Portal Prodigy™
Utilities Features in Detail

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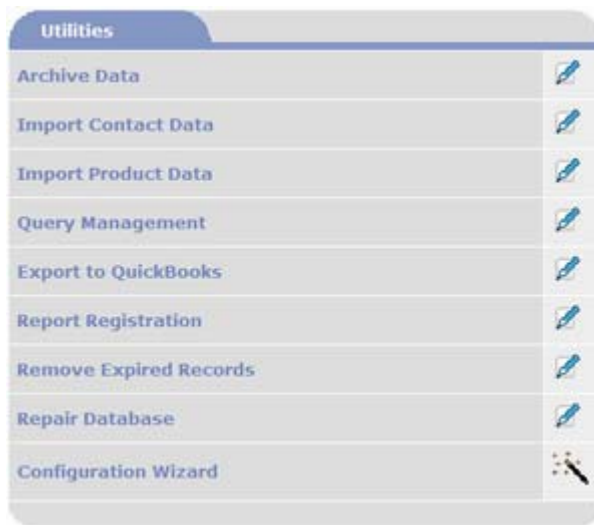
1.1 Introduction

This chapter presents an overview of various utility features that are used infrequently.

1.2 Components

This section describes the various components that are available from the Utilities Menu displayed below:

1.2.1   Archive Data

This is a future enhancement that is currently in development. We look forward to offering this feature in the near future.

1.2.2   Import Contact Data (Simple)

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

☐ 1	FirstName
☐ 2	LastName
☑ 3	Home Address1
☑ 4	Home City
☑ 5	Home State
☑ 6	Home Zip
☑ 7	Home Phone

The Import Contacts Data Management Page –

Select the Utilities Access Icon **Utilities** ▶ located in the Site Management menu column of the Main Administration menu (Ctrl-Alt-m) to view the Utilities Menu page.
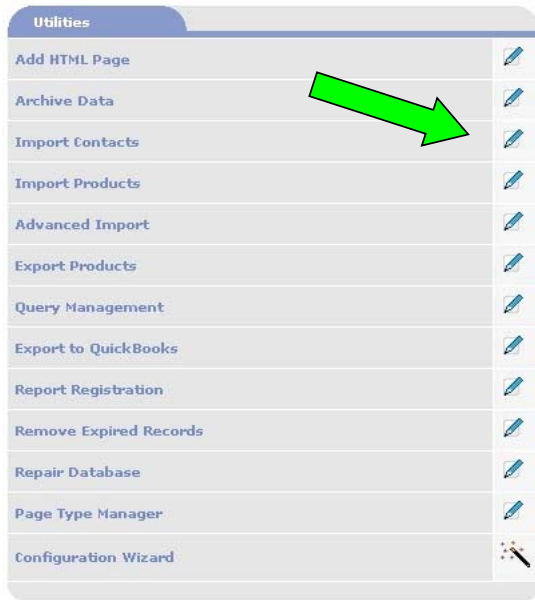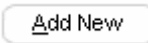
Clicking on the Utilities Menu Import Contacts Edit 🖉 button accesses the Contact Profiles page.

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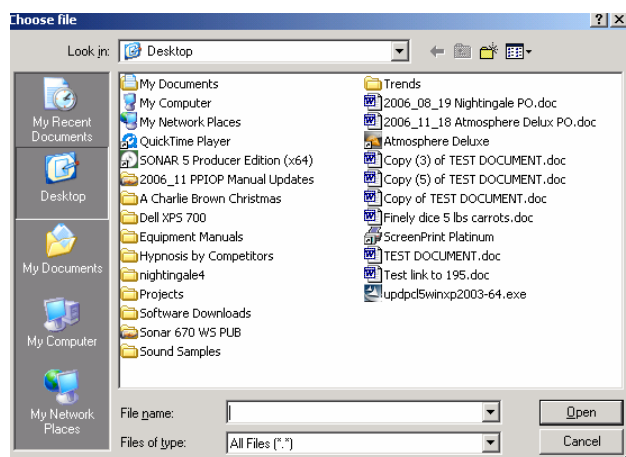
Select Data Subscription File Field - For each field included in the CSV file, enter the number corresponding to the order of the field in the CSV file. A zero is used to indicate that the field is not in your CSV file.

Values Included Section

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

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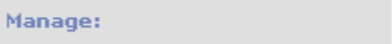
The import always preserves the Login Name and Password for contact records that already exist. If the imported record does not contain a contact's name, the Company Name will be used instead.

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 ⬜Features 📝 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
>
> Manage: PR Media Types 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..

Media Types	☐ Replace Contact Media Types	
Type	**Value**	**Column #**
Magazine		
Newsletter		
Newspaper		
Talk Show		

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.).

Check each Contact Type or Group you want the imported Contacts to be assigned to:

Contact Type	Special Interst Group:	Security Group
☐ Affiliate	☐ Receive Newsletter	☐ Admin
☐ Client		☐ Marketing
☐ Contractor		☐ Millennium Sales Reps
☐ Contributor		☐ Sales
☐ Employee		☐ Users
☐ Expert		
☐ LRCA		
☐ MailingList		
☐ Manufacturer		
☐ Media		
☐ Member		
☐ NonProfit		
☐ Other		
☐ Prospect		
☐ Reseller		
☐ SalesTeam		
☐ Vendor		
☐ Volunteer		
☐ VolunteerInterest		

1.2.3 Advanced Import

There are many reasons for importing large quantities of records in a single batch. For example, transferring data from a legacy system to your new PortalProdigy system or loading newly purchased data as in the form of purchased prospecting lists, product lists, etc. The Advanced Import utility makes importing large amounts new records and updating existing records with large and complex data structures 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

OR,

ProdCode,Name,Price,Type
SMR-123,Top,1,Test
SMR-234,Spindle,1.5,Test5

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 Advanced Import Page –
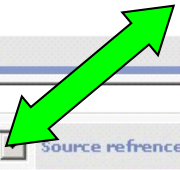
Select the Utilities Access Icon **Utilities** ▶ located in the Site Management menu column of the Main Administration menu (Ctrl-Alt-m) to view the Utilities Menu page.
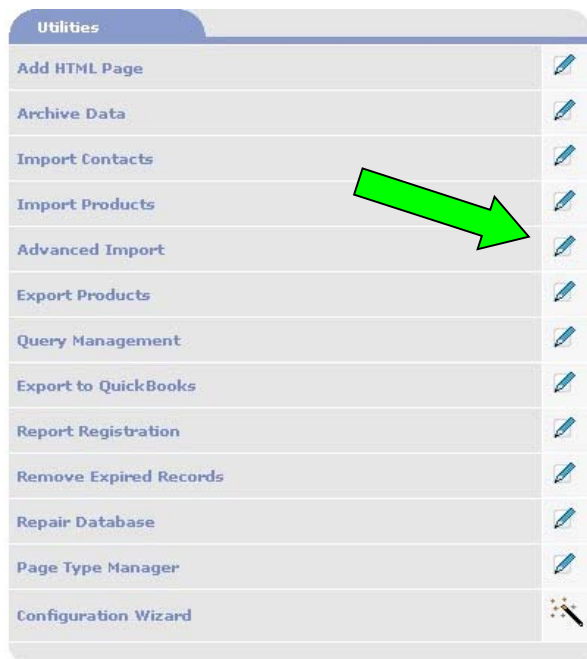
Clicking on the Utilities Menu Advanced Import Edit 🖉 button accesses the Advanced Import page.

Changing Data Type will change Import Page type.

Profile Name Entry Field - Enter a descriptive name here. It will be displayed in Import Profiles dialog window selection list.
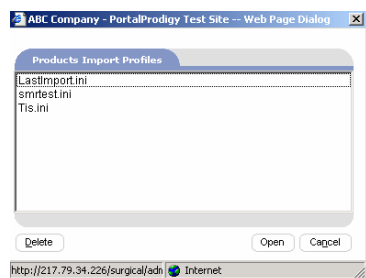
Retrieve Profile Button - Click the Retrieve Profile Button [Retrieve Profile] to display Import Profiles dialog window with selections that correspond to selection in the Data Type field.

Data Type Selection Field - Used to indicate the type of record to be imported: Products, Documents, Contacts, etc. Changing the Data Type refreshes and switches to the appropriate Import Page.

Source Reference – Memo field for reminder note or comment typically used to note source of data.

Import File Browser - Used to browse the user's work station in order to locate the CSV file to be imported.
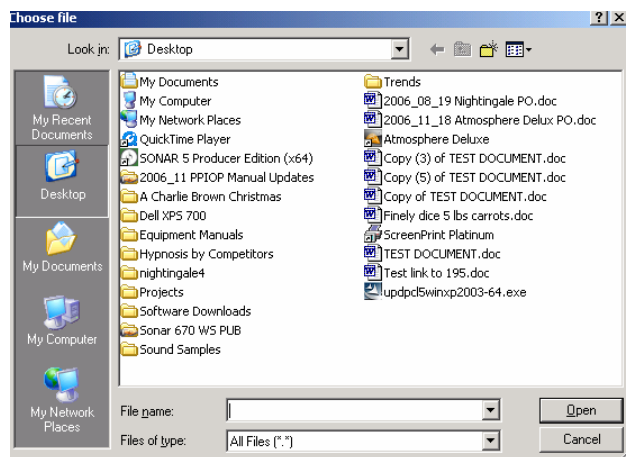
Last Imported File Field – Indicates the name and directory path location of the last file imported.

Update Existing Records Selection Field – The system will search for existing records and merge import data if this field is set to *Yes*. The system identifies matching existing records by one of the four listed fields by priority of their listed order:
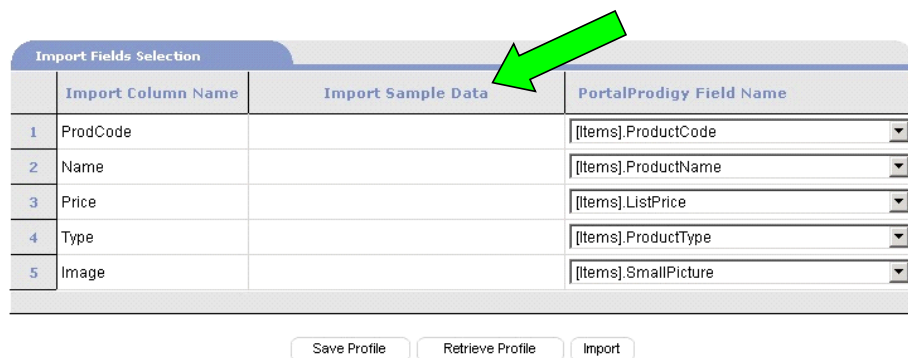
1. Item ID
2. Product Code (must be unique)
3. Manufacturer Name + Manufacturer Product Code
4. Preferred Vendor Name + Preferred Vendor Product Code.

Replace Existing Values Selection Field – If set to *Yes*, the system will replace imported values for existing values in the records. If set to *No*, the system will not import values into fields that already have data for existing records.

Does First Row Contain Field Names Selection Field - If the import file contains a header row, then select *Yes*, otherwise select *No*.

Add New Values to Lookup Tables Selection Field - The Advanced Import Utility provided the ability to map import data fields to internal record fields that use selection data such as Product Type. If you set this field to *Yes*, data that does not already match a current selection available to such fields will be added to the selection list and the record. If you set this field to *No*, data that does not already match a current selection available to such fields will be ignored and not imported.
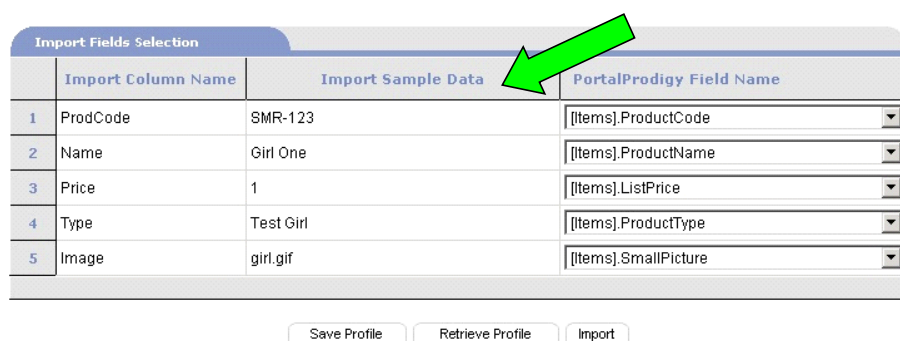
Open Import File Button – Click on the button to load the data from the import file. If the Import Sample Data column of the Import Fields Selection table is empty then there is no data loaded to import.

The Import Sample Data column of the Import Fields Selection table must be loaded with data in order to import.

Click on the Import button [Import] to import the data.

Importing Documents in Bulk – Document Specific Issues

Documents can be loaded in bulk using the Advanced Import feature using a little variation on the CSV file.

Each document must be saved as a separate file and stored in "Documents" sub-folder of folder containing the CSV file. (Note that all files in /documents subfolder will be uploaded regardless of whether specified in CSV file).
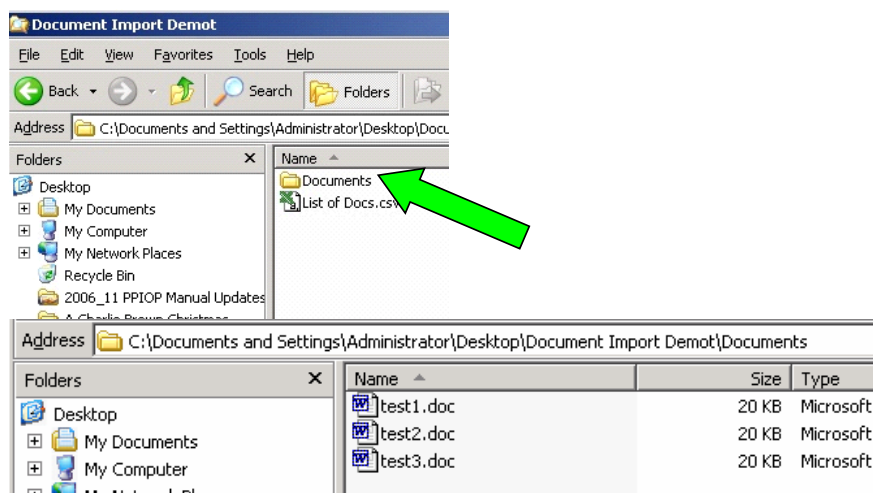
The CSV file for importing the three document listed in the figure above could follow the format as shown below:

Name,Description,File
Test Document One,The first Document in list,test1.doc
Test Document Two,The second Document in list,test2.doc
Test Document Three,The third Document in list,test3.doc

Map the *Document Name* column to "[Documents]:DocumentTitle"
Map the *Description* column to "[Documents]:DocumentDescription"
Map the *File* column to "[Documents]:OriginalFileName"

- **Importing HTML Documents with Related Files**

  HTML files with related files such as images, CSS style sheets, and scripts must follow the standard convention of storing them in sub-folder where sub-folder has same name as the HTML file with "_files" appended to it. For example, the sub-folder for "ReturnPolicies.htm" must be named "ReturnPolicies_files". Note that when you copy an HTML file in Windows it automatically copies this sub-folder for you.

Importing Products in Bulk - Product Specific Issues

Associated product images can be loaded in bulk using the Advanced Import feature using a little variation on the CSV file. Each product image must be saved as a separate file and stored in "Images" sub-folder of folder containing the CSV file.

The CSV file for importing the three document listed in the figure above could follow the format as shown below:

ProdCode,Name,Price,Type,Image
SMR-123,Girl One,1,Test Girl,girl.gif
SMR-234,Girl Two,2,Test Girl,2girl.gif
SMR-767,Girl Three,3,Test Girl,3girl.gif

1.2.4   Import Product Data (Simple)

1.2.5   Query Management

1.2.6   Export to QuickBooks

1.2.7   Report Registration

See the chapter titled *Reporting Features in Detail* for a complete explanation of this feature.

1.2.8   Remove Expired Records

This is a future enhancement that is currently in development. We look forward to offering this feature in the near future.

1.2.9   Configuration Wizard

See the chapter titled *Setup and Configuration* for a complete explanation of this feature.

1.3 Feature Administration

The Utility Menu options are used for infrequently performed special administrative tasks.

1.4 Tutorials

The following tutorials explain how to use the Utility Menu features.

1.4.1   Import Contacts Excluding Media and LRCA Types

1. As a pre-requisite to importing contacts:

   a. Verify that User Signup has been configured.

   b. Read chapter of Administrator Manual titled "Import Data Features in Detail".

c. Have a qualified CSV file containing Contact information either on your computer or accessible on your local area network from your computer.

- File must be formatted according to CSV standards as comma delimited file format.

- Data types must match corresponding Portal Prodigy data types.

- Portal Prodigy accepts most standard phone formats and will convert them to 999.999.9999 format. Phone Extensions should be placed in separate field (column).

- States must be in two letter abbreviated format, such as "CA" for "California". Note that when State is not included as field in import, the default State specified in User Signup Features Management is assigned.

- Country must be in three letter abbreviated format, such as "USA" for "United States of America". Note that when Country is not included as field in import, the default Country specified in User Signup Features Management is assigned.

d. If you want to assign the imported Contacts to a specific Security Group/Type, verify that this Security Group exists; otherwise add it. Read chapter of Administrator Manual titled "User Groups and Security in Detail".

2. Go to Site Administration Menu.

3. Click on the Utilities Go To icon located in the Site Management section.

4. Click on the Add New button.

5. Enter a Profile Name.

6. Click the Browse button and use the Choose File dialog box to select a CSV file.

7. If the imported CSV file contains field (column) labels in the first row, check 'Ignore first row which contains column headings'. This checkbox is located to the right of the 'Values Included' section heading.

8. For each field (column) in the imported CSV file, enter the column number in the text box of the corresponding field name on the Import Contacts Data Management page.

9. A zero or blank (no number) indicates that the field is not in your CSV file.

10. Check all fields that should have their existing value replaced by the imported value. Empty fields in existing contact records will always be updated with the imported value. If the contact is new, all of the fields will be imported when the new contact record is created.

11. Check applicable Contact Types (such as "Client", "Prospect", "Manufacturer", "Vendor", etc.) to assign the imported Contacts to.

12. If applicable, check one or more Special Interest Groups to assign the imported Contacts to.

13. Check one or more Security Types (Security Groups) to assign the imported Contacts to.

14. Click the Save button to save the import profile.

15. Click the Import button to perform the import.

16. When import has finished it will display the total number of rows that were successfully imported and it will list by row number each row that could not be imported and reason why.

17. Click Close button to return to the Utilities Menu.

1.4.2　　Import Media Contacts

1. As a pre-requisite to importing media contacts:

    a. Verify that User Signup has been configured.

    b. Verify that the default PR Media Types are sufficient and if applicable add new PR Media Types.

    c. Read chapter of Administrator Manual titled "Import Data Features in Detail".

    d. Have a qualified CSV file containing Media Contact information either on your computer or accessible on your local area network from your computer.

        • File must be formatted according to CSV standards as comma delimited file format.

        • Data types must match corresponding Portal Prodigy data types.

        • Portal Prodigy accepts most standard phone formats and will convert them to 999.999.9999 format. Phone Extensions should be placed in separate field (column).

        • States must be in two letter abbreviated format, such as "CA" for "California". Note that when State is not included as field in import, the default State specified in User Signup Features Management is assigned.

        • Country must be in three letter abbreviated format, such as "USA" for "United States of America". Note that when Country is not included as field in import,

the default Country specified in User Signup Features Management is
assigned.

- Media Types defined either as separate columns (fields) for each Media Type
  or single column for Media Type with different value indicating media type.

  e. If you want to assign Media Types to a specific Security Group/Type, verify that this
Security Group exists; otherwise add it. Read chapter of Administrator Manual titled
"User Groups and Security in Detail".

2. Go to Site Administration Menu.

3. Click on the Utilities Go To icon located in the Site Management section.

4. Click on the Add New button.

5. Enter a Profile Name.

6. Click the Browse button and use the Choose File dialog box to select a CSV file.

7. If the imported CSV file contains field (column) labels in the first row, check 'Ignore first
row which contains column headings'. This checkbox is located to the right of the 'Values
Included' section heading.

8. For each field (column) in the imported CSV file, enter the column number in the text box of
the corresponding field name on the Import Contacts Data Management page. Fields
(columns) used to specify Media Types (such as "Magazine", "Radio", etc) are specified in
the 'Media Types' section rather than the 'Values Included' section. This is explained
further down in the steps.

9. A zero or blank (no number) indicates that the field is not in your CSV file.

10. Check all fields that should have their existing value replaced by the imported value. Empty
fields in existing media contacts records will always be updated with the imported value. If
the media contact is new all of the fields will be imported when the new contact record is
created.

11. In the 'Media Types' section check the 'Replace Contact Media Types' 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.

12. The Media Contacts Import process supports either of two column (field) layouts for Media
Types:

  a. Separate individual columns (fields) for each Media Type:

- 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").

   b. Single shard column (field) used to specify a single Media Type.

- 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.).

13. Check "Media" in Contact Type section.

14. If applicable, check one or more Special Interest Groups to assign the Media Contacts to.

15. Check one or more Security Types (Security Groups) to assign the imported Media Contacts to.

16. Click the Save button to save the import profile.

17. Click the Import button to perform the import.

18. When import has finished it will display the total number of rows that were successfully imported and it will list by row number each row that could not be imported and reason why.

19. Click Close button to return to the Utilities Menu.

1.4.3   Advanced Import Documents

1. As a pre-requisite to importing documents:

   a. Read chapter of Administrator Manual titled "Document Resource Library in Detail".

   b. Have a qualified CSV file containing Document information either on your computer or accessible on your local area network from your computer.

- File must be formatted according to CSV standards as comma delimited file format.

- Data types must match corresponding Portal Prodigy data types.

- Each document must be saved as a separate file and stored in "Documents" sub-folder of folder containing the CSV file. (Note that all files in /documents subfolder will be uploaded regardless of whether specified in CSV file). HTML files with related files such as images, CSS style sheets, and scripts must follow the standard convention of storing them in sub-folder where sub-folder has same name as the HTML file with "_files" appended to it. E.g. The sub-folder for "ReturnPolicies.htm" must be named "ReturnPolicies_files". Note that when you copy an HTML file in Windows it automatically copies this sub-folder for you.

2. Go to Site Administration Menu.

3. Click on the Utilities Go To icon located in the Site Management section.

4. Click on the Advanced Import option.

5. Select "Documents" from Type list box. Let the page refresh.

6. Click the Browse button and use the Choose File dialog box to select a CSV file.

7. If the imported CSV file contains field (column) labels in the first row, set 'Does first row contains field names?' to "Yes"; otherwise set to "No".

8. If you want the import process to create new values such as Categories, set "Add new values to lookup tables?" to "Yes". If you want the import process to only import values that already exist, set this option to "No".

9. Click on the Open Import File button. (If this is the first time you are uploading something into PortalProdigy from your computer, you may be asked to install an upload applet and to trust a certificate. In order to continue you will need to respond to the prompts to allow installation of the applet and to trust the certificate. This is necessary to upload multiple files from your computer to the Web server. Once installed, it can only upload files that you specify. If you have any questions, please contact us.) This will display the Import Fields Selection section where you will map the columns in your CSV file to PortalProdigy fields.

10. For each field (column) in the imported CSV file, select the applicable PortalProdigy Field Name.

- Note that fields that end with "ID" only accept a PortalProdigy ID. You cannot create IDs. IDs must already exist in PortalProdigy. If a match is not found, the import process will reject the record.

- Also note that the field [Documents].OrginalFileName will import the complete file name including the file's extension, e.g. "ReturnPolicies.htm". If you have the file extension stored in a separate column in your CSV file there is a separate field that can be used for this.

11. Click the Import button to perform the import.

12. If prompted with "Do you agree to upload?" pop-up dialog box, click the Ok button.

13. When import has finished it will display the total number of rows that were successfully imported and it will list by row number each row that could not be imported and reason why.

14. Click Close button to return to the Utilities Menu.

1.4.4   Advanced Import Products

(PortalProdigy also offers an Import Product Data feature that is simpler to use than the Advanced Import. The Import Product Data feature offers a limited set of data fields.)

1. As a pre-requisite to importing products:

    a. Follow the steps outlined in the tutorial titled "Setup a Product Catalog and Online Shopping".

    b. Read chapter of Administrator Manual titled "Item/Products Catalog Features in Detail".

    c. Read chapter of Administrator Manual titled "Import Data Features in Detail".

    d. Have a qualified CSV file containing Product information either on your computer or accessible on your local area network from your computer.

        • File must be formatted according to CSV standards as comma delimited file format.

        • Data types must match corresponding Portal Prodigy data types.

        • If loading product pictures, they must be stored in "Images" sub-folder of folder containing the CSV file. The sub folder must be named "Images" in order for Product Data Import process to find it. (Note that all files in /images subfolder will be uploaded regardless of whether specified in CSV file).

        • If loading product pictures, the CSV file must have a column containing the file name of the picture, e.g. "Item1001.jpg".

        • If loading HTML Product Descriptions, each Product's Description must be saved as a separate HTML file and stored in "Documents" sub-folder of folder containing the CSV file. (Note that all files in /documents subfolder will be uploaded regardless of whether specified in CSV file).

        • If loading HTML Product Descriptions, the CSV file must have a column containing the file name of the HTML description, e.g. "Item1001.htm".

e. If you want to import product Detail Category Keywords, you must define the product Detail Categories before importing products. See the tutorial titled "Setup a Product Catalog and Online Shopping".

2. Go to Site Administration Menu.

3. Click on the Utilities Go To icon located in the Site Management section.

4. Click on the Advanced Import option.

5. Select "Products" from Data Type list box.

6. Click the Browse button and use the Choose File dialog box to select a CSV file.

7. If the imported CSV file contains field (column) labels in the first row, set 'Does first row contains field names?' to "Yes"; otherwise set to "No".

8. If you want the import process to create new values in the lookup tables for Product Brands, Product Classifications, Product Types, etc., set "Add new values to lookup tables?" to "Yes". If you want the import process to only import values that already exist in the lookup tables set this option to "No".

9. Click on the Open Import File button. (If this is the first time you are uploading something into PortalProdigy from your computer, you may be asked to install an upload applet and to trust a certificate. In order to continue you will need to respond to the prompts to allow installation of the applet and to trust the certificate. This is necessary to upload multiple files from your computer to the Web server. Once installed, it can only upload files that you specify. If you have any questions, please contact us.) This will display the Import Fields Selection section where you will map the columns in your CSV file to PortalProdigy fields.

10. For each field (column) in the imported CSV file, select the applicable PortalProdigy Field Name. Note that fields that end with "ID" only accept a PortalProdigy ID. You cannot create IDs. IDs must already exist in PortalProdigy. If a match is not found, the import process will reject the record.

11. Click the Import button to perform the import.

12. If prompted with "Do you agree to upload?" pop-up dialog box, click the Ok button.

13. When import has finished it will display the total number of rows that were successfully imported and it will list by row number each row that could not be imported and reason why.

14. Click Close button to return to the Utilities Menu.

1.4.5   How to Archive and Purge data.

This is a future enhancement that is currently in development. We look forward to offering this feature in the near future.

1.4.6   How to Create a Query to View data.

The documentation for this section is currently being written. We look forward to offering this in the near future.

1.4.7   How to Create and Update Query.

The documentation for this section is currently being written. We look forward to offering this in the near future.

1.4.8   How to Export Transaction Data to QuickBooks.

The documentation for this section is currently being written. We look forward to offering this in the near future.

1.4.9   How to Export Transaction Data to CSV Files for Import into 3rd Party Accounting Systems.

The documentation for this section is currently being written. We look forward to offering this in the near future.

1.4.10   How to Remove Expired Records

This is a future enhancement that is currently in development. We look forward to offering this feature in the near future.