

MyPortal

*Launch, Track and Manage Document and Message Delivery
from the Web*

**User Guide
Version 4.0**

TABLE OF CONTENTS

| | |
|--|-----------|
| Introduction to this Guide | 5 |
| About this guide | 5 |
| Audience | 5 |
| Introduction to MyPortal..... | 6 |
| Overview | 6 |
| Key Benefits..... | 6 |
| Primary MyPortal Features | 6 |
| System Requirements..... | 6 |
| Security Measures | 7 |
| WELCOME: Logging In..... | 8 |
| Logging In | 8 |
| Remember Me | 8 |
| Check Username | 8 |
| Language Selection | 9 |
| Username and Password Help..... | 9 |
| JOBS: Check Job Status | 10 |
| Job Status Dashboard..... | 10 |
| View a List of Your Jobs..... | 10 |
| Locate a Job..... | 11 |
| Check Job Status..... | 13 |
| View Details on Any Jobs in Error | 14 |
| JOBS: Create and Send a Fax Job | 15 |
| Select Job Type | 15 |
| Select Template/Saved Job (optional) | 16 |
| Choose Recipients | 16 |
| Select Document(s)..... | 17 |
| Add Cover Sheet (optional)..... | 18 |
| Add Letterhead (optional)..... | 19 |
| Customize Fax Header (optional) | 20 |
| Send Test (optional)..... | 20 |
| Preview Fax (optional) | 20 |
| Customer Reference and Billing Code (optional) | 21 |
| Delivery Report Type (optional)..... | 21 |
| # of Retries (optional)..... | 21 |
| Schedule Delivery | 22 |
| Review and Send Job | 22 |
| JOBS: Create and Send an Email Job..... | 23 |
| Select Job Type | 23 |
| Select Template/Saved Job (optional) | 24 |
| To: Select Recipients | 24 |
| Subject..... | 25 |
| Open an HTML File..... | 25 |
| Create an HTML message from scratch | 26 |

| | |
|--|-----------|
| Save Your HTML Message | 27 |
| Format Your HTML Message | 27 |
| Add custom elements to your HTML message | 27 |
| Open a Text File | 33 |
| Create a text message from scratch | 34 |
| Add custom elements to your text message | 34 |
| Attach a File (optional) | 34 |
| Add Customer Reference and Billing Code (optional) | 35 |
| Select Report Options | 35 |
| Track Opened HTML Messages (optional) | 36 |
| Schedule your Delivery | 37 |
| Review and Submit Job | 37 |
| JOBS: Create and Send a Voice Job | 38 |
| Select Job Type | 38 |
| Select Template/Saved Job (optional) | 38 |
| Choose Recipients | 39 |
| Message Contents | 40 |
| Specify Customer Reference and Billing Code (optional) | 41 |
| # of Retries | 41 |
| Call Management | 41 |
| Select Report Options | 42 |
| Call Control | 42 |
| Delivery Schedule | 43 |
| Review and Submit Job | 43 |
| JOBS: Create and Send a SMS Job | 44 |
| Select Job Type | 44 |
| Select Template/Saved Job (optional) | 44 |
| Choose Recipients | 45 |
| SMS Message Contents | 46 |
| Specify Customer Reference and Billing Code (optional) | 46 |
| Select Report Options | 47 |
| Delivery Schedule | 47 |
| JOBS: Create and Send a Fax MailMerge Job | 48 |
| Select Job Type | 48 |
| Select Main Document File | 48 |
| Select Data Source File | 49 |
| Select Character Set | 49 |
| Map Fax Address Field | 49 |
| Map Record Reference Field (optional) | 49 |
| Map Fax Header Field (optional) | 49 |
| Select Job Start Time | 50 |
| Select Fax Delivery Mode | 50 |
| Select Job Report Type | 50 |
| Enter Customer Reference (optional) | 50 |
| Enter Billing Code (optional) | 51 |
| Customize Global Fax Header (optional) | 51 |
| View TIFF Preview Fax | 51 |
| JOBS: Cancel a Job | 52 |

| | |
|--|-----------|
| JOBS: Resend a Job | 53 |
| Resend a Job..... | 53 |
| JOBS: Manage Job Templates | 55 |
| Create a New Template..... | 55 |
| Delete a Template..... | 56 |
| Delete All Templates..... | 56 |
| Edit an Existing Template..... | 56 |
| Locate a Template..... | 57 |
| Save Job Settings as a Job Template..... | 57 |
| View a Job Template..... | 57 |
| Use Job Template to Send a Job..... | 58 |
| LISTS: Manage Lists | 59 |
| Upload a New List..... | 59 |
| Map Your List Fields..... | 61 |
| Search for a List..... | 63 |
| View a List of All Stored Lists..... | 63 |
| View List Contents..... | 64 |
| Download a List..... | 64 |
| Delete a List..... | 64 |
| Delete All Lists..... | 64 |
| Edit a List..... | 65 |
| Learn about Text, Comma-delimited (CSV) Files..... | 68 |
| Create a Text, Comma-Delimited (CSV) File using Microsoft Excel..... | 69 |
| Create a Text, Comma-Delimited (CSV) File using a Common Database Application..... | 70 |
| Create a New List from Scratch using Notepad..... | 70 |
| Create a New List from Scratch using Microsoft Excel..... | 71 |
| Set up a List for Use with Cover Sheets..... | 73 |
| Advanced Feature: Control Access to Lists within Your Company..... | 77 |
| Reference Information: List Data Formatting..... | 77 |
| REPORTS | 82 |
| Search for a Job..... | 82 |
| View Job Activity Summary..... | 83 |
| Generate Detailed Job Report..... | 84 |
| Generate Exception Job Report..... | 84 |
| Destination Error Codes..... | 84 |
| Resend a Job..... | 85 |
| Cancel a Job in Progress..... | 86 |
| Retrieve Opt-Out Report..... | 86 |

Introduction to this Guide

About this guide

This guide contains information about the MyPortal application.

Audience

ParentREACH customers are the primary target audience for this guide.

Introduction to MyPortal

Overview

MyPortal is a web-based application that allows your company to quickly and easily create, send, and manage documents and messages online. The self-service portal also provides access to your distribution lists, job reports, templates and account usage details.

Key Benefits

MyPortal consists of a simple-to-follow website that:

- Minimizes the time it takes to send documents and messages
- Simplifies document tracking and management
- Provides step-by-step features to minimize the time you spend training others in your company
- Consolidates all document delivery and billing information in a single place so you can stay organized

Primary MyPortal Features

MyPortal gives you access to the following functions:

- Create and launch email, voice, SMS and fax jobs
- Resend and cancel jobs
- Generate and download reports on status of jobs
- Create and manage job templates
- Upload and manage distribution lists
- View and edit your individual account profile and the profile of other users within your company (administrator privileges)
- View and search online help

System Requirements

MyPortal is available 24 hours per day, 7 days per week via any standard internet browser. You must have Internet Explorer version 6.0 or higher or Firefox. It is also required that you have JavaScript enabled in your browser. A high-speed LAN connection is recommended for optimal functioning.

Security Measures

Security within MyPortal is approached from multiple angles. HTTPS (Hypertext Transfer Protocol over Secure Socket Layer) is the secure protocol for accessing the system from the web. HTTPS protects your privacy by encrypting user page requests. All confidential data are encrypted in the database for further security, and information is hosted in a secure data center.

WELCOME: Logging In

Logging In

The Login page is the first page you see when accessing MyPortal. On this page, you can review new features and see an overview of how the website works. You can also use the dropdown box on this page to select a language in which you would like to view the site.

To log in:

1. Type your Username in the first textbox.
2. Type your Password in the second textbox.
3. Click **Login**.



Remember Me

If you would MyPortal to remember your Username, check the **Remember Me** box. The next time you navigate to the login page your Username will already be entered in the textbox.

Check Username

Once you have logged in, check that your Username at the top left of the form is correct. Some browsers and internet servers may cache this page from a previous user on your system. If your Username is not displayed, you can force your browser not to look in the cache but make another connection to the internet and bring up the page from the server instead. This can be done by holding down the shift key and clicking the “Refresh” (on Internet Explorer) or “Reload” (on Navigator) button.

Language Selection

You can change the language that appears on the site by changing the language drop-down selection. MyPortal contents will appear in the language you select.

Username and Password Help

If you forget your Username or your password, contact ParentREACH Technical Support for further assistance. A Technical Support representative will give you your password after validating your account. Please be prepared to provide your account number, the name of your company's account representative, or the name of your company. 888-REACH-01

JOB Status: Check Job Status

Job Status Dashboard

MyPortal allows you to check the status of your job by using the **Job Status Dashboard** page. From here you can:

- View a list of your jobs
- Locate a particular job
- Check job status
- Cancel a job that is in progress (see Jobs: Cancel a Job)
- Resend a completed job (see Jobs: Resend a Job)
- View details on any jobs in error

View a List of Your Jobs

Jobs sent within the last two days can be located under the **Jobs** tab, which is also the first page you see when you log in. Information about older jobs (those more than two days old) can be found under the **Reports** tab.

To open the Job Status Dashboard:

1. Click on the **Jobs** tab, and click the **Check Job Status** link.

The Job Status Dashboard page will appear with two tables: **Jobs in Progress** – jobs currently running and **Completed Jobs** – jobs completed in the last 2 days.

Jobs In Progress and Completed Jobs Tables

You can use the **Jobs In Progress** table to:

- View list of jobs in progress
- Search for a job
- View status details of a job
- Cancel a job
- Pause and un-pause a voice job

You can use the **Completed Jobs** table to:

- View list of jobs completed within the past two days
- Search for a job
- View status details of a job
- Resend a job

The following information is provided by these tables:

Jobs In Progress Table Columns

| Column Name | Description |
|---------------|---|
| Job # | A unique tracking number. The job number is generated automatically when your job has been accepted. |
| Job Type | The type of job that was launched: fax, email, voice or SMS. |
| Status | The status options for a job include <i>in progress</i> (documents or messages are still being sent), <i>scheduled</i> , or <i>error</i> (job could not be started due to an error with the document, list, or job settings). <ul style="list-style-type: none"> Clicking the status link will display the Job Status Details page where you can see the current state of the job (ex: Awaiting Delivery), a status bar showing how much of the job has been completed, and the number of messages that are sent, pending, errored, or cancelled. If you click the Cancel button on this page, you will cancel the remainder of your job. Clicking the status link for a job that is in error will display the error code and details about the error. Clicking the status link of a scheduled job will allow you to reschedule the job to a new date and time or send it immediately. |
| Delivery Type | The delivery time for the job: express (immediate), scheduled, or off-peak. |
| Started | The date and time that attempts for your job were started by the system. |
| List Name | The address list(s) used for your job. |
| # of Items | The number of recipients in your job. |
| Action | The actions permissible for your job. If your job is still in progress, you may cancel any job or pause and un-pause a voice job. |

Completed Jobs Table Columns

| Column Name | Description |
|---------------|--|
| Job # | A unique tracking number. The job number is generated automatically when your job has been accepted. |
| Job Type | The type of job that was launched: fax, email, voice or SMS. |
| Status | The status options for a job in this table will show <i>completed</i> . Each row of the status column includes a link which you may click to view the Job Status Details for the selected job. |
| Delivery Type | The delivery time for the job: express (immediate), scheduled, or off-peak. |
| Completed | The date and time that all job attempts were finished. |
| List Name | The address list(s) used for your job. |
| # of Items | The number of recipients in your job. |
| Action | The actions permissible for your job. If the job has completed all attempts you may resend the job. |

Locate a Job

Following are several techniques to help you locate a particular job:

Search for a Job by Job #

Search for a particular job by the job number that was assigned by MyPortal when your job was submitted. This job number appears in the Job # column of the Job Status Dashboard as well as on the reports in the Reports section. To search for a job on the Job Status Dashboard use the following steps:

1. Decide whether your job will most likely be listed in the Jobs in Progress table or the Completed Jobs table. This is the table you will search.
2. Enter the job number in the search textbox at the top left of the appropriate table.
3. Click the **Search** button and the table will list the results of your search.

Clicking **Show All** will refresh the page after performing a search and display all of the jobs again.

Navigate Through Table to Locate Job

If your job does not appear on the first page, navigate through the table by clicking the page numbers at the top of the table or by clicking:

- *First* to see the first page
- *Prev* to see the previous page
- *Next* to see the next page
- *Last* to see the last page

Sort Column Headings

Re-sort columns by clicking one of the column headers (Job, Status, Started, Completed, List Name, # of Items and Action). To sort in the opposite direction, click the column header a second time.

Expand or Reduce Number of Jobs Per Page

Control how many jobs are displayed in the table by using the dropdown box at the top, right. The table will show approximately 20-25 rows by default.

Example – list only 10 jobs:

Your complete list contains 23 jobs, but you only want to see 10 jobs per page. To do this, you select *10 jobs* in the dropdown box at the top right. The page is then redisplayed with the first 10 jobs listed in the table. To see the second page listing of the next 10 jobs, you click *2* or *Next*. To see the final page of your listing (fax jobs 21, 22 and 23), you click *3*, *Next*, or *Last*. You can then click *Prev* to see a previous page on the list or *First* to return to the first page.

Filter Jobs by Type

To view the jobs by type, select fax, email, voice or SMS in the drop-down list. Jobs of that type will be displayed.

Filter Completed Jobs by Date

To narrow the jobs displayed in the Completed Jobs table by date, you can filter them by *Today Only*, *Yesterday Only*, or *Show All* using the dropdown box at the top.

Check Job Status

Your job can have one of four statuses: *In Progress*, *Completed*, *Paused* or *Error*.

- **In Progress** jobs are listed in the Jobs In Progress table. These jobs are still in the process of delivering.
- **Paused** jobs are listed in the Jobs In Progress table. These jobs are voice jobs that you have paused. You can un-pause a paused job.
- **Completed** jobs are listed in the Completed Jobs table. These jobs have completed delivering.
- **Error** jobs are listed in the Jobs In Progress table. These jobs could not be started due to an error with job itself. Errors could be caused by a number of things including incorrect or unsupported document format, incorrect list format, incorrect delivery report destination, etc.

To view job status details:

1. Locate the job
2. Click on the status of the job
3. View status details

The **Job Status Details** page refreshes every ten seconds and displays the following information:

- **Job Number** – the number assigned by the system when your job is submitted
- **Job State** – the current status on the processing of your job (ex: “Awaiting Delivery”, “Delivery Completed” or “Error”)
- **Percent Complete** – the percentage of messages that have been completed
- **Sent** – the number of messages that have been sent successfully
- **Pending** – the number of messages that are still waiting to be delivered
- **Errors** – the number of messages in which the delivery failed
- **Blocked** – the number of messages that were blocked by the system
- **Cancelled** – the number of messages in your job that you cancelled successfully

Depending on the state of your job, you may **Cancel** the job (for in progress jobs) or **Resend** (for completed jobs). See sections **Jobs: Cancel a Job** and **Jobs: Resend a Job** for instructions.

View Details on Any Jobs in Error

Errors may occur during the processing of a job. If your job could not be launched due to an error, the status of the job will show **Error**. Clicking on job status will provide error information including the error's processing code and error details.

JOB: Create and Send a Fax Job

MyPortal makes it easy for you to create and send a new fax job. You may also save your fax job details as a job template. It is quite straightforward to build a new fax job using a job template that you previously saved in the system. The system supports 4 basic functions: Step 1: Choose Recipients; Step 2: Document Information; Step 3: Job Tracking and Report Options; and Step 4: Delivery Schedule. Then you will advance to the Review and Send Job page.

There are a number of required and optional features available:

- Use an existing job template/saved job (optional)
- Choose list (new or stored)
- Additional recipients
- Select document(s)
- Add cover sheet (optional)
- Add letterhead (optional)
- Customize fax header (optional)
- Send test (optional)
- Preview fax (optional)
- Specify customer reference and billing code (optional)
- Select delivery report type (optional)
- Select number of retries (optional)
- Schedule your delivery
- Save your job as a template (optional)
- Review and send job

Select Job Type

First, select the 'Jobs' tab and choose 'Create/Send Job' option. The job type is the type of job you are creating – fax, email, voice, SMS or fax mail merge. If 'fax' is selected as the default job type in your account settings, the Create/Send Job page for a fax job will be displayed automatically. If not, select the 'fax' icon to have the Create/Send Fax Job page displayed:

CREATE/SEND FAX JOB



Select Template/Saved Job

Select Template/Saved Job (optional)

What is a job template?

A job template is simply the settings you save for any job you send. You can give the job a name when you create it and select that name when you want to launch a new job with the same or similar settings.

Create Job Template (optional)

1. Click the **Save as a Template** button in the lower right corner at any time.
2. Enter a name for your job.

The job details you have entered so far will be saved under the name entered.

Use a Job Template/Saved Job (optional)

To build your job off of a previously saved job template, select the job template from the dropdown box in the upper right-hand corner of the “Create/Send Job” page. Once you have selected a job template, the job details for the selected template will be pre-filled on all of the Create/Send Job steps. You may then continue to modify the details for your job as desired. (If you would like more information on how to modify the job template, please refer to **JOBS: Manage Job Templates.**)

Choose Recipients

You can upload a new list or select a stored list:

Upload New List

To upload a new distribution list from your local system, use the following steps:

1. Click **Browse**. A window will display, which allows you to locate the list on your local system. *The list must be in text format and delimited by comma, tab, semi-colon or colon.*
2. Once you have found your list, click on its file name and click **Open**. MyPortal will then close the browse window and your list will be uploaded to the system. The list will automatically be associated with the job you are sending.

If you wish, you may change your mind and remove one or more of your selected lists from your job by highlighting and deleting the list name in the **Select Stored List** box.

(For more information on how to upload a list from your local system and ensure proper formatting of your file, please refer to **Lists: Upload a New List.**)

Select Stored List

To use a distribution list that you previously stored:

1. Click **Select File** next to “Select Stored List”. MyPortal will display a list of your available lists.
2. Select one or more distribution lists by holding down the CTRL key and clicking the name of the lists. (Note: You may also view, delete and upload lists from this location.)
3. Click **Add** to add the selected list(s) to your job.
4. Click **Done**. MyPortal will close the List Selection window and return you to the **Create/Send Job** page where you will be able to see the names of all the lists you have selected.
5. If you wish, you may remove one or more of your list selections from this page by deleting the name of the list from “Select Stored List”.

Additional Recipients

You may add ad-hoc, individual recipients to your job as desired. To add one or more ad-hoc recipients to your job, select the Yes radio button, and then type each recipient’s fax number into the textbox. (Note: If you enter an email address, the document will be delivered as an attachment to the email or as the body of the email if the file is text.)

To add more than three additional recipients, enter the desired number next to **No. Additional Addresses** and click the **Add More** icon. MyPortal will then display additional textboxes, and you will be able to add more fax numbers.

Select Document(s)

You may specify one or more documents to be added to your job in this section. You may also select the order in which your documents will be sent.

1. In Step 2: Document Information, Click the **Browse...** button. The system will open a window where you can locate the file from your local system.
2. Click **Open** to select a document. The system supports the following types of documents:

Allowable file types include:

- Microsoft Word (.doc)
- Microsoft Excel (.xls)
- Adobe Acrobat (.pdf)
- Text (.txt)
- Rich Text Format (.rtf)
- Hypertext Markup Language (.htm, .html)
- Microsoft PowerPoint (.ppt)
- Tiff (.tif, .tiff)
- Printer Language – PCL5 (.prn)

- Postscript (Adobe PS files; .ps)
- JPEG (.jpg)
- GIF (.gif)
- Bitmap (.bmp)
- Microsoft Visio (.vsd)
- Microsoft Project (.mpp)

It is important to make sure you are choosing a file type supported by the system. If you choose an incorrect file type, your document may be delivered as garbled text.

3. Click **OK**. The prompt will disappear, the page will refresh, and your document will be listed.
4. To add another document, click **Add Another File** and repeat the previous steps.

Note: Once clicked, the document you have chosen will be uploaded to the system and all document files will be displayed in a list.

Note 2: While you may specify an unlimited number of documents to be included in your job, delivery limits imposed by the system will be enforced once your job is submitted.

5. If you have added more than one document to your job, you can change the order in which the documents will be delivered by using the following steps:
 - a. To reorder your documents, type the preferred order into the textboxes to the right of each file name. When you have finished, click the **Reorder** button and your documents will be reordered.
 - b. To remove a document, select the checkbox to the right of the file name and then click the **Remove** button. The selected document will be removed.
6. Select a fax resolution for your fax from the dropdown box. The available options include Standard (default selection) and Fine.

Note: Standard mode has a resolution of approximately 100x200 lines per inch. Fine mode has a resolution of approximately 200x200 lines per inch. Keep in mind that Fine mode deliveries may increase the cost of your job since it takes longer to deliver fine mode faxes.

Add Cover Sheet (optional)

A cover sheet can be included with your outgoing fax. The cover sheet will be populated with your recipient's information. You may request a default or registered custom cover page to precede the fax documents going to each destination.

Cover sheets are populated with data from your distribution list file. For example, the default cover sheet (sys_default) on MyPortal uses data from your distribution

list for the Header, To, Attn, and Addr fields. (Please see the “Lists: Set up a List for Use with Cover Sheets” section for more information.)

Note: If you are familiar with mail-merge inserts, cover sheets do not use inserts.

There are two types of cover sheets: system default cover sheets and custom cover sheets. The system default cover sheet is available automatically for all customers. Custom cover sheets are specially created by ParentREACH graphics department and loaded into your account. You may add a cover sheet to your fax job by using the following steps:

1. Select the Yes radio button to **Add Cover Sheet?** under **Document Information** on Step 2.
2. Enter fields for your cover sheet: “From” (the name of the person or company you want the cover sheet to be “from”) and “Subject/Comments” (the subject of the fax. This maps to the “Attn” field on the system default cover sheet.) .

Note 1: Custom cover sheets may support different fields and multiple lines. This is dependent on the type of cover sheet created and selected.

Note 2: The **To**, **From**, and **Attn** lines on the cover sheet will be filled in using information supplied by the corresponding **To**, **From**, and **Attn** fields in your list. That is, when a destination list file contains a “From” field, this data will take precedence over the “From” data entered on the MyPortal website. However, if there is no “From” data entered in the destination list file, the value entered in the “From” field on the website will be used. The “To,” and “Attn” fields work the same way in that any fields included in a destination list will take precedence over values entered on the website. (These fields work differently from the global header and customer reference fields where values entered on MyPortal take precedence over the values included in the destination list file.)

3. Select a standard (default) or custom cover sheet by clicking the **Select File** button and then selecting a cover sheet in the pop-up window that appears. (Note: The system’s default cover sheet can also be found in the list of available cover sheets under the name sys_default.)
4. Click the **Select** button when you have found the correct file. (If you change your mind and decide not to add a cover sheet, you may click the **Cancel** button.)

Add Letterhead (optional)

Letterheads are custom created files loaded into your account that can be overlaid onto outgoing fax documents. Letterheads usually contain your company’s logo, as well as other fixed data at the top and/or bottom of the page. Letterheads can exist on the first page only, or can also have the same, or different, information on subsequent pages. Your fax documents should avoid placing any text or graphics in the area where your stored letterhead also has text/graphics. If you have registered one or more letterhead files in the system using ParentREACH graphics

department, this optional field will allow you to select which letterhead will be used for your fax job.

You may add a letterhead to your fax job by using the following steps:

1. Select the Yes radio button next to **Add Letterhead**.
2. Click the **Select File** button and then choose your letterhead file in the pop-up window that appears.
3. Highlight the correct letterhead name and click **Select**. (If you change your mind and decide not to add letterhead, you may click the **Cancel** button.)

Customize Fax Header (optional)

A global fax header is an optional field that will apply to the entire fax job and will appear on the top of every recipient's fax. The Fax Header field may be up to 20 characters long. When data is entered in this field, header information normally pulled from your list data will be replaced by this value.

Tip: This field is generally used when you want identical "From" information printed on all delivered fax pages.

1. Select the Yes radio button for **Customize Fax Header?**
2. Enter the desired text for your fax header. The Fax Header may be up to 20 characters long.

Send Test (optional)

The Send Test feature allows you to enter up to 3 fax numbers to which you want to send a test fax. To send a test:

1. Click **Send Test** in Section 2: Document Information
2. Enter up to 3 fax numbers
3. Click **Submit**

You will be returned to the fax job create page and your document(s) will be sent to the fax numbers entered. Please be aware that it may take several minutes to receive your test.

Note: Send Test will not be visible if your account is enabled for Fax Preview

Preview Fax (optional)

Fax preview allows you to view a rendered fax version of your document prior to launching your job. Fax preview is available if your account has been enabled for this feature. To preview your fax:

1. Next to **Preview fax prior to launch?**, select **Yes, PDF Format** or **Yes, TIFF Format**

2. Finish selecting your fax job options and click **Review & Send**. Your fax preview will be generated in a separate window and you will be taken to the job review page
3. If your preview is acceptable, close the preview window, click **Submit** and your job will be submitted to the system. If your preview is not acceptable, close the preview window and click **Back**.

Customer Reference and Billing Code (optional)

You may add a Customer Reference and/or a Billing Code to your job by typing values into the appropriate textboxes under **Job Tracking and Report Options** of Step 3.

Customer Reference – An optional identification code you may give your job. The customer reference will print on your delivery report.

Note 1: The customer reference that appears on a job report can be a maximum of 41 characters in length, although MyPortal allows you to enter more than 41 characters.

Note 2: If you include customer reference code data in your distribution list file and also enter different data through MyPortal, the data entered through the website will take precedence over the data included in your distribution list file.

Billing Code – An optional billing or department code you may give your job. If you enter a billing code, your monthly invoice will be sorted by bill codes, and all jobs with the same billing code will be subtotaled. The bill code you enter can be up to 20 characters in length.

Delivery Report Type (optional)

You can select the type of report to receive after your job completes. The report will be sent to the destination address specified in your account under the “Settings” tab. There are 5 delivery report options:

- **Detail** – provides job summary, a listing of each recipient who received your fax, and each recipient who did not receive your fax including the failure reason.
- **Exception** – provides job summary and a listing of reach recipient who did not receive your fax including the failure reason.
- **Conditional** – provides an Exception report only if there were undelivered destinations for the job.
- **Summary** – provides job summary information
- **None** – no report will be delivered.

of Retries (optional)

You can specify the number of times you want each destination attempted, up to 4 attempts. Selecting “default” will use the retry algorithm that is set up in your account.

Schedule Delivery

On Step 4: Delivery Schedule, you may schedule the delivery of your job according to the following:

1. Send Now (Express)
2. Scheduled: Enter the start date and start time from the dropdown boxes after you click “Scheduled.” The time zone box will default to your local time zone.
3. Send Off-Peak (job will be sent anytime between the hours of 9:00 p.m. and 7 a.m. EST)

Review and Send Job

You may review your job details before launching the job. You may change any of the details by using the **Back** button to go back and make your changes. Your changes will be saved when you navigate back and forth.

Launch your job from the **Review Job** page by clicking the **Submit** button. MyPortal will confirm your job launch and provide a unique job ID for tracking purposes. You will then be returned to the **Job Status Dashboard** page where your job will appear in the Jobs in Progress table.

Important Tip!

Make a note of the Job # (unique ID number) assigned to your job so that you can easily track its status from the Job Dashboard.

JOBS: Create and Send an Email Job

MyPortal makes it easy for you to create and send an email message to hundreds or thousands of recipients. The website provides an interface for creating or opening your message, selecting recipients and launching your job. There are a number of required and optional features you can select along the way:

- Select job type
- Select an existing job template/saved job (optional)
- To: Select recipients
- Specify email subject (optional)
- Open or create an HTML message
- Save your HTML message (optional)
- Format your HTML message (optional)
- Add custom elements to your HTML message (optional)
- Select or create a text message
- Add custom elements to your text message (optional)
- Attach a file (optional)
- Add customer reference and billing code (optional)
- Select delivery report options (optional)
- Track opened HTML messages (optional)
- Schedule your delivery
- Review and send job

Select Job Type

You have the option to send an email, fax, voice, SMS or fax mailmerge job. To send an email job:

1. Click **Jobs**
2. Choose Email icon

If 'email' is selected as the default job type among your Settings, the Create/Send Job page for an email job will be displayed automatically.



Select Template/Saved Job (optional)

What is a job template?

A job template is simply the settings you save for any job you send. You can give the job a name when you create it and select that name when you want to launch a new job with the same or similar settings.

Create Job Template (optional)

1. Click the **Save Draft** button in the top right or lower right corner at any time.
2. Enter a name for your job and click **OK**.

The job details you have entered so far will be saved under the name entered.

Use a Job Template/Saved Job (optional)

To build your job off of a previously saved job template, select the job template from the dropdown box in the upper right-hand corner of the “Create/Send Job” page. Once you have selected a job template, the job details for the selected template will be pre-filled on the page. You may then continue to modify the details for your job as desired. (If you would like more information on how to modify the job template, please refer to **JOBS: Manage Job Templates.**)

To: Select Recipients

You can select one or more stored lists, add a new list or enter ad-hoc additional recipients.

Select Stored List

To use a distribution list that you previously uploaded to MyPortal:

1. Click **Select Stored List** next to “To”. A list of your available lists will be displayed.
2. Select one or more distribution lists by holding down the CTRL key and clicking the name of the lists.
3. Click **Add List(s)** to add the selected list(s) to your job.
4. Click **Finish**. MyPortal will close the List Selection window and return you to the **Create/Send Job** page where you will be able to see the names of all the lists you have selected.
5. If you wish, you may remove one or more of your list selections from this page by deleting the name of the list from “Select Stored List”.

Note: You may also view your list from this page. Simply highlight the list and click **View List**.

Add New List

To upload a new distribution list from your local system, use the following steps:

1. Click **Add New List** next to “To”. A window will display, which allows you to locate the list on your local system. *The list must be in text format and delimited by comma, tab, semi-colon or colon.*
2. Enter the list name
3. Select the field delimiter (comma, tab, semi-colon or colon) and select the character set.
4. Click **Browse**. Once you have found your list, click on its file name and click **Open**. MyPortal will then close the browse window. Click **Upload List**, and your list will be uploaded to the system. The list will be associated automatically with the job you are sending.

If you wish, you may change your mind and remove one or more of your selected lists from your job on this page by deleting the list name in the **Select Stored List** box.

(For more information on how to upload a list from your local system and ensure proper formatting of your file, please refer to **Lists: Upload a New List**.)

Additional Recipients

You may add ad-hoc, individual recipients to your job as desired. Additional addresses are often used in conjunction with address lists but may also be used instead of a list. (Please note that you cannot use inserts or passwords with additional addresses.)

To add one or more ad-hoc recipients to your job, simply type in each recipient’s email address in the “To” field and separate them by commas.

Subject

You may specify the subject line for your email message by typing it into the Subject textbox. Enter the subject line text to be displayed, up to 256 characters. The subject field cannot exceed one line of text.

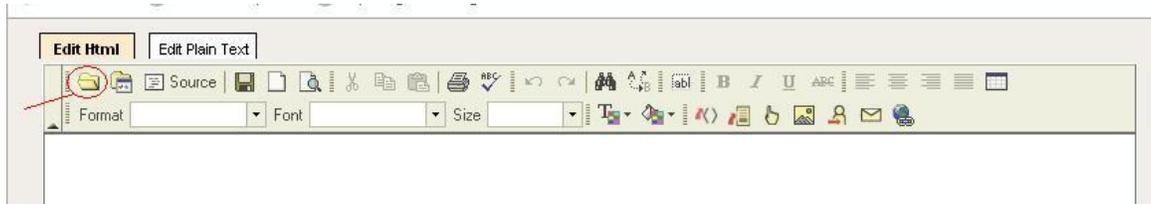
Important: Since the word “remove” in the Subject line indicates a request for removal, be sure not to include the word “remove” when you specify a subject for your message!

Open an HTML File

The body of your email message may be plain text or HTML. HTML messages allow you to include formatting (different fonts, bold, color, etc) and additional elements such as images. Most recipients can view an HTML message in their email client although some may be using an email client that does not support HTML. In this case you can select both an HTML and a text message and the text message will be sent to the recipients who cannot handle HTML.

To open an existing HTML file from your local system:

1. Click the folder icon (first icon on the editor)



2. Click **Browse** to locate the file
3. Click **OK**. The contents of your file will appear in the editor. From here you can edit the contents or use it as-is with your job. To send your message, simply click “Send Now” for immediate delivery or “Send Later” to schedule the delivery.

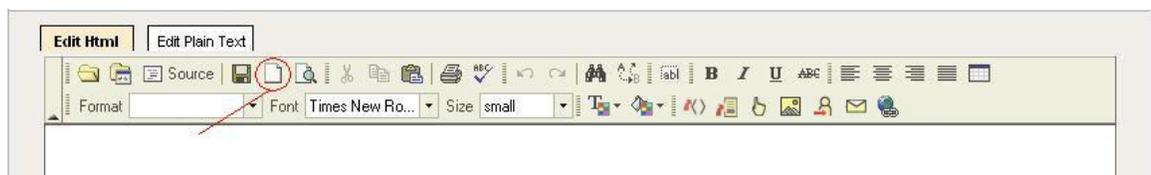
If you have previously purchased access to the Customer File Store, you have the option of selecting the HTML file from the file store. To do this:

1. Click the **Edit Html** tab
2. Click the “folder-file store” (2nd icon) and the File Store popup window will appear.
3. Browse the file store for the html file you wish to add.
4. Select the file by clicking on it.
5. Click the **Add** button, then click **OK**. The popup window will disappear and the file will appear in the editor.

Create an HTML message from scratch

The body of your email message may be plain text or HTML. HTML messages allow you to include formatting (fonts, bold, color, etc) and additional elements like images. Most recipients can view an HTML message in their email client although some may be using an email client that does not support HTML. In this case you can select both an HTML and a text message and the text message will be sent to the recipients who cannot handle HTML.

To create an HTML message simply enter the message in the space available. If you have started typing and wish to start over, click the “blank page” icon.



To send your message, simply click “Send Now” for immediate delivery or “Send Later” to schedule the delivery.

Save Your HTML Message

To save your message, click the **Save** icon. A dialog box will open asking you to enter a “Template Name.” Enter a name here, and when you wish to re-call this message for a job, select this name from the drop-down list in the upper right hand corner of the Create / Send Job page. The message will open in the editor.

Format Your HTML Message

You can change the look and feel of your HTML message using a number of different formatting options:

| | |
|--|---|
| Align left, Center, Align right, Justify | |
| Bold, Italic, Underline | |
| Insert table | |
| Font | Font <input type="text" value="Arial"/> |
| Font size | Size <input type="text"/> |
| Text strike-through | |
| Style | Style <input type="text"/> |
| Text color | |
| Background color | |
| Cut, Copy and Paste | |

Add custom elements to your HTML message

The HTML editor allows you to customize your HTML message with a number of enhanced features.

Personalized List Inserts

You may personalize your message with information unique to each recipient by using **List Inserts**. For example, you may wish to insert the recipient’s name into the message vs. using a generic term, i.e. Dear Mr. Jones instead of Dear Customer:

1. Place your cursor in your document where you want the custom information to appear
2. Click the **List Inserts** icon. You may add as many inserts into the document as you like. Please be aware that your list must have corresponding data for each of the inserts. 

* Field Names in your list must follow the protocol: INS_1, INS_2, etc.

Mail-to Link

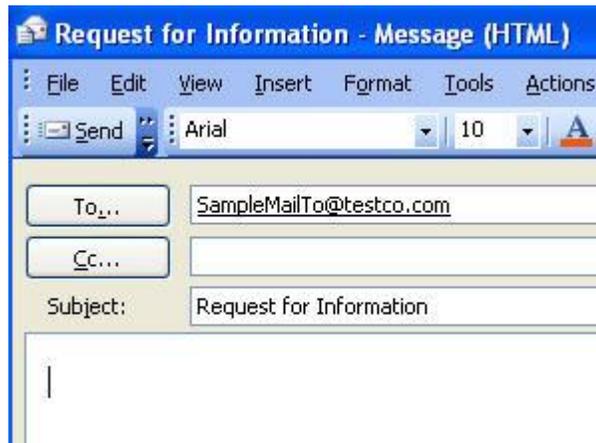
The Mail-to Link allows you to embed an email address in the body of your message. When your recipients click on the link their email client will open and they can send a message to the email address you have selected

1. Place your cursor in your document where you want the link to appear
2. Click the **Mail-To** icon 
3. Enter the email address to which you want messages to be sent. This email address will also appear in the body of the message
4. Enter the email subject you want to appear on the email message
5. Click OK.

The Mail-To link will be inserted automatically into your message:



When your recipients click on the mailto link in the message, their email client will open automatically and pre-fill with the address and email subject.



Downloadable Files

A downloadable file is a file that you make accessible to your recipients via a link in your message. Upon receiving your email, the recipient has the option of downloading the file from the website by clicking on a link. You can include one or more downloadable files in a single message, and they can be of any file type, i.e. Microsoft Word, Adobe PDF, JPEG, etc. MyPortal automatically adds downloadable file links into your message body at the end of the message, just before the removal instructions. This section explains how to add downloadable files and select the security for your downloadable files. Please be aware that once the files expire, the recipient will no longer be able to download them.

The recipient of your message will see a link in the message. The recipient clicks the link to access your downloadable file. When the link is clicked, the following events occur:

- The recipient is connected to the website where the downloadable file is stored, and their browser launches (if it was not already running).
- Document availability is verified. If the job has expired, MyPortal displays an appropriate error message.
- Browser security settings are verified. If they do not match the required level of security, MyPortal displays an error message.
- The downloadable file is sent to the browser
- Depending on the file type and the recipient's software and configurations, any of the following may occur:
 - File opens directly in the browser.
 - File needs to be downloaded and a download link is displayed.
 - File can be opened with a separate software application. If so, a dialog box presents the recipient with several options, including saving the file to a location the recipient chooses.
- The recipient address and file access time are logged and made available to you in your reports.

To enable downloadable files:

1. Place your cursor in your document where you want the link to appear.
2. Click on the **Downloadable file** icon 
3. Browse for the file you wish to make available
4. Click **OK**.

The downloadable file(s) will be added to your email job. To remove a file, click the delete icon (**X**) next to the file name listed on the screen.

Downloadable File Security

Downloadable file security allows you to select an option to encrypt the document during the download process. Two options are available:

- **Normal** – No encryption is provided and files are retrieved using standard HTTP protocol.
- **Secure** – Secure Sockets Layer (SSL) encryption is provided and files are retrieved using HTTPS protocol. The file will not be accessible to recipients who do not have an updated browser capable of handling the requested security level. The minimum security level is 40-bit (which is the lowest security level provided by most browsers today). If you request a higher security level (through your profile settings) such as 128-bit, recipients with less security will need to update their browsers to access your message's downloadable files.

To choose security settings:

1. Select **Advanced Options**
2. Select **Normal** or **Secure** in the file security dropdown box.

Require Password

You can require your recipients to enter a password before they can download the file. Recipients will be prompted for a password before they are permitted to view any downloadable files that are part of your message.

If you enter a Master password, all recipients will be able to use the same master password unless you also assign an individual password to a recipient through the Password field in the recipient list. In this case, the recipient will be required to enter their individual password and the Master password will be invalid for them. Recipients that do not have an individual password assigned will use the Master password. Keep in mind that if you select the Yes radio button for password usage, the Portal will prompt your recipients to enter a password before being able to download the file. If you have not assigned a Master password or an individual password, the recipients will only be able to view the downloadable files if they leave the password field blank when they are prompted for a password.

To require a password:

1. Select **Advanced Options**
2. Select **Yes** radio button to Require Password.

To assign a Master password to your downloadable files:

1. Select **Yes** radio button to Require Password.
2. Enter the master password in the first textbox.
3. Re-enter the master password in the second textbox.

To assign an individual password to your downloadable files:

1. Include a Password field (column) in your recipient destination list.

2. Enter a password in the Password field for each recipient. Note: The passwords entered may be the same or different for each recipient.

Click-to Link

Click-to tracking is an effective way to measure the results of your message broadcast. When your recipient clicks on a link that you insert into your message, you can track the link that was clicked, and the date / time of the click action. The MyPortal report can tell you exactly which recipient addresses clicked-to a URL link, as well as the exact date and time that they activated the link. Each time a recipient clicks on the link to visit your web address the action is reported separately in your reports.

To insert a click-to link:

1. Place your cursor in your document where you want the link to appear
2. Click the **Click-to** link 
3. Enter the URL to be the click-to link
4. Enter any alternate text. The alternate text will be displayed in the message instead of the click to link. For example you wish the message to read “click here” instead of “www.yourcompany.com”
5. Click **OK**.

The URL or alternate text will be inserted into your message. When recipients click on this link, you will be able to track those actions on your email delivery reports.

Send-a-friend Link

The send-a-friend link allows the recipient of your email message to forward the message to their friends. The recipient of the message will see a link that reads, “To send a copy of this message to your friend(s), click on the following link...” When they click the link, they will be prompted for their name and their friends’ email addresses. They can also add their own optional text message. MyPortal then delivers the original document and displays the original recipient’s name in the From field. You can track how many times the message has been forwarded by specifying a send-a-friend report.

Send-a-friend preserves the original document formatting, while avoiding common forwarding problems such as long/short lines and incorrect formatting for text or HTML recipients. Recipients who have been sent your email from their friends can in turn send another copy of your message on to their friends.

To insert a send-a-friend link in your message:

1. Place your cursor in your document where you want the link to appear
2. Click the **Send a Friend** icon 

3. Next to **Alternate Text** enter the text and / or browse for an image next to **Link Image**. The text you enter and / or the image you select will be inserted into your document. Recipients click on the text link or image to initiate the Send a Friend dialog box where they can enter the email addresses. If you insert a link image you can set the width and height of the image. This can be re-sized once the image is visible in the editor.
4. Click **OK**.

Send-A-Friend Reports

You will be able to view all of the send-a-friend actions taken on the special send-a-friend report. This separate report on the friend deliveries is available as either a Summary or a Detail report. In accordance with the Company’s anti-SPAM policy, the addresses of the send-a-friend recipients are not disclosed unless those individuals choose to be added to your list.

Hyperlink

MyPortal allows you to insert hyperlinks into your message:

1. Place your cursor in your document where you want the link to appear
2. Click the **Hyperlink** icon 
3. Enter the URL
4. Click **OK**. The URL will appear in your message.

Add Images

You may add one or more images to your message.

1. Place your cursor in the message where you want the image to appear
2. Click the **Picture** icon 
3. Click the **Browse** button to locate the image.
4. Click **OK**. The image will appear in your message

Note: These images are stored on the Company’s servers and will appear automatically when recipients open the message.

Additional HTML functions

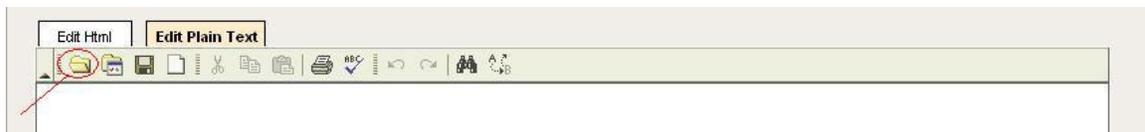
| | |
|-------------------------------------|---|
| Create a new document |  |
| Open local file |  |
| Open Customer File Store (CFS) file |  |

| | |
|-----------------------|---|
| Save document |  |
| Print document |  |
| Check spelling |  |
| Find and replace |  |
| View HTML source code |  |
| Preview document |  |
| Undo |  |
| Redo |  |

Open a Text File

The body of your email message may be plain text or HTML. To open an existing Text file from your local system:

1. Click **Edit Plain Text** tab
2. Click the folder icon (first icon on the editor)



3. Click **Browse** to locate the file
4. Click **OK**. The contents of your file will appear in the editor. From here you can edit the contents or use it as-is with your job. To send your message, simply click "Send Now" for immediate delivery or "Send Later" to schedule the delivery.

If you have previously purchased access to the Customer File Store, you have the option of selecting the text file from the file store. To do this:

1. Click the **Edit Plain Text** tab
2. Click the "folder-file store" (2nd icon) and the File Store popup window will appear.
3. Browse the file store for the text file you wish to add.
4. Select the file by clicking on it.
5. Click the **Add** button, then click **OK**. The popup window will disappear and the text file will appear in the editor.

Create a text message from scratch

The body of your email message may be plain text or HTML. To create a text message simply enter the message in the space available. If you have started typing and wish to start over, click the “blank page” icon.



To send your message, simply click “Send Now” for immediate delivery or “Send Later” to schedule the delivery.

Add custom elements to your text message

The text editor allows you to customize your text message with a number of enhanced features.

| | |
|-------------------------------------|---|
| Open local file |  |
| Open Customer File Store (CFS) file |  |
| Save document |  |
| Print document |  |
| Check spelling |  |
| Find and replace |  |
| Cut, Copy and Paste |  |
| Undo |  |
| Redo |  |

Attach a File (optional)

One or more attachment files can be included with your outgoing email messages. Each attachment is delivered to all recipients as an attachment to the body of your email message. You may add an attachment to your email job by using the following steps:

1. Click the **Attach a File** link
2. Click the **Browse** button to add attachment from your local system. .
3. Browse for your file and select it in the popup window.
4. Click the **Open** button to add the file from your local system. Follow steps 2 and 3 to add more attachments.

The attachment will be added to your email job. To remove an attachment, click the delete icon (X) next to the file name listed on the screen.

Add Customer Reference and Billing Code (optional)

You may add a Customer Reference and/or a Billing Code to your job by typing values into the appropriate textboxes under **Reporting and Tracking**.

Customer Reference – An optional identification code you may give your job. The customer reference will print on your delivery report.

Note 1: The customer reference that appears on a job report can be a maximum of 41 characters in length, although MyPortal allows you to enter more than 41 characters.

Note 2: If you include customer reference code data in your distribution list file and also enter different data through MyPortal, the data entered through the portal page will take precedence over the data included in your distribution list file.

Billing Code – An optional billing or department code you may give your job. If you enter a billing code, your monthly invoice will be sorted by bill codes, and all jobs with the same billing code will be subtotaled. The bill code you enter can be up to 20 characters in length.

Select Report Options

You may select different types of reports to be sent to you about your job: **Posting Report, Completion Report and Send-a-Friend Report**. Click **Reporting and Tracking** to open report options.

Posting Reports

In the posting phase of your job delivery, MyPortal begins to send these messages to their internet destinations. Once every message has left the Company's mail servers, the posting report is generated.

Select Posting Report Type:

- **None** – No Posting Report will be sent.
- **Summary** – The report summarizes known information about the job and any attachments or downloadable files. The information included in a Posting Report is final and does not change over the job's lifetime.
- **Enhanced** – The enhanced summary posting report option will be available if you have registered for enhanced reports. If you select this option, you will receive an enhanced report of summary information as a PDF or Excel file that contains the results and a graphical representation of the results.

Completion Reports

A Completion Report is sent once your job completes. Your job is considered complete once its expiration date is reached. By default, jobs without a downloadable file or send-a-friend link expire in 3 days. Jobs with a send-a-friend link expire in 7 days. Jobs with a downloadable file expire in 14 days.

Select Completion Report Type:

- **None** – No Completion Report will be sent.
- **Summary** – The report summarizes the number of posted, canceled, blocked, delivered, not delivered, and unconfirmed messages. If applicable, it also includes a downloadable file and HTML Open counts.
- **Enhanced** – The enhanced summary posting report option will be available if you have registered for enhanced reports. If you select this option, you will receive an enhanced report of summary information as a PDF or Excel file that contains the results and a graphical representation of the results.
- **Detail** – The detail report provides summary information plus a CSV file with details on posting and delivery statuses for every message destination. The details for each address include the posting time, delivery time (if known), downloadable file access details (if applicable), HTML Open details (if applicable), and failed address indicators.

Send-A-Friend Reports

A Send-A-Friend report will be sent containing about information recipients' use of the Send-A-Friend feature:

- **None** – No Send-A-Friend Report will be sent.
- **Summary** – The report informs you when recipients use the send-a-friend feature to forward your message to their friends. Privacy dictates that the addresses of the send-a-friend recipients are not disclosed unless those individual choose to be added to your list.
- **Detail** – The detail report provides all the same information included in the summary report. In addition, the reference field in the detail report contains the original destination information, or, if this field was blank on the original list, the original email destination address will be displayed. Thus, the detail report allows you to see which original recipient was responsible for each send-a-friend address.

Track Opened HTML Messages (optional)

You may track whether an HTML recipient has opened your email message or viewed it in the preview pane of their email software. If you use this feature, your summary and detail reports will include 'HTML Open' counts.

The summary report will indicate an "HTML Open" count for both unique opens

by each destination and multiple opens by the same destination. The summary report will also show the percentage open rates. Note: If some destinations receive a plain text message body, the percentage open rate will be understated, since the rate is computed on all deliveries and it will not be known how many such destinations read only the plain text version of your message. Only if all destinations are receiving only the HTML version, would the percentage open rate be accurate. However, you can use the calculated HTML open rate to compare the open rate over a period of time through multiple message broadcasts.

The detail report will show columns for HTML opens, total count, unique count, and time of first open.

To track opened HTML messages, click **Reporting and Tracking and** select one of the following next to **Track Opened HTML messages**:

- **None** – The portal will not track opened HTML messages.
- **Top** – The portal will place a clear .gif file at the very top of your HTML message that may shift your message down by a few lines.
- **Bottom** – The clear .gif file will be placed at the very bottom of your HTML message and will not shift your message down.

Schedule your Delivery

To send your job immediately, click **Send Now** and the review page will appear. To schedule your job for later delivery, click **Send Later** and select the date / time when the job should start.

Review and Submit Job

After selecting **Send Now** or **Send Later** a review page will appear. You may change any of the details by clicking the **Cancel** button to return to the Create/Send Job page and then make your changes. Your changes will be saved when you navigate back and forward.

Click **Submit** to launch your job. MyPortal will confirm your job launch and provide a unique job ID for tracking purposes.

Important Tip!

Make a note of the Job # (unique ID number) assigned to your job so that you can easily track the status of your job.

JOBS: Create and Send a Voice Job

MyPortal makes it easy for you to create and send a new voice job. You may also save your voice job details as a job template. It is also quite simple to build a new voice job using a job template that you previously saved in the system. The system walks you through 4 basic functions that include: Step 1: Choose Recipients; Step 2: Message Contents; Step 3: Job Tracking and Report Options; and Step 4: Delivery Schedule.

Select Job Type

You have the option to send an email, fax, voice, SMS or fax mailmerge job. To send a voice job:

3. Click **Jobs**
4. Choose Voice icon

If 'voice' is selected as the default job type among your Settings, the Create/Send Job page for a voice job will be displayed automatically.



Select Template/Saved Job (optional)

What is a job template?

A job template is simply the settings you save for any job you send. You can give the job a name when you create it and select that name when you want to launch a new job with the same or similar settings.

Create Job Template (optional)

1. Click the **Save as a Template** button in the lower right corner at any time.
2. Enter a name for your job.

The job details you have entered so far will be saved under the name entered.

Use a Job Template/Saved Job (optional)

To build your job off of a previously saved job template, select the job template from the dropdown box in the upper right-hand corner of the "Create/Send Job" page. Once you have selected a job template, the job details for the selected template will be pre-filled on all of the Create/Send Job steps. You may then continue to modify the details for your job as desired. (If you would like more information on how to modify the job template, please refer to **JOBS: Manage Job Templates**.)

Choose Recipients

You can upload a new list or select a stored list:

Upload New List

To upload a new distribution list from your local system, use the following steps:

1. Click **Browse...** A window will display, which allows you to locate the list on your local system. *The list must be in text format and delimited by comma, tab, semi-colon or colon.*
2. Once you have found your list, click on its file name and click **Open**. MyPortal will then close the browse window and your list will be uploaded to the system. The list will automatically be associated with the job you are sending.

If you wish, you may change your mind and remove one or more of your selected lists from your job on this page by deleting the list name in the **Select Stored List** box.

(For more information on how to upload a list from your local system and ensure proper formatting of your file, please refer to the **Lists: Upload a New List** section of the User Guide.)

Select Stored List

To use a distribution list that you previously uploaded to MyPortal.

1. Click **Select File** next to “Select Stored List”. MyPortal will display a list of your available lists.
2. Select one or more distribution lists by holding down the CTRL key and clicking the name of the lists. (Note: You may also view, delete and upload lists from this location.)
3. Click **Add** to add the selected list(s) to your email job.
4. Click **Done**. MyPortal will close the List Selection window and return you to the **Create/Send Job** page where you will be able to see the names of all the lists you have selected.
5. If you wish, you may remove one or more of your list selections from this page by deleting the name of the list from “Select Stored List”.

Additional Recipients

You may add ad-hoc, individual recipients to your job as desired. Additional addresses are often used in conjunction with address lists but may also be used instead of a list.

To add one or more ad-hoc recipients to your job, select the **Yes** radio button, and then type each recipient’s phone number, and, if desired, reference information, into the textboxes available.

To add more than three additional recipients, enter the number of additional recipients and click the **Add More Recipients** icon. MyPortal will then display

additional textboxes, and you will be able to continue adding new, ad-hoc recipients.

Message Contents

You have several different options available to you for your voice message. You may upload a simple audio file in WAV format, select a text-to-speech template or voice script that you previously created. In addition, you may choose to have the same or different messages played to live answer and answering machines.

Deliver Single File

Select this option to choose a single file to be used with your job.

1. Choose the radio button and select the file that corresponds with the type of message for your job: Wav file, text-to-speech template or voice script.
2. Select the method of delivery:
 - **Live and answering machine:** plays the message to both live answers and answering machines
 - **Live and answering machine with pause:** plays the message to both live answers and answering machines but inserts a 2 second pause prior to playing the message
 - **Live answer only:** plays the message to live answer only. The message will not be played if an answering machine is detected.
 - **Answering machine only:** plays the message to answering machines only. The message will not be played if a live answer is detected.
 - **Force play:** selecting this option indicates that your message will play once a configured amount of time has elapsed since the call was answered.

NOTE 1: Force Play Delay: When Delivery Method is set to Force Play, this field becomes available and is used to set the amount of time to wait, after the call is answered, before the message begins playing. The value entered is in milliseconds (1000th of a second) with the default value set to 1000 (1 second), but any value between 100 milliseconds (1/10th of a second) and 20000 milliseconds (20 seconds) is acceptable.

Note 2: Force Play does not work reliably with destinations that include extensions.

Deliver Different File for Live Answer and Answering Machine

Select this option to choose different files to be played to live answers and answering machines

1. Choose the radio button and select the file that corresponds with the type of message for live answers: Wav file, text-to-speech template or voice script.
2. Choose the radio button and select the file that corresponds with the type of message for answering machines: Wav file or text-to-speech template

Specify Customer Reference and Billing Code (optional)

You may add a Customer Reference and/or a Billing Code to your job by typing values into the appropriate textboxes under **Job Tracking and Report Options** of Step 3.

Customer Reference – An optional identification code you may give your job. The customer reference will print on your delivery report.

Note 1: The customer reference that appears on a job report can be a maximum of 41 characters in length, although MyPortal allows you to enter more than 41 characters.

Note 2: If you include customer reference code data in your distribution list file and also enter different data through MyPortal, the data entered will take precedence over the data included in your distribution list file.

Billing Code – An optional billing or department code you may give your job. If you enter a billing code, your monthly invoice will be sorted by bill codes, and all jobs with the same billing code will be subtotaled. The bill code you enter can be up to 20 characters in length.

of Retries

You can specify the number of times you want each destination attempted, up to 2 attempts. Selecting “default” will use the retry algorithm that is set up in your account.

Call Management

Call Traffic Management is used by customers who have large jobs and therefore the potential of creating a large amount of transfers into a call center. The simple idea is to not flood a call center and create a hold situation for the transfer caller, while, at the same time, creating enough call volume, via transfers, to keep the operators busy. There are two ways in which to control the transfers.

- **Outbound Pacing** - This option can be used to control the amount of outbound dials or pace thereby controlling the amount of transfers that can be sent into the call center.
- **Transfer Pacing** - This option controls the transfers by controlling the number of transfers allowed at any given time into the call center. The customer establishes a transfer rate, which is the maximum number of transfers allowed at any time. The

system will look at the transfer rate and look at the active transfers and either slow down or increase the pace automatically to align the actual transfers with the requested transfer rate.

With either option, it is required that the initial pace be set-up by customer service. Once an initial pace is established, additional paces can be set-up by the customer online. If no pace has been established, a message is displayed notifying the user that a pace does not exist for this account. If an initial pace has been established, the system will open with the Call Center Configuration screen. For more information on the features available with Call Management, refer to the **Advanced Options: Voice Call Management** section of this guide.

Select Report Options

On step 3, **Job Tracking and Report Options**, you may choose the types of reports you would like sent to you about your job: **Detail, Exception, Conditional, Summary or None.**

Call Control

Call control allows your recipients to control the call through such features as rewind, fast forward, replay and more. Following are the features available via Call Control:

| | |
|-----------------------------|--|
| Message Replay | Select the number on the keypad recipients should push to replay the message from the beginning. You may also set a limit on how many times the message can be replayed. Acceptable values are 1 - 99. Once the limit is reached, the replay request will be ignored. |
| Message Fast Forward | Select the number on the keypad recipients should push to fast forward the message 5 seconds. If less than 5 seconds remain in the message, this request will be ignored. |
| Message Rewind | Select the number on the keypad recipients should push to rewind the message 5 seconds. 5 seconds is the maximum number of seconds the message can be rewinded. You may also set a limit on the number of times the recipient can rewind the message. Acceptable values are 1 - 99. Once the limit is reached, the rewind request will be ignored. |
| Volume Up | Select the number on the keypad recipients should push to increase the volume of the message. If the volume is set to the maximum, the request will be ignored. |
| Volume Down | Select the number on the keypad recipients should push to decrease the volume of the message. If the volume is set to the minimum, the request will be ignored. |
| Message Pause | Select the number on the keypad recipients should push to pause the message. This feature allows the recipient to pause message playback until either the message pause key is pressed again or the message pause timeout value is reached. |
| Transfer | Select the number on the keypad recipients should push to transfer the call. Note: the transfer feature and number(s) must be pre-configured with us for this feature to be enabled. Any transfer numbers established for your account will appear to the right of this |

| | |
|---|---|
| | option on the page. |
| Opt Out | Select the number on the keypad recipients should push to opt out of receiving future messages. |
| Opt Out Confirm | Specify whether or not you want an opt out confirmation played when the recipient opts out. If "yes" is selected, a static message will be played. |
| Apply Opt Out At User / Customer Level | Specify whether the recipient will be opted out of all communications sent by your company (customer-level) or by you (user-level) |
| Call Control Menu Position | The call control menu will be played to your recipients and describes all of the keypad features available to them while listening to the message. You may specify the menu to be played at the beginning or end of the call. |
| Call Control Menu Template | The call control menu will be played to your recipients and describes all of the keypad features available to them during the call. You may select from a list of menu templates that you have created or choose not to play a menu at all. |
| Call Control Silence | The number of seconds added if hot key transfer, opt out or replay message option is selected. This option is useful for allowing the call recipient enough time to request a hot key transfer. Acceptable values for this field are 0 to 10 seconds. |

Delivery Schedule

On step 4, you may schedule the delivery of your job according to the following:

1. Send Now (Express)
2. Scheduled: Enter the start date and start time from the dropdown boxes after you click "Scheduled." The time zone box will default to your local time zone.
3. Use Stop Time – allows you to set a specific time when the job should stop, regardless of the delivery state of the job. This is useful if your job may run into times that will disturb recipients (i.e. middle of the night).

Review and Submit Job

Click the **Review & Send** button at the bottom of the **Create/Send Job** page to review the details of your job on the **Review Job** page before submitting it. You may change any of the details by using the **Back** button to return to the Create/Send Job page and then make your changes. Your changes will be saved when you navigate back and forward.

Click **Send Now** to launch your job. MyPortal will confirm your job launch and provide a unique job ID for tracking purposes. You will then be returned to the **Job Status Dashboard** page where your job will appear in the Jobs in Progress table.

Important Tip!

Make a note of the Job # (unique ID number) assigned to your job so that you can easily track the status from the Job Dashboard.

JOB: Create and Send a SMS Job

MyPortal makes it easy for you to create and send a new SMS job. If you wish, you may also save your SMS job details as a job template. It is also quite simple to build a new SMS job using a job template that you previously saved in the system. The system walks you through 4 basic functions that include: Step 1: Choose Recipients; Step 2: SMS Message Contents; Step 3: Job Tracking and Report Options; and Step 4: Delivery Schedule. There are a number of features available to you as part of your SMS Job:

- Select job type
- Use an existing job template/saved job (optional)
- Choose list
- Additional recipients
- Specify SMS message contents
- Add customer reference and billing code (optional)
- Select delivery report options
- Schedule your delivery
- Review and send job

Select Job Type

First, select the 'Jobs' tab and choose 'Create/Send Job' subtab. The job type is the type of job you are creating – fax, email, voice, SMS or fax mail merge. If 'SMS' is selected as the default job type among your Settings, the Create/Send Job page for a SMS job will be displayed automatically. If not, select the 'SMS' icon have the Create/Send SMS Job page displayed.



Select Template/Saved Job (optional)

What is a job template?

A job template is simply the settings you save for any job you send. You can give the job a name when you create it and select that name when you want to launch a new job with the same or similar settings.

Create Job Template (optional)

1. Click the **Save as a Template** button in the lower left corner at any time.

2. Enter a name for your job.

The job details you have entered so far will be saved under the name entered.

Use a Job Template/Saved Job (optional)

To build your job off of a previously saved job template, select the job template from the dropdown box in the upper right-hand corner of the “Create/Send Job” page. Once you have selected a job template, the job details for the selected template will be pre-filled on all of the Create/Send Job steps. You may then continue to modify the details for your job as desired. (If you would like more information on how to modify the job template, please refer to **JOBS: Manage Job Templates.**)

Choose Recipients

You can upload a new list or select a stored list:

Upload New List

To upload a new distribution list from your local system, use the following steps:

1. Click **Browse...** A window will display, which allows you to locate the list on your local system. *The list must be in text format and delimited by comma, tab, semi-colon or colon.*
2. Once you have found your list, click on its file name and click **Open**. MyPortal will then close the browse window and your list will be uploaded to the system. The list will automatically be associated with the job you are sending.

If you wish, you may change your mind and remove one or more of your selected lists from your job on this page by deleting the list name in the **Select Stored List** box.

(For more information on how to upload a list from your local system and ensure proper formatting of your file, please refer to **Lists: Upload a New List.**)

Select Stored List

To use a distribution list that you previously uploaded to MyPortal:

1. Click **Select File** next to “Select Stored List”. MyPortal will display a list of your available lists.
2. Select one or more distribution lists by holding down the CTRL key and clicking the name of the lists. (Note: You may also view, delete and upload lists from this location.)
3. Click **Add** to add the selected list(s) to your email job.
4. Click **Done**. MyPortal will close the List Selection window and return you to the **Create/Send Job** page where you will be able to see the names of all the lists you have selected.

5. If you wish, you may remove one or more of your list selections from this page by deleting the name of the list from “Select Stored List”.

Additional Recipients

You may add ad-hoc, individual recipients to your job as desired. Additional addresses are often used in conjunction with address lists but may also be used instead of a list.

To add one or more ad-hoc recipients to your job, select the **Yes** radio button, and then type each recipient’s mobile number, and, if desired, reference information, into the textboxes available.

To add more than three additional recipients, enter the number of additional recipients and click the **Add More Recipients** icon. MyPortal will then display additional textboxes, and you will be able to continue adding new, ad-hoc recipients.

SMS Message Contents

Your SMS message consists of simple text. You may upload a text file or type in the text directly from the Portal. Note! SMS messages are limited to 160 characters

1. Enter the **Sender Name**. This will be the “from” name on each SMS message
2. Select the text file to be used for your SMS message by browsing your local system, browsing the ParentREACH File Store (if applicable to your account) or entering the text directly by clicking on the “Edit / Create” button.

You may delete the file by clicking on the “X” next to the file name and select a different file.

Specify Customer Reference and Billing Code (optional)

You may add a Customer Reference and/or a Billing Code to your job by typing values into the appropriate textboxes under **Job Tracking and Report Options** of Step 3.

Customer Reference – An optional identification code you may give your job. The customer reference will print on your delivery report.

Note 1: The customer reference that appears on a job report can be a maximum of 41 characters in length, although MyPortal allows you to enter more than 41 characters.

Note 2: If you include customer reference code data in your distribution list file and also enter different data through MyPortal page, the data entered through the portal page will take precedence over the data included in your distribution list file.

Billing Code – An optional billing or department code you may give your job. If you enter a billing code, your monthly invoice will be sorted by bill codes, and all jobs with the same billing code will be subtotaled. The bill code you enter can be up to 20 characters in length.

Select Report Options

On step 3, **Job Tracking and Report Options**, you may choose the types of reports you would like sent to you about your job: **None, Summary, Exception or Complete.**

Delivery Schedule

On step 4, you may schedule the delivery of your job according to the following:

1. Send Now (Express)
2. Scheduled: Enter the start date and start time from the dropdown boxes after you click “Scheduled.” The time zone box will default to your local time zone.

JOBS: Create and Send a Fax MailMerge Job

MyPortal makes it easy for you to personalize faxes using Microsoft Word's Mail Merge. The portal's Fax MailMerge page allows you to quickly launch your mail merge fax broadcast to one or more destinations. Please note that in the current version of the portal, only fax destinations are supported for mail merge.

There are a number of required and optional features you can select along the way:

- Choose main document file
- Choose data source file
- Select character set
- Map fax address field
- Map record reference field (optional)
- Map fax header field (optional)
- Select job start time
- Select fax delivery mode
- Select job report type
- Enter customer reference
- Enter billing code
- Enter global fax header

Select Job Type

First, select the **Jobs** tab and choose **Create/Send Job** subtab. The job type is the type of job you are creating – fax, email, voice, SMS or fax mail merge. If 'Fax MailMerge' is selected as the default job type among your Settings, the Create/Send Job page for a Fax MailMerge job will be displayed automatically. If not, select the 'Fax MailMerge' icon have the Create/Send Fax MailMerge Job page displayed.

Select Main Document File

Select the native Microsoft Word document file you created using the Mail Merge functionality in Word. This must be a valid path and filename to an existing file on your computer. Type in the complete location and filename on your computer or use the **Browse** button to find the file. See the section titled "How to Create your Mail Merge Main Document File" for more information.

Select Data Source File

Select the comma separated value (CSV) file containing the destination addresses and insertion fields – known as the data source in the MS Word Mail Merge utility. The data source file is required. It must be a valid path and filename to an existing file on your computer. Type in the complete location and filename or use the **Browse** button to find the file.

Select Character Set

This field specifies the character set of your Data Source File. Allowable character sets include:

Western European (ISO-8859-1)

Chinese (Simplified, GB2312)

Chinese (Traditional, Big5)

Japanese (Shift-JIS)

Korean (KSC)

Map Fax Address Field

The fax address field maps to the field to be used for a delivery address in the Data Source File. This field is required. The value of the field must be one of the data labels identified in your Data Source File. If the keyword ‘fax’ is found as one of the fields in the Data Source File, the field will be the default value selected by the system. You can select any field for this value, but it must contain valid fax numbers.

Map Record Reference Field (optional)

The record reference is the name of any keyword field in the Data Source File to be used to further identify each destination in the detailed delivery report. This field is optional. If you supply no item reference mapping, the reference will default to the value for the Delivery Address field.

Map Fax Header Field (optional)

The Record Header is the name of any keyword field in the Data Source File to be placed in a fax header for each delivered address. The Record Header can be a maximum of 20 characters. The fax header is printed at the very top of each delivered fax page. This header or pilot line includes: The delivered date/time, the Record Header field value, and the page (Page # of ##). If the Record Header option is not selected, NO fax header line will be printed. (See Global Header for another alternative.)

Note 1: The fax header is not displayed as part of the Merge Preview.

Select Job Start Time

Select the delivery schedule from the options available in the dropdown box:

1. Send Now (Express): For immediate delivery attempts.
2. Off-Peak: Fax job will be sent anytime between the hours of 9:00 p.m. and 7 a.m. EST.
3. Scheduled: Use the dropdown boxes to change the date and/or time for a scheduled job. You may schedule a job up to 7 days in the future. Note: The time will be changed to GMT when your job is uploaded to MyPortal.

Select Fax Delivery Mode

Select a fax resolution for your fax. The available options include Standard (default selection) and Fine. Standard mode has a resolution of approximately 100x200 lines per inch. Fine mode has a resolution of approximately 200x200 lines per inch. Keep in mind that Fine mode deliveries may increase the cost of your job because it takes longer to deliver fine mode faxes.

Select Job Report Type

You may choose to have a delivery report including the details of your job sent to you. Select the report type from the type of delivery report options available in the dropdown box:

- **Detail** – Includes status detail for each destination on your fax list including Company Name (Ref), Contact Name (Header), Status (Success or Failure), Status Reason (No Answer, Busy, etc.), Number of Attempts to that destination, and Elapsed Time to deliver. (Note: The number of destinations on the detailed delivery report may include the report itself. Thus, the total number of destinations may be one greater than the number of destinations on your list(s).)
- **Exception** – Includes a listing of the destinations to which the fax could not be delivered and the reason for the failure (busy, no answer, etc.). This report also includes the number of attempts made.
- **Conditional** – This report will be generated only if a fax could not be delivered to one or more of your destinations.
- **Summary** – A report specifying summary details for your job including the totals for the number of faxes delivered and the number of non-delivered faxes.
- **None** – No report will be generated.

Note 1: The Delivery Report will be delivered to the destination entered in the Report Destination Address field under the Fax Job Settings in your user profile settings.

Enter Customer Reference (optional)

The customer reference field is an optional identification code you may give your Fax MailMerge broadcast. The customer reference will print on your job delivery

report. It can be a maximum of 41 characters in length, although only 20 characters will be displayed on the job delivery report. The customer reference field can be used on the Job Status Dashboard to help you find this job. The customer reference will also be printed on your invoice.

Enter Billing Code (optional)

The billing code is an optional billing or department code you may give your Fax Mail Merge job. If you enter a billing code, your monthly invoice will be sorted by this code, and all jobs with the same billing code will be subtotaled. The bill code you enter can be up to 20 characters in length.

Customize Global Fax Header (optional)

The global header is an optional field of up to 20 characters. When data is entered here, the Record Header field for each destination is given with this value. This value then prints in the top header line of each delivered fax. This field is generally used when you want specific From information to print on all delivered fax pages.

View TIFF Preview Fax

You may preview your fax mail merge by clicking the round icon in the middle of the review page. You may view your Fax MailMerge document with the insertions from the first record (up to the first 5 pages). You should inspect this image to insure that the correct fields are merged, and the fonts are reproduced as expected.

You will need to have a TIFF viewer installed on your local system in order to preview your mail merge document. A TIFF viewer is normally included as part of the Windows operating systems. During the Fax MailMerge submission process, your browser will ask you what program to associate with the Fax MailMerge Preview and you can select the appropriate viewer from there.

The following is a short list of MailMerge compatible TIFF viewers that you can download if one is not already installed on your system. Please note that ParentREACH does not endorse any of these products; this is simply a helpful tool to provide easy access to a viewer.

[ACDSee32 3.0 for Windows 95/98/2000/NT](#)

[Jasc Software PaintShop Pro 6 for Windows 95/98/NT](#)

[Tiff-Sight for MAC](#)

[GraphicConverter for MAC](#) (North America)

[GraphicConverter for MAC](#) (Everywhere else)

JOBS: Cancel a Job

MyPortal allows you to cancel jobs that are in progress and jobs that have not yet started. However, you cannot cancel a job that has already been completed or cancelled.

- When you cancel a job that has not yet started (for example, a job scheduled for the future), you may cancel the job before any delivery attempts are made.
- Canceling a job that has already started:
 - When you cancel a fax, voice or SMS job that has already started, you can only cancel any outstanding deliveries that are not actually in progress at the instant of cancellation. There can be a delay in reaching all of the remote delivery sites, and, during this interval, some deliveries might still be started. Deliveries that have already been started cannot be cancelled.
 - When you cancel an email job that has already started, you can only cancel the email deliveries that have not yet been posted.

Use the following methods to cancel a job:

1. Click **Jobs tab** and **Check Job Status** link on the left side of the page.
2. Find your job listed on the **Jobs In Progress** table on the same page.
3. Click the **Cancel** button in the Action column.

OR

Click the icon in the **Status** column to open the **Job Status Details** page for your job and then click the **Cancel** button on that page.

4. Click the **Yes** button on a popup message which asks, “Are you sure you want to cancel this job?” The message will also note that if the system is simultaneously sending messages, it may not be possible to cancel all deliveries.

After you click the **Yes** button, your job will be cancelled and MyPortal will display the **Job Status Detail** page for your cancelled job. The details will include the number of messages that were cancelled out of the total number of messages in your job.

JOBS: Resend a Job

MyPortal allows you to quickly and easily resend one of your completed jobs.

Resend a Job

- Resend a job in its entirety to all addresses included in the original job
- Resend a job to only the destinations that did not receive the document
- Resend a job to destinations that did not receive the document where the error was specifically “busy” or “no answer” (fax jobs only)
- Resend a job to one or more of your stored lists
- Resend a job to additional addresses

You may also specify the time you want the resend to start.

How to Resend a Job:

You may resend a job from one of the following three locations:

1. **Job Status Dashboard:** Locate your job in the Completed Jobs table of the Job Status Dashboard page and click the Resend button.
2. **Job Status Details:** Click the Resend icon located on the Job Status Details page for your job.
3. **Report Results:** Click the Resend button located on the Report Results page for your job.

To Resend Your Job:

1. Select the desired recipients for your job from the available resend options:
 - a. Resend to all recipients in my original list
 - b. Resend to all undelivered recipients in my original list
 - c. Resend to undelivered recipients in my original list with a status of Busy and/or No Answer (you may use the checkboxes on the page to select Busy, No Answer, or both options). Note this is for fax only.
 - d. Resend to a stored list (click the Browse button to select one or more of your saved lists stored on MyPortal’s system)
 - e. Resend to additional recipients
2. Job Schedule: Select your schedule preferences at the bottom of the page from the following options:
 - a. Send Now (Express)
 - b. Scheduled *

- c. Off-Peak (fax job will be sent anytime between 9:00 p.m. and 7 a.m. EST)

* If you select the Scheduled option, MyPortal will allow you to select your start date and start time from dropdown boxes beneath the scheduling section.

3. Click the **Resend** button.

Note: If you change your mind and decide not to resend your job, you may click the **Cancel** button. In this case the Resend Job page will vanish and the page you were on previously will reappear.

MyPortal will resend your job based on the schedule and list options you entered above. The **Job Confirmation Page** will appear with details about the job you just resent, including:

- Unique ID number for your job (generated by the system) – a new Job # will be generated for your resent job
- Job start time (or scheduled time)
- Name of the list(s) used as well as any ad-hoc addresses
- Name of the document file(s)
- Job preferences

Important Tip!

Make a note of the Job # (unique ID number) assigned to your job so that you can easily track the status of the job from the Job Dashboard.

JOB S: Manage Job Templates

A job template is simply the settings you save for any job you send. When you launch a new job you can give the job a name and save the job settings. When you have an identical or similar job you need to send in the future, you can select this template for use as the basis of the new job.

The Manage Templates section allows you to:

- Create a new template
- Delete a template
- Edit an existing template
- Locate a template
- Save job settings as a job template
- View a job template
- Use job template to send a job

MANAGE TEMPLATES

Available Templates Refresh Delete All Templates ?

Display: All OR Date Range: July 19 2005 - July 19 2006 Search

9 templates found, displaying all templates.

| Template Name | Template Type | Modified Date | Edit | Delete |
|---------------------|---------------|---------------|------|--------|
| leanEmailTemplate | Email | 07/19/06 | | |
| leanTestSimpleEmail | Email | 07/19/06 | | |
| july16_1 | Email | 07/16/06 | | |
| july17_1 | Email | 07/17/06 | | |
| mitch2 | Email | 07/16/06 | | |
| mitch_test | Email | 07/16/06 | | |
| newemailtemp | Email | 07/16/06 | | |
| shilpa11 | Email | 07/17/06 | | |
| shilpadr1 | Email | 07/17/06 | | |

[CREATE NEW TEMPLATE](#)

Create a New Template

There are two ways to create a new job template:

1. Click the **Jobs** tab, and the **Manage Templates** link.
2. Click the **Create New Template** button at the bottom of the page.
3. Enter a job name for your template.
4. Complete all or a portion of the settings for your job by following the 4 steps of the job send process. See **Job Launch** for more details.

5. Click **Save As Template** at the bottom left of the page to save the template. Your template will now be available when you click on the **Jobs** and the **Manage Templates** link.

OR

1. Click on the **Jobs** tab, and the **Create/Send Job** link.
2. Enter a job name for your template.
3. Complete all or a portion of the settings for your job by following the 4 steps of the job send process. See **Job Launch** for more details.
4. Click **Save As Template** at the bottom left of the page to save the template. Your template will now be available when you click on the **Jobs** tab and the **Manage Templates** link.

Delete a Template

MyPortal allows you to delete a template that has been saved:

1. Click on the **Jobs** tab and the **Manage Templates** link on the left.
2. Locate your job template (using the procedures described in **Locate a Template**.)
3. Click the **Delete** icon next to the name of the template you wish to delete.

MyPortal will delete your job template from the system and then redisplay the Manage Templates page.

Delete All Templates

MyPortal allows you to delete all of the templates to which you have access:

1. Click on the **Jobs** tab and the **Manage Templates** link.
2. Click the **Delete All Templates** button at the top right of the table.

MyPortal will permanently delete all job templates from the system and then redisplay the Manage Templates page without any templates listed.

Edit an Existing Template

MyPortal allows you to edit a job template once it has been saved:

1. Click the **Jobs** tab and the **Manage Templates** link.
2. Locate your job template using the procedures described in **Locate a Template**.
3. Click **View** next to the template you wish to edit. The details from your job template will now appear on the **Create/Send Job** page of the **Jobs** area of MyPortal.

4. Update the settings for your job template by changing the entries on the Create/Send Job page as desired.
5. Click **Save as Template** to accept the new changes

Locate a Template

You can locate one of your saved job templates by using the following steps:

1. Click the **Jobs** tab and select the **Manage Templates** link.
2. Enter the template name in the textbox and then click Search.

OR

Enter new dates and then click Search.

If your search was successful, the template you were searching for will be the only template listed on the Manage Templates page.

Save Job Settings as a Job Template

Once you have entered details into MyPortal for one of your jobs, you may wish to save your job settings for future use. You may do so by saving your settings as a job template:

1. Click the **Jobs** tab and enter the **Create/Send Job** area.
2. Enter any job selections you desire in the steps on the Create/Send Job page.
3. Click the **Save as Template** button found at the bottom of the Create/Send Job page.

OR

Leave the “Save this job as a template” checkbox checked on the Review Job page in the Create/Send Job area.

4. Enter a name for your template in the popup window which prompts you for a name.

MyPortal will save all of your job settings on the system as a job template.

View a Job Template

You may view a saved job template by using these steps:

1. Click the **Jobs** tab at the top of the page
2. Select the **Manage Templates** link.
3. Locate your template. If you do not immediately see your template listed on the table, you can find it by following the steps listed in **Locate a Template**.

4. Click the name of the template in the Template Name column. The Review Job page from the Create/Send Job section will appear and display the details from your job template. The Create/Send Job page will also be populated with details from your job template.

Use Job Template to Send a Job

To use one of your job templates to send a job:

1. Click the **Jobs** tab and then click the **Manage Templates** link.
2. Locate your job template (using the procedures described in **Locate a Template**).
3. Edit your job template as needed and click **Review & Send** at the bottom of the page.

MyPortal will now send your job using the details in the saved job template and any changes you may have made subsequently. The Review/Send page will be displayed on the screen. Click the **Submit Now** button at the bottom of the page to send your job.

Troubleshooting Tips:

1. If your job template details include a job with “Scheduled” times that occur in the past, MyPortal will prompt you with a message saying this is not permissible. You will then be able to change your job’s scheduled delivery time.
2. If you select a job template for which one, or more, of the document files is no longer available, MyPortal will use a pop-up window to inform you of the problem. MyPortal will then remove the invalid paths from the Create/Send Job page and display the page to you. You will then be required to enter new document paths to send your job.

LISTS: Manage Lists

You can easily manage your recipient distribution lists via MyPortal. The following features are available to you:

- Upload a new list
- Map your list fields
- Search for a list
- View a list of all your stored lists
- View list contents
- Download a list
- Delete a list
- Edit a list

The following helpful topics are also covered in this section:

- Learn about text, comma delimited files
- Create a text, comma delimited file using Microsoft Excel
- Create a text, comma delimited file using a common database application
- Create a new list from scratch using Notepad
- Create a new list from scratch using Microsoft Excel
- Set up a fax list for use with cover sheets
- Set up list options for fax jobs
 - Personalize your fax header
 - Send to international fax numbers
- Advanced Feature: Control access to lists within your company
- Reference Information: List data formatting

Upload a New List

In order to send a document to your recipients, you must first upload a new list from your local computer to the system. The system supports upload of fax, email, voice and SMS lists. It is important to note that the file containing your recipients must be saved as a text, delimited file for it to be uploaded. To upload a new list, follow these steps:

1. Click the **Lists** tab.
2. Click the **Upload New List** button. The Upload New List popup window will appear.

3. Enter the **List Name**. The list name entered will become the unique ID for referencing and selecting the list in the future when new jobs are launched.

List names may use from 1 to 24 characters and can be composed of letters, digits, and underscores. List names may not contain spaces. They should not contain any punctuation characters, except for the underscore. Case is insensitive, so there is no difference between LIST_A and list_a, for example. No spaces or tabs are allowed. The list name you enter does not have to match your local list name, but it may help you keep track of your lists if you use the same name.

4. Keep the **Character Code Set** as “Western European” unless you are uploading a Japanese or Chinese character list.
5. Click **Browse...** to locate the list on your local system.
6. Highlight the list you want to upload to the system and click **Open**.
7. Select your list delimiter: comma, tab, semi-colon or colon. Your list must be in text format with fields separated by one of these delimiters to be uploaded properly.
8. Select your list type: fax, email, voice or SMS.
9. Click **Upload List**
10. If the system can recognize the fields in your list, the upload will be successful. If the system cannot recognize the fields in your list, a list mapping wizard will appear. See **Map Your List Fields** for more details.
11. The system will provide a confirmation page including:
 - Upload Status: Complete, Failed or In Progress (a Refresh option is provided on the page)
 - List Name
 - List File Name
 - Total # of records in file
 - Total # of accepted records
 - Total # of rejected records
12. Click **Close Window**.
13. Your list will now appear under available lists.

* *Helpful Hint:* MyPortal provides immediate feedback on any list values that are rejected when you upload a list.

Map Your List Fields

When uploading a new list, the system must identify certain fields (or columns) in your list, such as the address field. The list mapping wizard makes it easy for you to identify the needed fields in your list. *Note!* To bypass the wizard, you can also follow certain rules to name the fields in your list file. See **Reference Information: List Data Formatting** for more information.

When you upload a list, the wizard checks that the Address (ADDR) field is present. If this field is not present, the List Mapping Wizard appears after you click **Upload List**.

Please note that when uploading a list, the wizard only helps in the identification of the commonly used fields for the Address (ADDR), Company Name (Ref) and Contact Name (Header). There are additional fields that can be named. For example, fax lists can include fields for use with cover sheets, email lists can contain inserts, etc.

Map a List

After clicking the **Upload List** button:

1. Depending on the type of list you are uploading (fax, email, voice or SMS) select the address field in your list.
2. *Fax lists only:* Identify the contact name in your list by selecting **Contact Name (Header)** from the drop-down list. Data from this field will be printed in the header of each out-going fax. Selecting this field is optional.

Example:

The record shown here was corrected to change the header field name from “MyHeader” to “Contact Name (Header)”:

The screenshot shows a web browser window titled "http://test2.myportal.premiereglobal.com/uploadListMap.do - Microsoft Internet Explorer". The page content is titled "MAP FIELDS" and contains the following text:

The system requires you to identify certain fields in your list needed by the system. Leave all other fields as-is.

Fax # (Addr): Select the field that corresponds with the fax number. – *Required*

Company Name (Ref): Select the field that contains the information you want to appear on the delivery reports. This is usually the company name but could also be any other field.

Contact Name (Header): Select the field that contains information you want to appear on the top of each out-going fax. This is usually the contact name. – *Optional but recommended*

| Row No. | Company Name (Ref) | Type | Addr | Contact Name (Header) | To |
|---------|--------------------|------|------------|-----------------------|------------------|
| 0 | Ref | | | MyHeader | |
| 1 | MMC Productions | fax | 2063500753 | FILM INSIDER | Matt McConaughey |

The header data for this record appears at the top of this record's fax:

Mar 14 2006 15:39:04 Via Fax ->

FILM INSIDER

Page 001 Of 001

Mr. M. McConaughey
MMC Productions

Dear Matt,

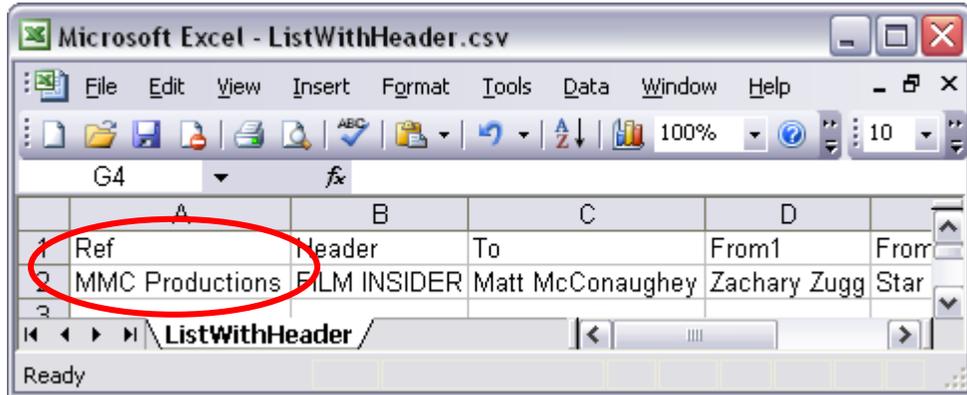
You and a guest are cordially invited to attend the Animation Awards Banquet. Nick Park, the three-time Academy Award-winning creator of the animated characters Wallace and Gromit will be presented with this year's Ani award. The evening's festivities will include a sneak preview of Nick's newest film, *The Curse of the Were-Rabbit!*, featuring the beloved Wallace and Gromit.

All proceeds from the evening will go to charity.

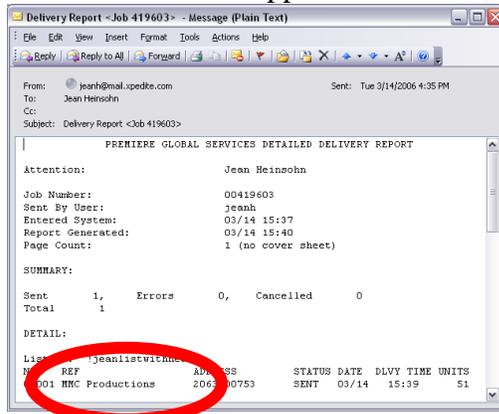
- 3. Identify the company name in your list by selecting **Company Name (Ref)** from the drop down list. Data from this field will appear next to the address on your delivery reports and will help you more easily identify successful and unsuccessful deliveries. Selecting this field is optional.

Example:

“MMC Productions” is the Ref in this list:



MMC Productions appears as the REF in the Detailed Delivery Report:



4. Check that all the other drop-down boxes still read *select correct field name*.

Search for a List

You can search for an existing list in the system by following these steps:

1. Click the **Lists** tab. The **Available Lists** table will appear showing you a list of all your current lists in the system.
2. Enter the list name in the textbox at the top of the page and click **Search**. Your search results will be displayed. You can also enter a partial search using the wildcard * value. For example, if you enter ab*, the search results will include any list beginning with ab such as abc consulting, abbott inc., etc.

View a List of All Stored Lists

You may view and search a list of the distribution lists that are currently stored in your account. Click on the **Lists** tab to view the Available Lists table.

Initially the table will be sorted alphabetically (0-9, A-Z) by List Name. You may re-sort the table by clicking one of the column headers. To sort in the opposite direction, click the column header a second time. The table's contents include:

- List Number
- List Name
- Modified Date
- Created Date
- Options to **View**, **Delete**, or **Download** a list

MyPortal will page the table according to the space available on the browser screen. If you have more lists than will fit on one page, you may navigate through the table by clicking the page numbers displayed at the top of the table to jump ahead and back, or by clicking:

- *First* to see the first page
- *Prev* to see the previous page
- *Next* to see the next page
- *Last* to see the last page

You may **View**, **Delete**, or **Download** a list from the **Manage Lists** page. The page also includes an **Upload** option which you may use to upload a new list to the system.

View List Contents

You may use the following method to view the contents of an existing list:

1. Click on the **Lists** tab.
2. Locate the list by entering the List Name in the search box and clicking **Search**.
3. Click the **View** button to the right of the name of the list. The contents of your list will appear in a separate pop-up page.
4. To close the list's contents, click the **Close** button.

Download a List

You may download a list in text, comma-delimited (CSV) format from MyPortal to your local computer. To download a list, use the following steps:

1. Click the **Lists** tab.
2. Locate your list from the **Available Lists** section of the page. You can find your list by entering the List Name in the box and clicking **Search**.
3. Click the **Download** button to the right of your list name to open the **File Download** pop-up window.
4. Click the **Open** button on the pop-up window to view your list, or click the **Save** button and select a location to save the list on your local system, and then click the next **Save** button. The list is now available on your local system for viewing and editing.

Delete a List

You may delete a specific list from the system. Once a list has been deleted, it will no longer be available for you to use. To delete a list, follow these steps:

1. Click the **Lists** tab.
2. Find the list you wish to delete on the **Manage Lists** page.
3. Click the checkbox to the right of the name of the list and click the **Delete** button at the top.
4. MyPortal will ask you to confirm the deletion of your list. (Note: No additional warnings will be given.) Click the **OK** button to complete the deletion of your list or click the **Cancel** button to cancel the deletion.

Delete All Lists

MyPortal also allows you to delete *all* the lists you have access to if you wish:

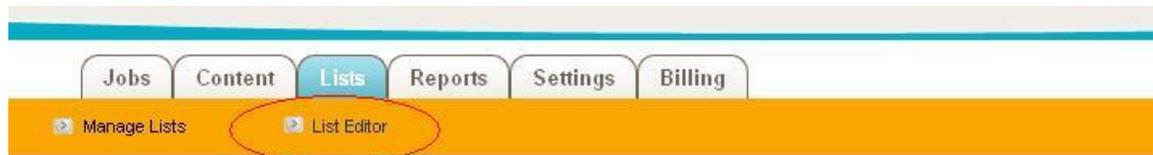
1. Click the **Lists** tab.
2. Place a check in the **Select All** checkbox at the top of the Delete column.

3. MyPortal will ask you to confirm the deletion of all lists. (Note: No additional warnings will be given.) Click the **OK** button to complete the deletion of all lists or click the **Cancel** button to cancel the deletion.

Important! This will permanently delete all of the lists you have access to. Some of these lists might be used by other people in your company. Please be sure you truly wish to delete all lists before you select this option.

Edit a List

MyPortal allows you to add, change and delete individual recipient data on your list via the List Editor. You can also create new lists from scratch by typing in your recipient data directly into the list editor. To access the list editor, go to **Lists** and click the **List Editor** subtab link.



Edit list contents

To edit an existing list stored in your account, follow these steps

1. Click **List** menu
2. Click **Open**. Depending on the number of lists in your account it may take several seconds to display all of the lists
3. Highlight the list you wish to edit. Your list contents will appear in the editor.
4. Be sure to save any changes you make to your list.
 - To delete contents from a cell, click on the cell once and select the Delete key on your keyboard
 - To add contents to a cell, click on the cell once and enter the data
 - To edit the contents of a cell, highlight the cell once and
 - To cut and paste contents from one cell to another, click the cell that contains the contents you want to paste and click the Cut icon in the editor. Click the cell where you want to paste the data and click the Paste icon
 - To copy and paste contents from one cell to another, click the cell that contains the contents you want to copy and click the Copy icon in the editor. Click the cell where you want to paste the data and click the Paste icon
 - To copy a row to another row, highlight the row you want to copy and select the Ctrl-C keys on your keyboard. Highlight the row number

where you want to copy the data and select the Ctrl-V keys on your keyboard.

- To search for specific data in your list, click the **Search** tab. Select the column that contains the data you wish to search. Enter your search criteria and click **Search**.
- To search and replace specific data in your list, click the **Search** tab. Click the **Replace** button. Select the column that contains the data you wish to search. Enter your find and replace criteria and click either **Replace** or **Replace All**. Replace all will replace all of the data automatically. Replace allows you to select replace one by one for each item.

Save Changes

To save the changes to your list:

1. Click **List** menu
2. Click **Save**.
3. Highlight the list you wish to edit. Your list contents will appear.

Save Changes under a New List Name

To save the changes under a new list name

1. Click **List** menu
2. Click **Save As**.
3. Enter the list name. The system will verify that the list name is unique and save the list.

Import a List

You can import a list from your local system to edit online. To import a list:

1. Click **List** menu
2. Click **Import**. Depending on the number of lists in your account it may take several seconds to display all of the lists
3. Highlight the list you wish to edit. Your list contents will appear in the editor.

Export a List

You can export a list from the editor to your local system. To export a list:

1. Click **List** menu
2. Click **Export**.
3. Click either **Open** to view the exported contents or **Save** to save the list contents on your local system.

Print a List

You can print the contents of your list. To print the list, click the **Print** option, select the printer and choose Print.

Add More Insert, To and From Fields

The system supports the addition of multiple fields for the optional fields of “insert”, “to” and “from”. To add more insert fields, click the **Insert** dropdown and select the insert column to add. To add more “to” fields, click the **To** dropdown and select the “to” column to add. To add more “from” fields, click the **From** dropdown and select the “from” column to add.

Create New List from Scratch

To create a new list from scratch, follow these steps

1. Click **List** menu
2. Select **New** and the type of list you want to create (Email list, Fax list, SMS list, Voice list)
3. A blank spreadsheet will open and you can enter your list data in the cells

There are required and optional fields for each of the list types and these are auto-created as column headings when you choose a new list:

| Field Name | Required / Optional | Description | List Types |
|------------|---------------------|--|--|
| REF | Optional | Reference field; this is usually the company name and appears on delivery reports next to the address. This helps you identify the recipient of the message on your reports | Fax, Email, Voice, SMS |
| TYPE | Required | The type of address. The values that must be entered are: <ul style="list-style-type: none"> ▪ Fax numbers: Fax ▪ Email addresses: Internet ▪ Phone numbers: Voice ▪ Mobile numbers: SMS | Fax, Email, Voice, SMS |
| ADDR | Required | The address of your recipients. Depending on the type of list you are creating this could be a fax number, email address, phone number or mobile number. | Fax, Email, Voice, SMS |
| INS_1 | Optional | A personalization field for inserting customized information into the body of your message, You can add multiple insert fields. | Email, Voice, Fax- <i>for bannerfx usage only.</i> |
| Password | Optional | Only applicable if you are including downloadable files in your message. This is | Email |

| | | | |
|----------------------|----------|--|------------|
| | | the password entered by the recipient to retrieve downloadable files | |
| eFormat | Optional | The preferred email format of the message body the recipient will receive. Leaving the field empty or setting it to "default" will send a multipart message body rather than just a single message body if it would do so normally. Valid entries are html, text or default. | Email |
| Header | Optional | Information that prints on the top of the outgoing fax. This is usually the contact name. | Fax |
| TO_1; FROM_1; Attn_1 | Optional | Information used with coversheets. This personalizes the information that is inserted in the To, From and Attn fields of the coversheets. You may add more than one To, From or Attn field depending on how your coversheets were created. | Fax |
| AltType | Optional | Enter the word "fax" for the alternate fax address or "voice" for the alternate phone number | Fax, Voice |
| AltAddr | Optional | The fax number for an alternate address. If the delivery is unsuccessful to the primary address, delivery attempts will be made to this alternate address | Fax, Voice |

Learn about Text, Comma-delimited (CSV) Files

A CSV file (or comma separated value file) is simply a file with a text format in which each field (or column) is separated by a comma. CSV formatting is used as a portable representation of information that is typically stored in a database. When you export data from a database, each row (each line) in the resulting CSV file represents one entry (or record) in the list. Cell data, that is, each field in a record, is separated by commas. Commas may be followed by spaces and/or tabs, but these are optional, and MyPortal ignores them. If a field includes a comma, the whole field must be surrounded with double quotes so that the comma is not mistaken for a field delimiter.

Virtually all software applications allow you to save or export the data into CSV format. Most database software provides online help for saving information in CSV format. It is often as simple as selecting a CSV extension in the Files of Type field in a Save As window. However, the column headings must match those required by MyPortal so that your data is properly applied.

In a CSV file, each line has the same number of columns. The first line is typically the Column Title or Heading line that describes the type of data in that

column. An example for a fax list which includes data such as fax number, contact name, etc. is shown below:

Fax, Email, Contact, Company
 4155551212, samsmith@abc.com, Sam Smith, ABC Company
 3332221212, jjones@xyz.com, John Jones, XYZ Incorporated
 7771111212, suej@abbott.com, Susan Johnson, Abbott Consulting

Example of a valid CSV list file for use in a fax list for MyPortal:

```
Ref, Addr, Type, To_1, To_2, To_3, To_4, To_5
1,2125551212,fax,John Smith,ABC Systems,123 Main Street,Suite 100,"New York, NY"
2,2125551234,fax,Bob Jones,ABC Company,,101 Broadway,"New York, NY"
3,2125551267,fax,Ralph Green,Revlon,100 Park Ave.,,"New York, NY"
```

If there are commas within a particular field in the CSV file, you can choose to enclose the field by quotes so that the import of the list works correctly and imports the right data into the right places:

```
"Ref","Addr","Type","To_1","To_2","To_3","To_4","To_5"
"1","2125551212","fax","John Smith","ABC Systems","123 Main Street","Suite 100","New York, NY"
"2","2125551234","fax","Bob Jones","ABC Company",,"101 Broadway","New York, NY"
"3","2125551267","fax","Ralph Green","Revlon","100 Park Ave.",,"","New York, NY"
```

Create a Text, Comma-Delimited (CSV) File using Microsoft Excel

Your list file must be in text, comma-delimited (CSV) format in order to upload it to the system, and Microsoft Excel is an easy tool for creating a CSV file. This section describes how to save an existing file in text, comma-delimited format using Excel.

1. Launch Microsoft Excel.
2. Click **File, Open** to open an existing Microsoft Excel file or other text format file that contains your recipients.
3. Once the file is opened, click **File, Save As**.
4. Enter a name for your file next to **File name** and select **CSV (Comma delimited) (*.CSV)** next to **Save as type**.

The image shows a screenshot of the Microsoft Excel 'Save As' dialog box. The 'File name' field contains the text 'MyNewList.csv'. The 'Save as type' dropdown menu is open, showing 'CSV (Comma delimited) (*.csv)' selected. To the right of the dialog box are two buttons: 'Save' and 'Cancel'.

5. Click **Save**
6. Click the **OK** button in the popup window that appears to only save the active sheet.
7. Click the **Yes** button in the next popup window to keep the workbook in CSV format.
8. Follow MyPortal steps for **Upload a New List** to upload the list to the system.

Create a Text, Comma-Delimited (CSV) File using a Common Database Application

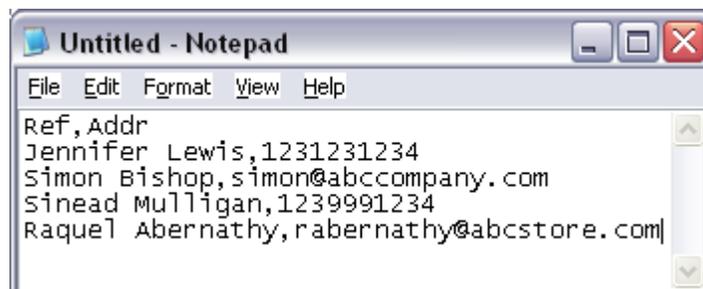
Virtually all database and contact management systems allow you to export or save the file in text, comma-delimited (CSV) format. There may be minor differences among the various applications as to how you convert the file to text, csv format. In most instances, you can:

1. Open the file in the source application.
2. Click **File, Save As** or **File, Export**.
3. Locate an option to save as or export as text, comma-delimited (CSV) format.
4. Locate a folder where you would like to save the converted file and enter a name for the file.
5. You can now upload this file to MyPortal.

Create a New List from Scratch using Notepad

You can quickly create a new recipient list from scratch. The example below is a fax list that consists of a field containing fax numbers and a second field containing contact names. The following instructions tell you step-by-step how to rapidly create a valid recipient list with names and addresses using Notepad.

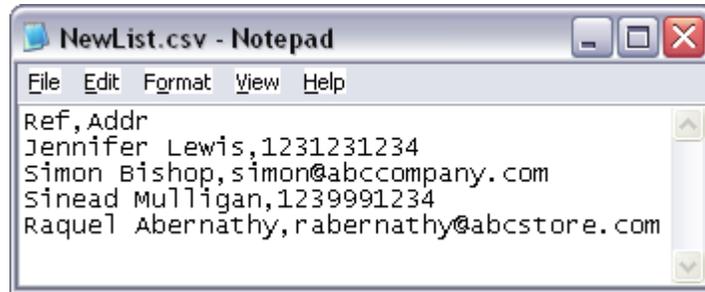
1. Launch the application **Notepad**.
2. Click **File, New** to open a new document.
3. Type "**Ref,Addr**" on the first line.
4. Select the Enter key on your keyboard to continue to the second line.
5. Type in list of names and addresses for your recipients:
 - a. Type in the name of one of your recipients.
 - b. Type a comma (,) directly after the name.
 - c. Type in either the fax number, email address, phone number or mobile number of the recipient directly after their name.
 - d. Select the Enter key on your keyboard to continue to the next line.
 - e. Repeat steps 4a-d until you have entered your entire list.



6. Save your new list:
 - a. Select **File, Save As...** in the top menu.
 - b. In the popup window that appears, select the folder where you would like to save your new list.
 - c. Select **All Files** from the Save As Type dropdown box
 - d. In the file name box, type in the name of your new recipient list followed by “CSV”.
 - e. Click the **Save** button.



You have successfully created a new csv list that you can now use with a job.



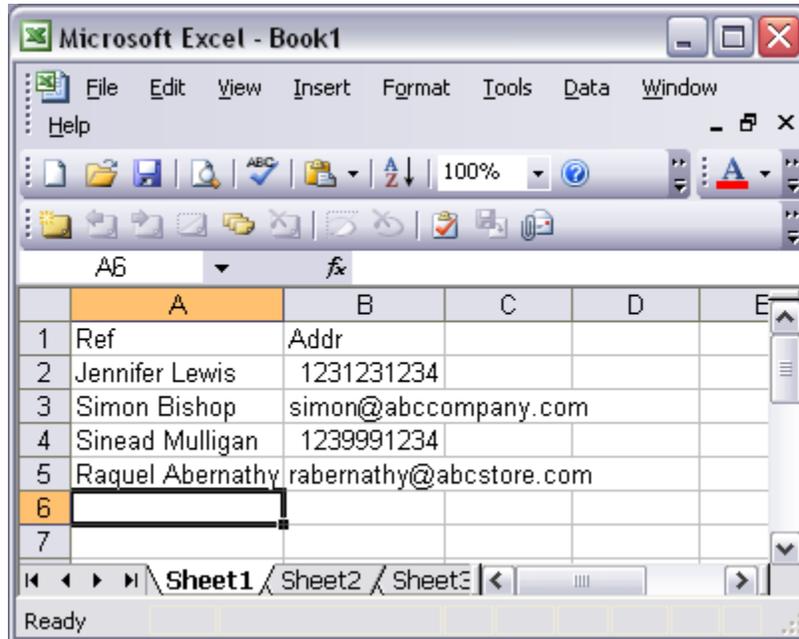
7. To upload the new list to MyPortal, follow the instructions under **Lists: Upload a New List**.

Create a New List from Scratch using Microsoft Excel

If you do not already have a list of recipients, you can create a new list using Microsoft Excel. The following example shows the creation of a fax list using Excel:

1. Launch Microsoft Excel.
2. Click **File, New** to open a blank workbook.
3. Type “Ref” in box A1.
4. Type “Addr” in Box B1.
5. Tab to the cell beneath the Ref box (A2) and type in a contact name.
6. Tab to the cell beneath the Addr box (B2) and type in the destination for that contact.

7. Type in the rest of your list of recipient names and addresses:



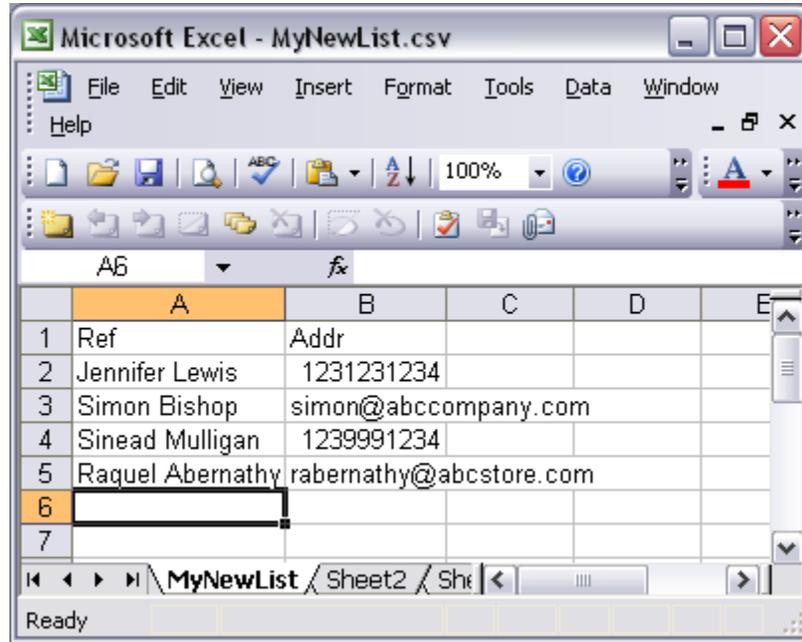
8. Save your new list:
- Select **File** and **Save As...**
 - Select the folder where you would like your list stored, enter a name for your file next to **File Name**, and select **CSV (Comma-delimited) (*.CSV)** next to **Save as type**.
 - Click the **Save** button.



- Click the **OK** button in the popup window that appears to only save the active sheet.
- Click the **Yes** button in the next popup window to keep the workbook in CSV format.

You have successfully created a new csv list that you can now use with a job.

Follow the **Upload a New List** instructions to upload this list to the system.



Set up a List for Use with Cover Sheets

You can select a cover sheet to be sent with your fax job, and each recipient on your list will receive a personalized cover sheet along with the faxed document. In order for the cover sheet to be personalized with the correct “To” and other information, your list needs to include certain information and be formatted correctly. The following fields can be used in your list and inserted on your cover sheets:

- To – this is usually the contact name from your list
- From – the person or company sending the document
- Attn – the subject of your cover sheet or additional Attention information

| | A | B | C | D | E |
|---|-------------|-------------|----------------|-------------|-----------------|
| 1 | Addr | Ref | To | From | Attn |
| 2 | 4155559999 | ABC Company | Jan Jones | Bob Smith | Accounting Dept |
| 3 | 9095551212 | XYZ Inc | Karen Anderson | Bob Smith | Marketing Dept |

Note: If you do not have a “From” field or an “Attn” field in your list, you can enter this information from MyPortal web interface and it will appear on each cover sheet. This is under **Optional Features** within **Create / Send Job**. The text entered in the “From” textbox will appear in the “From” section of your cover sheet. The text entered in the “Subject/Comments” textbox will appear in the “Attn” section of the cover sheet.

Cover Sheet Setup: Include Cover Sheet

From:

Subject/Comments:

Select Cover Sheet:

However, if you do have a “From” or “Attn” field in your list, the information from your list will be used, regardless of whether or not you enter information in the web interface.

Using Multiple Lines in Your Cover Sheet

Some list fields are permitted to have multiple lines. These fields are: *Attn*, *To*, *From*. While these fields can have between 1 and 5 lines, all other list fields are limited to a single line.

Mar 07 2006 08:04:46 Via Fax -> ABC Consulting Joe Smith Page 001 OF 002

| 1 | Ref | Type | Addr | Header | To | From | Attn |
|---|-------------|------|------------|-------------|-------------|----------------|--------------------------|
| 2 | ABC Company | fax | 3035551222 | Joe Smith | Joe Smith | Carolyn Cooper | Important Communication! |
| 3 | XYZ Inc. | fax | 5055554444 | Bob Johnson | Bob Johnson | Carolyn Cooper | Important Communication! |
| 4 | Abbott Co | fax | 4441112385 | Sarah Green | Sarah Green | Robert Hillman | Important Communication! |

VIA FAX

TO: Joe Smith

FROM: Carolyn Cooper

ATTN: Important Communication!

TO: FAX PHONE#: 3033881037

Job Number: 07749930-007-1-0000
TIME: Tue Mar 07 00:04:00 2006

2 pages including cover sheet

To create field names for fields with multiple lines, use the normal field name followed by the line number (example: Attn1). The line number may be preceded by any number of dashes, underscores, or nothing (example: Attn--1 or Attn_1). Field names are not allowed to contain both dashes and underscores for the same field.

For example, to create an Attn field with 5 lines, you could split the Attn field into five fields with the following names:

- Attn1, Attn2, Attn3, Attn4, Attn 5
or
- Attn_1, Attn_2, Attn_3, Attn_4, Attn_5
or
- Attn-1, Attn-2, Attn-3, Attn-4, Attn-5

Rules for Naming Multi-Line Fields:

1. The number, not the column position, determines the order of the columns in a list. If you create the following field names for your list, the data for list columns 4 and 3 would be switched in your actual list:
To--1, To--2, To--4, To--3, To--5

2. The field names for multiple line fields are renumbered upon upload. If you create a list with the following field names, the fields will be renumbered starting at 1 when you upload your list:

To--3, To--4, To--5

After the portal renumbers your fields, your uploaded list will have the following field names:

To--1, To--2, To--3

Thus, the order implied by the number used in an uploaded file will be maintained.

3. When multi-line fields (such as in the examples given above) are uploaded to MyPortal, blank fields (fields with no data) will be eliminated, and the next field containing data will be assigned to the next numbered field.

Personalize your Fax Header

You can control the information that appears on the top of each outgoing fax by including certain information in your list. The contents of the **Header** field in your list will be inserted on the top of each fax, and this is typically the contact name of the fax recipient. This helps ensure that the document makes it to the intended recipient, particularly if you are not attaching a coversheet to your document. This example shows how the header field containing **Joe Smith** maps to the name that prints on the top of the fax.

| | A | B | C |
|---|-------------|------------|---------------|
| 1 | Addr | Ref | Header |
| 2 | 9095551212 | XYZ Inc | Joe Smith |

Mar 06 2006 21:15:18 Via Fax

-> ABC Consulting

Joe Smith

Page 001 of 001



January 13, 2006

To Whom It May Concern:

Sending to International Fax Numbers

You can include international fax numbers in your distribution list if you prefix them with the codes needed to dial the number directly. Directly dialed international calls require:

1. The international calling number (*see below), then
2. The country code of the country you are calling, then
3. The city code of the city you are calling, then
4. The fax number.

* The international calling number from the US to another country is 011.

Note 1: For help, you may reach an AT&T international operator by dialing "00".

Note 2: If you are calling a country with an 808 or 809 country code, you do not need to dial 011, but you do need to dial 1.

Example – Send a fax to the Sun Palace hotel in Cancun, Mexico from the US:

Question: You wish to send a fax from the U.S. to the Sun Palace hotel in Cancun, Mexico. You know their local fax number is 881 6089. How can you dial it directly from the US?

Answer: To dial directly from the U.S., you will need the international calling number + the country code for Mexico + the city code for Cancun + the Sun Palace's local fax number (881 6089). First, you look up the codes you need on the internet (if you have trouble you can call the AT&T international operator for help):

- U.S. international calling: 011
- Country code for Mexico: 52
- Cancun area code: 998
- Sun Palace in Cancun: 881 6089

Next, assemble the complete fax number:

international calling code + country code + city code + local fax number:
011 + 52 + 998 + 881 6089

And now you are ready to direct dial a fax to the Sun Palace!

Include an International Fax Number in your Distribution List

To include an international fax number in your distribution list, simply include all the numbers (codes) you would need to dial the fax number directly from your location.

Example: To add the number for the Sun Palace in Cancun to a distribution list being called from the U.S., add 011529988816089 to the Addr column.

| | A | B | C |
|---|--------------|-------------|-----------------|
| 1 | Ref | Type | Addr |
| 2 | Jennifer Joy | fax | 2069990753 |
| 3 | Zachary Zugg | fax | 2069990755 |
| 4 | Sun Palace | fax | 011529988816089 |
| 5 | | | |

Advanced Feature: Control Access to Lists within Your Company

MyPortal allows you to control access and visibility to lists within your account. There are two types of lists that can be maintained: customer-level lists and user-level Lists. Customer-level lists can be viewed by any user accessing your account and user-level lists can only be viewed by the user who uploaded the list.

Special characters in the system (!, #, @, \$) indicate certain things about the list when they are used as the first character of the list name. The ‘!’ character identifies the list as a user-level list that will be accessible only by the ID registered to use it. The ‘#’ character identifies the list as a customer-level list that will be accessible to any user logging into that customer account. Important! Care should be taken before uploading or removing a customer level list. To specify a list as a user-level or company-level simply place a “!” or a “#” in front of the list name.

For example: The ABC Company has two users: sally123 and john456. Sally and John have each created a ‘personal’ (or user-level) list named ‘personal’. A company wide (or customer-level) list named ‘sales’ also exists. The directory of lists for both Sally and John now includes both ‘!personal’ and ‘#sales’ as a list name. However, John cannot access Sally’s list ‘!personal’ list, nor vice versa. Both Sally and John are able to access the ‘#sales’ list.

The ‘@’ and ‘\$’ characters are reserved for special purposes. Use them only if instructed to do so by your Representative.

Reference Information: List Data Formatting

The contents and format of the lists you upload are important. The system requires certain fields to be present and identified in order for your job launch and

document deliveries to be processed successfully. A list mapping wizard will appear automatically at the time you upload a new list to help you identify the correct fields in your list, but you can also include additional fields for using special features such as cover sheets, inserts, etc. If you name your list fields the correct system names, you can bypass the list mapping wizard altogether. The following sections describe list field naming conventions

Your list must be may only be used for a specific job type, i.e. fax, email, voice or SMS. The following table includes the exact field name for each allowable field, a description of the field, values allowed for the field, whether or not it is mandatory to include the field in your list, and whether or not multiple lines are allowed in the field.

| Field Name | Description | Acceptable Values | Mandatory | Multiple Lines Allowed |
|----------------------|---|---|---|---|
| Ref | This is usually the company name of your recipient but can be any other field that you choose. The "Ref" information appears on your delivery report and helps you identify who did and did not receive the document. | Any 7-bit Latin ISO characters (ASCII) | No | No |
| Type | The type of address used in the address field (Addr). | The following field values are acceptable: <ul style="list-style-type: none"> • "fax" • "internet" (e-mail) • "sms" • "voice" | No if you have a single type of address in your list. You can select the address type when you upload the list. If you have multiple types of addresses, type is required. | No |
| Addr | The address destination for the document, which may include fax numbers, phone numbers, email addresses or SMS mobile numbers. | Addr value must be consistent with any value entered in the Type field. Every record in the Addr column should contain valid information (either an area code with a 7-digit number or an email address with an @ sign). | Yes | Yes, depending on address up to 5 lines allowed |
| Header (fax only) | This is the information that appears at the top of a fax as a header. Note: if you have addresses on your list other than fax number (i.e. email address), the header will be ignored. | Any 7 bit Latin ISO characters (ASCII). Only the first 20 characters will be used by MyPortal system. | No | No |
| To (fax only) | Text for use in "To" field on a cover Sheet | Any language characters | No | Yes, up to 5 lines allowed |
| From (fax only) | Text for use in From field on cover sheet | Any language characters | No | Yes, up to 5 lines allowed |
| Attn (fax only) | Text for use in Attn field on cover sheet | Any language characters | No | Yes, up to 5 lines allowed |

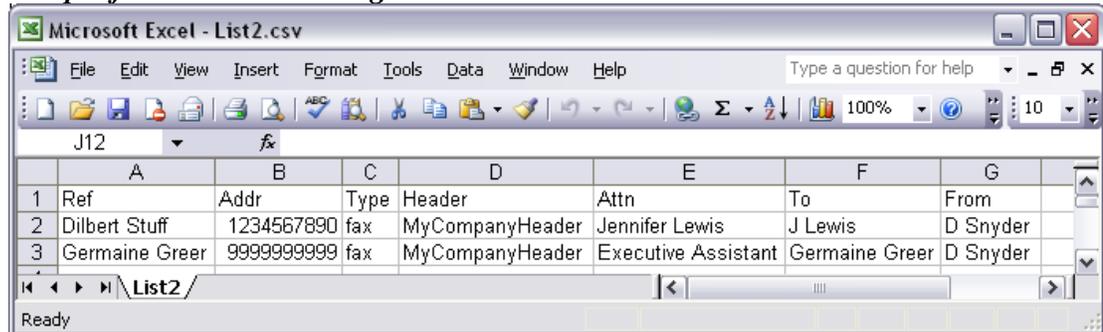
| | | | | |
|--|---|---|--|--|
| Password (email only) | The password you assign to this recipient that they will use when they retrieve downloadable files that you have protected by password. | Any ASCII characters | No | No |
| Eformat (email only) | The preferred email format of the message body the recipient will receive. | The following field values are acceptable: <ul style="list-style-type: none"> • "text" • "html" | Optional. It can be left blank for some recipients and filled in for others. | No |
| INS# (or INS_#) (email or voice only) | Insert text. (Note: To learn more about inserts, please reference the section on inserts in this User Guide.) | Any characters from the character set you select for your list | No | No (however, multiple insert fields are allowed) |

Examples:

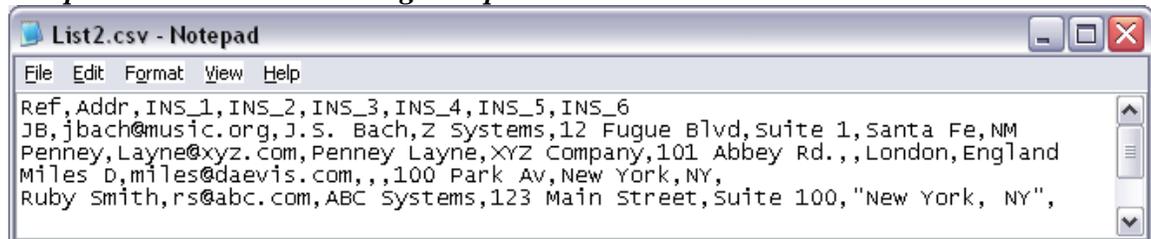
Sample fax list created using Notepad:



Sample fax list created using Excel:



Sample email list created using Notepad:



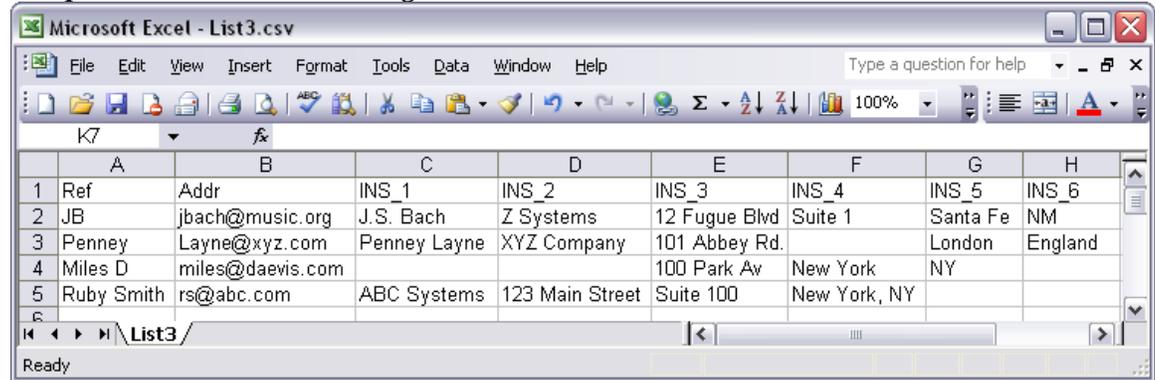
The eight fields in this sample are:

- Ref
- Addr
- INS_1 through INS_6

If the field data is missing, a common placeholder should be added. For example, the third line contains: a Ref field of “Penney”, an Addr field of Layne@xyz.com, an INS_1 field of “Penney Layne”, an INS_2 field of “XYZ Company”, an INS_3 field of “101 Abbey Rd.”. However, the INS_4 field is blank and is marked by a comma placeholder before the INS_5 field of “London” is listed.

To include a comma within a single field, enclose the data in quotes, such as “New York, NY”. The quotes distinguish the comma used *within* the field from the commas used *between* fields.

Sample email list created using Excel:



| | A | B | C | D | E | F | G | H |
|---|------------|------------------|--------------|-----------------|---------------|--------------|----------|---------|
| 1 | Ref | Addr | INS_1 | INS_2 | INS_3 | INS_4 | INS_5 | INS_6 |
| 2 | JB | jbach@music.org | J.S. Bach | Z Systems | 12 Fugue Blvd | Suite 1 | Santa Fe | NM |
| 3 | Penney | Layne@xyz.com | Penney Layne | XYZ Company | 101 Abbey Rd. | | London | England |
| 4 | Miles D | miles@daavis.com | | | 100 Park Av | New York | NY | |
| 5 | Ruby Smith | rs@abc.com | ABC Systems | 123 Main Street | Suite 100 | New York, NY | | |

Note: It does not make a difference to MyPortal whether you create your list using Notepad, Excel or any other application as long as you save it as a text, delimited file.

Special Formatting Requirements

- **Empty Fields:** The last column in your list may not contain any blanks. In addition, for fax lists, if there is no cover sheet related data in your list (such as the ‘To’ field), the list will be imported correctly, but the cover sheet to that recipient will be missing some information.
- **Address Types and Values:** The **Addr** values must be valid addresses based on the address type, **Type**, selected. For example, email@work.com is an invalid address when used as a “list” number but is valid when used as an “internet” type address.
- **Mis-named Field Headings:** The field (column) names *must* be named correctly. A list containing a mis-named column (i.e., unrecognizable heading) will fail to upload. If you were to name an address field anything other than *Addr*, an error would be created and your list would not be accepted.
- **Mixed Lists:** It is possible to send a mixed list containing both fax and email addresses within the ADDR field. When you launch a fax job, the document will be converted to fax and delivered as an attachment to email or in the body of the message if the document format is text. In this case, a valid CSV list file would be:

Addr, Ref, Header

8001232121, ABC Company, Jan Smith
joejones@xyz.com, XYZ Company, Joe Jones

In the case of mixed lists, make sure you specify the list type as “Fax” during the new list upload process

- **Using Quotes in Your List:** If the data in a field contains commas, the field should be enclosed with quotes. This ensures that the system does not get confused by commas that separate your fields from commas within a field.

For example: If you wish to include *Eatontown, N.J.* as the data for one of your list fields, the data should be enclosed in quotation marks as follows:

“Eatontown, N.J.”

This way, MyPortal will not read the comma between Eatontown and N.J. as the start of a new data record.

REPORTS

The Reports section allows you to generate different types of reports on jobs that you have launched. Reports can include summary information as well as recipient-level delivery details. Following are the types of reports that can be generated online:

Job Report

- ***Detail*** – A report specifying the final delivery or non-delivery status for each destination included in your list(s). The information for each destination will specify the results for that destination including the number of attempts and the elapsed time to deliver (or byte count for email destinations). (Note: The number of destinations on the detailed delivery report may include the report itself. Thus, the total number of destinations may be one greater than the number of destinations on your list(s).)
- ***Exception*** – A report specifying only those destinations to which your message could not be delivered including the reason the delivery failed.
- ***Summary*** – A report specifying the totals for the number of messages delivered and the number of non-delivered messages.

Opt-Out Report

Opt-out reports allow you to retrieve a list of the addresses that are blocked by the system.

The following features are described in this section:

- Search for a job
- View job activity summary
- Generate detailed job report
- Generate exception job report
- Resend a job
- Cancel a job in progress
- Retrieve Opt-Out Report

Search for a Job

MyPortal allows you to generate reports on your jobs when you click on the **Reports** tab. Since you may have launched hundreds or thousands of jobs, MyPortal makes it easier for you to locate a specific job, or series of jobs, by providing various search options:

- By Date
- By Billing Code
- By Customer Reference
- By Job ID
- Sorting options

Once you have entered your filter and search options, click **Get Report** to display a list of the jobs that match your criteria. Keep in mind that it may take several minutes to generate the results depending on how many jobs match your search.

After clicking Get Report a list of all jobs that meet your search criteria will be displayed and the following information will be available for each job:

| Field | Description |
|--------------------|---|
| Job Number | A unique tracking number. The job number is generated automatically when your fjob has been accepted. |
| Billing Code | An optional billing (or department) code that you may have included when you created your job. (Note: Your monthly invoice will be sorted by bill codes, and all jobs with the same code will be subtotaled. The bill code you enter can be up to 20 characters in length.) |
| Customer Reference | This is an optional identification code you may have given your job when you launched it. (Note: The customer reference that appears on a job report can be a maximum of 41 characters in length, although MyPortal allows you to enter more than 41 characters.) |
| Lists | The address list(s) used for your job. You may display the list's contents by clicking one of the list's names in this column. |
| Items | The total number of destinations included in your job. |
| Completed | The date and time your job was received completed |
| Started | The date and time that all job attempts were started. |
| Status | The status options for a job include <i>in progress</i> (messages are still being sent), <i>error</i> (job could not be started due to an error with the document, list, or job settings) or <i>completed</i> (job has successfully finished). Each row of the status column includes a link which you may click to view the Job Status Details for the selected job. |
| Delivery Type | The priority with which your job was sent – <i>express</i> (sent immediately), <i>scheduled</i> (sent according to the start date and time you entered), or <i>off-peak</i> (sent between the hours of 9:00 p.m. and 7:00 a.m. EST) |
| Optional Action | The actions permissible for your job. Each row of the action column includes a link which you may click to begin actions permissible for the selected job. If your broadcast is still in progress, you may cancel the job. If the job has completed all attempts, you may resend the job. |

View Job Activity Summary

To view summary information for a particular job:

1. Click the **Job #** for the job you wish to view
2. Summary information for that job will be displayed including:

| Field | Description |
|------------|--|
| Job Number | A unique tracking number. The job number is generated automatically when your fax job has been accepted. |
| User Name | The user who launched the job. |

| Field | Description |
|-----------------|---|
| Billing Code | Billing code assigned to the job |
| Entered System | The date and time the job was received into the system. |
| Job Report Time | The date and time the report for that job was generated. |
| Number of Pages | The number of pages included in the job (for fax only) |
| Email Subject | The subject of the email message (email only) |
| Job Statistics | The number of recipients included for each job status such as successful, error, etc. |

Generate Detailed Job Report

MyPortal allows you to generate a detailed report that shows all of the successful and unsuccessful details for your job. To generate a detailed report:

1. From the Summary information for a particular job, select **Detailed Report** from the drop-down list
2. Information for each recipient will be available. The details include:
 - ListID: list name for recipient
 - Reference: unique reference for that recipient
 - Address: destination address
 - Status: delivery status for that recipient. Statuses include:
 - Units: number of units for that recipient
 - Number of attempts: number of delivery attempts to that recipient
 - First Attempt: time of first attempt to recipient
 - Last Attempt: time of last attempt to recipient
 - BaudRate: fax baud rate to recipient (only applicable to fax destinations)

Generate Exception Job Report

MyPortal allows you to generate an exception job report that shows all of the unsuccessful details for your job. To generate an exception report:

1. Select **Exception Report** from the Job Summary
2. Information will appear for all recipients who did not receive the document. Refer to “Generate Detailed Job Report” for definitions of fields that are available.

Destination Error Codes

If the document is not delivered to a particular destination, following are the error codes:

| | |
|-------------|--|
| Bloc | Fax not delivered due to an invalid or blocked fax number |
| BMNF | Blocked mailbox not found – an automatic block from a failed delivery attempt due to agreement with ISPs for a |

| | |
|-------------|---|
| | limited number of delivery attempts and then the address is automatically blocked |
| Busy | Fax or voice not delivered due to busy number |
| Disc | Fax probably not delivered because of disconnect probably due to fax protocol error or fax machine running out of paper |
| Err | Error |
| Exp | Fax retries expired. Default for retries is 150 minutes after message is sent |
| Frm | Message not delivered because invalid form name specified |
| ICPT | Fax not delivered because the fax number is wrong, changed, or there is a phone line contention. An operator or recording may have intercepted the call. This is occasionally a problem with overseas locations where phone lines may be in high demand |
| INVD | All status values from 5100-5199 |
| Log | Invalid logo name – this is a profile setting |
| NOAN | Destination fax machine did not answer, number may be wrong, or a person or answering machine picked up on each delivery attempt |
| NOFN | Fax was not delivered because fax machine cannot accept transmissions in fine mode |
| NOFX | Fax was probably not delivered because machine that answered the call did not provide a valid fax machine response, or the fax machine was disconnected or ran out of paper |
| PAGC | Possible that the recipient received the fax, but the receiving fax machine failed to signal a confirmation of the last page to MyPortal |
| Pro | Processing error resend |
| PVOC | Fax not delivered because a human voice answered the phone |
| Sent | Fax message was delivered |
| TFDD | Fax message not delivered because fax number has too few dial digits |
| TMDD | Fax message not delivered because fax number has too many digits |
| Tran | Fax message not delivered due to translation error |
| UNCC | Fax message not delivered because of unknown country code |

Resend a Job

To resend a job that has completed:

1. Click the **Reports** tab. Select **Job Report** as the Report Type

2. Enter any filter information for the job you wish to resend and click **Submit**.
3. Click **Resend** link in the **Optional Action** column next to your desired job.
4. Enter the desired resend options:
 - Resend to all “not sent” during the original job, or
 - Resend to only recipients with a “busy” and / or “no answer” status
 - Enter the time you want to resend job to be started
5. Click **Resend**.

Cancel a Job in Progress

To cancel a job that is in progress:

1. Click the **Reports** tab. Select **Job Report** as the Report Type.
2. Enter any filter information for the job you wish to cancel and click **Submit**.
3. Click **Cancel** link in the **Optional Action** column next to your desired job.
4. Select “**Deliveries only**” or “**Deliveries and Reports**” from the drop-down list and click **Submit Cancel Request**. Your job will be cancelled. *Note!* Calls are being made simultaneously to your recipients, so it may not be possible to cancel all calls.

Retrieve Opt-Out Report

Opt-out reports allow you to generate a list of all the recipients who have opted out of communications or have been blocked by the system. To generate an opt-out report:

1. Click the **Reports** tab. Select **Opt-Out Report** as the Report Type
2. Enter a date range or keep the selection All Opt-Outs
3. Select the type of opt-outs you wish to retrieve, for: fax jobs, email jobs, voice jobs or SMS jobs.
4. Click **Get Report**
5. The results will show the address that is blocked, the date the address was blocked, the customer reference (if applicable) and the job number from which the address was blocked (if applicable). From here you can export the results or search for a particular address.