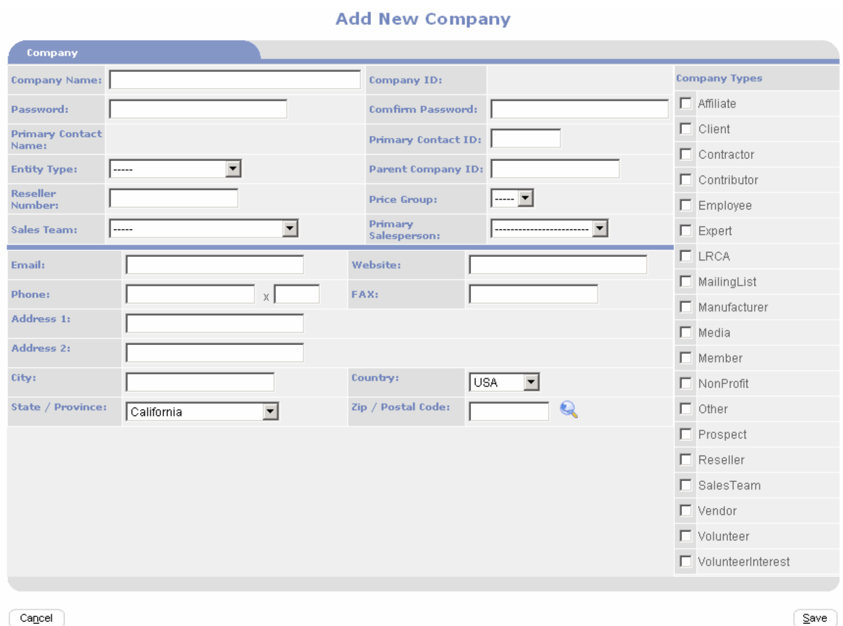
When finished entering Contact information, click Close button and confirm save.

You will be returned to the Search for Contacts page where you can initiate the addition of another contact.

1.5.2 How to Add a New Company

Click the Companies add icon on the Site Administration Menu page (Ctrl-Alt-m).

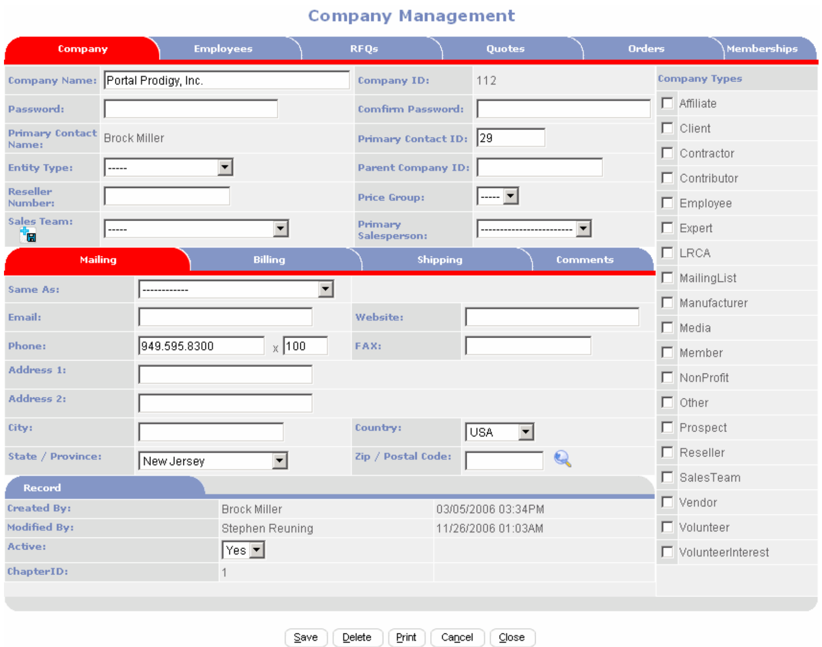




The Add New Company page is the default New Record entry page.

When users return to edit and view the company they will NOT be taken to this form. Instead they will be taken to the Company Management page described earlier in this chapter under the *Components* section.

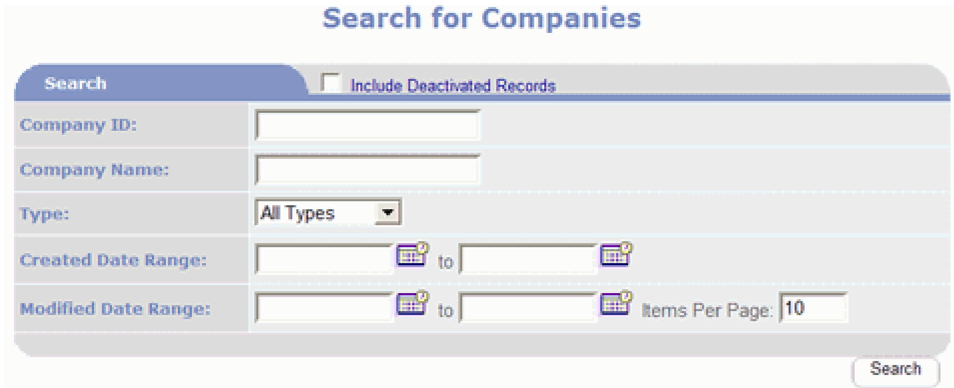
Fill out the data fields you want to collect. Some fields may be required as per settings in User Signup Features Management. See the Component's section of this chapter for a description of each field.



1.5.3 How to Link a Contact to a Company Record

- Using Search for Contacts retrieve the Contact record.

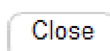
- On the Contact Management page click the Company Search button which is located to the right of the Company Name field.



- Perform a search to find the company.

- Click the **Select** option to link the company to the contact.

- You will be returned to the Contact Management page.

- On the Contact Management page, click 

button and confirm save of contact record.

1.5.4 How to Create Contact Types

- Go to Site Administration menu.

- Click Features go to icon.

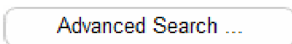
- Click UserSignup option.

- Click Contact Types located at the bottom of the Signup Features section of the User Signup page.

- For each new Contact Type repeat the following steps:

- Click Add New Contact Type link.
- Enter the Type.
- Click Save.

1.5.5 How to Perform an Advanced Search

- Go to the Site Administration Menu,
- Click the Contacts browse icon to display the Search for Contacts page.
- Click on the 

button to display the Contacts Advanced Search page as shown below.

- For each criteria repeat the following:
  - To control order select a parenthesis using the Left Par list box; otherwise leave this blank.
  - Select a Field using the Field Name list box.
  - Select an operand using the Operand list box.
  - Enter a value.
  - Optionally select a parenthesis using the Right Par list box.
  - If you are entering additional criteria select a concatenator using the Concat list box.
  - Click Save to add the criteria to the Select statement.

- Click the Search button to display perform the search and display the results as shown below: