

*Portal Prodigy*<sup>™</sup>  
**Features Management Menu in Detail**

Chapter Excerpt from Software User & Administration Guide  
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[www.portalprodigy.com](http://www.portalprodigy.com)

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## 1.1 Introduction

Using Features Management permitted Administrator can enable/disable and configure PORTALPRODIGY component features.



On the left side of the Features Management page, PORTALPRODIGY lists specialized components. On the right side of the Features Management page, PORTALPRODIGY lists generalized components. When a specialized component is disabled it is hidden from list boxes as a selection, administrative options to maintain the component are disabled, and the component is not accessible from the Visitor portion of the Website.

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## 1.2 The Visitor Experience

Features Management is only accessible in the Administrative portion of PORTALPRODIGY. However, the settings in Features Management do affect the Visitor experience and explanations of this are provided in the respective feature components chapter.

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## 1.3 Components

The following components are accessible from the Feature Management page. This section provides a detailed explanation and instructions for Generalized Components. For detailed explanation and instructions regarding Specialized Components see the Chapter related to the component.

**Feature Management - Specialized Components:**

- **Ask the Expert:**
- **Broadcasting:**
- **Discussions:**
- **Documents:**
- **Donations:**
- **Events:**
- **Exchanges:**
- **LRCA:**
- **Membership Fees:**
- **News:**
- **Newsletters:**
- **Notes:**
- **Press Releases:**
- **Product & Inventory:**
- **Surveys:**

**Feature Management - Generalized Components:**

- **Companies:**
- **Help:**
- **GL Features:**
- **Orders:**
- **Payments:**
- **Reporting Classes:**
- **Menu Builder:**
- **Mini Browser Builder**
- **Table Builder:**
- **User Signup**

**1.3.1 Companies Feature Management page:**

<input type="checkbox"/> First Name	<input type="checkbox"/> Middle Initial	<input type="checkbox"/> Last Name	<input type="checkbox"/> Prefix	<input type="checkbox"/> Suffix
<input type="checkbox"/> NickName	<input type="checkbox"/> Title	<input type="checkbox"/> Profession	<input type="checkbox"/> Home Email	<input type="checkbox"/> Office Email
<input type="checkbox"/> Home Phone	<input checked="" type="checkbox"/> Office Phone	<input type="checkbox"/> Office Ext.	<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Pager
<input type="checkbox"/> Home Fax	<input checked="" type="checkbox"/> Office Fax	<input type="checkbox"/> Home Web	<input type="checkbox"/> Office Web	<input type="checkbox"/> Mail To Office
<input type="checkbox"/> Mail To Home	<input type="checkbox"/> Home Address 1	<input type="checkbox"/> Home Address 2	<input type="checkbox"/> Home City	<input type="checkbox"/> Home County
<input type="checkbox"/> Home State	<input type="checkbox"/> Home Zip	<input type="checkbox"/> Home Country	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Office Address 1
<input type="checkbox"/> Office Address 2	<input checked="" type="checkbox"/> Office City	<input type="checkbox"/> Office County	<input checked="" type="checkbox"/> Office State	<input type="checkbox"/> Office Zip
<input type="checkbox"/> Office Country	<input type="checkbox"/> Comments& Requests	<input type="checkbox"/> Notes		
<a href="#">Manage</a>	<a href="#">Terms</a>			

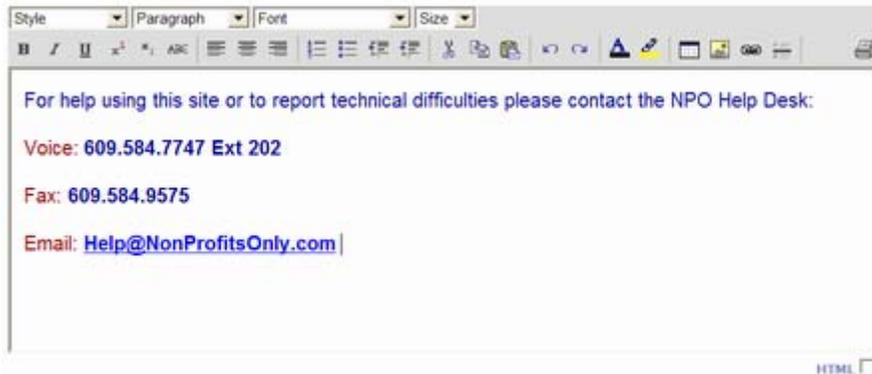
- **Checkboxes** - This page is used to select Companies data elements to be displayed in Companies Grid. Check all data elements you want to be included.

- **Manage Terms** - It also contains a link to the Terms Management page.

### 1.3.2 Help Features Management page



- **Help URL** - enter the website URL (address) to be displayed when a user presses the HELP icon or HELP option within PORTALPRODIGY.
- **Help Contact Information:** used to display anything you want. You may enter a textual information directly into the memo field or use the PORTALPRODIGY Document Editor to create the information as HTML as shown in the image below.



You may also cut HTML from other applications or tools and paste it into this field. Cut and paste will only copy the HTML and will not copy images, style sheets, etc. The resulting Help page appears as follows:



### 1.3.3 GL Features Management page



- **Enable GL Entries** - used to turn the GL Journal Transaction entries feature on so that PORTALPRODIGY will create entries in the GL Journal for financial transactions. Default is set to “No”. Set to “Yes” to enable the feature.
- **Import Chart of Accounts:** text box with Browse... button. Used to select a comma delimited file containing GL Accounts to be imported. The comma delimited format should have a CSV file extension. Provides easy method to import GL Accounts from QuickBooks. [Insert > file format]
- **Links: GL Accounts** – displays the GL Accounts Management page where you can add, edit and delete GL Accounts.
- **Links: GL Account Types** – displays the GL Account Types Management page where you can add, edit and delete GL Account Types.

<input type="button" value="Upload File"/>	Initiates upload of Import Chart of Accounts file.
<input type="button" value="Save"/>	Saves the GL Features Management settings entered on this page.
<input type="button" value="Cancel"/>	Close the page discarding all entries and edits.
<input type="button" value="Close"/>	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

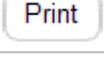
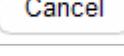
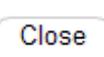
### 1.3.4 GL Accounts Management page:

The screenshot displays the 'GL Account Management' interface. At the top, there is a list of GL accounts with their respective numbers and names, such as '1000 Cash', '1040 Inventory', and '5000 Cost of Goods Sold'. Below the list, there are two links: 'Add New GL Account' and 'Import From QuickBooks'. The 'Add New GL Account' link is highlighted, leading to a form titled 'Account'. This form contains four input fields: 'GL Account Number', 'GL Account Name', 'GL Account Type' (with a dropdown menu set to 'Current Asset'), and 'GL Listbox Type' (with a dropdown menu set to 'Revenue'). At the bottom of the form, there are four buttons: 'Save', 'Print', 'Cancel', and 'Close'.

- **Add New GL Account** – this link displays the Account section fields.

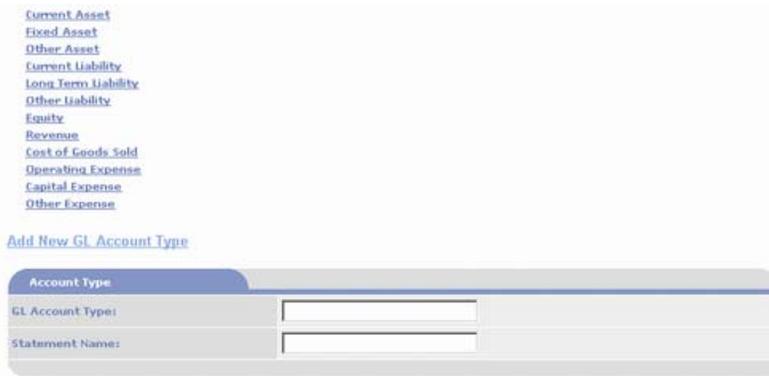
**Account section:**

- **GL Account Number:** this is the number of the account. You should enter the same number used in your accounting system, such as QuickBooks.
- **GL Account Name** - this is the textual description of the account. This value is used for selection in list boxes and printed in reports. You should enter the same number used in your accounting system, such as QuickBooks.
- **GL Account Type** - used to categorize accounts. Select value from the list box. These values are defined in the GL Account Type Management page as part of the administrative setup process.
- **GL List box Type** - used to specify to PORTALPRODIFY which data element list box to include the GL Account as selection within. Select from one of the pre-defined values in the list box, corresponding to specific data elements within PORTALPRODIFY pages as Payments Feature Management, Orders Features Management, Items Management, etc.

	Saves the GL Features Management settings entered on this page.
	Deletes current record. PORTALPRODIFY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
	Print the current page (contents of your browser window) according to your browser's print settings.
	Close the page discarding all entries and edits.
	Close the page and save changes. PORTALPRODIFY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

### 1.3.5 GL Account Types page:

Lists existing GL Account Types along with option to add new GL Account Types.



- **GL Account Type:** used to group GL Accounts. Enter the name you want to display when selecting from list box.
- **Statement Type:** used to group GL Accounts on printed financial statement. Enter the name to display when creating printed output.

<input type="button" value="Save"/>	Saves the settings entered on this page.
<input type="button" value="Delete"/>	Deletes current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
<input type="button" value="Print"/>	Print the current page (contents of your browser window) according to your browser's print settings.
<input type="button" value="Cancel"/>	Close the page discarding all entries and edits.
<input type="button" value="Close"/>	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

### 1.3.6 Orders Features Management page

Used to configure Product Orders.

**Details section:**

Default Shipping Carrier:	UPS	Default Shipping Method:	2nd Day
Allow Unfulfilled Orders to be Invoiced:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Time Zone:	
Response Notification Email:	brock@brolin.net		
Response Notification Template:	-----		
Order Phone:	888.862.1591		
Order Policy Document:	<input type="text"/>		
Manage:	<a href="#">Credit App</a>	<a href="#">Account Types</a>	<a href="#">Credit Rating</a> <a href="#">Shipping Carriers</a> <a href="#">Taxes</a>

- **Default Shipping Carrier** – product orders will default to this shipping carrier. Selecting “None” forces the user to select a value before an order can be saved. Example values - “Fed-X”, “UPS”.
- **Default Shipping Method** – if a Default Shipping Carrier is selected, a default shipping method must be specified, e.g. *Ground* or *Next Day Morning*
- **Allow Unfulfilled Orders to be Invoiced** - set to *Yes* to allow unfulfilled Order to be invoiced and to *No* to not allow unfulfilled Orders to be invoiced. Defaults to *Yes*. When unfulfilled Orders are invoiced, PORTALPRODIGY creates GL Entries in the special Unfulfilled GL Accounts. When the Orders are later fulfilled, PORTALPRODIGY creates reversing entries in the Unfulfilled GL Accounts and creates offsetting entries for the Fulfilled GL Accounts.
- **Time Zone** – specify the time zone used for orders. Entered as [Insert > + or - Greenwich Time???
- **Response Notification Email** – specify the email address of the person responsible for processing new orders and PORTALPRODIGY will notify this person every time an order is placed.
- **Response Notification Template** – specify the email Broadcast Template to use when sending the Response Notification Email. When no template is specified, PORTALPRODIGY uses a default template with very basic information. PORTALPRODIGY allows the creation of a customized template tailored to your organization’s needs. Customized Email Broadcast Templates are created using the Broadcast Feature.
- **Order Phone** – enter your organization’s sales or customer service telephone number to be displayed during the shopping checkout process.
- **Order Policy Document** - Add Policies Document – click on this link to load a document containing your organization’s order policies. Order polices are the Terms and Conditions for orders placed on your organization’s Website. (See the section titled **Order Policies**

**Document Management page** for detailed explanation.) PORTALPRODIGY stores the Order Policies as a document in the Document Resource Library, which allows it to be linked to other pages within your PORTALPRODIGY Website. The following options are used to attach, edit and remove your Order Policies document:

-  - used to upload the document to the PORTALPRODIGY Document Resource Library and automatically attach it the Order Process.
-  - used to create or edit an existing document using the PORTALPRODIGY Document Editor.
-  - used to attach a document that already exists in the Document Resource Library. Either enter a Document ID into the text box or click on the  lookup icon to use the Search For Documents feature to locate and select an existing document.

▪ **Manage:**

- [Credit App Account Types](#) – click on this link to define and edit the list of valid Credit Types permitted for use.
- [Credit Rating](#) – click on this link to define the list of valid Credit Rating values permitted for use.
- [Shipping Carriers](#) – click on this link to define and maintain Shipping Carriers and shipping rates.
- [Taxes](#) – click on this link to define tax districts and tax rates.

**GL Accounts section:**

- **Unfulfilled Shipping Revenue** – the GL Account specified here will be credited when unfulfilled orders are invoiced; and it will be debited when previously invoiced orders are fulfilled (shipped).
- **Accounts Payable** – the GL Account specified here will be credited when purchases are made.
- **Accounts Receivable** - the GL Account specified here will be debited when “on account” orders are fulfilled (shipped); and credited when payments are applied to fulfilled (shipped orders).
- **Unfulfilled Receivables** – the GL Account specified here will be debited when unfulfilled “on account” orders are invoiced.

- **Sales Tax Revenue** – posting of orders will credit this GL account with the total invoice sales tax amount.
- **Unfulfilled Sales Tax Revenue** – the GL Account specified here will be credited when unfulfilled orders are invoiced. Debited when previously invoiced orders are fulfilled (shipped).
- **Shipping Revenue** – posting of orders will credit this GL account for the total invoice shipping fees (freight) amount charged.

<input type="button" value="Save"/>	Saves the Orders Features Management settings entered on this page.
<input type="button" value="Print"/>	Print the current page (contents of your browser window) according to your browser's print settings.
<input type="button" value="Cancel"/>	Close the page discarding all entries and edits.
<input type="button" value="Close"/>	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

### 1.3.7 Order Policies Document Management page:

Used to load a document containing your organizations order policies. The Order Policies document is accessible to visitors within the Shopping process.

- **Append File** – use the Browse button to load your policies document. This document is available for customer to view during the shopping and shopping checkout process. The document should be formatted as either HTML or Text.

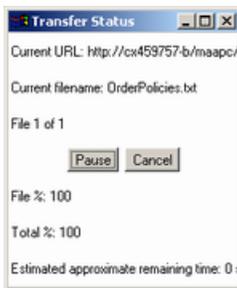


The first time you upload a document from a computer using PORTALPRODIGY, you will be prompted to install an Active-X component from Software Artisan's. PORTALPRODIGY uses this component to efficiently and reliably load documents via the HTML protocol. If this sounds entirely too technical, just answer Yes and leave it at that. You will not be prompted to do this again, unless you change your computer configuration.

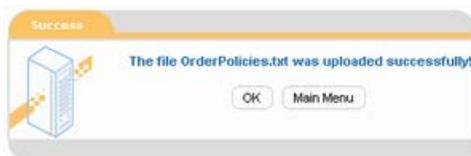
- Do you agree to upload dialog box:



- Transfer Status window:



This window provides a status of the file transfer. It will close automatically when the transfer has been completed and the following Success message will be displayed.



- **OK** – press this button to return to previous page.
- **Main Menu** – press this button to go directly to Main Menu.

### 1.3.8 Credit App Account Types page:

Used to define Account Types that can be selected on your organizations Credit Application form. E.g. “Mortgage”, “Credit Card”, “Secured Loan”, etc.

The screenshot shows a web form titled "Add New Item" for "Credit App Account Types". It features a "Details" tab. There are two main input fields: "Description:" which is a text box, and "Active:" which is a dropdown menu currently showing "Yes". Below the form are four buttons: "Save", "Print", "Cancel", and "Close".

- **Description** - enter a name of up to 30 characters describing the Account Type.
- **Active** - set to *Yes* to list this Account Type as a valid choice in the Account Types list box on the Credit Application form. Set to *No* to disable this Account Type.

### 1.3.9 Credit Ratings page:

Used to define Credit Rating Types that can be selected on your organizations Credit Application Administration form as part of credit application approval process. E.g. “Paid on time”, “Sometimes late”, “Frequently late”, “In Collection”, “Written off as bad debt”, etc.

The screenshot shows a web form titled "Add New Item" for "Credit Ratings". It features a "Details" tab. There are two main input fields: "Description:" which is a text box, and "Active:" which is a dropdown menu currently showing "Yes". Below the form are four buttons: "Save", "Print", "Cancel", and "Close".

- **Description** - enter a name of up to 30 characters describing the Credit Rating.
- **Active** - set to *Yes* to list this Credit Rating as a valid choice in the Credit Rating list box on the Credit Application Administration form. Set to *No* to disable this Account Type.

### 1.3.10 Shipping Carriers page:

Used to define the Shipping Carriers and Shipping Options and that will be available for product orders. The first step is to create a carrier. The next step is to define the shipping methods and rates for the carrier.

- **Shipping Carrier:** enter the Company Name for the Shipping Carrier. This is what the customer will see in the Shipping Carrier list box in the Shipping Options step of the Shopping Checkout process.

-  click on this button to create new shipping method for the selected Carrier.

- **Method:** used to enter a description of the Shipping Method.
- **Fixed Fee:** used to enter a fee amount that is always added to the shipping charge in addition to the other fees. It is a good practice to explain this in your Order Policies / Terms & Conditions page.
- **Minimum Fee:** used to enter a fee amount that is charged in lieu of the Rate Per Pound or % of Sales when the calculated Rate Per Pound or % of Sales Fee amount is less than the Minimum Fee amount.
- **Rate Per Pound:** used to enter a rate that shall be applied to the Order’s total Shipping Weight for all Items. Leave it blank or set to zero to cause PORTALPRODIGY to use the % of Sales method instead of Rate Per Pound method for determining the Shipping Fee.
- **% of Sales:** used to enter a rate that shall be applied to the Orders total Order Items amount for determining the Shipping Fee. When an amount is entered into Rate Per Pound, PORTALPRODIGY will not apply the % of Sales method.
- **Active:** set to *Yes* to list this Shipping Method as a valid choice in the Shipping Methods list box. Set to *No* to disable this Shipping Method.
- **Delete:** the  option is only displayed when retrieving existing records for editing. Click on the  icon to delete the Shipping Method.

When there are existing Shipping Carriers and Shipping Methods defined, the Shipping Carrier Management page appears as follows

The screenshot shows the 'Shipping Carrier Management' interface. At the top, there is a list of carriers: 'US Postal Service', 'Fed-X', 'UPS' (selected), and 'Consolidated Freight'. Below this is a link to 'Add New Shipping Carrier'. The main section is divided into two tabs: 'Carrier' and 'Methods'. The 'Carrier' tab shows a text input field for 'Shipping Carrier' with 'UPS' entered. The 'Methods' tab contains a table with columns: Method, Fixed Fee, Minimum Fee, Rate Per Pound, % of Sales, Active, and Delete. The table lists three methods: 'Next Day', '2nd Day', and 'Ground'. Below the table is a link to 'Add New Method'. At the bottom, there are buttons for 'Save', 'Delete', 'Print', 'Cancel', and 'Close'.

Method	Fixed Fee	Minimum Fee	Rate Per Pound	% of Sales	Active	Delete
Next Day	\$0.00	\$12.00	\$1.50	0.00%	Yes	-
2nd Day	\$0.00	\$7.50	\$1.00	0.00%	Yes	-
Ground	\$0.00	\$3.00	\$0.50	0.00%	Yes	-

When finished adding a new Method or editing an existing method be sure to save by either clicking

or

and confirming save.

### 1.3.11 Taxes page:

Used to define tax districts that your organization is required to collect sales tax for, when shipping orders to customers located in the tax district. When customers place orders for taxable items, PORTALPRODIGY searches the Tax table for a match to the State and County that the Customer's order is to be shipped to. PORTALPRODIGY contains a cross referenced table of Zip Codes and Counties. PORTALPRODIGY uses this table to determine the Customer's county based on their **Ship To** Zip Code. You should create one record for each State that you are required to collect sales tax for. When creating a State record, leave County empty. It is only necessary to input tax rates for Counties that have a different rate than the rate entered into the State record, because when PORTALPRODIGY does not find the County it will apply the State rate.

The screenshot shows the 'Tax Details' form. It has four rows of input fields: 'Tax Rate' with a text input containing '7.75'; 'State' with a dropdown menu showing 'CA'; 'County' with a dropdown menu showing 'Orange'; and 'Active' with a dropdown menu showing 'Yes'.

- **Tax Rate:** used to enter the sales tax rate to charge customers whose Shipping Address is located in the specified State and County.
- **State:** select a State from the drop down list box. Once a State is selected, the page will refresh to fill the County list box.
- **County:** select a county from the drop down list box. Leave blank to create rate for State.

- **Active:** by default this value is set to “Yes”, which means the record is active and available for use. To deactivate a record, set it to “No”. Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

### 1.3.12 Payment Features Management:

Used to enable and configure payment options.

**Payment Types section:**

Payment Types						
Payment Type	Pay Online	Pay By Mail	Pay At Event	Pay On-Account	Authorization Required	Address Required
Visa:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
Master Card:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
American Express:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
Discover:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	-----				
	Cash:	-----				
Check:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
Cash:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
Money Order:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
Credit Memo:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
Debit Memo:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	Payment Deposits				
	Cash:	Cash				
REFUND:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payment Deposit:	-----				
	Cash:	-----				

- **Payment Type** - PORTALPRODIGY supports the following payment types:

- VISA
  - Master Card
  - American Express
  - Discover
  - Check
  - Cash
  - Money Order
  - Credit Memo
  - Debit Memo
  - Refund
- 
- **Pay Online** - check to offer the Payment Type as a choice during online payment entry.
  - **Pay By Mail** - check to offer the Payment Type as a choice when Pay By Mail is selected. PORTALPRODIGY will print this Payment Type on the invoice.
  - **Pay At Event** - check to list this Payment Type as a choice when Pay at Event is selected.
  - **Pay On-Account** - check to allow the Payment Type as choice when payment is being entered for invoices charged on account (given terms).
  - **Authorization Required** - check to require authorization of the payment for the Payment Type. This setting works in conjunction with the Automated Card Authorization setting.
    - If authorization is required and Automated Card Authorization is set to “Yes”, PORTALPRODIGY will send an electronic authorization request via the Internet to the configured Authorization Gateway. PORTALPRODIGY displays the message “Please wait while authorizing payment” until an authorization response is received. If the authorization request is approved, PORTALPRODIGY will set the payment’s Payment Status to “Approved” and will store the returned authorization code and other applicable data. If the authorization request is denied, PORTALPRODIGY will display message “We are sorry but your payment request was declined” along with the reason returned by Authorization Gateway and will display applicable options.
    - If authorization is required and Automated Card Authorization is set to “No”, PORTALPRODIGY will complete the transaction and set the payment’s Payment Status to “Pending”. Payments with Payment Status set to “Pending” are processed but cannot be posted until Payment Status is set to “Approved”.
  - **Address Required** - check to require an address to be provided along with the payment information. If Automated Card Authorization is set to “Yes”, the address will be sent to the Authorization Gateway and must match the Credit Card billing address for the account.

**Check Information section**

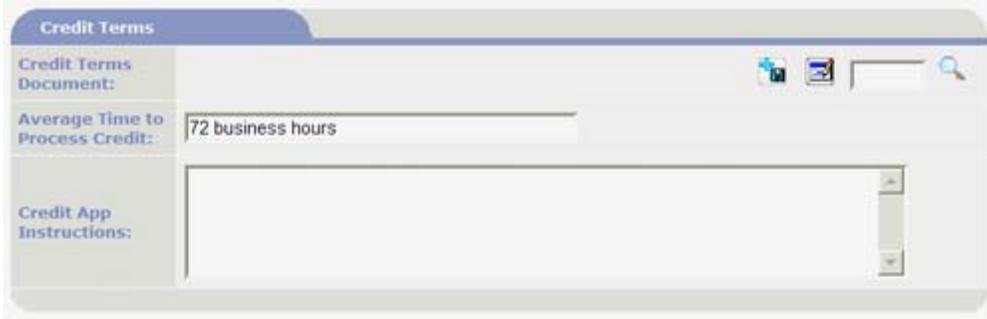
This section provides payment information for customers that are sending payment by mail; rather than making their payment online at the time of the transaction.

Check Information	
Check payable to:	Brolin Corporation
Mailing Address 1:	17 Hammond, Suite 406
Mailing Address 2:	
Mailing City:	Irvine
Mailing Country:	USA
Mailing State/Province:	California
Mailing Zip/Postal Code:	92618
Email:	
Phone:	
Fax:	

- **Check Payable To** - enter the Payee name required on the check.
- **Mailing Address 1** - enter the street address, street name and suite.
- **Mailing Address 2** - when Payment Mailing Address 1 does not provide enough room, this provides an additional address line.
- **Mailing City** - enter the city.
- **Mailing Country** - select the country. “USA” is the default value.
- **Mailing State** - select the State from the list box.
- **Mailing Zip/Postal Code** - enter the 5 digit zip code. You may optionally enter the 4 digit zip code extension. Enter in format “123450001”, i.e. without dash between main code and extension.
- **Email** – enter the email address customers should use to send emails regarding payment.
- **Phone** - enter the phone number customers should use to contact you regarding payment.
- **FAX** - enter the FAX number where customer should send faxes regarding payment.

**Credit Terms section:**

This information is displayed as part of the credit application process.



- **Credit Terms Document** – used to display a terms document from the Product Catalog and during the Checkout process in the Visitor portion of the Website. The following options  provide the choice to load a new document, edit an existing document or select a document from the PORTALPRODIGY Resource Library.
- **Average Time to Process Credit** – used to provide information. If Credit Application feature is enabled, enter text description of average time to process credit applications. After submission of a Credit Application, PORTALPRODIGY displays. Example values: “48 hours”, “One Week”, and “3 days”.
- **Credit App Instructions** – enter instructions to be displayed on the Credit Application form.

**Check Information section**



- **Message** – enter instructions to be displayed during the Order Checkout Process when the customer selects to pay by mail.

**Card Authorization section**



- **Automated Card Authorization** - select *Yes* to enable electronic authorization via the Internet. *No* is the default value.

- **Require CSC verification?** – set to *Yes* to require customer to enter a Card Security Code (CSC). This is a 3 or 4 digit code that appears on the back of credit cards.
- **Gateway** – select credit card gateway from list of gateways supported by PORTALPRODIFY.
- **Approve when CSC cannot be validated?** – set to *No* to require CSC verification for authorization.
- **Processor** – select credit card processor from list of processors supported by PORTALPRODIFY.
- **Approve when AVS cannot be validated?** - set to *No* to require Address verification for authorization.

**Processor section**



The screenshot shows a form titled "Processor" with a blue header. Below the header, there are six input fields arranged in two columns. The left column contains "User:", "Partner:", and "Host Address:". The right column contains "Password:", "Vendor:", and "Host Port:". Each field is represented by a text box with a light blue border and a white background.

- **User** – enter the login name to access your processor.
- **Password** – enter the password to access your password.
- **Partner** – if using Verisign’s Payflow, enter the Partner ID of the Authorized Reseller that registered you with the service.
- **Vendor** – if using Verisign’s Payflow, enter your Verisign Vendor ID.
- **Host Address** – enter the processor’s URL. E.g. Test-Payflow.Verisign.com
- **Host Port** – enter the processor’s port number. E.g. 443

**Proxy section**

This section is used when your site is on a Web Server that is behind a firewall and uses a proxy server to connect to the public Internet.



- **Use Proxy for Card Authorization?** - set to *Yes*, if you are using a Proxy Server; otherwise leave as *No*, which is the default value. When set to *No*, the other Proxy fields are ignored.
- **Proxy Address** – URL used by the Proxy Server.
- **Proxy Port** – Port used by the Proxy Server.
- **Proxy Login** – Login required.
- **Proxy Password** – Password required.

### 1.3.13 Reporting Classes Features Management

Reporting Classes are definable values that can be used as Report Criteria and for Grouping of data on Reports. You may create as many classes as you need.

Click on [Add New Reporting Class](#) to add.



- **Reporting Class** – enter a text value.

### 1.3.14 User Signup Features Management:

Used to configure the registration process for new users.

The screenshot shows a 'Sign Up Features' configuration panel. It contains several settings:
 

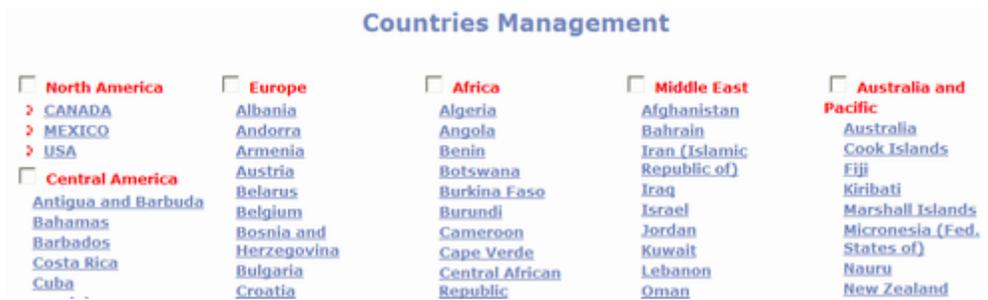
- Registration Form:** A dropdown menu set to 'Signup Form' with a link to 'Quick Registration Builder'.
- Password Minimum Length:** A dropdown menu set to '2'.
- Enable Signup on Login Page :** A dropdown menu set to 'Yes'.
- Name Required for default Sign Up:** Radio buttons for 'Yes' (selected) and 'No'.
- Address Required for default Sign Up:** Radio buttons for 'Yes' and 'No' (selected).
- Email Required for default Sign Up:** Radio buttons for 'Yes' (selected) and 'No'.
- Phone Number Required for default Sign Up:** Radio buttons for 'Yes' and 'No' (selected).
- Default Contact Menu:** A dropdown menu.
- Default Country:** A dropdown menu.
- Default State/Province:** A text input field.
- Auto Broadcast Template:** A dropdown menu.
- Response Notification Email:** A text input field containing 'brock@brolin.net'.
- Response Notification Template:** A dropdown menu.
- Sample Biography:** A large text area.
- Sample Closing Statement:** A large text area.
- Geography:** A dropdown menu set to 'Countries'.

- **Registration Form:** selects a registration form for the new user signup process. *Use Default* sets new user signup to the built in two-part long form that is also used by Edit Profile option.
- **Quick Registration Builder:** used to access the Quick Registration Builder feature. Quick Registration Builder allows you to create customized registration forms.
- **Password Minimum Length:** sets the required minimum length of user passwords.
- **Enable Signup on Login Page:** set to *Yes* to display the Signup link on the Login Page. Set to *No*, to remove the Signup link from the Login Page.
- **Name Required for default Signup:** set to *Yes* to require the user's name.
- **Address Required for default Signup:** set to *Yes* to require the user's address.
- **Email Required for default Signup:** set to *Yes* to require the user' email address. It is recommended to require an email address.
- **Phone Number Required for default Signup:** set to *Yes* to require the user' phone number.

- **Default Contact Menu:** used to select a default menu that is assigned to new users. The contacts' menu can be changed using Contact Management. Contact Menus allow specialized menus to be created for individuals and groups of users.
- **Default Country:** if you want the signup process to provide a default value for the Country field in addresses, select a country, otherwise leave blank. It is highly recommended to set a default country.
- **Default State/Province:** if you want the signup process to provide a default value for State field in addresses, select a country and a state, otherwise leave blank.
- **Auto Broadcast Template:** selects a template for the automated email that is sent to new users after they signup. This allows you to create a personalized thank you email. Templates are created using Broadcast Management.
- **Response Notification Email:** specify an administrator's email address to receive an email for each new user registration.
- **Response Notification Template:** selects a template for the automated response notification email that is sent to administrator specified by Response Notification Email address field. Templates are created using Broadcast Management. Response Notifications can be customized to include any of the contact data provided by the new user during registration.
- **Sample Biography:** used by the Press Release Feature to provide an example biography for users.
- **Sample Closing Statement:** used by the Press Release Feature to provide an example press release closing statement for users.
- **Geography:** Countries link is used to access Countries Management.

### 1.3.15 Countries Management:

Used to configure which countries shall be available as selections in the Country field for addresses.



Countries marked with a > are selected.

**Country Management**

Details:	
Country:	<input type="text" value="Germany"/>
Zip Format:	<input type="text"/>
Active:	<input type="button" value="No"/> ▾

- **Country:** used to change the spelling or replace the current name.
- **Zip Format:** this field is for future use.
- **Active:** set to *Yes* to make the country available as a selection. Set to *No* to disable the country from being selected.

### 1.3.16 Mini Browser Builder

Used to create Mini Browsers that can be inserted on your Website's home page or on specified feature pages. The following is an example of a mini browser:



Mini Browsers can contain pictures, text and links.

#### ***Mini Browsers Page:***

Used to select or add new Mini Browser.

### Mini Browsers



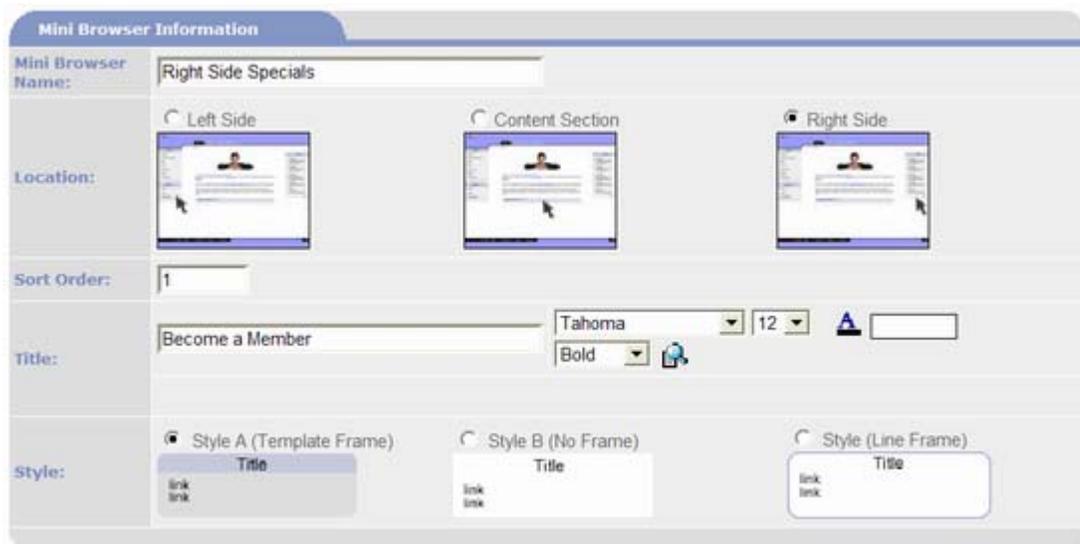
- **Mini Browser Names as Links** – click on the name to open the Mini Browser in the Mini Browser Builder page for editing or deletion.

	Opens the Mini Browser Builder page to create a new Mini Browser.
	Print the current page (contents of your browser window) according to your browser's print settings.
	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

#### **Mini Browser Builder Page:**

Used to create, edit and remove Mini Browsers. It is comprised of three sections:

#### **Mini Browser Information Section:**

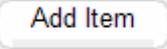


- **Mini Browser Name:** – Assign a name that will be used for identifying the mini browser in selection list boxes on Administrative pages.

- **Location:** – used to select where the Mini Browser is positioned on the Web page. The selection of location choices is dependent on the style of template selected. Possible values include: “Left Side”, “Right Side”, and “Content Section”. When “Left Side” or “Content Section” is chosen, it displays the Mini Browser directly below the Events and News Mini Browsers. When “Left Side” is chosen it displays directly below Side Menu. If template also uses Right Side Menu then “Right Side” causes it to display directly below Right Side Menu.
- **Sort Order** – the display order of the Mini Browser amongst the other mini browsers in the same Location.
- **Title** – label displayed in heading of Mini Browser.
  - Font Selection – list box with choices.
  - Font Size Selection – list box with choices from 8 to 18 point font.
  - Font Style Selection – list box with choices of *Normal* or *Bold*.
  - Font Color Selection – opens color selection pop-up window.
- **Style** – list box. Values include “Style A” and “Style B”. Style A shall match style of existing side menu or mini browser and Style B shall be without any frame or background.

**Mini Browser Information Section:**



- **Item Names as Links** – click on a name to open the Mini Browser Item Management page to edit or remove the Item.
-  – click on this button to create new Items within the Mini Browser.



- **Created By** - the name of the user that created the record and the date it was created. Lists user’s first name followed by last name.
- **Modified By** - the name of the user that last modified the record and the date it was last modified. Lists user’s first name followed by last name.
- **Active:** by default this value is set to “Yes”, which means the record is active and available for use. To deactivate a record, set it to “No”. Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.
- **ChapterID** - This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

**Options:**

	Saves the Mini Browser settings entered on this page.
	Deletes current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
	Print the current page (contents of your browser window) according to your browser’s print settings.
	Close the page discarding all entries and edits.
	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

- **Image** - (optional) the image shall be resized to fit the mini browser.
- **Link Text** – text box, 255. Plus options for Font, Size, Color, & Bold.
- **Link** – include same options as menu builder.
- **Text** – memo field. Plus options for Font, Size, Color, & Bold.
-

### 1.3.17 Menu Builder

Used to build and maintain menus for your PORTALPRODIGY Website including the menus that are an integral part of your PORTALPRODIGY Website template. Menu Builder can produce several different types of menus, each serving different purposes. Menu Builder can be used to build role based menus that are displayed once a user has been identified as a result of logging into the PORTALPRODIGY Website. Menu Builder can also be used to build specific feature based menus and to create additional sub menus that can be accessed from a Mini Browser, document, or other menu.

**Search Criteria section:**

- **Feature:** -used to search for menus by Menu Type.
- **Created Date Range:** - used to search for menus by the date they were created.
- **Modified Date Range:** - used to search for menus by the date they were modified.

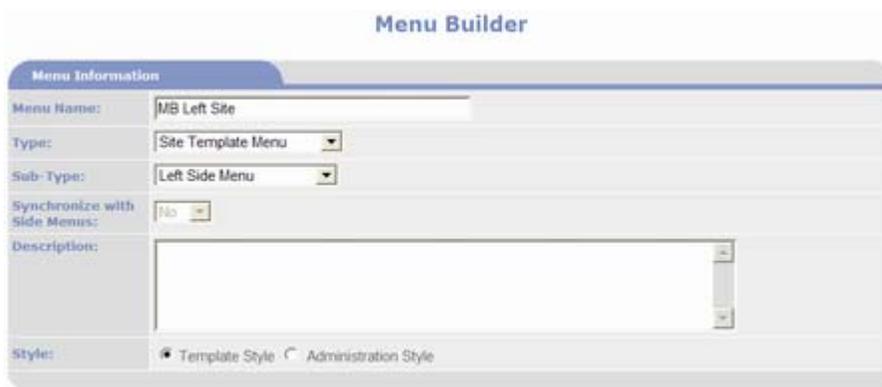
submits the search criteria and displays the matches below.

**Found Menus**

Menu	Type	Sub Type
Template Left Side Menu	Site Template Menu	Left Side Menu
Template Right Side Menu	Site Template Menu	Right Side Menu
Template Menu Bar A	Site Template Menu	Menu Bar A
Template Menu Bar B	Site Template Menu	Menu Bar B
Template Quick Jump Menu	Site Template Menu	Quick Jump Menu
Template Upper Drop Down Menu	Site Template Menu	Upper DropDown Menu
My Menu	Contacts Menu	

- **Menu** - this is the name assigned to the menu.
- **Type** - this is the Menu Type.
- **Sub Type** - this is the Menu Sub-Type

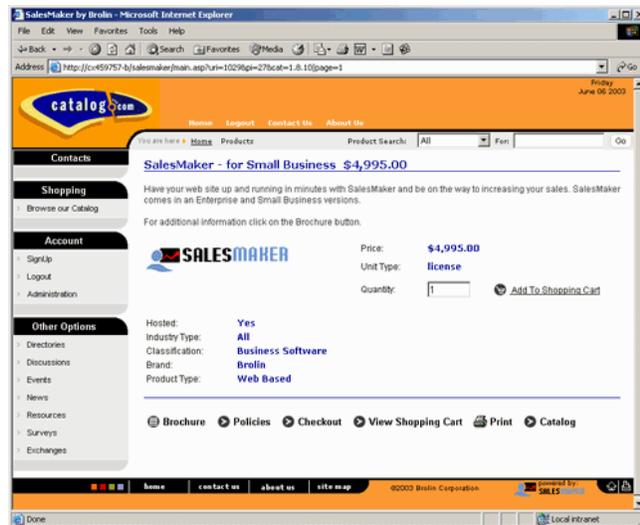
**Menu Information section:**



The screenshot shows the 'Menu Builder' interface. The 'Menu Information' section is highlighted. It contains the following fields:

- Menu Name:** MB Left Site
- Type:** Site Template Menu
- Sub-Type:** Left Side Menu
- Synchronize with Side Menus:** No
- Description:** (Empty text area)
- Style:**  Template Style  Administration Style

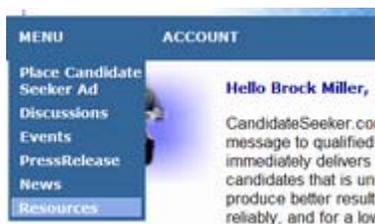
- **Menu Name** - used to assign a textual name for easy identification.
- **Type** - there are four types to select from:
  - **Site Template Menu:** specifies that the menu is an integral part of the standard template. This type of menu is displayed on all pages that use the template.
  - **Independent Menu:** specifies that the menu is independent of the standard template. This type of menu is displayed as its own page and can only be accessed by creating a link to it. It is extremely useful for creating sub-menus.
  - **Contacts Menu:** specifies that the menu is for use by the Contact Menu feature. The Contact Menu feature allows each contact/user to have a menu assigned to them. This is typically used to create personalized menus or special menus for specific groups. This type of menu is assigned to a contact from the contact's Contact Management page.
  - **Exchange Listings Menu:** specifies that the menu is for use by Exchange Menu features. The Exchange Menu feature allows each Exchange to have a customized menu of options.
  - **Sub-type** - applicable (enabled) only when Menu Type is set to Site Template Menu. There are four possible sub-types to select from and they dependent on the chosen template for your PORTALPRODIGY Website. Not all templates use all the sub-types. Review the sub-type definition listed below to determine which ones are used by the template you have selected. Note that one menu can be defined for each sub-type and that once a sub-type is assigned to a menu it is no longer displayed in the list box as an available choice.
  - **Left Side Menu** – used to define the menu for templates that display a menu on the left hand side of all pages. Currently templates 1, 2, 3, 4, 5, 7, and 10 support this type of menu.



- **Right Side Menu** - used to define the menu for templates that display a menu on the left hand side of all pages. Currently only template 3 supports this type of menu.
- **Menu Bar A** - used to define the menu for templates that display a menu bar style menu either directly below the header or directly above the footer on all pages. If the template has two menu bars, the upper menu bar is Menu Bar A and the lower menu bar is Menu Bar B. Currently templates 1, 2, 3, 4, 7, and 10 support this type of menu.
- **Menu Bar B** - used to define the menu for templates that display two menu bar style menus either directly below the header and/or directly above the footer on all pages. When the template has two menu bars, the upper menu bar is Menu Bar A and the lower menu bar is Menu Bar B. Currently templates 1, 2, 3, 7, 8, 9 and 10 support this type of menu.
- **Quick Jump Menu** - used to define the menu for templates that display a drop down list menu. Currently only template 7 supports this type of menu.



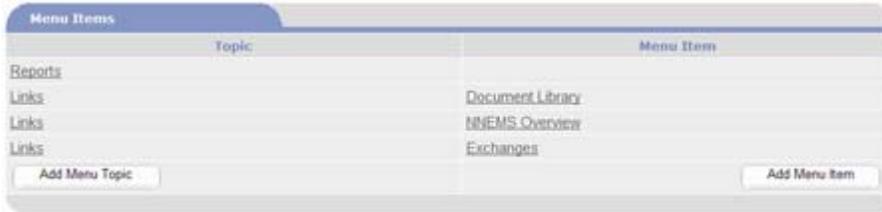
- **Upper Drop Down Menu** – used to define the menu for templates that display a drop down menu bar either directly below the header on all pages. Currently templates 6, 8, and 9 support this type of menu.



- **Lower Drop Down Menu** - used to define the menu for templates that display a lower down menu bar either directly above the footer on all pages. Currently none of the templates support this type of menu.
- **Synchronize with Side Menu** - applicable (enabled) only when Menu Type is set to *Site Template Menu* and Sub-type is set to *Quick Jump Menu*. Set to *Yes* when you want the Side Menus and the Quick Jump Menu to offer the same menu items. PORTALPRODIGY will automatically synchronize the menus, saving you the hassle of doing this manually. Set to *No* to have the menus remain independent.
- **Description** - applicable when Menu Type is set to *Independent Menu*, *Contacts Menu* or *Exchange Listings Menu*. Used to display a description above the menu. You may enter a textual description directly into the memo field or use the PORTALPRODIGY Document Editor to create the description as HTML.
- **Style** - there are style to choose from:
  - **Template Style** - this style is dependent on the selected template. It formats the menu to match the Visitor portion of the Website.

- **Administration Style** - this style formats the menu to match the Administrator portion of the Website.

**Menu Items section:**



- **Topic** - lists the defined Topics.
- **Menu Item** - list the defined Menu Items.
- **Add Menu Topic:** used to add a new Menu Topic. Not applicable to Sub-types *Menu Bar A* and *Menu Bar B*.
- **Add Menu Item** - used to add a new Menu Item.

**Record section:**



- **Created By** - the name of the user that created the record and the date it was created. Lists user's first name followed by last name.
- **Modified By** - the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.
- **Active:** by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.
- **ChapterID** - This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

**Option Buttons:**

**Save** used to save the data and continue working on the page.

**Delete** used to delete current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.

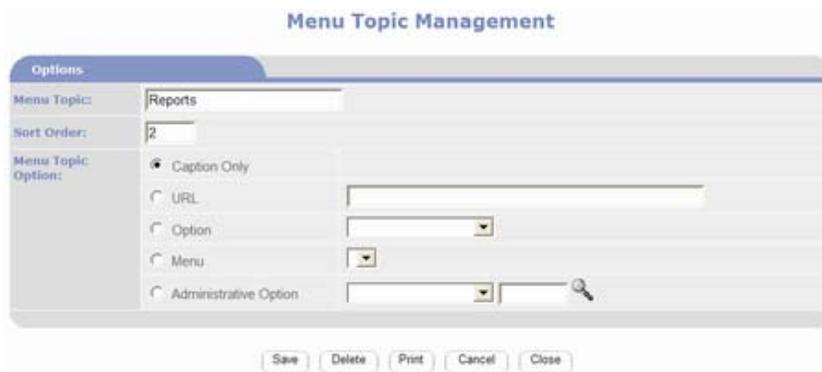
**Print** used to print the current page (contents of your browser window) according to your browser's print settings.

**Cancel** used to close the page discarding all entries and edits.

**Close** used to close the page and save changes. PORTALPRODIGY will prompts to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

### 1.3.18 Menu Topic Management page

**– Options section:**



- **Menu Topic** - a Topic is a heading that is displayed in the menu. Menu Items are listed underneath Menu Topics.
- **Sort Order** - allows you to control the order of the menu Topics.
- **Menu Topic Options:** select from one of the following:
  - **Caption Only** - used to display the Topic without making it a link to something.
  - **URL** - used when you want to manually specify a URL to link the Topic to. The URL can be to another Website or to a page within your PORTALPRODIGY Website. It is best to avoid the use of URLs as they are subject to change. You may enter the URL with our without the *HTML://*.
  - **Option** - used when you want to link the Topic to a PORTALPRODIGY feature.

- **Menu** - used when you want to link the Topic to a menu created using the PORTALPRODIGY Menu Builder.
- **Administrative Option** - used when you want to link the Topic to a PORTALPRODIGY Administrative option. Includes Resource Documents. The lookup feature allows you locate the item corresponding to the selected Administrative Option.

**Option Buttons:**

- Save** used to save the data and continue working on the page.
- Delete** used to delete current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
- Print** used to print the current page (contents of your browser window) according to your browser's print settings.
- Cancel** used to close the page discarding all entries and edits.
- Close** used to close the page and save changes. PORTALPRODIGY will prompts to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

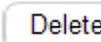
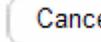
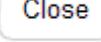
### 1.3.19 Menu Item Management page

**Options section**



- **Topic** - select a Topic to display the menu item under. Menu Items are listed underneath Menu Topics. When the menu Sub-type are *Menu Bar A* and *Menu Bar B* Topic cannot be changed because these types of menu are flat and do not and do not support Topics.
- **Menu Item** - this is the name of the menu option that will be displayed on the menu as a link
- **Sort Order** - allows you to control the order of the menu items within the selected Topic.
- **Menu Item Option:** select from one of the following:
  - **URL** - used when you want to manually specify a URL to link the Menu Item to. The URL can be to another Website or to a page within your PORTALPRODIGY Website. It is best to avoid the use of URLs as they are subject to change. You may enter the URL with or without the *HTML://*.
  - **Option** - used when you want to link the Menu Item to a PORTALPRODIGY feature.
  - **Menu** - used when you want to link the Menu Item to a menu created using the PORTALPRODIGY Menu Builder.
  - **Administrative Option** - used when you want to link the Menu Item to a PORTALPRODIGY Administrative option. Includes Resource Documents. The lookup feature allows you locate the item corresponding to the selected Administrative Option.

***Option Buttons:***

-  used to save the data and continue working on the page.
-  used to delete current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
-  used to print the current page (contents of your browser window) according to your browser's print settings.
-  used to close the page discarding all entries and edits.
-  used to close the page and save changes. PORTALPRODIGY will prompts to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

## 1.3.20 Quick Registration/Signup Builder

Email Address and Password are automatically included on the registration form and the Email Address provided is used as the contacts Login Email Address as well as copied to their Home and Office Email Address fields.

### Quick Registration Builder

Email Address and Password will be automatically included on the registration form and the Email Address provided will be used as the contacts Login Email Address as well as copied to their Home and Office Email Address fields.

Details			
Name:	Member		
Instructions:	<div style="border: 1px solid gray; height: 40px;"></div>		
Use Template:	Yes		
Check first column to include, second column to make required:			
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Address	<input type="radio"/> Home <input type="radio"/> Office <input checked="" type="radio"/> Both	<input type="checkbox"/> <input type="checkbox"/> Prefix	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> First Name
<input type="checkbox"/> <input type="checkbox"/> Phone	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Phone Ext	<input type="checkbox"/> <input type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> <input type="checkbox"/> Company Name	<input type="checkbox"/> <input type="checkbox"/> Position/Title	<input type="checkbox"/> <input type="checkbox"/> Cell Phone	<input checked="" type="checkbox"/> <input type="checkbox"/> Fax
<input type="checkbox"/> <input type="checkbox"/> Second Address Line		<input type="checkbox"/> <input type="checkbox"/> Comments	<input type="checkbox"/> <input type="checkbox"/> Special Interests

Record		
Created By:	Brock Miller	03/23/2004 09:50PM
Modified By:	Brock Miller	03/23/2004 09:50PM
Active:	Yes	
ChapterID:	1	

Save Delete Print Cancel Close

- **Name** – used to specify a textual title for the page. The title is placed on the top of the page and displayed using the standard page title format. The name is also displayed within menu drop down list boxes within the Administrative portion of the site when selecting the menu.
- **Instructions** – used to specify instructions to be displayed below the Page Title. Instructions may be entered as plain text or HTML. The HTML Editor  feature may be used to create and edit the Instructions as HTML.
- **Use Template List box** – defaults to *Yes*, which displays the Quick Registration form within your Organization’s Website’s branded template. When set to *No*, the Quick Registration form is displayed in a separate pop-up window without your Organization’s Website’s branded template.

- **Field Selection Checkboxes** – place a check in the first checkbox to include the field on the registration form. Place a check in the second checkbox to require the registrant to enter a value. A red asterisk is displayed on the registration form next to all required fields.
  - **Address** - When Address is checked the choices *Home*, *Office*, and *Both* are displayed on the registration form as shown in the picture below.
  - **Prefix** – check to include a Prefix list box on the registration form with choices *Dr.*, *Mr.*, *Mrs.*, *Ms.*, *Miss*.
  - **First Name** – check to include first name on the registration form.
  - **Middle Name** – check to include middle name on the registration form.
  - **Last Name** – check to include last name on the registration form.
  - **Phone** – check to include phone number on the registration form. Note that PORTALPRODIGY contains separate sets of data fields for Office and for Home contact information and uses the following conditions to determine which set to store the Phone, Cell and Fax numbers in.
    - When Address is checked (included as field on form) and set to *Home*, the registration data is stored as Home Information.
    - When Address is checked (included as field on form) and set to *Office*, the registration data is stored as Office Information.
    - When Address is checked (included as field on form) and set to *Both* and Company Name is entered into the registration form, the registration data is stored as Office Information.
    - When Address is checked (included as field on form) and set to *Both* and Company Name is left blank on the registration form, the registration data is stored as Home Information and any value entered in the Phone Extension is discarded.
    - When Address is left unchecked (not included as field on form) and Company is checked (field on form) and the user provides the name of their company - PORTALPRODIGY will store the collected numbers in the Office set.
    - When Address otherwise PORTALPRODIGY will copy the phone number to both the Home and Office Phone number fields.
  - **Phone Ext.** – check to include text box for entry of phone extension on the registration form. Phone extension does not have a required checkbox because not all office numbers have extensions.

- **Cell Phone** – check to include the cell phone number on the registration form. Applies same rules as Phone for determining which field(s) to store the value in.
- **Fax** – check to include the fax number on the registration form. Applies same rules as Phone for determining which field(s) to store the value in.
- **Company Name** – check to include the Company Name on the registration form.
- **Position Title** – check to include the Position (Job) Title on the registration form
- **Comments** – check to include a comments memo field on the registration form that allows Registrants to enter questions, make requests or provide additional information.
- **Special Interests** – check to include a list of Special Interest Groups on the registration form. Special Interest Groups are created in Security Group Management. Registrants check each group that they are interested in. Special Interests Groups can be used as criteria for email broadcasts, creation of mail merge lists, querying and reporting.
- **Second Address Line** – check to include a second address line on the registration form. A second address line provides additional space for entering the street number and name.

The screenshot shows a 'Details' form for 'Company Form'. It includes a 'Name' field with the value 'Company Form'. Below this, there is a section titled 'Check first column to include, second column to make required:'. This section contains several rows of checkboxes and radio buttons. The first row has a checked checkbox for 'Address' and three radio buttons for 'Home', 'Office', and 'Both'. The second row has checkboxes for 'Prefix', 'First Name', 'Middle Name', and 'Last Name'. The third row has checkboxes for 'Phone', 'Phone Ext', 'Cell Phone', and 'Fax'. The fourth row has checkboxes for 'Company Name', 'Position/Title', 'Comments', and 'Special Interests'. The fifth row has a checkbox for 'Second Address Line'.

- **Home** – select this radio button option to collect the user’s Home Address on the registration form.
- **Office** – select this radio button option to collect the user’s Office Address on the registration form.
- **Both** – select this radio button option to display an option on the registration form for the user to enter either their Home Address or their Office Address.
- **Active** – by default this value is set to “Yes”, which means the record is active and available for use. To deactivate a record, set it to “No”. Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

- **ChapterID** – This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.
- **Intelligent Entry feature** – PORTALPRODIGY contains sophisticated processing logic to identify transactions with organizations versus individuals. This enables powerful marketing and reporting capability including aggregate reporting of revenue by both organization and individuals. This is supported by the ability of PORTALPRODIGY to store both Office and Home contact information. PORTALPRODIGY contains separate sets of data fields for Office and for Home contact information, and uses the following conditions to determine which set to store the Quick Registration Address, Phone, Cell and Fax numbers in.
  - When Address is checked (included as field on form) and set to *Home*, the registration data is stored as Home Information.
  - When Address is checked (included as field on form) and set to *Office*, the registration data is stored as Office Information.
  - When Address is checked (included as field on form) and set to *Both* and Company Name is entered into the registration form, the registration data is stored as Office Information.
  - When Address is checked (included as field on form) and set to *Both* and Company Name is left blank on the registration form, the registration data is stored as Home Information and any value entered in the Phone Extension is ignored. The Phone Extension is ignored because PORTALPRODIGY does not have a Home Phone Extension field; it only has one for Office Phone Extension.
  - When Address is left unchecked (not included as field on form) and Company is checked (field on form) and the user provides the name of their company, the registration data is stored as Office information.
  - When Address is left unchecked (not included as field on form) and Company is checked (field on form) and the user leaves Company Name blank, the registration data is stored as Home information.
  - When Address is left unchecked (not included as field on form) and Company is left unchecked (not included as field on form), the registration data is stored as Home information.

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## 1.4 Feature Administration

The following describes how to create and administer User Registration Signup forms using the Quick Registration Builder.

## 1.4.1 Quick Registration Builder

Used to create simplified registration (signup) forms that registrants can quickly complete. When users register on the website, PORTALPRODIGY creates a contact record for the registrant where their registration information is stored. The following is an example of a registration form created using the Quick Registration Builder.

**Quick Registration**  
Please complete the following registration form. Required fields are marked with \*.

**Personal information**

Login Name\* :

Password\* :

Confirm Password\* :

First Name\* :

Last Name\* :

**Contact information**

Company Name :

E-mail\* :

Phone\* :  x

**Address\***

Address Type:  Home  Office

Address:

City:

State, Zip: CA

Country: USA

### Quick Registration provides the following benefits:

- Enables visitors to quickly register on the website.
- Enables Administrators to control the information required by users.
- Eliminates users forgetting their login names by using their email address as their login name.
- Intelligent automated search and matching of new registrants to existing contact records. Finds matches to prospect records eliminating creation of duplicate records and enabling prospect conversion tracking and reporting.
- Intelligent processing logic integrated with registration process to identify transactions with organizations versus individuals. This enables powerful marketing and reporting capability including aggregate reporting of revenue by both organization and individuals.

- Ability to create specialized registration forms that can be assigned to specific activities such Membership Signup, Event Registration, Shopping, etc.
- Ability to create user profile maintenance form.
- Streamline the registration process for new users by creating simple registration forms.
- Creates a one step form that be used to replace the standard two step long form.
- Automatically assigns the users email address as their site login.

Building Quick Registration forms is simple and quick. It is as easy as checking the fields to be included. An additional checkbox allows the Administrator to specify whether a value is required by the registrant.

The Quick Registration Builder automatically includes an Email Address and Password field on all registration forms. The Email Address is used as the contacts Login Email Address and it is copied to the Home and Office Email Address fields in the registrants contact record and sets the *Mail to Home* or *Mail to Office* options accordingly, eliminating the need for the registration to specify these manually. Also, automatically sets the user's Contact Preference to *Email*. PORTALPRODIGY Broadcasting feature uses the Contact Preference in conjunction with Mail To settings to determine how to send broadcasts to the contact and to where.

PORTALPRODIGY includes a Date of First Access field that is used to track when Prospects first login to or register on your organization's website. When the visitor submits their registration from, PORTALPRODIGY performs an Intelligent Prospect Matching search, which checks the database for an existing contact record. It searches the following in the order listed below:

1. Login Email
2. Email (office or home) + Last Name
3. Phone# (office or home) + Last Name + First Name

Note that when the Quick Registration form does not include the Phone Number field or it does but the Phone Number is not required and the registrant does not provide it (leaves it blank), it will not use search method #3. PORTALPRODIGY then checks for the following one fo the following conditions and takes the specified action:

If a match is found and the Date of First Access field is empty and submission is from the Quick Registration form, PORTALPRODIGY will updates the existing record with the new values provided by the registrant including their email address and password; rather than creating a new contact record. PORTALPRODIGY places the current date in the Date of First Access field to signify that the person has accessed the system for the first time.

If a match is found and the Date of First Access field is empty and submission is from Standard Registration, then PORTALPRODIGY displays the message "We already have a contact record on

file for you. Please update any information that has changed, then press submit to complete the registration process”.

If a match is found and the Date of First Access field contains a date, PORTALPRODIGY displays the message - "The login email you have supplied is already in use. Have you registered with us before?" with Yes & No options.

- If "No" is selected then display "Please select one of the following options:"
- If "Yes" is selected then display "Please select one of the following options:"
  - "Email me my password"
  - "Display password hint"
- "Request Help"
- If "No" is selected PORTALPRODIGY displays "Please select one of the following options:"
  - "Enter a different email login address"
  - "Request Help"

If no match, PORTALPRODIGY will create a new contact record.

## **1.4.2 Intelligent Entry Feature**

PORTALPRODIGY contains sophisticated processing logic to identify transactions with organizations versus individuals. This enables powerful marketing and reporting capability including aggregate reporting of revenue by both organization and individuals. This is supported by the ability of PORTALPRODIGY to store both Office and Home contact information. PORTALPRODIGY contains separate sets of data fields for Office and for Home contact information, and uses the following conditions to determine which set to store the Quick Registration Address, Phone, Cell and Fax numbers in.

When Address is checked (included as field on form) and set to *Home*, the registration data is stored as Home Information.

When Address is checked (included as field on form) and set to *Office*, the registration data is stored as Office Information.

When Address is checked (included as field on form) and set to *Both* and Company Name is entered into the registration form, the registration data is stored as Office Information.

When Address is checked (included as field on form) and set to *Both* and Company Name is left blank on the registration form, the registration data is stored as Home Information and any value entered in the Phone Extension is ignored. The Phone Extension is ignored because PORTALPRODIGY does not have a Home Phone Extension field; it only has one for Office Phone Extension.

When Address is left unchecked (not included as field on form) and Company is checked (field on form) and the user provides the name of their company, the registration data is stored as Office information.

When Address is left unchecked (not included as field on form) and Company is checked (field on form) and the user leaves Company Name blank, the registration data is stored as Home information. When Address is left unchecked (not included as field on form) and Company is left unchecked (not included as field on form), the registration data is stored as Home information.

Using the Quick Registration Builder you can also create specialized registration forms to suite specific purposes. E.g. when new users add the first item to their shopping cart they are required to register (signup) on the site. You can create a simplified registration form specifically for these users who need to register during the Shopping process. You can also create separate registration forms for Membership Types, Contacts, and Event Registrants. E.g. you can create one registration form for Company Memberships and another for Individual Memberships.

A Quick Registration form can be included on a personal menu or substituted for the standard long form and made accessible to users to view and edit their contact profile.

When a user edits their contact profile Login Email Address, PORTALPRODIGY prompt the user with - "Copy the new Login Email Address to:" with the following options:

- "Home Email Address"
- "Office Email Address"
- "Neither (only use for Login purposes)"

When either Home or Office Email Addresses are changed in the standard long form PORTALPRODIGY prompts the user with: "Replace the Login Email Address with this new email address?" with the following options:

- "Yes"
- "No"

## 1.5 Tutorials

The following tutorials explain how to perform various configuration tasks available from Feature Administration.

### 1.5.1 Modify Site Template Menus

From the Site Administration Menu select Features.

From the Features Management page select Menu Builder.

On the Search for Menus page set Feature to *Site Template Menu* and press

Search

Menu	Type	Sub Type
<a href="#">Template Left Side Menu</a>	Site Template Menu	Left Side Menu
<a href="#">Template Right Side Menu</a>	Site Template Menu	Right Side Menu
<a href="#">Template Menu Bar A</a>	Site Template Menu	Menu Bar A
<a href="#">Template Menu Bar B</a>	Site Template Menu	Menu Bar B
<a href="#">Template Quick Jump Menu</a>	Site Template Menu	Quick Jump Menu
<a href="#">Template Upper Drop Down Menu</a>	Site Template Menu	Upper DropDown Menu

Click on the menu (named link) that you want to edit.

Leave the settings in the More Information section as is.

Topic	Menu Item
Features	Member Directory
Features	Surveys
Features	Discussions
Features	Events
Features	News
Features	Resources
Account	Standard Rules and Guide Lines
Account	SignUp
Account	Login
Account	Administration
Menu	Donations
Menu	Endorsements
Menu	Exchanges
Menu	LRCA
Menu	PressRelease
CASA	Develop a Local Program
CASA	Donations
CASA	How to Volunteer
CASA	National CASA
CASA	Our Staff - Our Board
CASA	Statewide Directory

Buttons: Add Menu Topic, Add Menu Item

**Edit A Topic**

To edit a Topic click on the Topic's Name on the Found Menus list

**Menu Topic Management**

Options

Menu Topic:

Sort Order:

Menu Topic Option:

- Caption Only
- URL
- Option
- Menu
- Administrative Option

Buttons: Save, Delete, Print, Cancel, Close

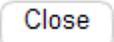
Modify the Menu Topic name and sort order as necessary. It is best to keep Menu Topic names short because Side Menus will either wrap to a second row or will extend beyond the border of the menu, depending on the chosen template. Both of these scenarios are unsightly.

To sort all Menu Topics alphabetically, set Sort Order to 0.

Select a Menu Topic Option as follows:

- To display as a label without linking it to anything, click on the Caption Only radio button.

- To enable as a link to a specified Web page, click on the URL radio button. When possible, try to avoid the use of URLs, as they are subject to change. You may enter the URL with or without the *HTML://*.
- To enable as a link to a PORTALPRODIGY feature, click on the Option radio button, then select an option from the drop down list.
- To enable as a link to a menu created using the PORTALPRODIGY Menu Builder, click on the Menu radio button, then select a menu from the drop down list.
- To enable as a link to a PORTALPRODIGY Administrative option, click on the Includes Resource Documents, then select an option from the drop down list. The lookup feature  is used to locate the item corresponding to the selected Administrative Option. E.g. when *Documents* is selected, click on  to locate a document using the Search For Documents page. To make a selection click on the document name in the Found Documents list. This returns the Document ID to the Menu Item Management page. If you already know the Document ID you may enter it directly into the text box.

Click  and when PORTALPRODIGY prompts you to save your changes, click OK. An Ok response saves the changes, closes the page, and returns to the Menu Builder page.

### **Edit an Item**

To edit a Menu Item click on the Menu Items Name on the Found Menus list



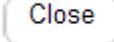
To place the Menu Item under a different Topic, change the Topic by selecting a different one from the drop down list.

Modify the Menu Item name and sort order as necessary. It is best to keep Menu Item names short because Side Menus will either wrap to a second row or will extend beyond the border of the menu, depending on the chosen template. Both of these scenarios are unsightly.

To sort the Menu Items alphabetically within their assigned Topic, set Sort Order to 0

Select a Menu Topic Option as follows:

- To enable as a link to a specified Web page, click on the URL radio button. When possible, try to avoid the use of URLs, as they are subject to change. You may enter the URL with or without the *HTML://*.
- To enable as a link to a PORTALPRODIGY feature, click on the Option radio button, then select an option from the drop down list.
- To enable as a link to a menu created using the PORTALPRODIGY Menu Builder, click on the Menu radio button, then select a menu from the drop down list.
- To enable as a link to a PORTALPRODIGY Administrative option, click on the Includes Resource Documents, then select an option from the drop down list. The lookup feature  is used to locate the item corresponding to the selected Administrative Option. E.g. when *Documents* is selected, click on  to locate a document using the Search For Documents page. To make a selection click on the document name in the Found Documents list. This returns the Document ID to the Menu Item Management page. If you already know the Document ID you may enter it directly into the text box.

Click  and when PORTALPRODIGY prompts you to save your changes, click OK. An Ok response saves the changes, closes the page, and returns to the Menu Builder page.

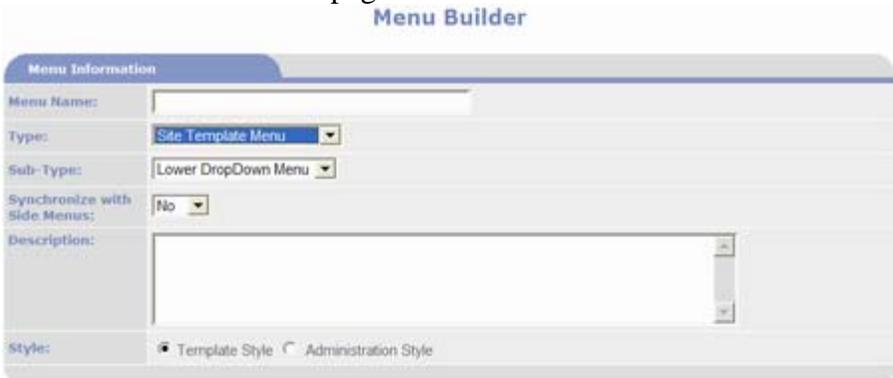
### **1.5.2 Create a Standalone Menu:**

When creating standalone (independent) menus you have the option of organizing the Menu Items by Topic or without Topics. Menu Builder's versatility allows Topics to be added or deleted at any time. When a Topic is deleted, existing Menu Items assigned to the deleted Topic become unassigned and will display on the Menu first, before Menu Items assigned to Topics. You can use Menu Item Management to assign them to a Topic.

- From the Site Administration Menu select Features.
- From the Features Management page select Menu Builder.



- On the Search for Menus page click **Add New**.



Enter a Menu Name. Note that this name gets displayed on the menu page as the menu's heading.

Select *Independent Menu* from the Type drop down list box.

Leave Synchronize with Side Menus set to *No* as this is not applicable to Independent Menus.

Enter instructions or anything or other message that you would like to have displayed above the menu on the menu page. You may either enter a textual description directly into the Description memo field or you may use the PORTALPRODIGY Document Editor to create the description as HTML. (For instructions how to uses the Document Editor see the Document Editor section of the Document Resource Library in Detail Chapter.)

Select either *Template Style* or *Administration Style*.

Click **Save**. The menu is saved to the PORTALPRODIGY server database and the page Menu Builder page is refreshed to display the Menu Items section as shown below:



To edit a Topic click on the Topic's Name.

Modify the Menu Topic name and sort order as necessary. It is best to keep Menu Topic names short because Side Menus will either wrap to a second row or will extend beyond the border of the menu, depending on the chosen template. Both of these scenarios are unsightly.

To sort all Menu Topics alphabetically, set Sort Order to 0.

Select a Menu Topic Option as follows:

- To display as a label without linking it to anything, click on the Caption Only radio button.
- To enable as a link to a specified Web page, click on the URL radio button. When possible, try to avoid the use of URLs, as they are subject to change. You may enter the URL with or without the *HTML://*.
- To enable as a link to a PORTALPRODIGY feature, click on the Option radio button, then select an option from the drop down list.
- To enable as a link to a menu created using the PORTALPRODIGY Menu Builder, click on the Menu radio button, then select a menu from the drop down list.
- To enable as a link to a PORTALPRODIGY Administrative option, click on the Includes Resource Documents, then select an option from the drop down list. The lookup feature  is used to locate the item corresponding to the selected Administrative Option. E.g. when *Documents* is selected, click on  to locate a document using the Search For Documents page. To make a selection click on the document name in the Found Documents list. This returns the Document ID to the Menu Item Management page. If you already know the Document ID you may enter it directly into the text box.

Click  and when PORTALPRODIGY prompts you to save your changes, click OK. An Ok response saves the changes, closes the page, and returns to the Menu Builder page.

To edit a Menu Item click on the Menu Items Name.

To place the Menu Item under a different Topic, change the Topic by selecting a different one from the drop down list.

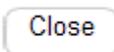
Modify the Menu Item name and sort order as necessary. It is best to keep Menu Item names short because Side Menus will either wrap to a second row or will extend beyond the border of the menu, depending on the chosen template. Both of these scenarios are unsightly.

To sort the Menu Items alphabetically within their assigned Topic, set Sort Order to 0.

Select a Menu Topic Option as follows:

- To enable as a link to a specified Web page, click on the URL radio button. When possible, try to avoid the use of URLs, as they are subject to change. You may enter the URL with or without the *HTML://*.
- To enable as a link to a PORTALPRODIGY feature, click on the Option radio button, then select an option from the drop down list.
- To enable as a link to a menu created using the PORTALPRODIGY Menu Builder, click on the Menu radio button, then select a menu from the drop down list.
- To enable as a link to a PORTALPRODIGY Administrative option, click on the  Includes Resource Documents, then select an option from the drop down list. The lookup feature  is used to locate the item corresponding to the selected Administrative Option. E.g.

when *Documents* is selected, click on  to locate a document using the Search For Documents page. To make a selection click on the document name in the Found Documents list. This returns the Document ID to the Menu Item Management page. If you already know the Document ID you may enter it directly into the text box.

Click  and when PORTALPRODIGY prompts you to save your changes, click OK. An Ok response saves the changes, closes the page, and returns to the Menu Builder page.

### 1.5.3 Create a User Menu:

This option has not been documented yet.

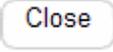
### 1.5.4 Create a Menu for an Exchange:

This option has not been documented yet.

### 1.5.5 Create a New Quick Registration form

- Go to the Site Administration menu.
- Select Features.
- Select Features Management
- Select User Signup.
- Select Quick Registration Builder.
- Select Add New

- Enter a Name to be used as the page title for the registration form.
- If you want to display special instructions or other information on the page enter them in the Instructions memo field or use the  HTML Editor option.
- Leave the User Template set to *Yes* if you want the registration form to be displayed within your organization’s branded Website template. Set to *No* if you want the registration form to display in a separate pop-up window without your organization’s branded Website template.
- Select fields to be displayed on the registration form by checking the first checkbox to the right of a field to include the field on the registration form.

- Place a check in the second checkbox to the right of the field to require the registrant to enter a value. A red asterisk is displayed on the registration form next to all required fields.
- When you check the Address Field it will display three radio button options. Select *Home* if you only want the person to register their home address. Select *Office* if you only want the person to register their office address. Select *Both*, to present the user with the option to select either Home or Office. If you want them to provide both addresses, then use the default User Signup form rather than a Quick Registration form.
- Click on  button at the bottom of the Quick Registration Builder page.
- Click  button in prompt to save dialog box to save the registration form.
- The registration form is now available to assign to a specific Feature Component or as the standard Registration Form.

### 1.5.6 Create a Mini Browser:

This option has not been documented yet.



**Mini Browser Builder**

**Mini Browser Information**

Mini Browser Name:

Location:  Left Side  Content Section  Right Side

Sort Order:

Title:  Arial 8 #000000 Normal

Style:  Style A (Template Frame)  Style B (No Frame)  Style (Line Frame)

**Record**

Active:

ChapterID:

Save Print Cancel Close

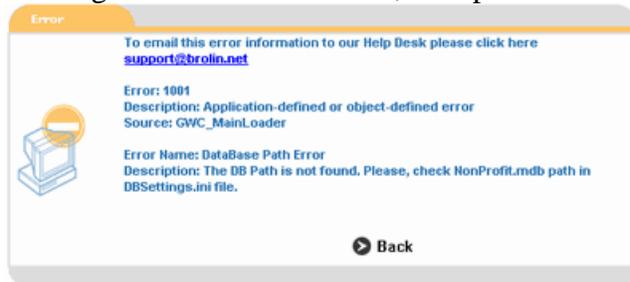
## 1.6 Special Situations

None have been documented as of this printing of the user guide.

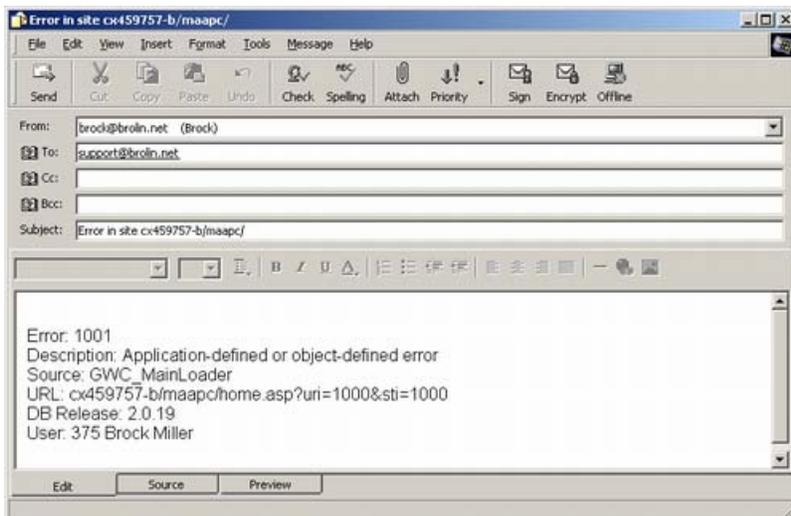
Part of the PortalProdigy success is you. As a member of the PortalProdigy community we welcome your contributions to the ongoing improvement and usage of the product. If you discover a solution to a special situation please email it to us at [support@portalprodigy.com](mailto:support@portalprodigy.com)

## 1.7 Troubleshooting

PORTALPRODIGY contains a sophisticated error management system that minimizes the potential for data loss and system interruption. When an error is generated on the PORTALPRODIGY web-server, PORTALPRODIGY gathers available information about the error, logs this information in an error log file on the web-server, then presents the information to the user as shown below.



The error message contains a Help Desk link. When clicked on, the Help Desk link creates an email message in the users default email program. This email identifies the website and describes the error. The Help Desk link is configurable in Features Administration.



Errors generated in the users browser such as script errors are managed directly by the users browser and not handled by PORTALPRODIGY.

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