II. ACEN® Working Website™ Tools - Notifier™

Your ACEN Working Website™ is made up of a collection of modular Working Website™ Tools, customized for your specific needs. The Working Website™ Tools work together seamlessly to exchange information with your clients, customers, suppliers, employees, or associates.

Using the Working Website™ tools, your ACEN website works for you, 24/7—with a minimum of effort on your part. What's more, as with all ACEN Tools, there's no technical knowledge required.

Many Working Website™ Tools use the ACEN Contact Manager database as a basis for exchanging information. The Contact Manager is an electronic list of contacts important to your business. Detailed information about the Contact Manager can be found in Section I of this document.

• Overview

The Working Website™ Tools that use the contact database are:

1. **Library**™, a tool to post and share documents and information in a variety of useful ways;
2. **Portfolio**™, where you can post your best work for the world to come and see, and target the most important folks—your customers and contacts;
3. **Notifier**™, a place to store your news, bulletins, and events, and broadcast them to your contacts; and
4. **BidGetter**™, where you can easily post and track your job bidding online.

• Definitions

Before we go further, let's demystify some jargon with a few definitions:

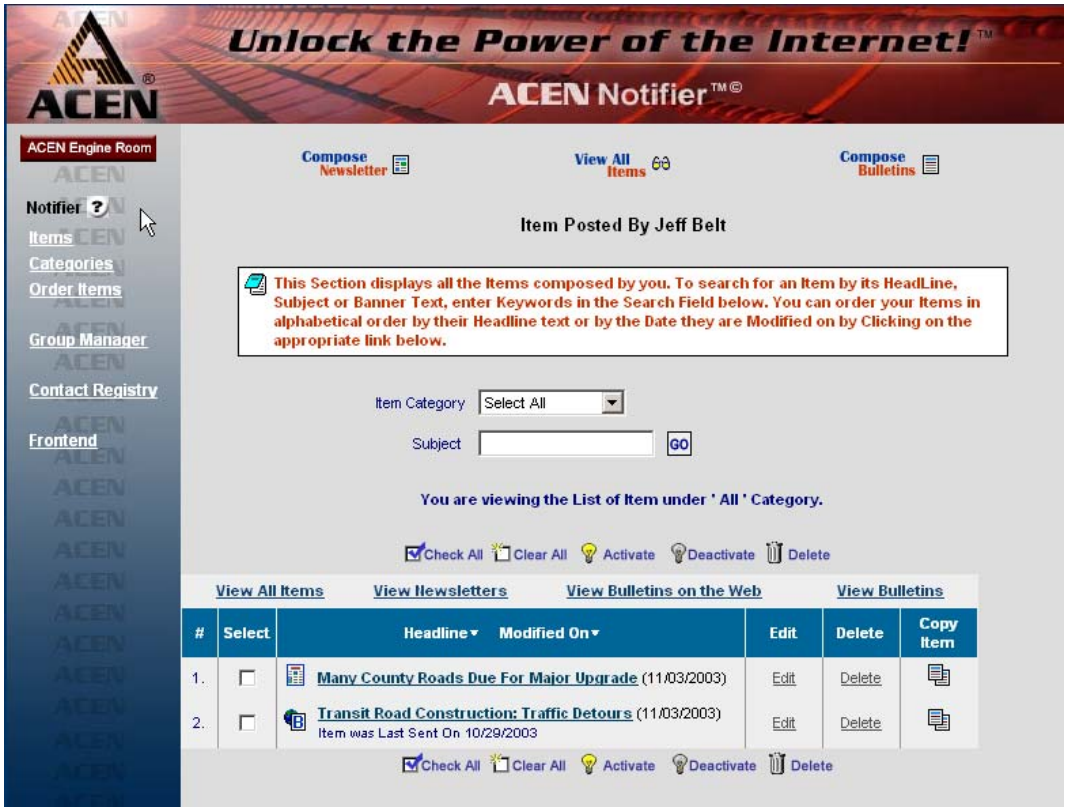
Contact is an individual associated with your website or business, such as a client, customer, or supplier (you decide how to classify your contacts). A contact is eligible to receive news and information about your company via your ACEN Working Website™ Tools. Typically, contacts manage their own accounts, deciding what options they do and don't want.

Document is an electronic file, such as a Microsoft Word file or PDF (Acrobat) file that is posted on your website. Typically, a document is associated with a specific project posted on your site. Interested users of your website can easily download, view, and/or print these documents.

3. Notifier™

Notifier™ allows you to keep customers, clients, and associates informed using attractive, custom-formatted e-mail bulletins and newsletters. You can selectively e-mail individuals or groups in your contact list, and all information is automatically archived on your website.

To view Notifier™, click on the Notifier link (at left) from any main page in the ACEN BackOffice™. The Notifier™ module is displayed:



The Notifier™ main page.

The Notifier™ module consists of three sections:

a. a list of **Items**;

b. a list of **Categories**; and

c. a place to **Order Items**.

Click on the links at left to navigate between these three sections. Note that **Items** is displayed by default.

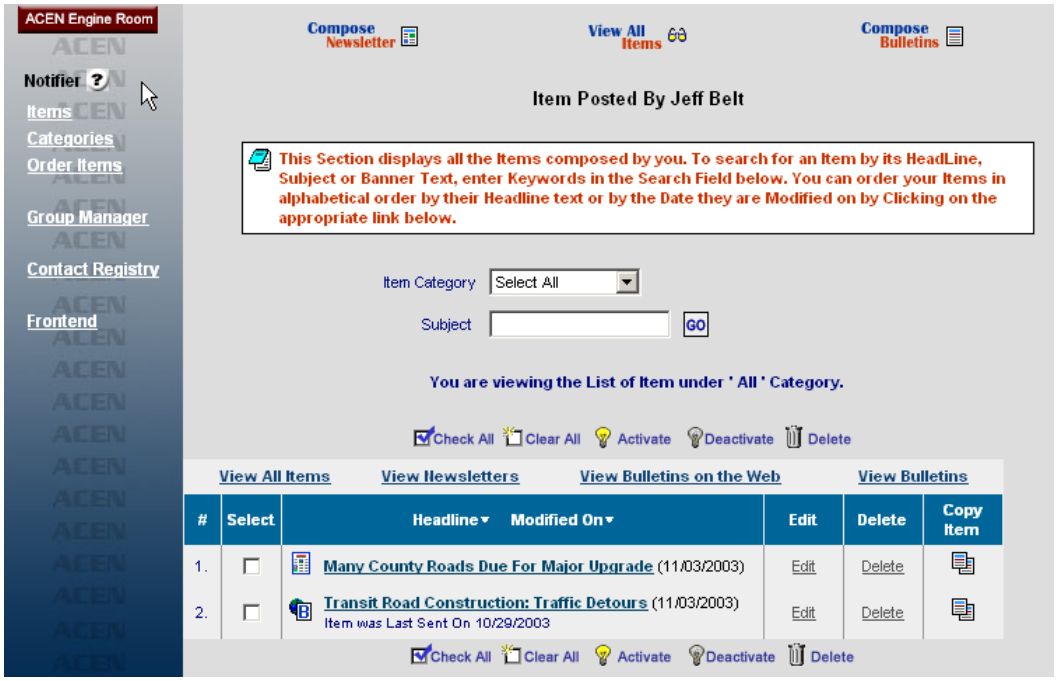
• Definitions

Newsletter is a document containing articles relevant to your organization, usually published on a regular basis (i.e., monthly, bi-monthly, seasonally, or yearly).

Bulletin is an "alert" document that usually covers one or more important topics. Typically, a bulletin is published sporadically, as needed.

- **Items**

The Items section contains a listing of items (posted by you, by default):



The Items section.

Three general options are displayed at the top of the page:

Compose Newsletter enables you to add a new newsletter, then selecting who will receive it.

View All Items/View All Items Posted By...(You) displays a list of all items, or just the ones you've posted. (Note that you can only edit you own items.)

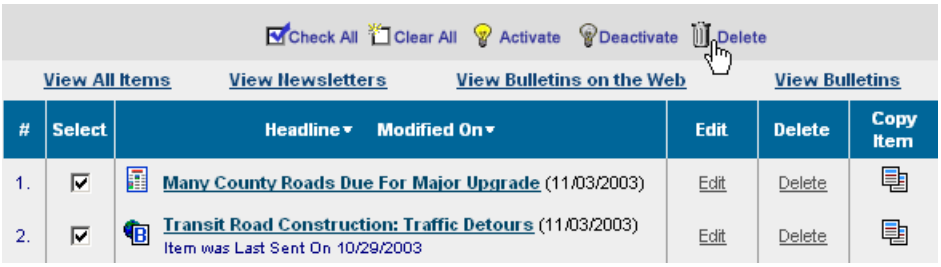
Compose Bulletins enables you to add a new bulletin, then selecting who will receive it.

The Item List Toolbar

The Items page includes a toolbar that allows you to edit and manipulate the items in the list:

Topic list toolbar.

You can modify individual items directly, or modify multiple items at once. The principle is this: to modify an individual item, click on the desired icon in that item's row; to modify multiple items, select the items that you want to modify, and then click on the desired icon in the toolbar.



Example item list.

For example, if we want to delete the "Transit Road Construction" item (see figure above), we simply click on "Delete" under the Delete column in that same row. If we want to delete both "Transit Road Construction" and "Many County Roads…" we select these two contacts by checking *both* checkboxes (under the Select column) and then clicking "Delete" Delete in the Toolbar (see figure above).

Here are some definitions:

Check All selects all displayed items

Clear All clears the checkboxes of all the displayed items.

Activate Activate makes the selected items "active" or visible on the website. For example: and indicate an active newsletter and bulletin, respectively.

Deactivate Deactivate makes the selected items "invisible" or "inactive" on the website. This is a convenient way to temporarily "shut-off" an item. For example: "dimmed" images and indicate an inactive newsletter and bulletin, respectively.

Delete permanently removes the selected items from the database (as in our example above).

Individual Item Controls

Each item in the item list has several useful controls, defined as follows:

Newsletter/Bulletin Icon and indicate whether the item is a newsletter or bulletin, respectively. Note that "dimmed" images (or) indicate an inactive newsletter and bulletin (see "Activate" and "Deactivate," above).

Headline Clicking on the item name displays summary of that item (see "View Topic Information" below). Note also that clicking on the column label "Headline" sorts the list by item.

Modified On sorts the list by modification date when clicking on the column label.

Edit allows you to edit that item.

Delete permanently removes the selected item from the database (as in our example above).

Copy Item allows you to easily duplicate an item. This is useful when posting a new item that is similar in form or content to another posted item.

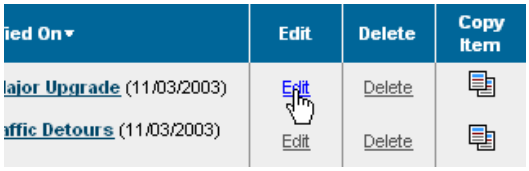
Adding/Editing Items

Step 1: Compose a Subject

To **add** a new Newsletter item, click on "Compose Newsletter" from the main Items page. To add a new Bulletin item, click on "Compose Bulletins" from the main Items page (in our example, we use the Newsletter section, but all menus and functions are identical to the Bulletin section).

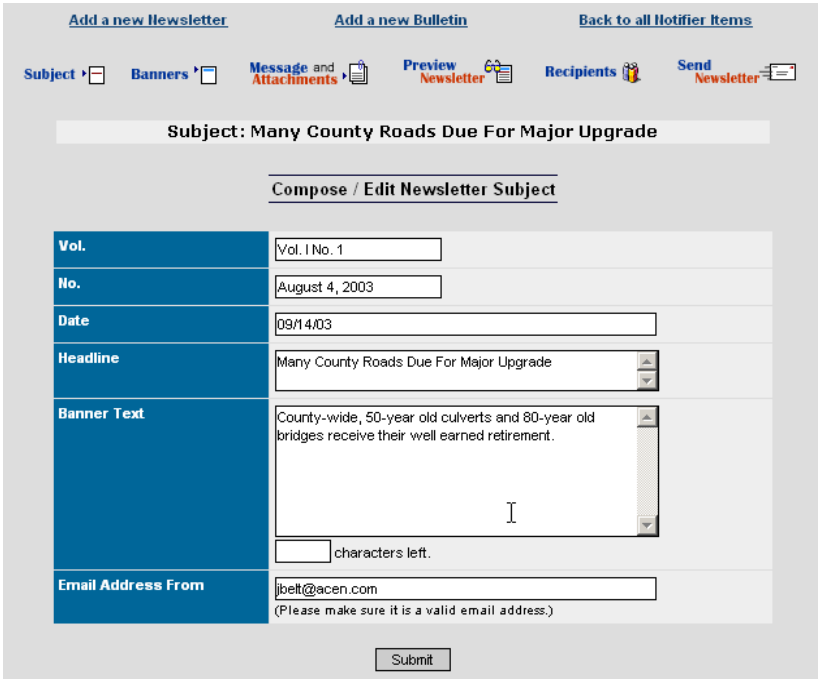
Adding a newsletter or bulletin.

To **edit** a particular item, click on the "Edit" link (from the Item list page, above):



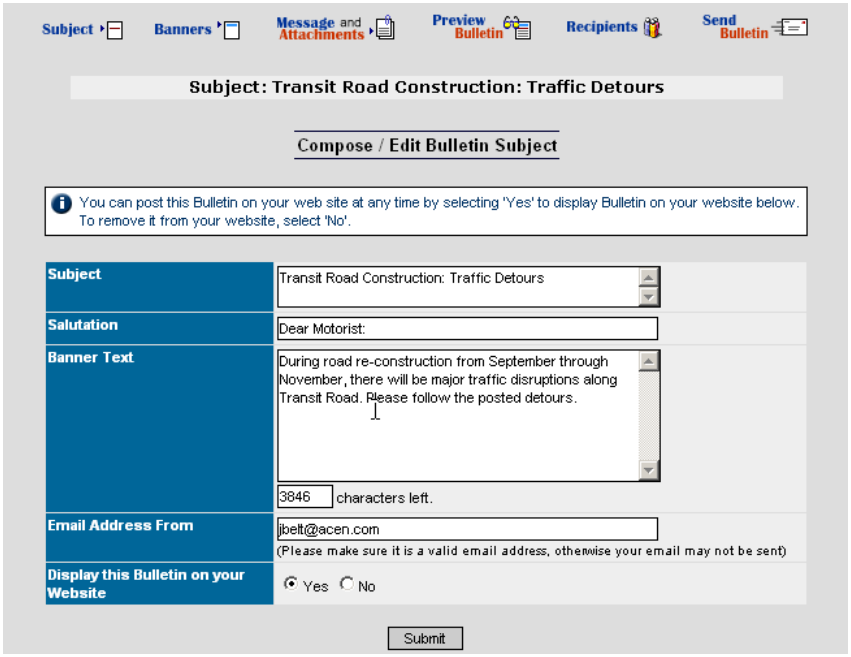
Adding/Editing a Newsletter.

For a Newsletter, the "Compose/Edit Newsletter Subject" form will be displayed:



Adding/Editing Newsletter Form.

For a Bulletin, the "Compose/Edit Bulletin Subject" form will be displayed:

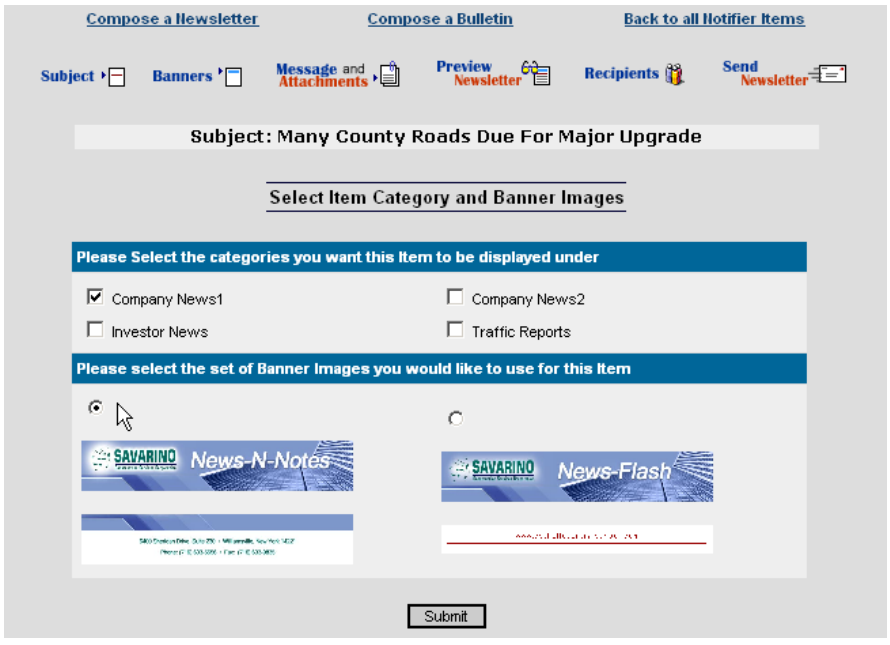


Adding/Editing a Bulletin.

You may now add/edit the items on the form. Keep in mind that the information on this page applies to the *entire* newsletter or bulletin. When you are finished, click "Submit" to go to Step 2.

Step 2: Select a Category and Banner

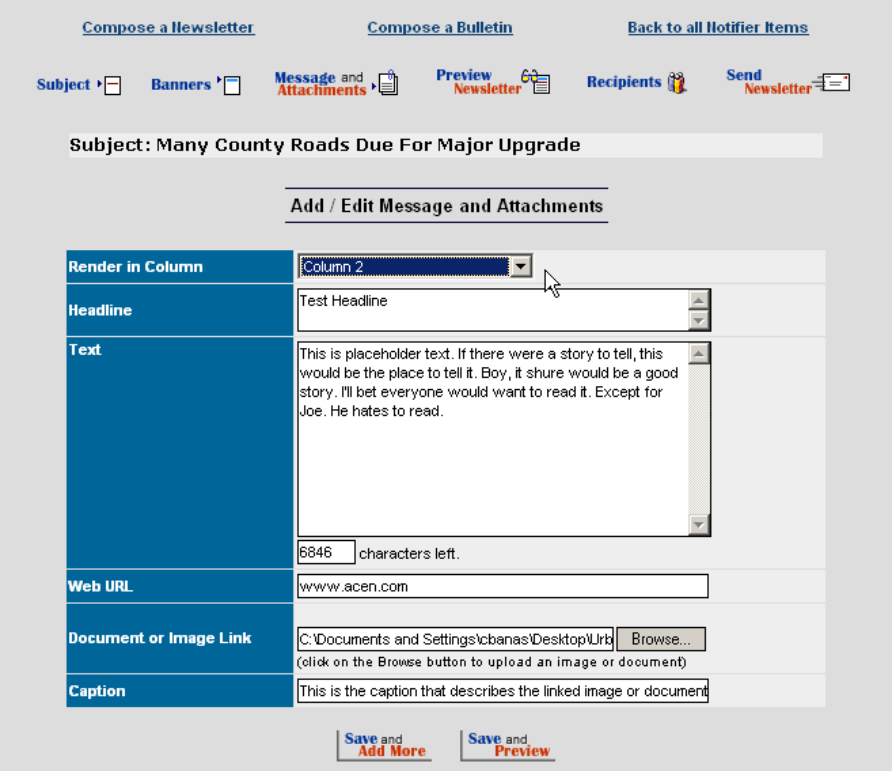
In this step, you must select a category and choose a banner style for the newsletter/bulletin. This page displays several custom categories and banner images. Select the ones you wish and click "Submit" to go to Step 3.



Selecting a category and a banner image.

Step 3: Add/Edit Message and Attachments

In this step, you enter the individual articles in the newsletter/bulletin. Select the ones you wish and click "Submit" to go to Step 3.



Selecting a category and a banner image.

Each form item is defined as follows:

Render in Column indicates what column this article will reside in the final custom layout.

Headline is the headline for this article.

Text is the "body" of the article.

Web URL enables you to include a link to a relevant internet address, if desired.

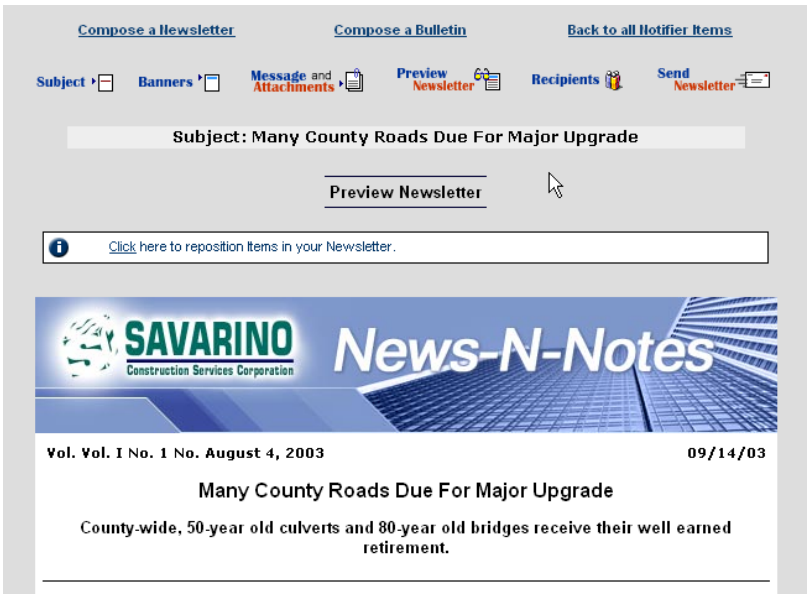
Document or Image Link enables you to include a document file or an image with the article, if desired.

Caption is a short description of the document or image link, if one exists.

If you wish to add another article, click "Save and Add More." When you are finished adding articles, click "Save and Preview" to go to Step 4.

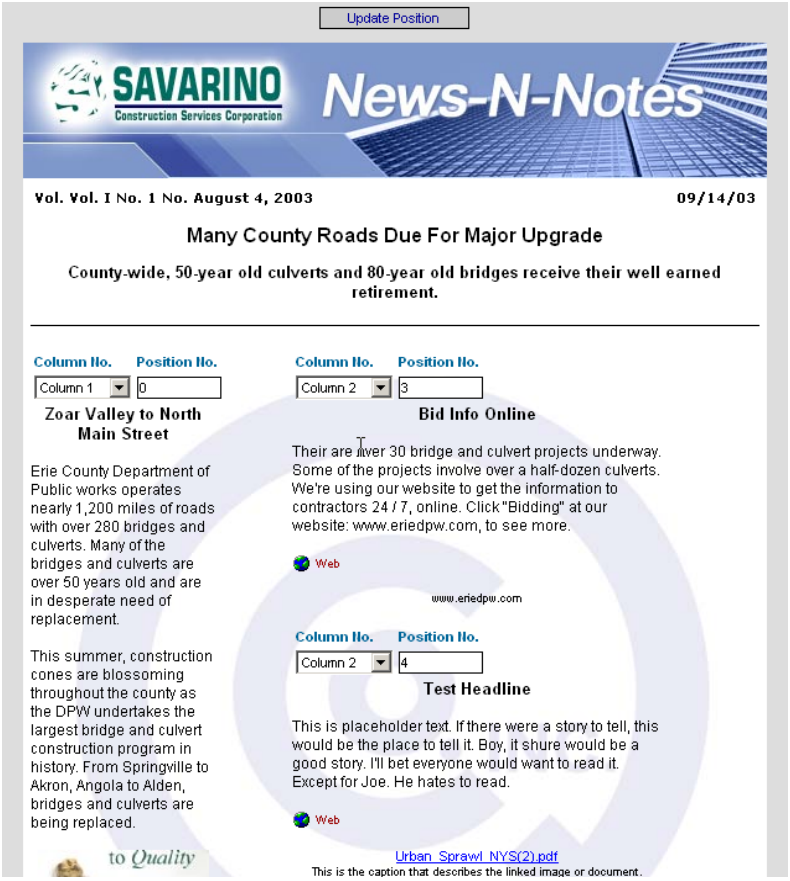
Step 4: Preview Newsletter/Bulletin

In this step, you may preview the finished newsletter/bulletin.



Previewing your Newsletter/Bulletin.

You may reposition items by clicking on the link (see figures above and below):



Repositioning items in your Newsletter/Bulletin.

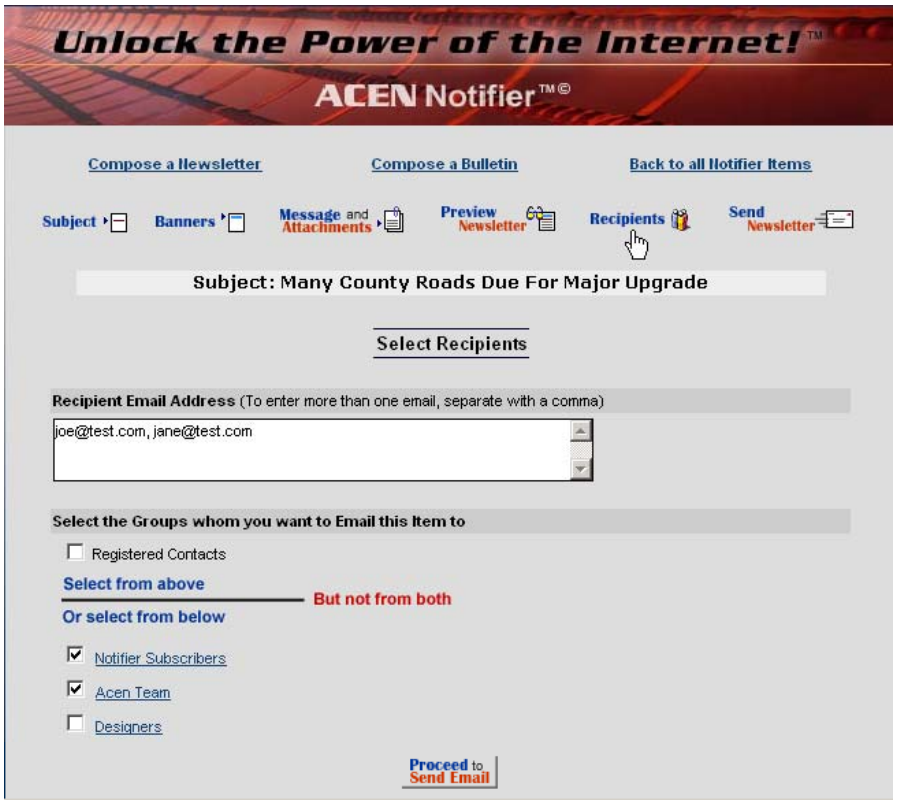
For each item, select the column and position number you desire. When you are finished repositioning, click "Update Position" to return to the preview page.

Previewing your Newsletter/Bulletin.

To move on to Step 5 (add/edit recipients), click "Recipients":

Step 5: Add/Edit Recipients

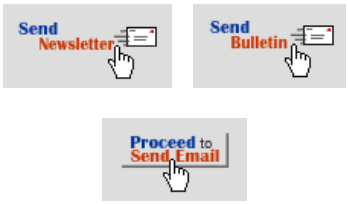
In this step, you add or edit recipients for your newsletter/bulletin:



Adding/editing recipients.

Select the individuals or groups that you would like to receive the newsletter/bulletin.

*__Note__: no matter who you choose as e-mail recipients, the newsletter or bulletin published on your website can be viewed by everyone.

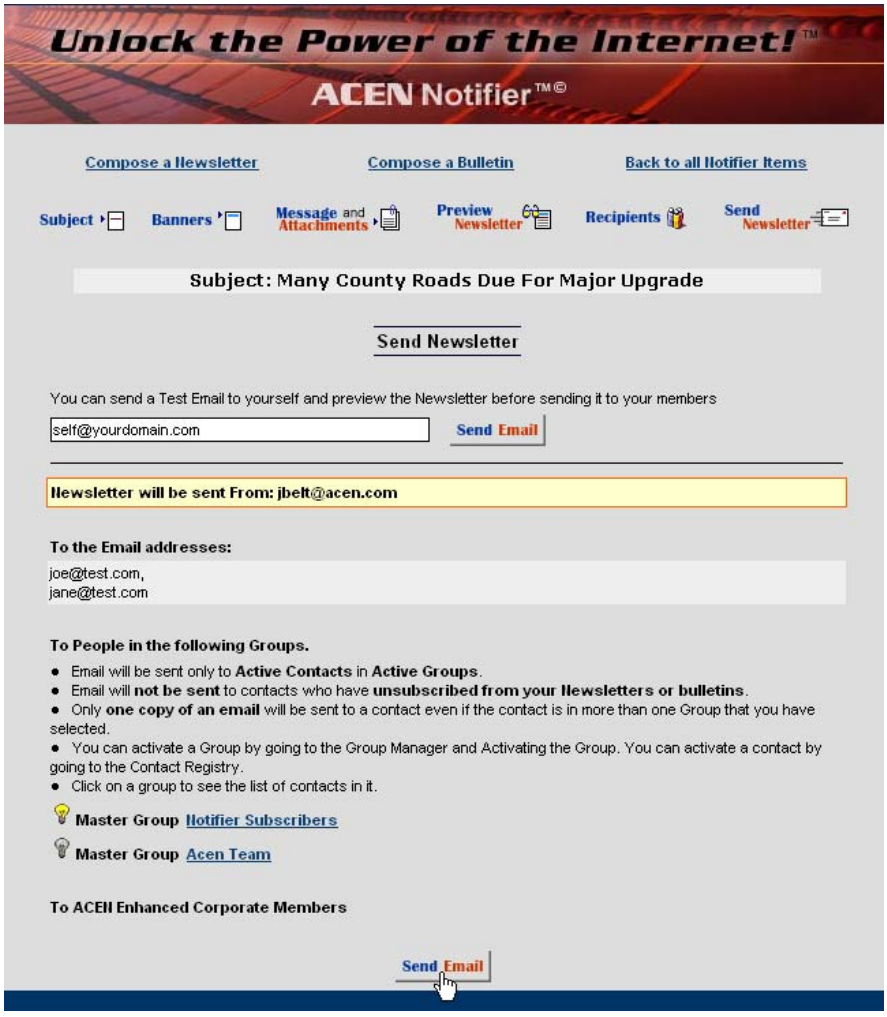


"Send" buttons.

When you are finished choosing recipients, click "Send Newsletter/Bulletin" at page top or "Proceed to Send Email" at page bottom. This will take you to the final step (Step 6).

Step 6: Sending Newsletter/Bulletin

In this step, you test your e-mail, confirm your recipients, and send the newsletter/bulletin:



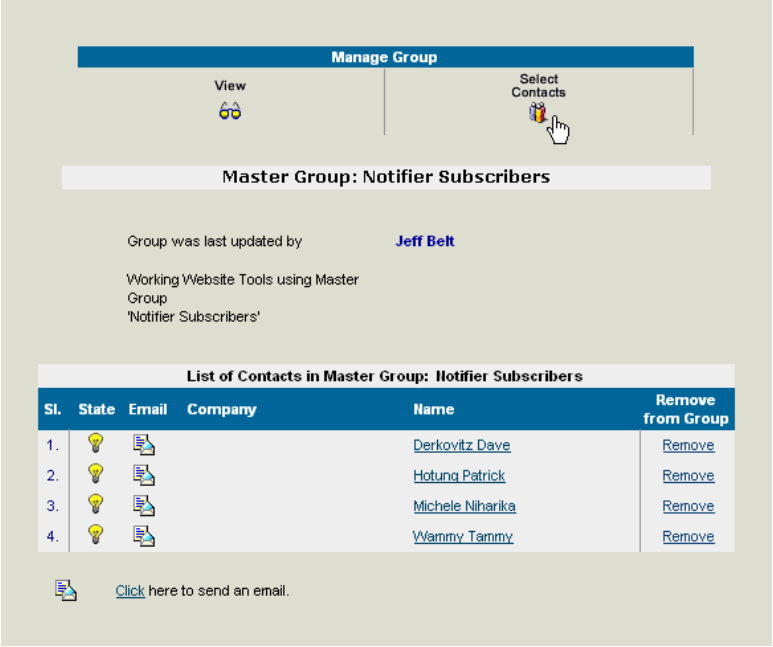
Adding/editing recipients.

Review the information on this page before sending your e-mail.

*__Note__: e-mail will be sent only to active members in active groups. You may check to see if a group is active by looking at the light bulb icon (= active; = inactive) next to the group name.

Click to edit a group.

You may edit any group before you send your e-mail. Click on the group name to edit a group (see above). A Group Manager window is displayed:



Editing group(s).

You may mow edit the contacts in the group (see the **Contact Manager** section for more information).

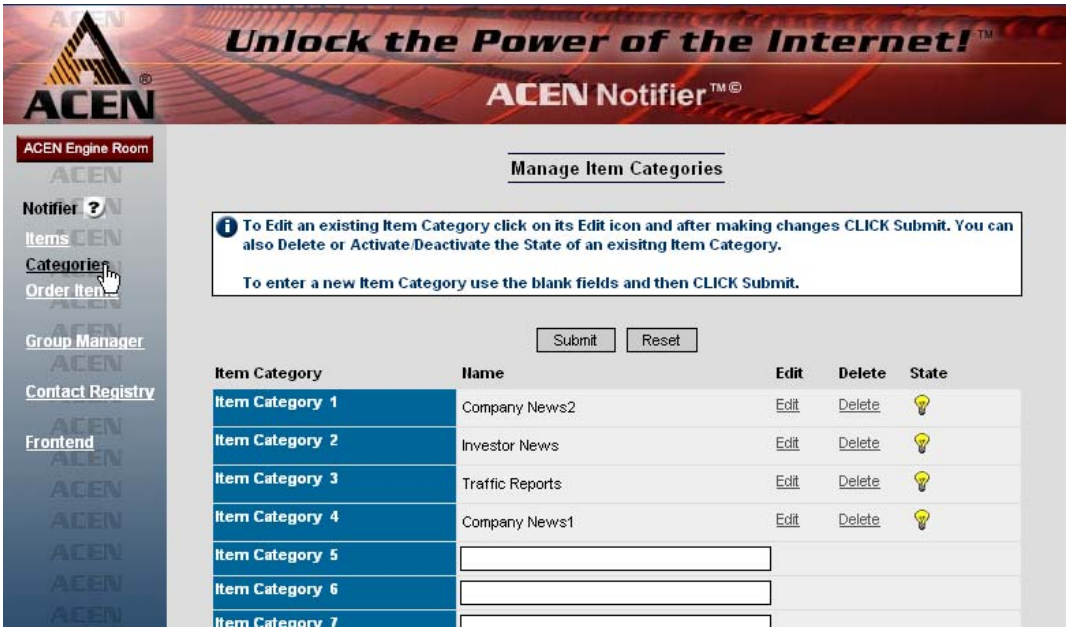
When you are finished testing the e-mail and confirming/editing recipients, click "Send Email" at page bottom to send your newsletter/bulletin:

"Send Email" button.

A message will appear confirming your e-mail has been sent:

- # Categories

As many as 50 different categories can be created for your newsletters and bulletins. Clicking on "Categories" at left brings you to the Categories page:

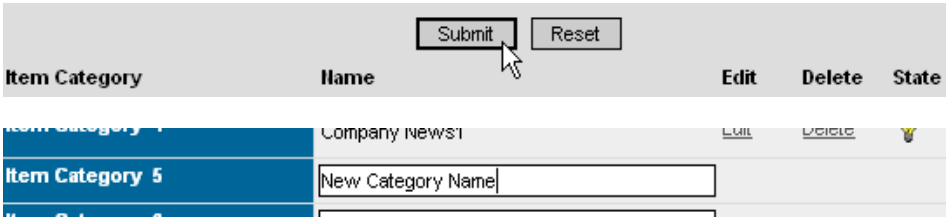


The Categories page.

You may now **add**, **edit**, **delete**, or **activate/deactivate** categories.

Adding Categories

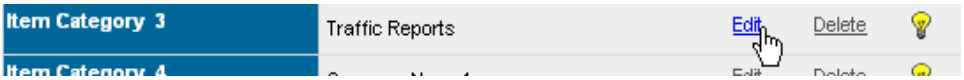
To add a new category, type the new topic name in an empty field, and click "Submit."



Adding a category.

Editing Categories

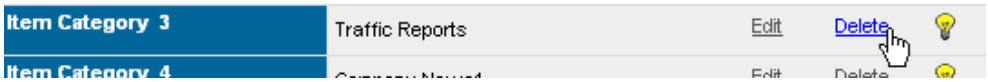
To edit a category, click "Edit" next to the category you wish to edit. The topic name will appear as an editable field. After you're finished making your changes, click "Submit."



Editing a category.

Deleting Categories

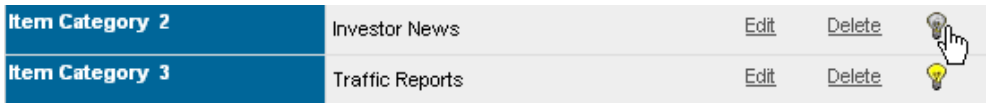
To remove a category, click "Delete" next to the category you wish to remove:



Deleting a category.

Activating/Deactivating Categories

An active category is visible* on the website, and is indicated by a yellow light bulb; an inactive category is indicated by a gray bulb. Click on the light bulb to activate/deactivate a category:

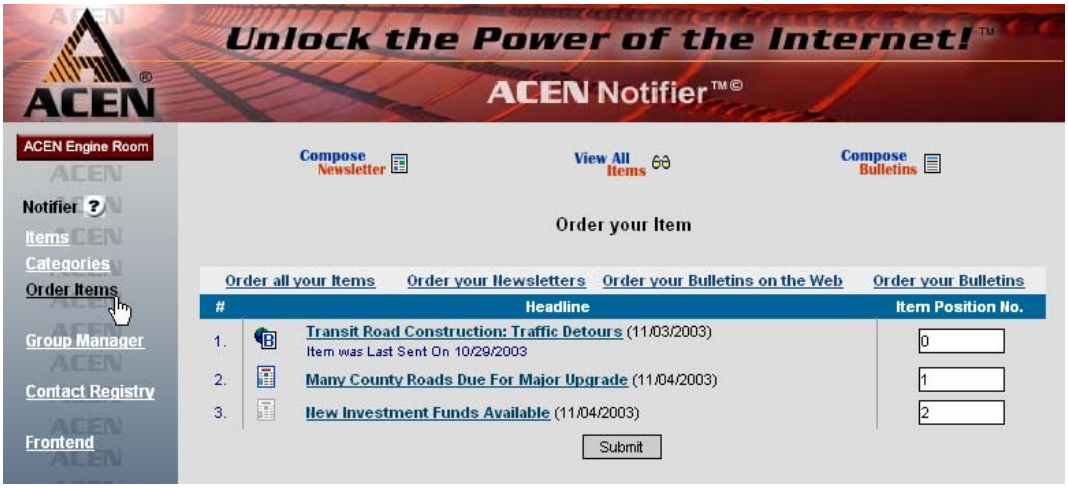


Activating/deactivating a category.

*__Note__: items under an inactive category will not be displayed. However, if any of those items are cross-listed under another visible category, those items will still be displayed.

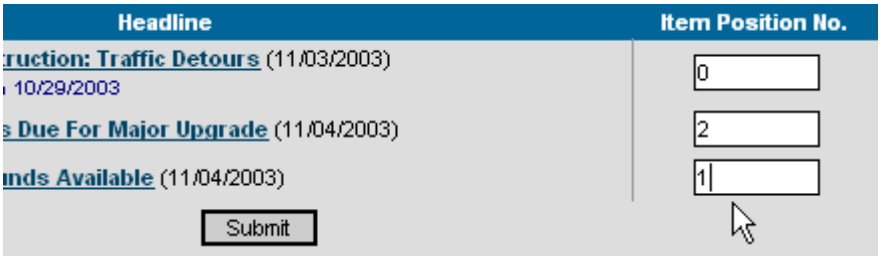
- **Order Items**

To order portfolio items, click on "Order Items" from the main Notifier™ page:



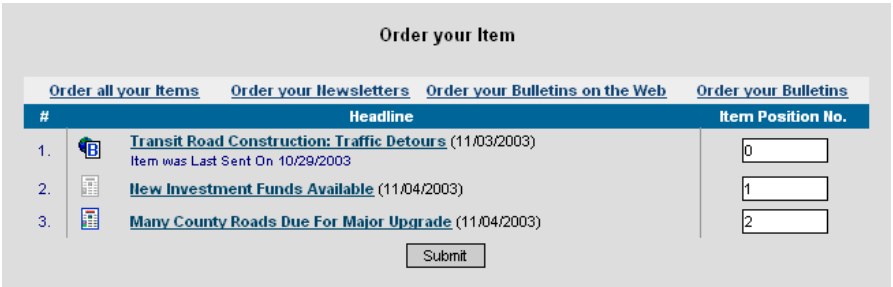
Ordering items in Notifier™.

You may now re-order the portfolio items in the list by changing the numbers under "Item Position No." at right:



Changing the order numbers.

Click "Submit" when you are done. The newly ordered list will display:



The new order.

* **Note**: to sort alphabetically by name, change all the Position Numbers to "1."