Portal Prodigy™
Broadcasting Features in Detail

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

1.1 Introduction

Broadcaster is a multi-purpose tool which merges message templates with contact data and then delivers them via email. Message templates execute manually, at a scheduled time or when triggered by a process event and broadcast email messages to specified individuals, contact types or interest groups. Variable data from an assortment of PortalProdigy features may be inserted into the text of messages providing extreme flexibility for creating mass customized mailings and automated notices. The feature can also be used to export contact data into .CSV format files which may be used with any fax broadcasting or word-processing software with merge capabilities.

This feature is ideal for opt-in mail programs and automated updates.

Broadcaster benefits include:

- Create an unlimited number of text or HTML message templates.

- Schedule broadcasts for specific dates and time or upon occurrence of a specified system event.

- Configure triggers to notify any one person or specific groups.

- WYSIWYG HTML document editor – Like a word-processor that automatically converts your document to HTML (The program language for creating web pages).

- Automatically notify recipients about online submissions such a new listing on an exchange, news articles, event registrations, etc. Online interaction with practically any PortalProdigy feature can be set to trigger a notification and include current record data from the triggering feature merged strategically into the message content.

- Include attachments from the document library or your computer or network.

- Use broadcaster to export data into database or mail merge ready software.

- You can even use broadcaster to print labels.

- Automated remove from email list system.

Some of the components, fields and settings of the Broadcaster feature, discussed in detail in this chapter, are:

Broadcast Template List
Sort By Radio Button -

Broadcast Template Edit and Update Page
Type Radio Button
Sender's Email Fields
Subject Field
Body Format Radio Button

Upload HTML Page Link
Edit HTML Page Link
Message Field
Attachments Field
Object Type Field
Object Field

Available Tags Field
Schedule Fields

1.2 The Visitor Experience

PORTALPRODIGY can be configured to send emails for a variety of purposes including automated confirmations of orders for products, membership, etc.; promotions; newsletters; announcements; and other notifications.

Visitors can also receive automated responses by email when they register on the site, order products, signup for a membership, register for an event, etc.

Prospects receiving email from you can easily request to be removed from your email list when the remove from email list tag is inserted into broadcast email.

1.3 Components

The Broadcast Feature facilitates sending email, fax or printed messages to a select group of contacts. At the time of this writing PORTALPRODIGY only supports *email* broadcasts from PortalProdigy servers. Fax broadcasting and print broadcasting abilities via PORTALPRODIGY servers are under development but not available to subscribers yet. However, PORTALPRODIGY prepares export files that can be used to broadcast via any permitted visitor's broadcast capable fax server or printer at their remote site.

Broadcasts Run Event can be triggered by any of these three methods:
- Run button pressed on Broadcast Template Maintenance page.
- Automatically by Scheduler.
- Automatically by some other event such as a new contact signup, an event registration, a purchase, etc.

When a Broadcast occurs it performs the following process:
- Retrieves a previously prepared *Broadcast Template*.
- Locates the Contact Records which match the triggering event's search criteria.
- Creates a data set for each matching Contact Record to be merged into the Broadcast Template.
- Merges information from each data set into any applicable variable tags located in the Broadcast Template.
- Emails each merged template to the appropriate contact or exports the merged data to a table where each data set has its own row.

1.3.1 Broadcast Templates

Broadcast Templates are accessed by clicking on the appropriate icon.
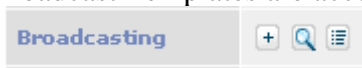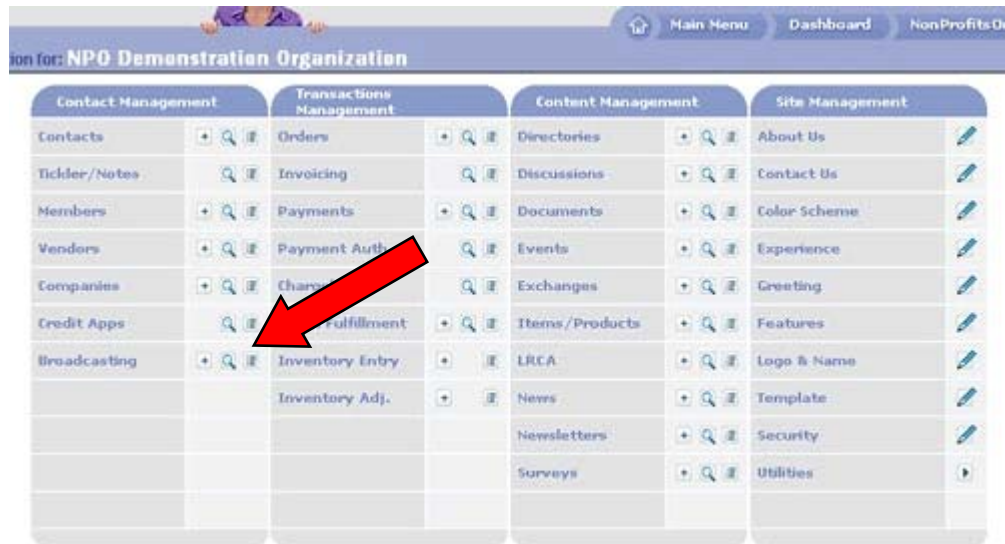
 Activates the Add a New Template function.

 Accesses the Template List.

 Activates the Reports Menu.

Broadcast Template List

Clicking on a template name in the Broadcast Templates list activates the Broadcast Template Edit and Update page.

- **Sort By Radio Button -**

Broadcast Template Edit and Update Page

- **Type Radio Button -**Selecting *Email* causes the template to send an email broadcast when the template is triggered. Selecting *Export to Mail Merge File* causes the template to create and save a .CSV format file on the visitor's remote computer when the template is triggered.

- **Sender's Email Fields -** If the template sends email(s), the address entered into this field will be inserted into the From field of the email(s).

- **Subject Field -** Text entered into the Subject field becomes the template's label and if the template sends email(s), the text entered into this field will be inserted into the Subject field of the email(s).

- **Body Format Radio Button -** Selecting the TXT radio button sets the template for text message. Selecting the HTML radio button sets the template for HTML message and activates the Edit HTML Page and Upload HTML Page links.


- **Upload HTML Page Link -** The message can be prepared using Microsoft Word or another publishing application that can export or save work as an HTML file and then uploaded into the Broadcast Template.

If the template contains graphic, which is very likely, graphics associated with the HTML file must be stored in a folder that bears the name of the parent HTML file followed by "_files". For example, a template saved as "PRTemp.htm" should have a related folder called "PRTemp_files".

Our sample template is saved as shown below:
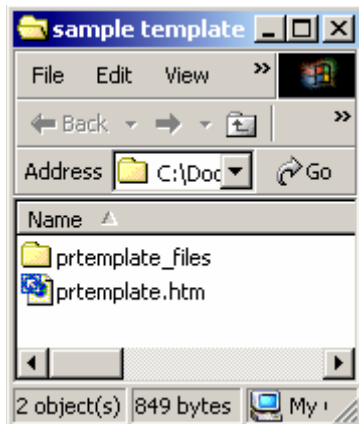
- **Edit HTML Page Link -** NNEM actually has its own document editor.
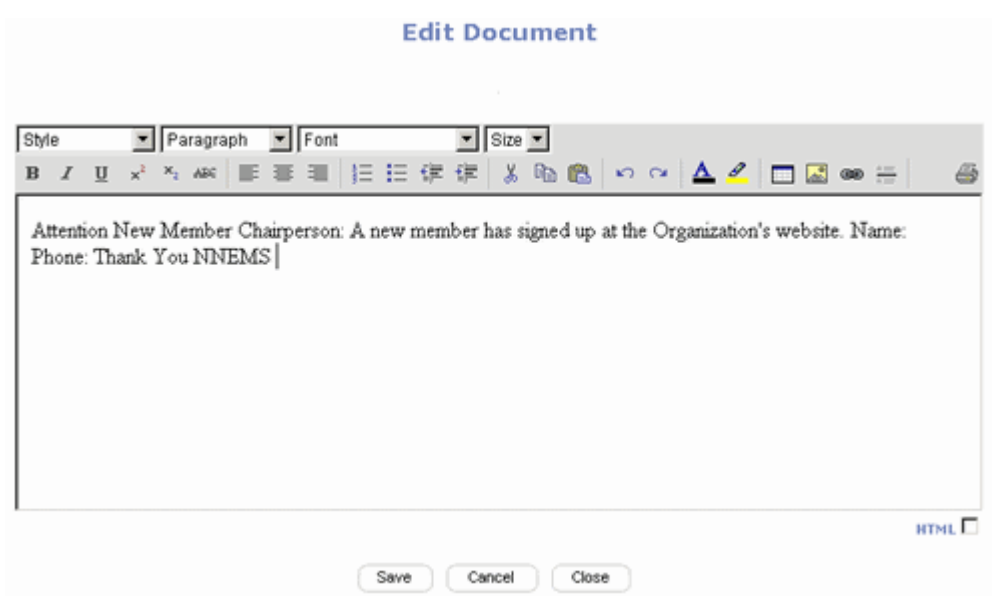
For the sophisticated, clicking on the HTML check box in the lower left hand corner of the editor displays the document's HTML code.

Edit Document

Attention New Member Chairperson: A new member has signed up at the Organization's website. Name: <%CONTACT:FirstName%><%CONTACT:LastName%>Phone: <%CONTACT:HomePhone%>Thank You NNEMS

HTML ☑

Save   Cancel   Close

- **Message Field -** The text or HTML message and merge variable of the template are entered into the Message Field. Merge variable which are displayed in the Available Tags field can be entered into the message. The Broadcaster creates a data set for each matching Contact Record to be merged into the Broadcast Template and merges information from each data set into any applicable variable tags located in the Broadcast Template.

Message:

Attention New Member Chairperson:

A new member has signed up at the Organization's website.

Name: <%CONTACT:FirstName%> <%CONTACT:LastName%>
Phone: <%CONTACT:HomePhone%>

Thank You
NNEMS

- **Attachments Field -** Email Broadcast Templates can include attachments. Attachments must be loaded into the Document Library first (See the chapter titled Documents Feature in Detail).

Attachments: + −

Clicking on the + icon activates the Document Search Page.

Clicking on a document name automatically logs it into the attachment list.

Multiple attachments can be included

Highlighting an attachment and clicking on the – icon removes it.

- **Object Type Field -** Object Type is a class of data related to a specific feature such as Events, Products, etc.

  When you create an event and click on the Broadcast button for that event, PORTALPRODIGY passes the Object Type, in this case "Event" and the Object, in this case the record number for the specific event, to the Broadcast engine. The Broadcast engine then knows what data type it is working with. It can then retrieve the appropriate set of field tags and it knows which data record to pull data from for the specified Object Type.

  If a Broadcast is triggered directly from the Administration Menu, the broadcast will not have a specific Object Type and the field tags will only include the Membership/Contact fields.

  The Membership/Contact fields are always included as field tags, even when an object type is specified. The membership/contact fields retrieve their data from the records specified as recipients of the Broadcast.

- **Object Field -** Object is the record number for a specific Event, Product, etc.

- **Available Tags Field -** The Available Tags change depending on the Object Type selected. The Tags are variable which can be copied and pasted into the Message Field and act as merge variables. The Broadcaster creates a data set for each matching Contact Record to be merged into the Broadcast Template and merges information from each data set into any applicable variable tags located in the Broadcast Template. All Object Types contain the special tag <%CONTACT:REMOVE_FROM_MAILLIST%>. This tag creates a link in the email that recipients can use to be removed from your mailing list.

- **Schedule To Run On Field and Time Fields -** Broadcasts can be scheduled in advance by entering values in the Schedule To Run On Field and Time Fields

Selecting Recipients for the Broadcast Template

There are two ways PORTALPRODIGY determines the recipients for an email broadcast or contact data sets for an export: the selections made in the Broadcast Recipients Selection page which is accessed via the Recipients button

Recipients , or those determined by the specific feature triggering a broadcast.

Recipients can be selected by Contact Type, Special Interest Group, or Security Group. Selecting down a column affects an "OR" search while selecting across columns affects an "AND" search. For example, selecting the boxes Client, Contractor and Contributor would select contacts that are clicked as Client OR Contractor OR Contributor and not necessarily a member of each Contact Type. On the other hand, checking Member, Finance and Accounting, and Admin would select contacts that are Members but must also be in the Financial and Accounting Special interest Group and must have Admin privileges.

Recipients	Accesses the Broadcast Recipients Selection Page.
Save	Saves the data entered into the Broadcast Template.
Delete	Deletes the Broadcast Template.
Print	Prints the website page to the visitor's local printer.
Reports	Accesses the Report Menu
Cancel	Closes the page without saving or updating values.
Close	Closes the page and prompts the visitor to save the data.

1.4 Feature Administration

Features Management

Broadcast Features

Options	
SMTP Server:	1.1.1.1
Administrator Notification Email Address:	smr@nonprofitsonly.com
Sender Name:	NPO Demonstration Organization
Retry Count:	5
Retry Delay Min:	3
Retry Hours:	1

- **SMTP Server Field -** The IP address of the SMTP server, to be used for email broadcasts, is entered in the SMTP Server Field.

- **Administrator Notification Email Address Field -** Every time the Broadcast feature sends an email broadcast, an administrator can be notified. Entering an email address in the Administrator Notification Email Address Field activates the notification system.

- **Sender Name: -** If the broadcaster sends an administrative notification, the address entered into the Sender Name field will be inserted into the From field of the notification email.

- **Retry Count -** Designates the number of times to try sending through the SMTP server if a prior attempt fails.

1.5 Tutorials

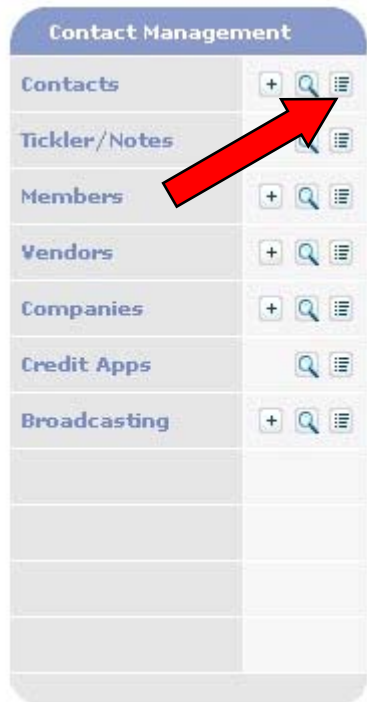## 1.5.1 Create Mailing Labels and Mail Merge Files

PORTALPRODIGY makes it easy for administrators to create mailing labels or merge members' addresses into form letters using Microsoft Word or their favorite word processing application. It does this by exporting an open standard file called a *Comma Delimited File*, also commonly known as a *CSV*.

This tutorial will show how to:

- Search for a targeted group of mail prospects
- Export a .csv file
- View the .csv file with Microsoft Excel or Microsoft Word 2000
- Import the .csv file into Microsoft Word 2000 mail merge document
- Print the labels on Avery labels or their equivalent

From the Administration Menu, click on the Contacts Report Icon.

Select *MailListExportReport* from the list by clicking on its label.

Select the desired Special Interest Groups by clicking on their label. You may select multiple items by using ctrl-Click. Then click on the *Create Export File* button.
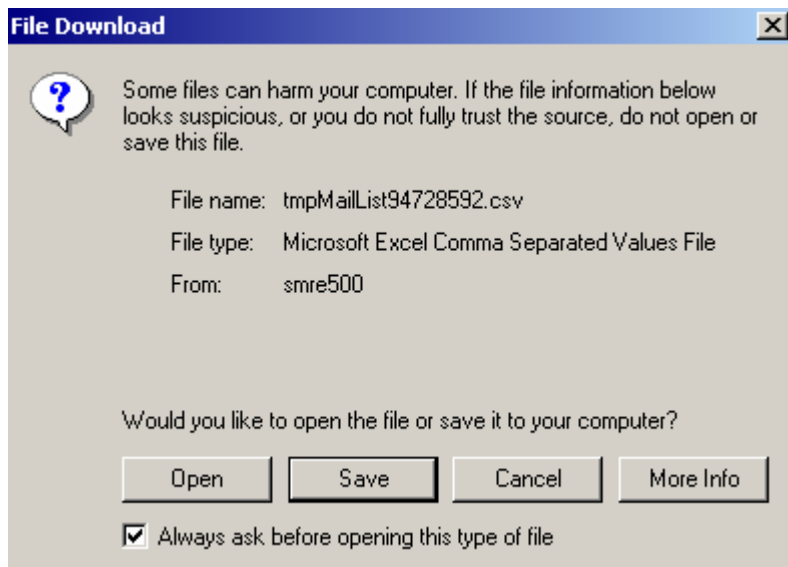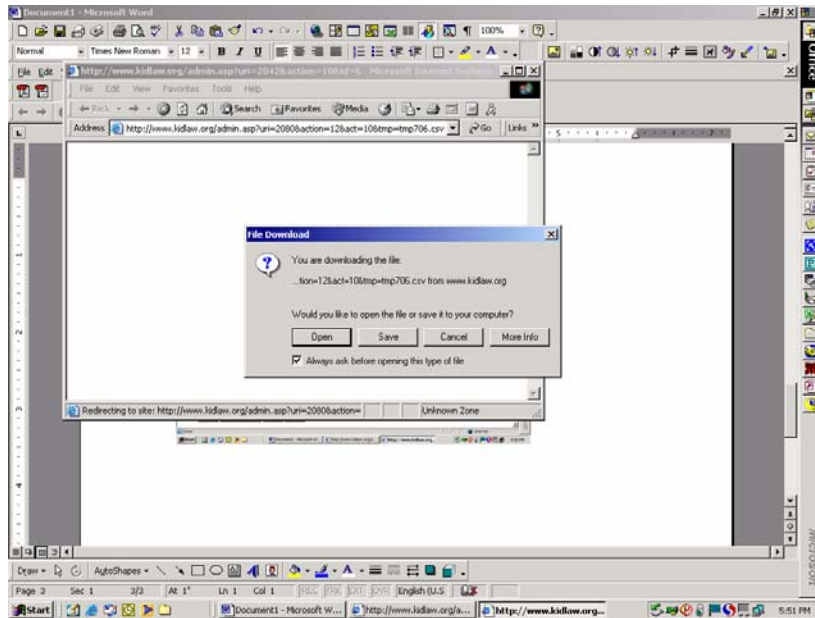
A second browser widow will open while the list processes. The size of the list will determine how long it takes to process. Depending on your bandwidth, computer speed and server load estimates can range fro .01 second per name to 3 seconds per name.
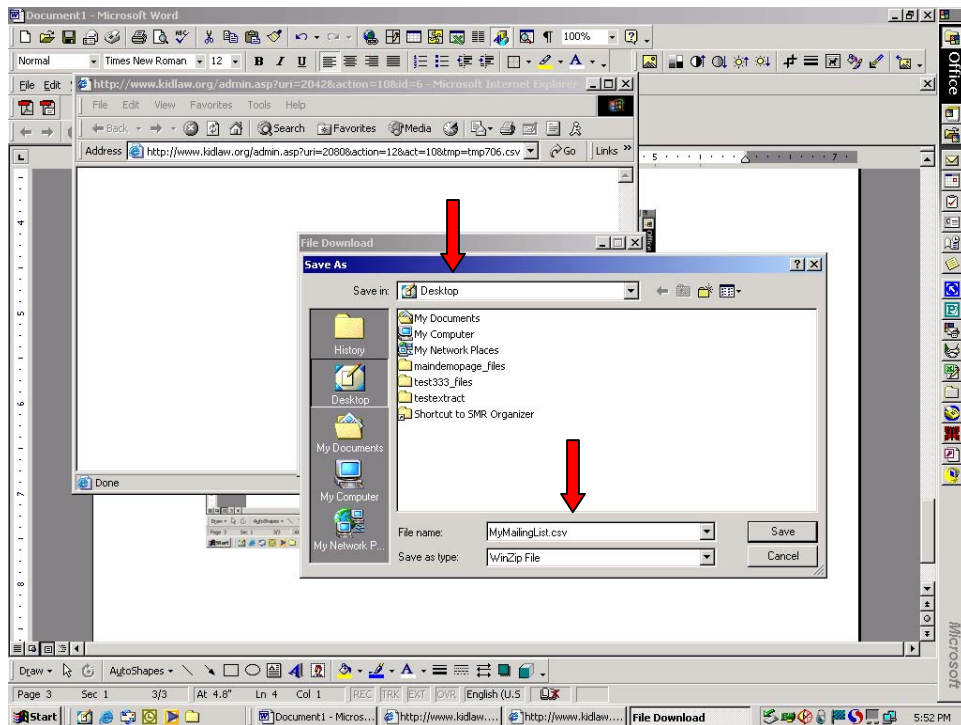

A dialog box will open at some point asking:

```
Would you like to open the file or save it to your
computer?
```
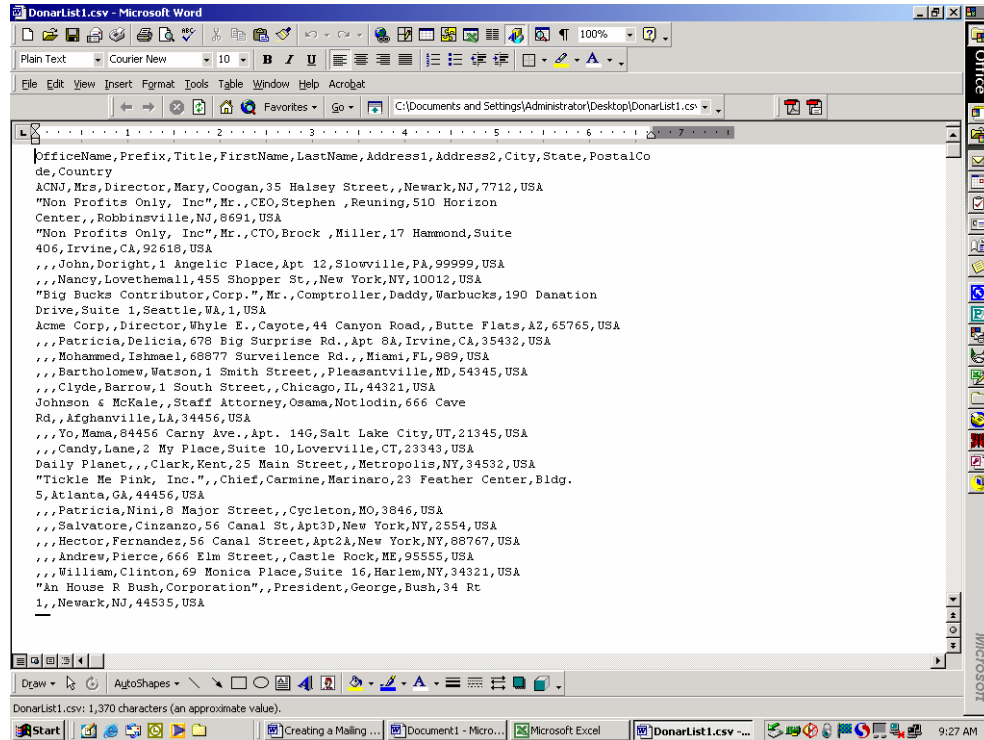
Select *Save*.

Select a desirable folder and file name then select *Save.* At this point you can log off the website and Internet if you wish to because the .csv file is saved on your computer.

To view the data file start your Microsoft Excel Spread Sheet , Microsoft Word, Notepad, or similar application program. The file appears different in a text editor than it does in a

spread sheet but the same data is there. For example, Microsoft Word shows the comma delimiters and quote text qualifiers while Excel uses the comma delimiters and quote text qualifiers to place the data into the proper columns. You can learn more about delimiters in Appendix D.
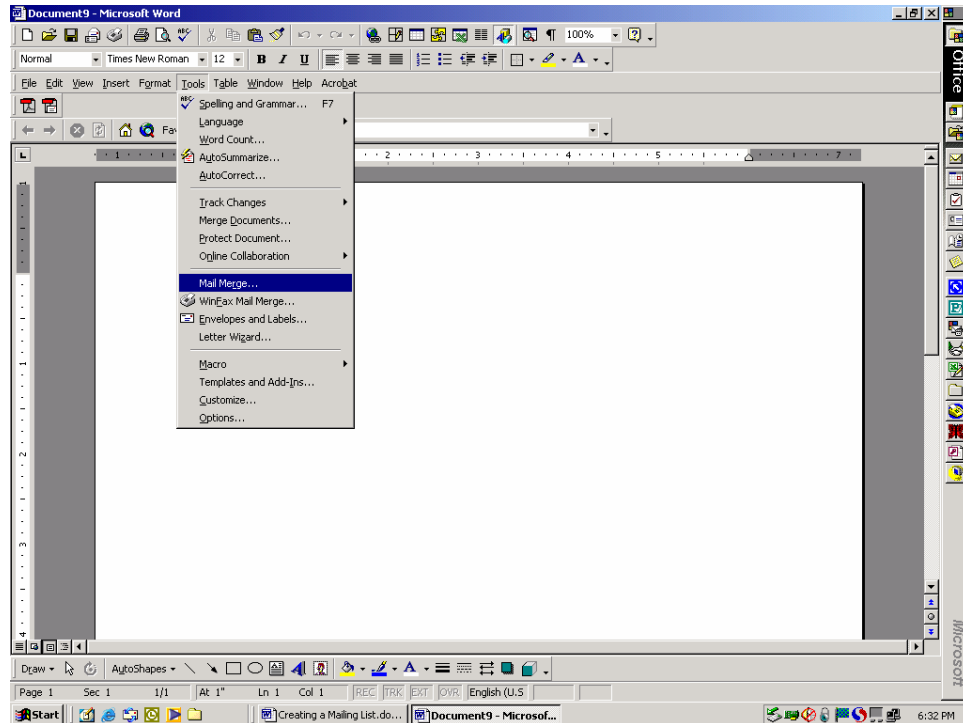
You won't need the .csv file open to create labels. So if the file is open, close it.

The following instructions are specific to Microsoft Word 2000. If you are using a different mail merge or word processing application review the section on merging delimited database files.

Open a blank document in Microsoft Word. Then, select *Mail Merge* from the *Tools* command menu.

Click on the *Create* button of the Mail Merge Helper dialog window.
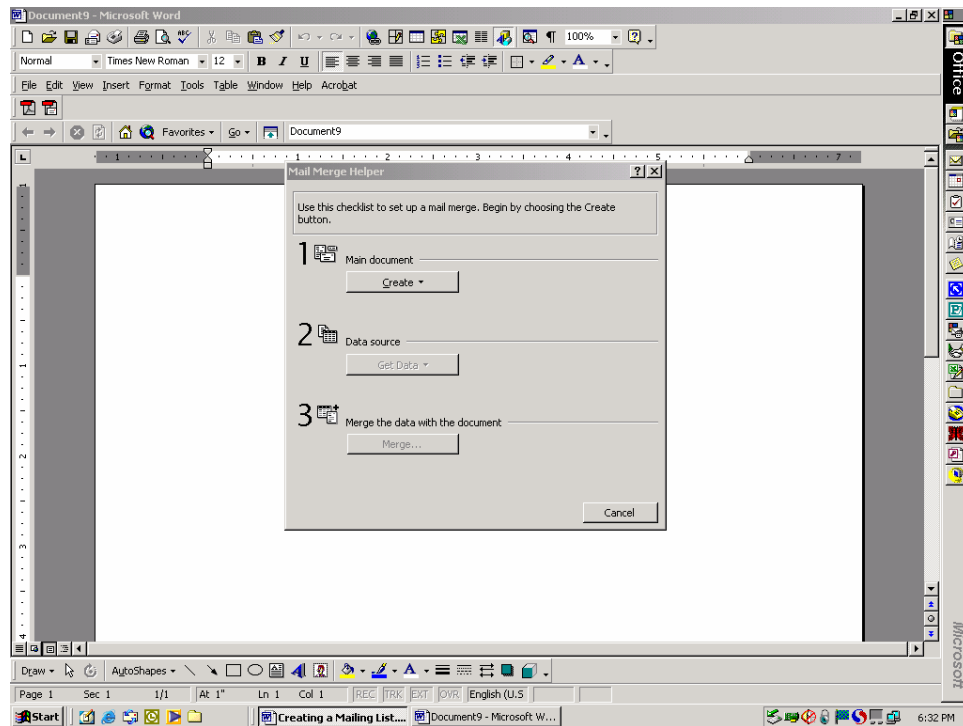
Select *Mailing Labels…* from the pull down list of the Create button.
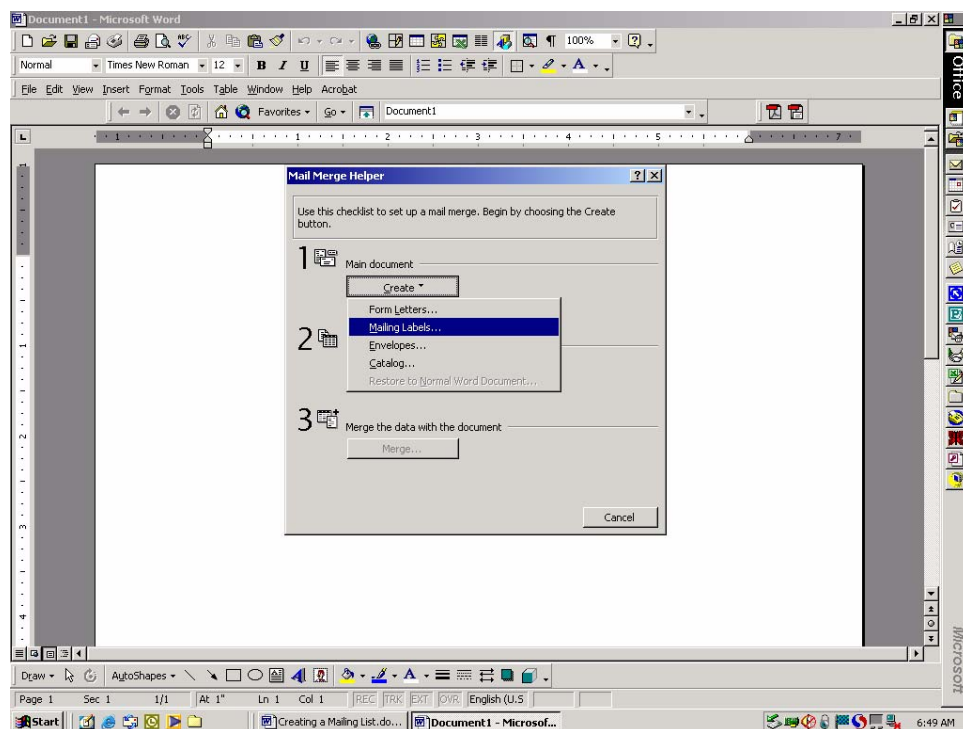
Then select *Open Data Source…* from the Get Data button pull down selection list.
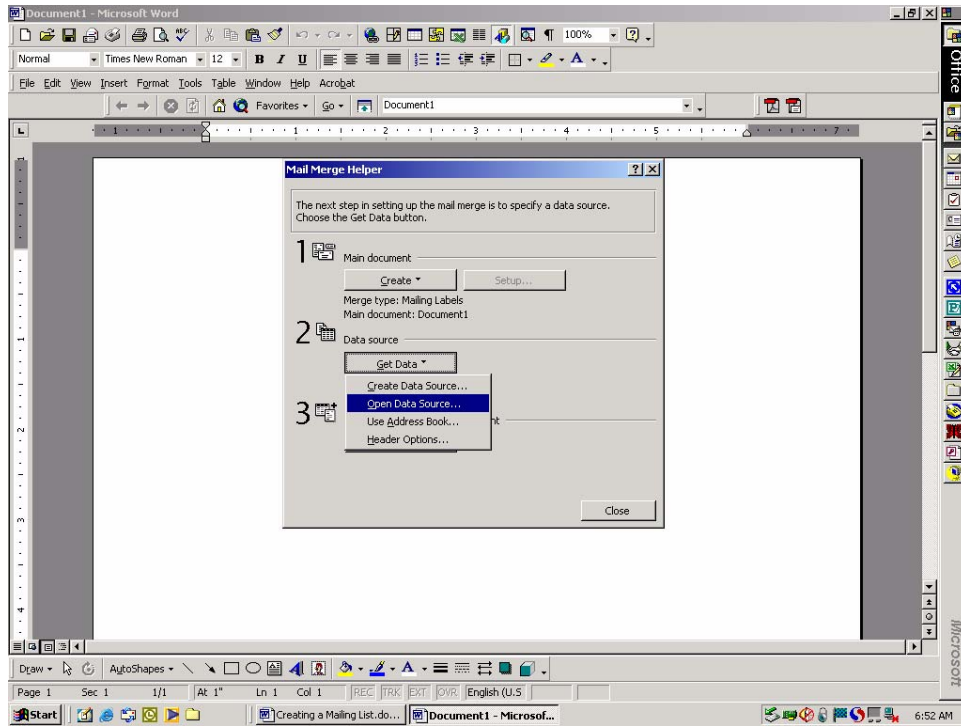
Locate the .csv file you wish to merge and open it.
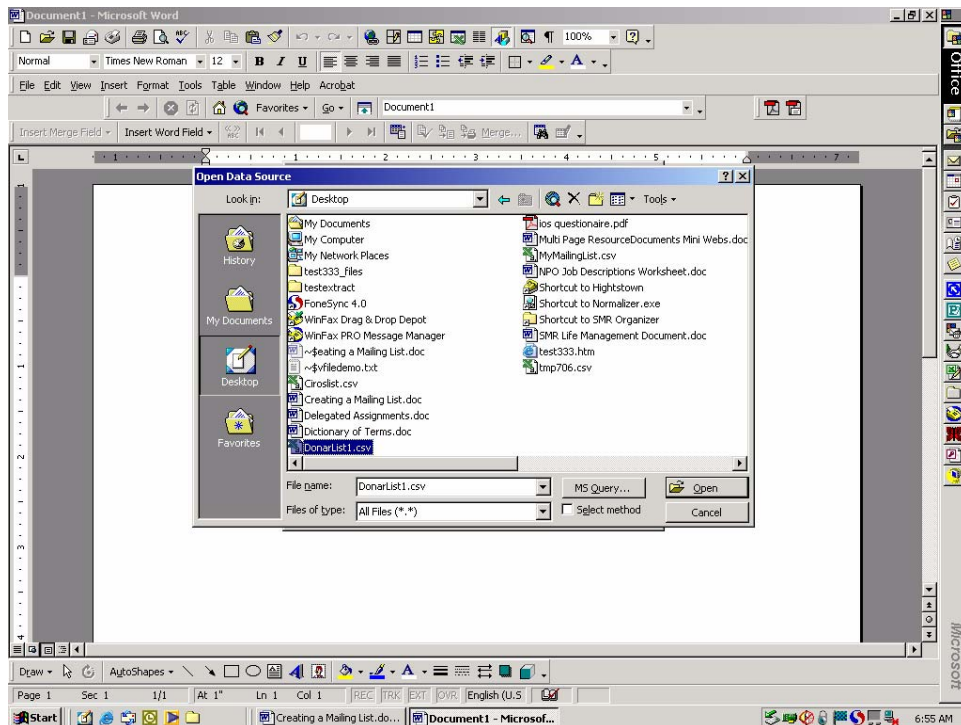
Select the appropriate settings for your printer and labels (we use Avery 5160) and click OK in the Label Options dialog window.
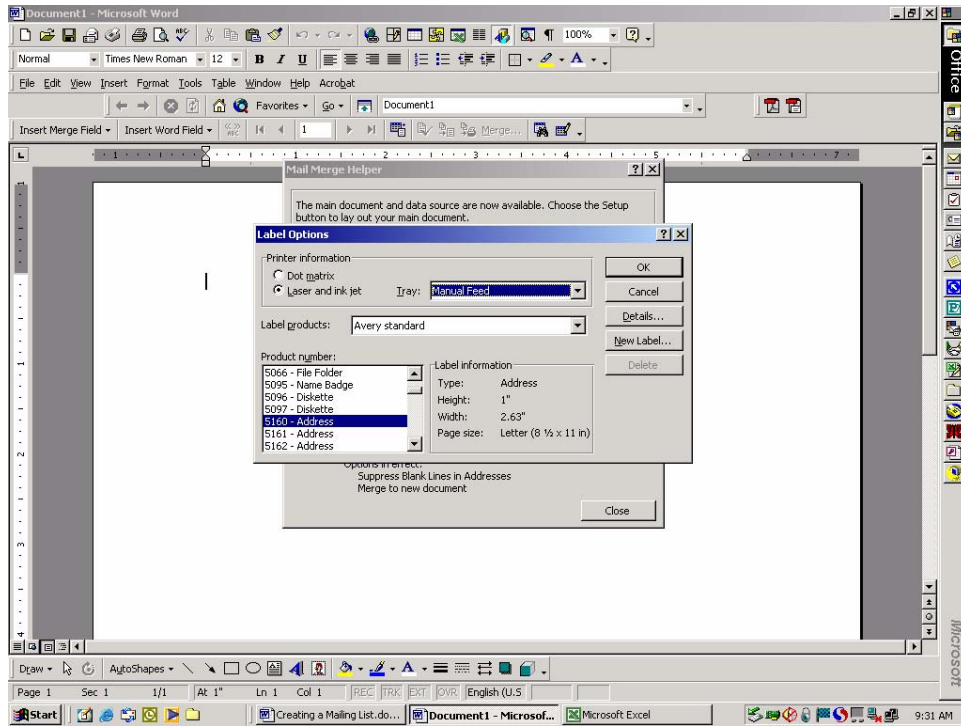
Select the fields you wish to show on your labels by selecting from the Insert Merge Field button on the Create Labels dialog window. It's a process that must be repeated for each field you wish to include on your label so, don't click the OK button until each desired field has been selected.
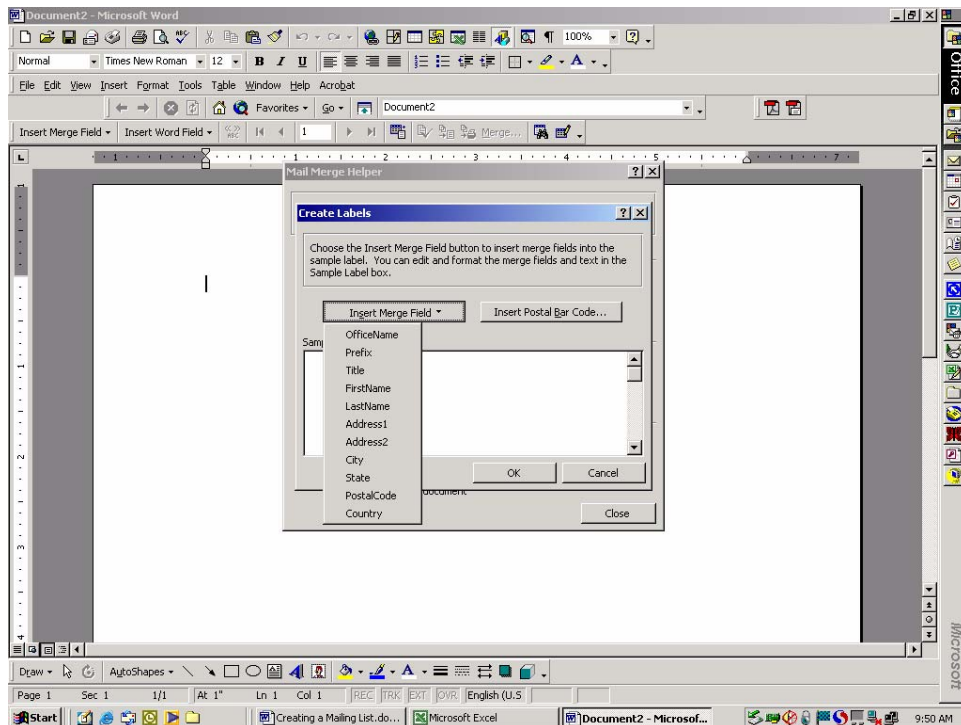
As you select fields, they will appear in the Sample Label box in the Create Labels dialog window. You can use Tabs, Spaces and Carriage Returns in the Sample Label box to format the label.
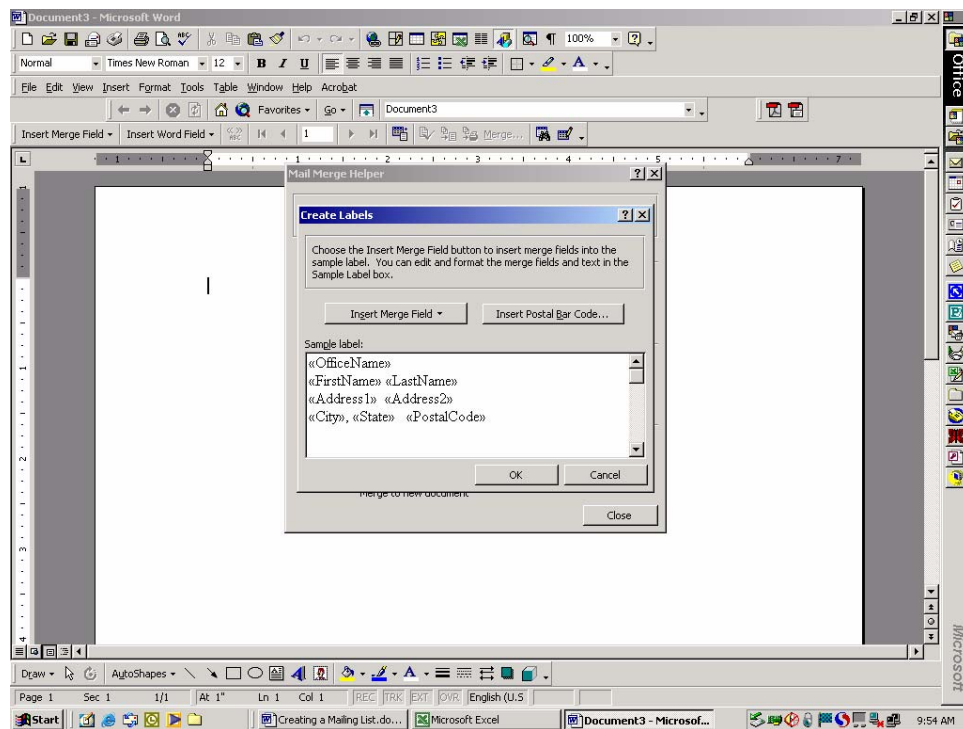
When the label layout is complete, click on the OK button.

Generally, the default settings in The Merge dialog window are appropriate but you can update them if desired. Then, Click on the Merge button.
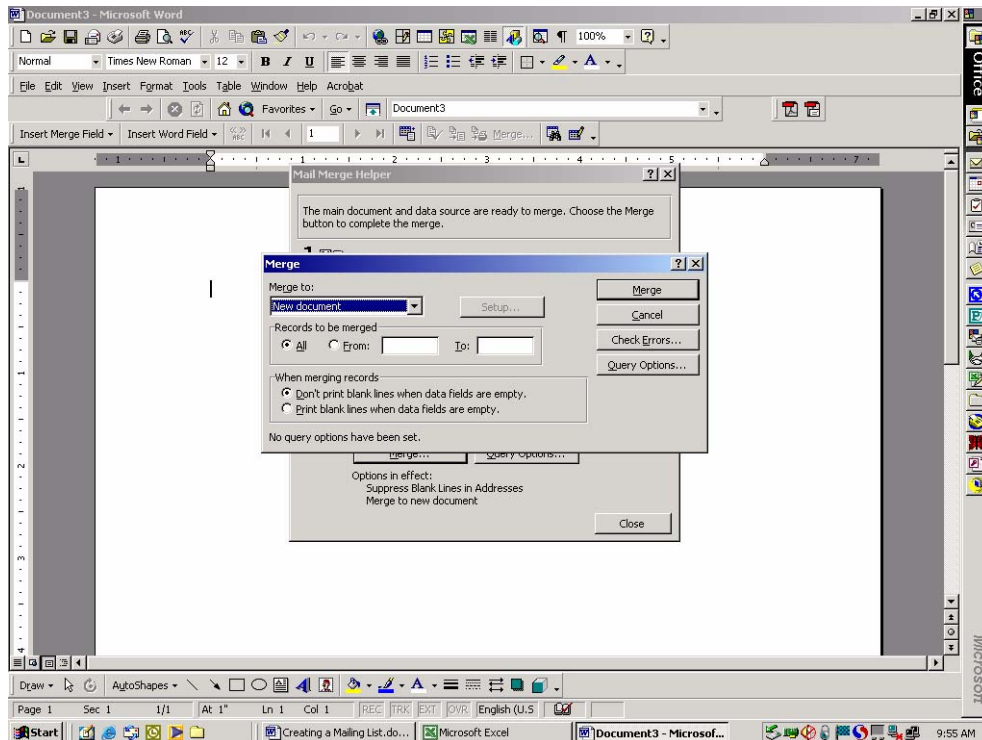
Send you labels to the printer!!!
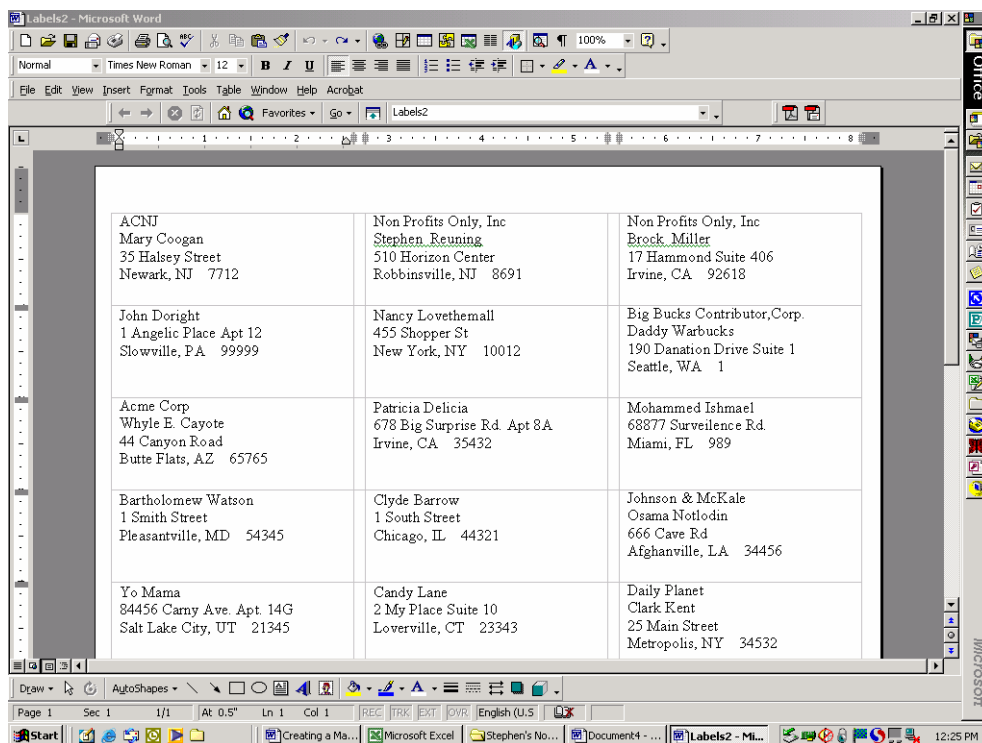
1.5.2 Create Bulk Mail Letters Using Microsoft Word

PORTALPRODIGY makes it easy for administrators to create mailing labels or merge members' addresses into form letters using Microsoft Word or their favorite word processing application. It does this by exporting an open standard file called a *Comma Delimited File*, also commonly known as a *CSV*.

This tutorial will show how to:

- Search for a targeted group of mail prospects
- Export a .csv file
- View the .csv file with Microsoft Excel or Microsoft Word 2000
- Import the .csv file into Microsoft Word 2000 mail merge document
- Print the labels on Avery labels or their equivalent

From the Administration Menu, click on the Contacts Report Icon.

Select *MailListExportReport* from the list by clicking on its label.

Select the desired Special Interest Groups by clicking on their label. You may select multiple items by using ctrl-Click. Then click on the *Create Export File* button.

A second browser widow will open while the list processes. The size of the list will determine how long it takes to process. Depending on your bandwidth, computer speed and server load estimates can range fro .01 second per name to 3 seconds per name.

A dialog box will open at some point asking:

```
Would you like to open the file or save it to your
computer?
```

Select *Save*.

Select a desirable folder and file name then select *Save.* At this point you can log off the website and Internet if you wish to because the .csv file is saved on your computer.

To view the data file start your Microsoft Excel Spread Sheet , Microsoft Word, Notepad, or similar application program. The file appears different in a text editor than it does in a spreadsheet but the same data is there. For example, Microsoft Word shows the comma delimiters and quote text qualifiers while Excel uses the comma delimiters and quote text qualifiers to place the data into the proper columns. You can learn more about delimiters in Appendix D.

Microsoft Word - DonarList1.csv

```
OfficeName,Prefix,Title,FirstName,LastName,Address1,Address2,City,State,PostalCo
de,Country
ACNJ,Mrs,Director,Mary,Coogan,35 Halsey Street,,Newark,NJ,7712,USA
"Non Profits Only, Inc",Mr.,CEO,Stephen ,Reuning,510 Horizon
Center,,Robbinsville,NJ,8691,USA
"Non Profits Only, Inc",Mr.,CTO,Brock ,Miller,17 Hammond,Suite
406,Irvine,CA,92618,USA
,,,John,Doright,1 Angelic Place,Apt 12,Slowville,PA,99999,USA
,,,Nancy,Lovethemall,455 Shopper St,,New York,NY,10012,USA
"Big Bucks Contributor,Corp.",Mr.,Comptroller,Daddy,Warbucks,190 Danation
Drive,Suite 1,Seattle,WA,1,USA
Acme Corp,,Director,Whyle E.,Cayote,44 Canyon Road,,Butte Flats,AZ,65765,USA
,,,Patricia,Delicia,678 Big Surprise Rd.,Apt 8A,Irvine,CA,35432,USA
,,,Mohammed,Ishmael,68877 Surveilence Rd.,,Miami,FL,989,USA
,,,Bartholomew,Watson,1 Smith Street,,Pleasantville,MD,54345,USA
,,,Clyde,Barrow,1 South Street,,Chicago,IL,44321,USA
Johnson & McKale,,Staff Attorney,Osama,Notlodin,666 Cave
Rd,,Afghanville,LA,34456,USA
,,,Yo,Mama,84456 Carny Ave.,Apt. 14G,Salt Lake City,UT,21345,USA
,,,Candy,Lane,2 My Place,Suite 10,Loverville,CT,23343,USA
Daily Planet,,,Clark,Kent,25 Main Street,,Metropolis,NY,34532,USA
"Tickle Me Pink, Inc.",,Chief,Carmine,Marinaro,23 Feather Center,Bldg.
5,Atlanta,GA,44456,USA
,,,Patricia,Nini,8 Major Street,,Cycleton,MO,3846,USA
,,,Salvatore,Cinzanzo,56 Canal St,Apt3D,New York,NY,2554,USA
,,,Hector,Fernandez,56 Canal Street,Apt2A,New York,NY,88767,USA
,,,Andrew,Pierce,666 Elm Street,,Castle Rock,ME,95555,USA
,,,William,Clinton,69 Monica Place,Suite 16,Harlem,NY,34321,USA
"An House R Bush,Corporation",,President,George,Bush,34 Rt
1,,Newark,NJ,44535,USA
```


Microsoft Excel - DonarList1.csv

|	A	B	C	D	E	F	G	H	I	J	K
1	OfficeName	Prefix	Title	FirstName	LastName	Address1	Address2	City	State	PostalCode	Country
2	ACNJ	Mrs	Director	Mary	Coogan	35 Halsey Street		Newark	NJ	7712	USA
3	Non Profits Only, Inc	Mr.	CEO	Stephen	Reuning	510 Horizon Center		Robbinsville	NJ	8691	USA
4	Non Profits Only, Inc	Mr.	CTO	Brock	Miller	17 Hammond	Suite 406	Irvine	CA	92618	USA
5				John	Doright	1 Angelic Place	Apt 12	Slowville	PA	99999	USA
6				Nancy	Lovethemall	455 Shopper St		New York	NY	10012	USA
7	Big Bucks Contributor,Corp.	Mr.	Comptroller	Daddy	Warbucks	190 Danation Drive	Suite 1	Seattle	WA	1	USA
8	Acme Corp		Director	Whyle E.	Cayote	44 Canyon Road		Butte Flats	AZ	65765	USA
9				Patricia	Delicia	678 Big Surprise Rd.	Apt 8A	Irvine	CA	35432	USA
10				Mohammed	Ishmael	68877 Surveilence Rd.		Miami	FL	989	USA
11				Bartholomew	Watson	1 Smith Street		Pleasantville	MD	54345	USA
12				Clyde	Barrow	1 South Street		Chicago	IL	44321	USA
13	Johnson & McKale		Staff Attorney	Osama	Notlodin	666 Cave Rd		Afghanville	LA	34456	USA
14				Yo	Mama	84456 Carny Ave.	Apt. 14G	Salt Lake City	UT	21345	USA
15				Candy	Lane	2 My Place	Suite 10	Loverville	CT	23343	USA
16	Daily Planet			Clark	Kent	25 Main Street		Metropolis	NY	34532	USA
17	Tickle Me Pink, Inc.		Chief	Carmine	Marinaro	23 Feather Center	Bldg. 5	Atlanta	GA	44456	USA
18				Patricia	Nini	8 Major Street		Cycleton	MO	3846	USA
19				Salvatore	Cinzanzo	56 Canal St	Apt3D	New York	NY	2554	USA
20				Hector	Fernandez	56 Canal Street	Apt2A	New York	NY	88767	USA
21				Andrew	Pierce	666 Elm Street		Castle Rock	ME	95555	USA
22				William	Clinton	69 Monica Place	Suite 16	Harlem	NY	34321	USA
23	An House R Bush,Corporation		President	George	Bush	34 Rt 1		Newark	NJ	44535	USA

You won't need the .csv file open to create labels. So if the file is open, close it.

The following instructions are specific to Microsoft Word 2000. If you are using a different mail merge or word processing application review the section on merging delimited database files.
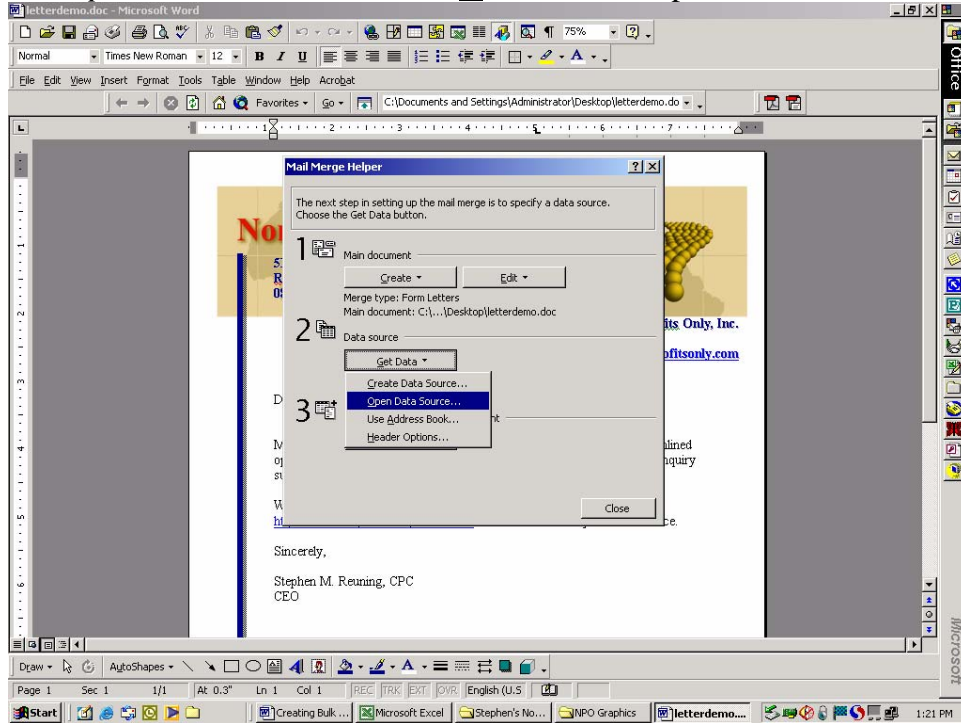
Open a pre-prepared form letter document in Microsoft Word. Then, select *Mail Merge* from the *Tools* command menu.
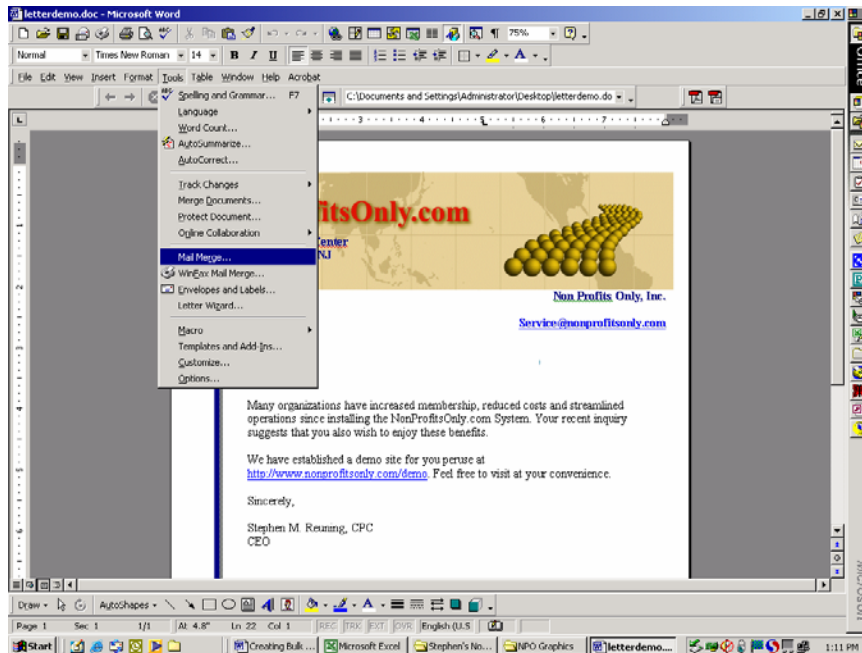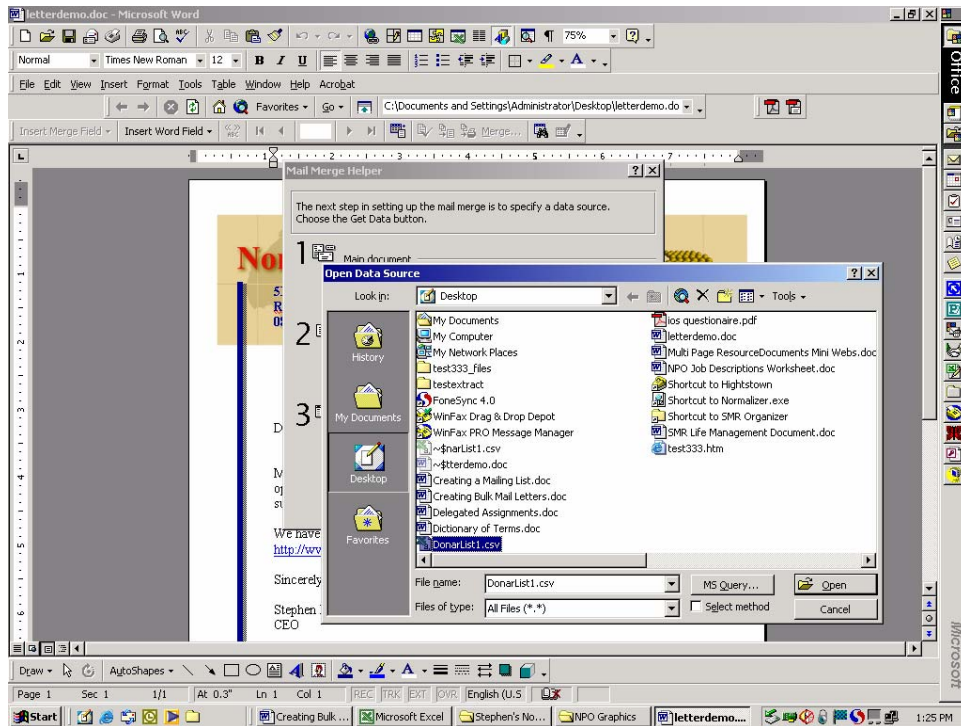

Click on the *Create* button of the Mail Merge Helper dialog window. Select *Form Letters...* from the pull down list of the Create button.
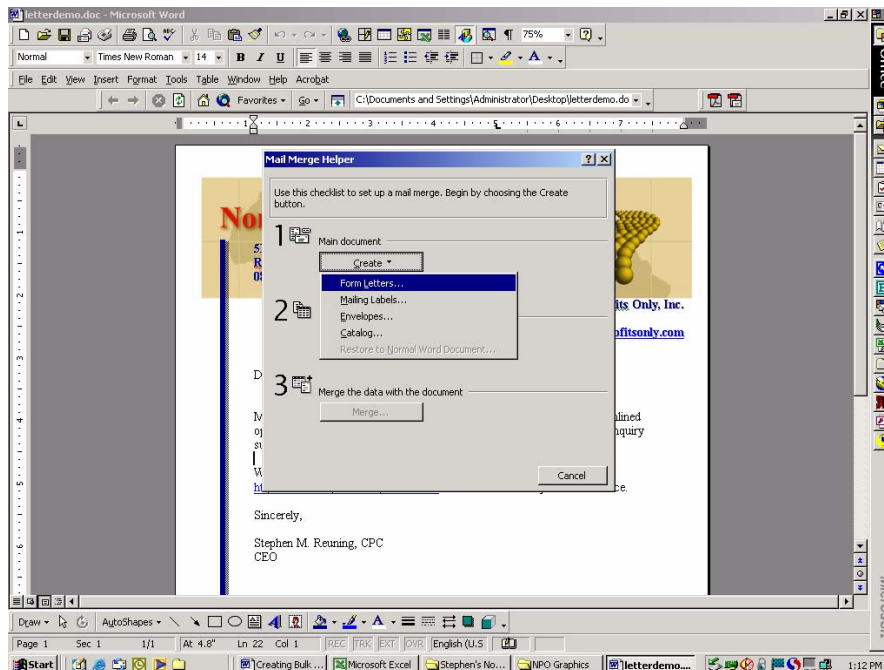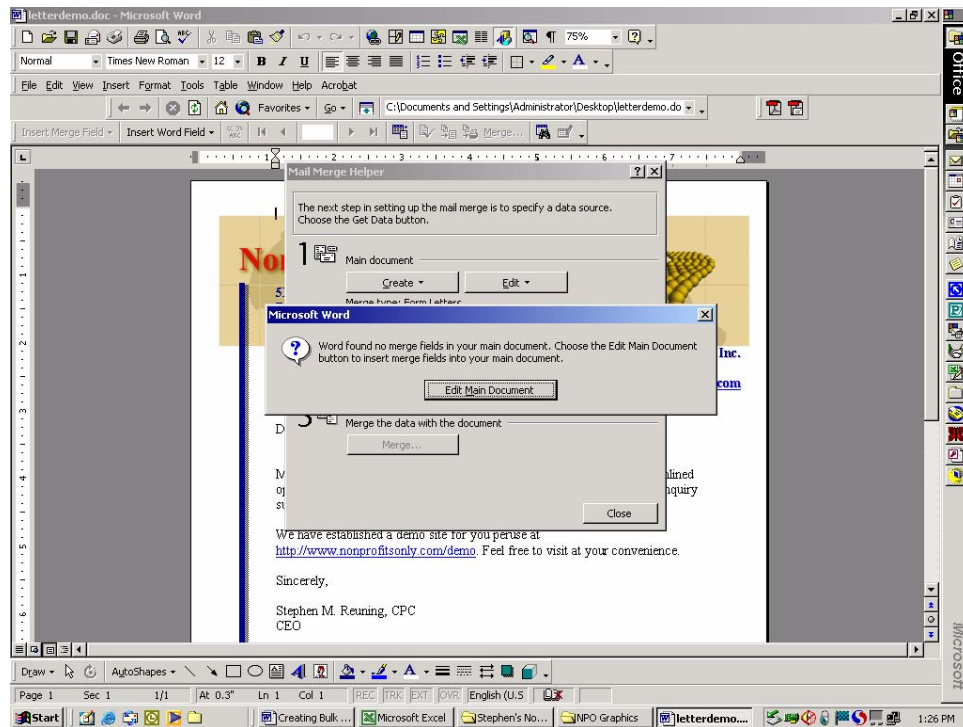
Then select *Open Data Source...* from the <u>G</u>et Data button pull down selection list.


Locate the .csv file you wish to merge and open it.

Once a data source document is selected in Microsoft Word, you insert fields from that source into the form letter. Select *Edit Main Document* from the Microsoft Word document wondow.

Select the fields you wish to show on your labels from the Insert Merge Field list on the merge toolbar in the upper left of the Microsoft Word application window. It's a process that must be repeated for each field you wish to include on your letter.
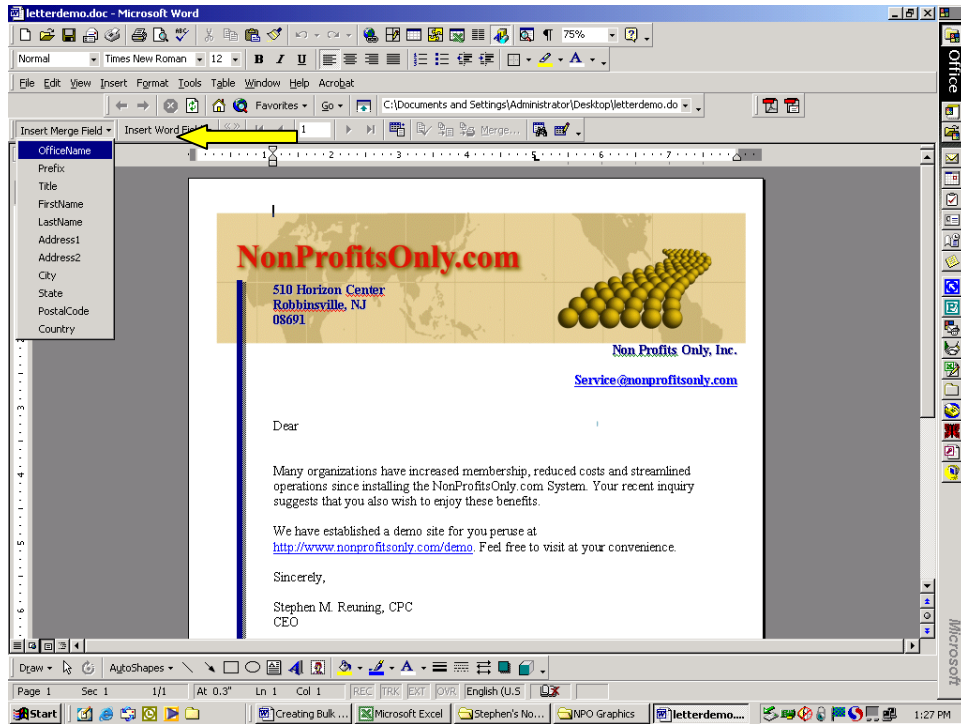
As you select fields, they will appear at the location of the cursor in your letter. You can use Tabs, Spaces and Carriage Returns to format the letter.
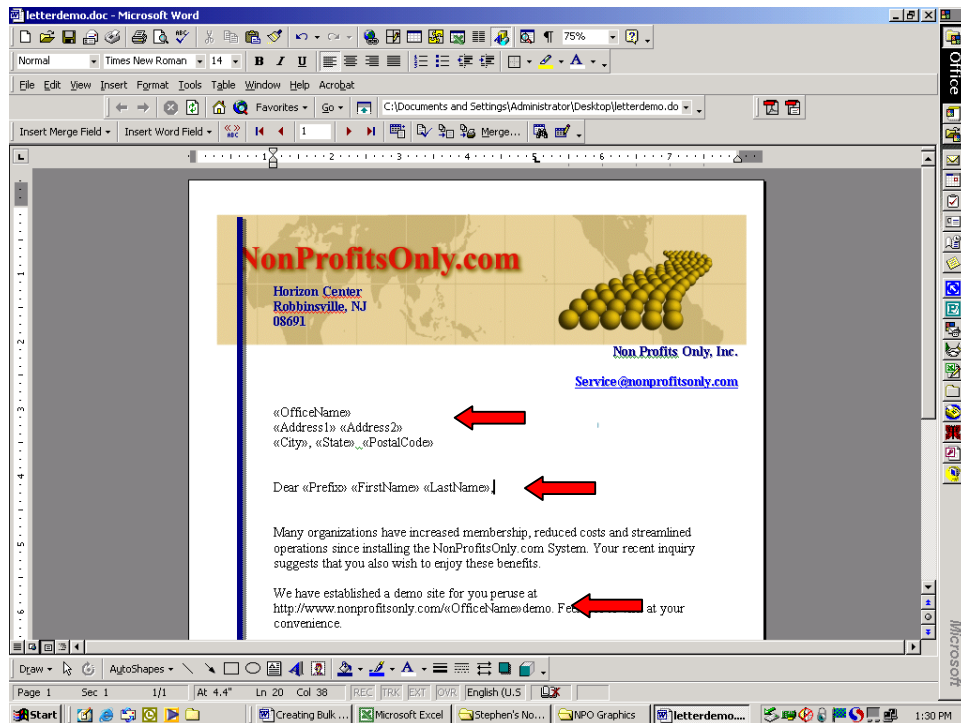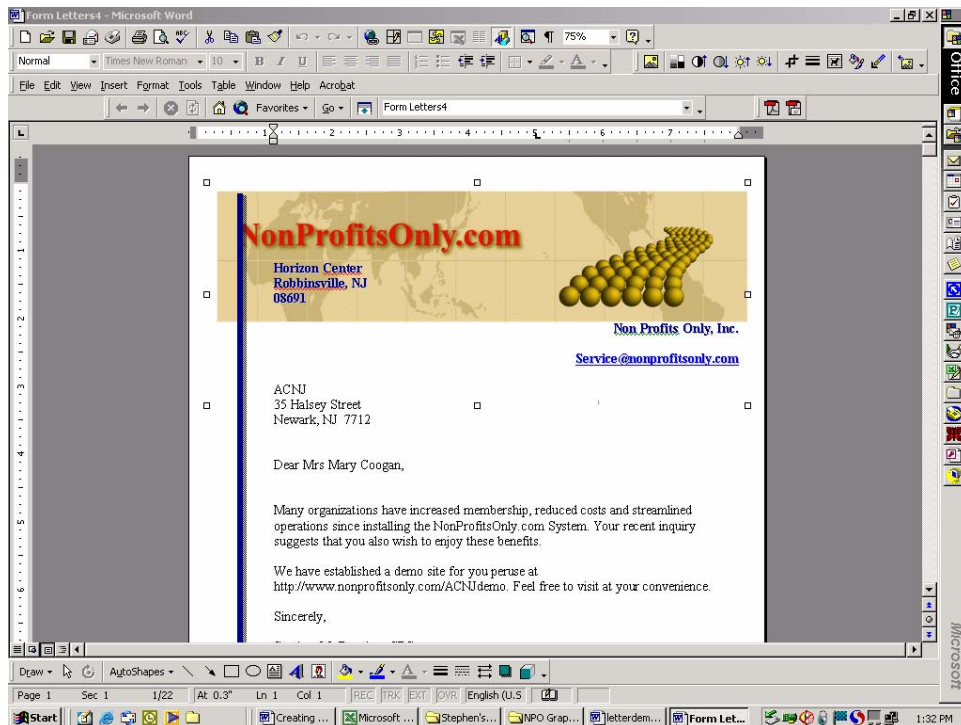
When the label layout is complete, select *Mail Merge* from the Tools Command Menu. Then click on the Merge button.
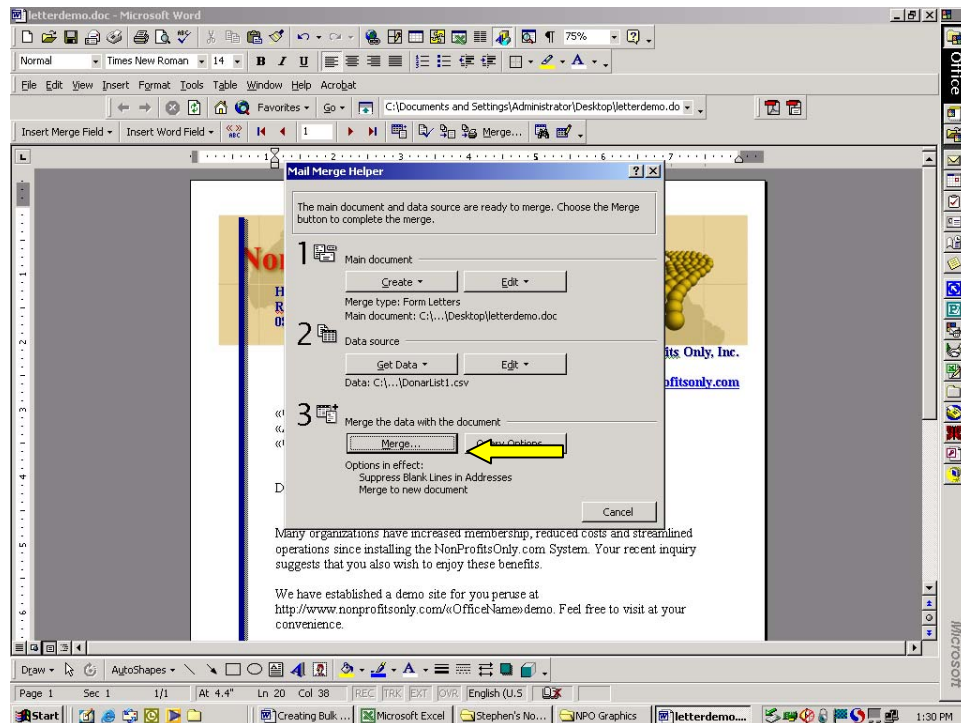
Generally, the default settings in The Merge dialog window are appropriate but you can update them if desired. Then, Click on the Merge button.
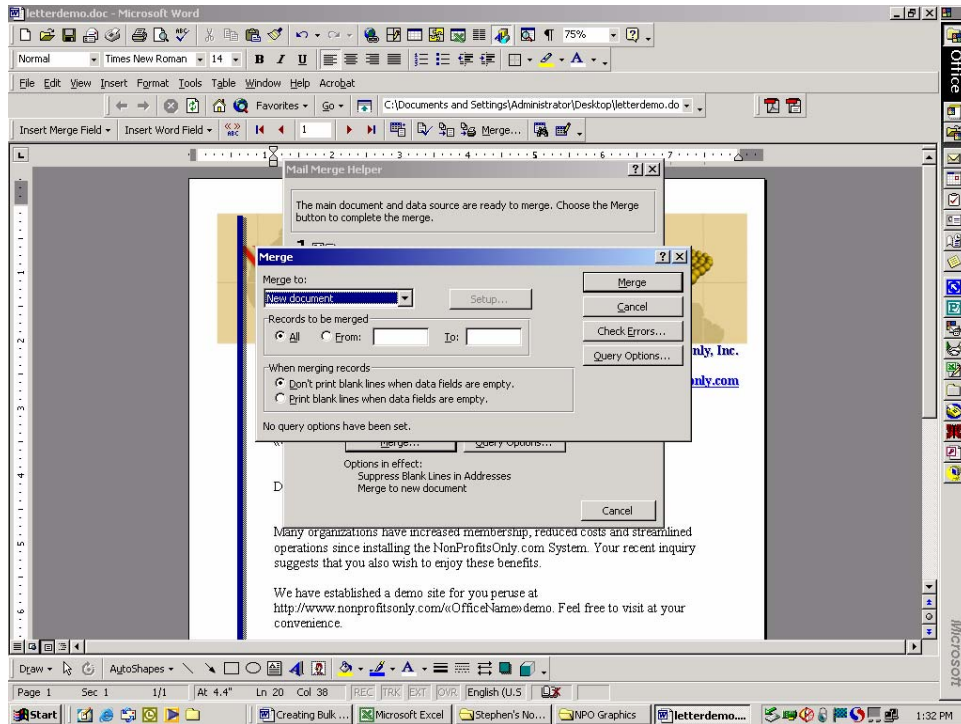
Send you letters to the printer!!!

1.6 Special Situations

When 'Export to Mail Merge File' is selected, the user will just insert tags into Message field. For a typical mail merge they would select the following fields:

<%Contact:First Name%>
<%Contact:Last Name%>
<%Contact:MailToCompanyName%>
<%Contact:MailToAddress1%>
<%Contact:MailToAddress2%>
<%Contact:MailToCity%>
<%Contact:MailToState%>
<%Contact:MailToZip%>
<%Contact:MailToCountry%>

but they can select any of the available tags. They should insert one tag per row/line in Message.

When the 'Export to Mail Merge File' is run, Broadcaster will check each recipient's values for Mail To Office and Mail To Home. It will create a separate output row for each value that is checked and resolve the tags as described below:

If the recipient's Mail To Office is checked, Broadcaster will create a row with:
<%Contact:MailToCompanyName%> replaced by Company Name
<%Contact:MailToTitle%> replaced by Title
<%Contact:MailToAddress1%> replaced by Office Address 1
<%Contact:MailToAddress2%> replaced by Office Address 2
<%Contact:MailToCity%> replaced by Office City
<%Contact:MailToState%> replaced by Office State
<%Contact:MailToZip%> replaced by Office Zip
<%Contact:MailToCountry%> replaced by Office Country
all otherTags will be replaced by applicable value.

If the recipient's Mail To Home is checked, Broadcaster will create a row with:
<%Contact:MailToCompanyName%> replaced by blank value
<%Contact:MailToTitle%> replaced by blank value
<%Contact:MailToAddress1%> replaced by Home Address 1
<%Contact:MailToAddress2%> replaced by Home Address 2
<%Contact:MailToCity%> replaced by Home City
<%Contact:MailToState%> replaced by Home State
<%Contact:MailToZip%> replaced by Home Zip
<%Contact:MailToCountry%> replaced by Home Country
all otherTags will be replaced by applicable value.

When 'Export to Mail Merge File' is run, Broadcaster will ignore everything but tags.

Output file format as CSV (comma delimited ASCII text file with text in quotes, one record per line). The file extension must be CSV. Broadcaster must prompt user with file browser with ability for user to enter a file name. Broadcaster will save the output file on the users system in the specified file name in the specified directory on their system.

Export to Mail Merge File can be saved as template the same as Email. Export to Mail Merge File cannot be saved scheduled, it can only be Run. This is because is must copy file to users machine. In the future we may add scheduling and have it either emailed or placed in ftp directory, but this is too complicated to implement at this time, given our development priorities.

Add field 'Sender Email Address:'. Default value from Broadcast Features page, but allow user to change the email address. Completion and error report should be sent to whatever address is specified here. This change is necessary so that replies go to the appropriate person.