

Portal Prodigy[™]
Exchanges Feature in Detail

Chapter Excerpt from Software User & Administration Guide

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www.portalprodigy.com

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1.1 Introduction

Using the Exchanges feature, organizations can offer their members, staff, constituents and others the opportunity to operate public or private exchanges for the purpose of selling products, promoting jobs, posting resumes, running speakers bureaus, songs and document selling and other sharing networks. Create public participation exchanges such as resume and job posting boards, vendor operated catalogs, trainer or speakers bureaus, and other visitor operated organization sponsored bazaars or markets. Define a virtually unlimited number of exchanges which can be public or private, free of charge or on a fee paid basis. Payment for participation can be accepted online using credit cards or other payment options. The Exchanges Feature differs from the Online Product Catalog Feature in that it fosters commerce or exchange between a defined group of *external participants*, such as members and service providers, which does not involve your organization directly.

Exchanges feature benefits include:

- Members, staff, constituents and others can operate public or private exchanges.
- Maintain product exchanges, service exchanges, job posting exchanges, resume posting exchanges, speakers bureaus, art galleries, lost and found, used equipment exchange, trainer consultancies and all sorts of other transaction networks.
- Define an unlimited number of exchanges.
- Exchange listings can be free of charge or on a fee paid basis.
- User defined exchange fields.
- Customize field display and search template distinctly for each exchange.
- Provide photo insert capability.
- Exchanges can be entirely visitor maintained or under the control of your organization.
- Accept exchange use payment online.

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

Exchange Management Page

Exchange Name Field
Maximum Free Listings Field
Expire Days
New Listing Fee
Renewal Listing Fee

Pay Online
Pay By Mail
Taxable
Menu
Notification Email Template
Selection Field
Exchange Fields Section Label

Exchange Fields

- Add column
- Require column
- Search column
- Matches column
- View column

- Label column
- Add & Update Listing
- Data Type column
 - 100 Character Text
 - \$ Amount
 - List box of States
 - Number
 - Date
 - Memo
 - List Box
 - Image
- Contact Fields:
 - Add column
 - Require column
 - Search column
 - Matches column
 - View column
 - Label column
 - Data Type column
 - Enable Confidential Option?
- Listing Information Fields:
 - Add column
 - View column
 - Search column
 - Matches column
 - Limit To Members Only
 - Reference ID
 - Posted Date.
 - Last Update Date
 - Expires Date
- Add Listing Page Options:
 - Page Title
 - Instructions
- Update Listing Page Options:
 - Page Title
 - Instructions
- Search Listing Page Options:
 - Page Title
 - Instructions
- View Listing Page Options:
 - Page Title
 - Instructions
 - Record:
 - Created By Field
 - Modified By Field
 - Active Field –
 - Chapter ID
 - Topic Selection Field
 - Private Selection Field
- Security Permissions:
 - View Listing

1.2 The Visitor Experience

Using the Exchanges feature, organizations can offer their members, staff, constituents, etc. the opportunity to operate public or private exchanges for the purpose of selling products, promoting jobs, posting resumes, and other sharing networks. Once an exchange is set up, visitors can access it from the website home page. Exchanges are highly customizable so it is difficult to demonstrate all the possibilities in the document you are reading. So, we'll demonstrate the general possibilities.

Exchanges typically have two levels of security: that which is accessible to the public for browsing and searching an exchange; and that which is accessible to a private group for adding and updating items to an exchange. For example, a Job Exchange might allow all visitors (the public) to search for jobs while only allowing member employers (private group) to post jobs. Furthermore, an Art for Sale exchange might allow all visitors (the public) to search for Art while only allowing members (private group) to post art for sale.



Visitors clicking on the public link are presented with the Exchange Search page. By entering criteria into the fields, visitors narrow the list of items that will be presented. Clicking on the

button executes a search for matching items.

Search For Art for Sale

You may search on any combination of fields. Fields marked with a * allow a phrase or multiple words such as first and last name. To view all listings, press Search without entering any criteria. In the Keyword search field only, you may use the words "AND" or "OR" within your criteria. The use of "AND" will narrow the scope of your search, whereas the use of "OR" will broaden the scope of your search.

Search fields

Keyword (Searches Title & Description) *

Price:

to

Date Created:

to

Contact Person:

Date Posted:

to

Reference Code:

Items Per Page:

10

Search

Search results are displayed in the Exchange Listings window. The visitor can view more details by clicking on an item's title.

Exchange Listings

Page 1 of 1		Total matches:3
Title	Creation Date	Reference ID
Baseball - Photo Realism 36" X 48"	07/05/03	6
Cravens Acrylic on Canvas 72" X 96"	07/05/03	5
Noodles Acrylic on Canvas 36" X 48"	07/05/03	4

➤ Clear ➤ Close

Visitors can be provided with images as well as descriptive text. Unlike the Products Catalog feature which allows online purchases from the organization through the website, Exchanges simply provides the visitor with a way to contact the individual that submitted the listing to an exchange. Clicking on the Reply button executes an email to the individual that submitted the listing.

Exchange Art for Sale Listings



Details		ReferenceID: 4
Title:	Noodles Acrylic on Canvas 36" X 48"	
Price:	\$400.00	
Artist Name:	Michael L Pintur	
Date Created:		
Description:	Colorful acrylic on canvas 36" X 48"	
Special Instructions:	Only serious bids accepted starting at \$400.00 bidding ends Sept 1, 2003	

Contact Information	
Contact Person:	Stephen Reuning
Phone number:	555.555.5555 x 201
Email Address:	smr@npodemosite.com

 **Print**  **Reply**  **Close**

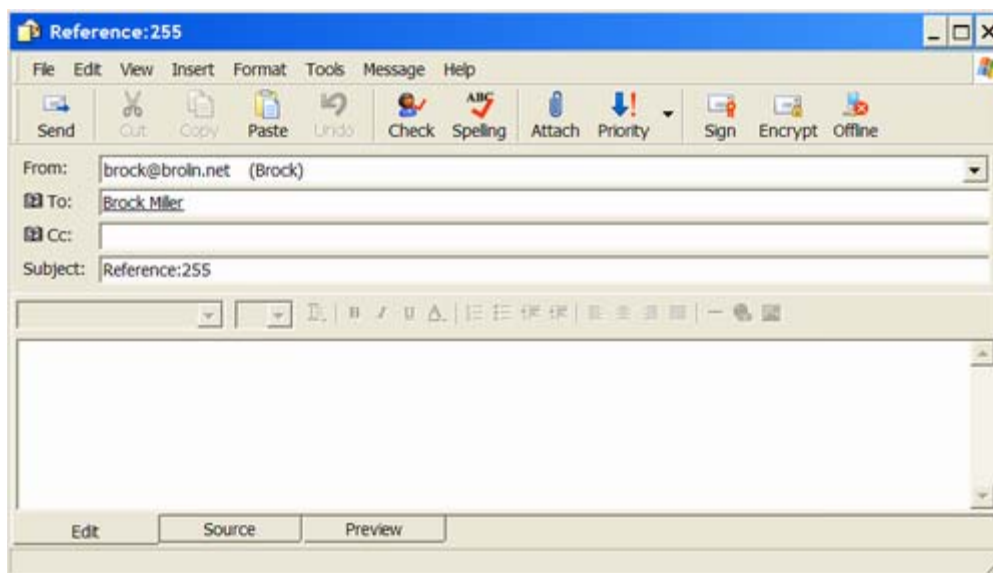
One of the features that can be enabled for Exchanges is a Confidential Listing option. When a listing is made confidential, the listing’s contact information is hidden from visitors and replies are sent via PORTALPRODIGY. This maintains the confidentiality of the listing contact’s email address. PORTALPRODIGY acts as an intermediary, so the replying party does not need to know the other parties email address.

Listing Reply

Here you can send your email reply to the exchange listing.

The screenshot shows a web form titled "Compose Email Message". It has several input fields: "From Name*" with a text box, "From Address*" with a text box, and "Message*" with a large text area. Below these are "Attachments:" with a note "(You may attach up to 3 files)" and three "Browse..." buttons. At the bottom, there is a "Send a copy to You?" section with radio buttons for "No" (selected) and "Yes". At the very bottom of the form are "Cancel" and "Send" buttons.

When the Confidential option is disabled, replies are sent via the visitors email browser. The following is an example of what a visitor will experience when they use Outlook Express:



The To: and Subject: of the email are automatically filled in. The visitor then types their message in the body of the email and may optionally attach files.

Authorized visitors can add and update the exchanges. Visitors clicking on the private link, for example [☀ Add Art for Sale](#) are first asked to login.

To add or update an Exchange listing, please login or select signup if you do not have an account with us.

Login Email Address:

Password:

☐ Remember password

➤ Login

first time users
**Sign up
here** 

 [Forgot your login email address or password?](#)

The authorized visitor is presented with an Exchange Listing page which lists ONLY the active listings input by their login in the past. The visitor can click on a listing title in order to update a listing or click on ➤ **Add Listing** button to add a new listing.

A special feature for System Administrators displays the ➤ **Select User** button only on their display. This allows Administrators to enter and update listings for a user other than themselves. This feature helps make member and customer support easier.

Exchange Listings

Baseball - Photo Realism 36" X 48"	07/05/03	6
Crayons Acrylic on Canvas 72" X 96"	07/05/03	5
Noodles Acrylic on Canvas 36" X 48"	07/05/03	4


➤ Close ➤ Add Listing ➤ Select User

Descriptive data is typed into the appropriate fields and images may be imported from the visitor's local computer or network.

Listing Entry for Art for Sale Exchange

Details		ReferenceID: 6
Title:	Baseball - Photo Realism 36" X 48"	
Price:	\$4,000.00	
Artist Name:	Jaque Stile	
Date Created:		
Description:	Boy with baseball- Photo realistic oil painting	
Special Instructions:		

Contact Information		Retrieve Home Info from Signup	Retrieve Office Info from Signup
Contact Person:	Stephen Reuning		
Phone number:	555.555.5555	x	201
Email Address:	smr@nonprofitonly.com		

Images		We suggest using pictures no more than 4" in height
Original Image 1:	BD19563_.GIF 	
Update Image 1:	<input type="text"/>	<input type="button" value="Browse..."/>
Image 2:	<input type="text"/>	<input type="button" value="Browse..."/>

Listing Information	
Limit To Members Only:	<input checked="" type="radio"/> No <input type="radio"/> Yes
Expires Date:	07/15/2003

The organization can even setup exchanges which charge for listings. For example, a Job exchange could allow job hunters to search the listings for free but charge employers to list jobs. In such a case, Administration presets pricing for the exchange and acceptable payment options such as online payment. When the visitor enters a job listing, they are presented with the payment option which states the fee amount and requests a credit card type choice.

The fee for a 90 day listing is \$25.00.

Pay by credit card

Visa

 [Print](#)  [Cancel](#)  [Next](#)

The visitor is presented with the credit card payment input window where they can enter their credit card information and submit it.

Payment

Please, fill in your payment information

Payment Information	
Account number:	<input type="text"/> Visa
Name on Card:	<input type="text"/>
Expiration Month:	MM <input type="text"/>
Expiration Year:	YY <input type="text"/>
Payment Date:	07/05/2003

Credit Card Billing Address	Retrieve Billing Address
Address 1:	<input type="text"/>
City/State/Zip:	<input type="text"/> <input type="text"/> <input type="text"/>
Country:	USA <input type="text"/>

Their listing is confirmed

Exchange Listing Confirmation

Your Exchange Listing has been saved.

 [Close](#)

1.3 Components

The following components are used by the Exchange feature.

1.3.1 Exchange Management Page


The Exchange Management page is divided into the following sections: Exchange Details; Exchange Fields; Contact Fields; Listing Information; Add Listing Page Options; Update Listing Page Options; Search Listing Page Options; View Listing Page Options; Record details; and Security Permissions.

The screenshot shows the 'Exchange Management' page with a tabbed interface. The 'Exchange Details' tab is selected. The form contains the following fields and options:

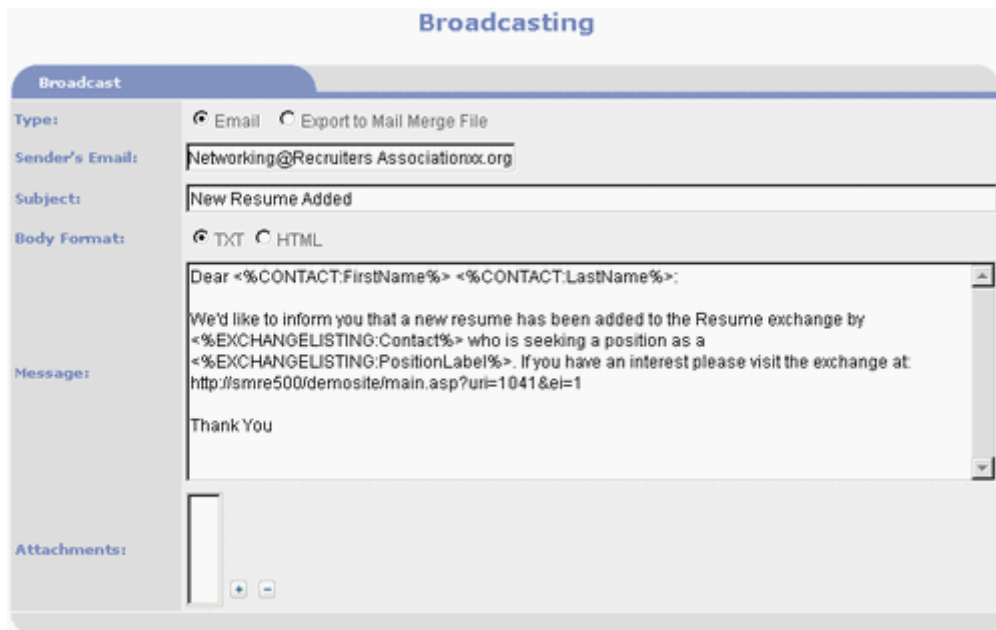
Exchange Name:	<input type="text" value="Jobs"/>		
Maximum Free Listings:	<input type="text" value="5"/>	Expire days:	<input type="text" value="365"/>
New Listing Fee:	<input type="text" value="\$0.00"/>	Renewal Listing Fee:	<input type="text" value="\$0.00"/>
Pay Online:	<input type="radio"/> Yes <input checked="" type="radio"/> No		Pay by Mail:
Taxable:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Notification Email Template:	<input type="text" value=""/> <input type="button" value="Add New"/>		
Menu:	<input type="text" value=""/>		
Exchange Fields Section Label:	<input type="text" value="Details"/>		

Exchange Details

- **Exchange Name Field** – The name entered into this field will appear on lists and reports. Consequently it should describe the exchange as succinctly as possible.
- **Maximum Free Listings Field** – Lists the maximum number of free listings a single user may have active at one time in the exchange. If an amount greater than zero is entered in the New Listing Fee field then visitors will be presented with a payment form when they exceed the maximum free listing quantity. If the amount in the New Listing Fee is zero, then the visitor will not be allowed to enter more listings than the Maximum Free Listings quantity.
- **Expire Days** – Listings will expire within the number of days entered in this field. Expired items no longer appear on Exchange items lists.
- **New Listing Fee** – The price to be charged per listing should be entered here if there is a charge.
- **Renewal Listing Fee** – The price to be charged for a renewal of a listing should be entered here if there is a charge.
- **Pay Online** – If selected as Yes, visitors will be able to pay using their credit card online.
- **Pay By Mail** – If selected as Yes, visitors will be able to select pay by check and will be provided an address to send payment.

- **Taxable** – the Taxable Field defaults to *No*. If selected as *Yes*, the visitor will be charged sales tax on the Exchange Fee. The applicable tax rate is based on the customer's ship to address.
- **Menu** – used to specify a menu to be displayed as part of the Exchange pages in the visitor portion of the site. Menus are defined using Menu Builder. The Menu Type must be set to *Exchange Listing Menu*. Note that the menu's location on the page and its style may vary for each template. Typically the menu is displayed on the left side of the page.
- **Notification Email Template Selection Field** – The template selected in this field will be broadcast each time an item is added to the exchange. A new template can be created by clicking on the  button. More details regarding broadcast template can be read in the chapter titled Broadcasting Feature in Detail.
- **Exchange Fields Section Label** – used to specify the Exchange content section tab label displayed on visitor pages.

Sample Notification Template for Resume Exchange



The screenshot shows a web interface titled "Broadcasting" with a "Broadcast" tab selected. The interface includes fields for "Type:" (with radio buttons for "Email" and "Export to Mail Merge File"), "Sender's Email:" (containing "Networking@Recruiters Associationxx.org"), "Subject:" (containing "New Resume Added"), "Body Format:" (with radio buttons for "TXT" and "HTML"), "Message:" (containing a personalized email template), and "Attachments:" (with a file selection button and a minus icon). The email template text is as follows:

Dear <%CONTACT:FirstName%> <%CONTACT:LastName%>:

We'd like to inform you that a new resume has been added to the Resume exchange by <%EXCHANGELISTING:Contact%> who is seeking a position as a <%EXCHANGELISTING:PositionLabel%>. If you have an interest please visit the exchange at: <http://smre500/demosite/main.asp?url=1041&ei=1>

Thank You

Exchange Fields

This section is used to build the exchange forms that visitors will be presented with. They include a form for adding new listings, a form for searching listings, a form for displaying matches to search criteria, and a form for viewing listings.

Exchange Fields					
Add	Require	Search	Matches	View	Data Type
1	<input checked="" type="checkbox"/>	1	1	1	Position Title
3	<input type="checkbox"/>	3		3	Approximate Annual Compensation
	<input type="checkbox"/>				
	<input type="checkbox"/>				
4	<input checked="" type="checkbox"/>	4	2	4	Position is located in which state
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
2	<input type="checkbox"/>	2		2	Minimum Years of Experience Required
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				Internship Beginning Date
	<input type="checkbox"/>				Internship Ending Date
6	<input checked="" type="checkbox"/>	6		6	Basic Job Description
7	<input type="checkbox"/>	7		7	Benefits
5	<input type="checkbox"/>	5		5	Industry Type
	<input type="checkbox"/>				
8	<input type="checkbox"/>	8		8	Logo or Company Picture
	<input type="checkbox"/>				Image2

Columns Descriptions:

- **Add column** – used to enter a number corresponding to the field's order on the Exchange's Add New Listing form. Entry of a number activates the field, displaying it on the Add New Listing and form. No entry (leaving the text box blank) deactivates the field causing it to not be displayed on the Add New Listing form.
- **Require column** – checking this causes the Add New Listing form and the Update Listing form to require the user to supply a value in this field.
- **Search column** – used to enter a number corresponding to the field's order on the Search Listing form. Entry of a number activates the field and displays it on the Search Listing form. No entry (leaving the text box blank) deactivates the field causing it to not be displayed on the Search Listing form.
- **Matches column** – used to enter a number corresponding to the field's order in the Matches grid. Entry of a number activates the field and displays it on the Matches grid. No entry (leaving the text box blank) deactivates the field causing it to not be displayed in the Matches grid.
- **View column** - used to enter a number corresponding to the field's order on the Exchange's View Listing form. Entry of a number activates the field, displaying it on the View Listing form.

form. No entry (leaving the text box blank) deactivates the field causing it to not be displayed on the View listing form.

- **Label column** – Used to specify the field label displayed on the form.
- **Data Type column** – Determines the type of data that will be enterable into the field.
 - **100 Character Text** – This field will allow up to 100 alpha and numeric characters.
 - **\$ Amount** – Numbers entered into this field will be converted to currency format such as 40000 converting to \$40,000.
 - **List box of States** – Provides a selection that includes the 50 US States plus US Territories and Districts.
 - **Number** – Numbers entered into this field will be converted to a format such as 40000 converted to 40,000
 - **Date** – Converts entries into MM/DD/YYYY format
 - **Memo** – Is a scrollable textbox field.
 - **List Box** – Provides a selection of values that you define.
 - **Image** – this field allows an image to be uploaded and displayed.

Contact Fields:

This section is used to build the contact information portion of the Exchange forms.

Add	Require	Search	Matches	View	Label	Data Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contact Person	Contact Person
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Company/Organization Title	Company Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Phone Number	Phone Number
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fax Number	Fax Number
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Email Address	Email Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mail Address	Mailing Address1,Address2,City,State,Zip

Enable Confidential Option? Yes

Column Descriptions:

- **Add column** – Check to activate the field and displays it on the Exchange's Add New Listing form.
- **Require column** – checking this causes the Exchange's Add New Listing form and the Update Listing form to require the user to supply a value in this field.

- **Search column** – Check to activate the field and displays it on the Exchange’s Search Listing form.
- **Matches column** – Check to activate the field and displays it on the Exchange’s Matches grid.
- **View column** – Check to activate the field and displays it on the Exchange’s View Listing form.
- **Label column** – Used to specify the field label displayed on the forms.
- **Data Type column** – Specifies the type of data that is enterable into each field. The Contact Information field types are preset and cannot be changed. This allows PORTALPRODIGY to store the contact information in normalized form.
 - **Contact Person**
 - **Company Name**
 - **Phone Number**
 - **Fax Number**
 - **Email Address**
 - **Mailing Address, Address2, City, State, Zip**
- **Enable Confidential Option?** – Defaults to *No*. Set to *Yes* to enable the Confidential option for the Exchange. The Confidential option is presented as a choice on the Exchange’s Add New Listings and Update Listings pages. The user who is adding a listing then has the choice to have their identity remain confidential. When an individual listing is set to Confidential, the listing’s contact information is hidden from other users. When a visitor replies to a confidential listing, the Reply is sent via PORTALPRODIGY rather than via the visitor’s email browser, thus hiding the contacts email address, maintaining confidentiality. When the Confidential option is set to *No*, replies are sent via the visitor’s email browser, thus making the contact’s email address visible.

Listing Information Fields:

This section is used to build the contact information portion of the Exchange forms.



Listing Information					
Add	Search	Matches	View	Label	Data Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Limit to Members Only	Yes/No Listbox
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Reference ID	Number
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Posted Date	Posted Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Last Update Date	Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Expires Date	Date

Column Descriptions:

- **Add column** – Check to activate the field and displays it on the Exchange’s Add New Listing form.
- **Search column** – Check to activate the field and displays it on the Exchange’s Search Listing form.
- **Matches column** – Check to activate the field and displays it on the Exchange’s Matches grid.
- **View column** – Check to activate the field and displays it on the Exchange’s View Listing forms.
- **Label column** – displays the label that will be displayed on the form when this option is selected. Includes the following:
 - **Limit To Members Only** – includes list box to select whether the listing should be accessible for all visitors or Members Only.
 - **Reference ID** – displays the record ID assigned by PORTALPRODIGY.
 - **Posted Date** – displays the date the listing was added.
 - **Last Update Date** – displays the date the listing was last modified.
 - **Expires Date** – displays the date the listing expires.
- **Data Type column** – Specifies the type of data that is displayed for each field. The Contact Information field types are preset and cannot be changed. This allows PORTALPRODIGY to store the contact information in normalized form.
 - **Yes/No List box**
 - **Number**
 - **Posted Date**
 - **Date**

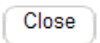
- **Date**

Add Listing Page Options:

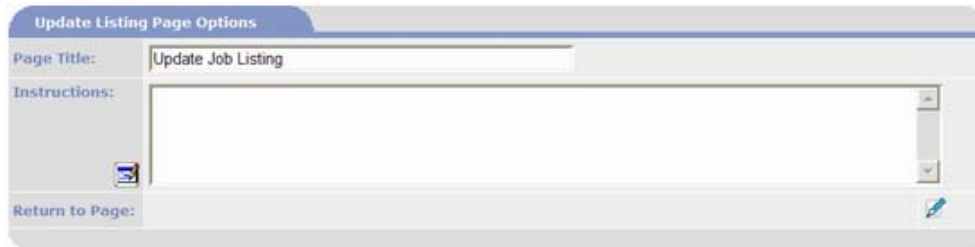
- **Page Title** – used to specify a textual title for the page. The title is placed on the top of the page and displayed using the standard page title format.
- **Instructions** – used to specify instructions to be displayed below the Page Title. Instructions may be entered as plain text or HTML. The HTML Editor  feature may be used to create and edit the Instructions as HTML.
- **Return to Page** – used to specify which page or URL to display when the Add Listing Page is closed. Click on the  to display the Link Management feature.



Link Management feature:

This feature works the same as the Menu Builder link feature. For more information see the Chapter on Menu Builder Feature Component.

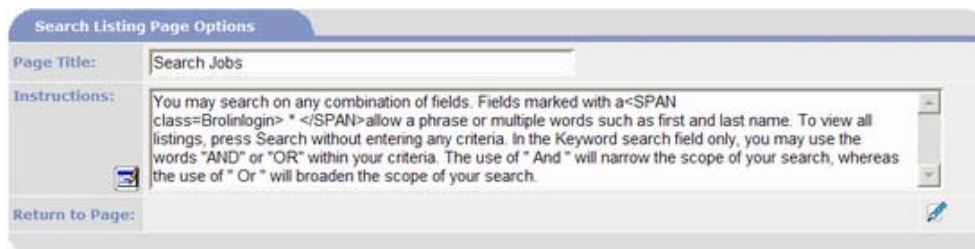
-  - click on the Close button to save the link and return to the Exchange Management page. PORTALPRODIGY will prompt to save your changes, be sure to select Ok. The Return to Page option will display the link.



Update Listing Page Options:



- **Page Title** – used to specify a textual title for the page. The title is placed on the top of the page and displayed using the standard page title format.
- **Instructions** – used to specify instructions to be displayed below the Page Title. Instructions may be entered as plain text or HTML. The HTML Editor  feature may be used to create and edit the Instructions as HTML.
- **Return to Page** – used to specify which page or URL to display when the Update Listing Page is closed. Click on the  to display the Link Management feature.


Search Listing Page Options:



- **Page Title** – used to specify a textual title for the page. The title is placed on the top of the page and displayed using the standard page title format.
- **Instructions** – used to specify instructions to be displayed below the Page Title. Instructions may be entered as plain text or HTML. The HTML Editor  feature may be used to create and edit the Instructions as HTML.
- **Return to Page** – used to specify which page or URL to display when the Search Listing Page is closed. Click on the  to display the Link Management feature.

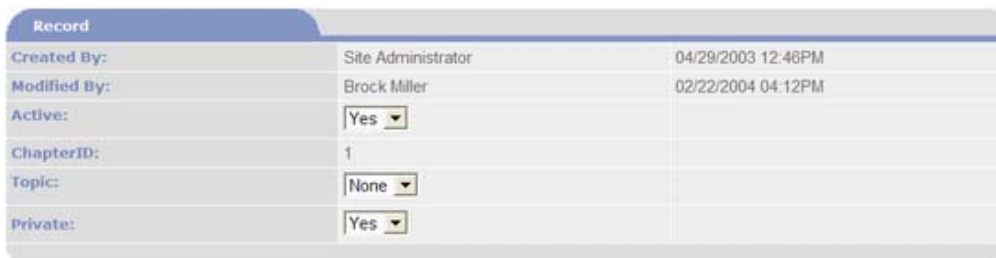
View Listing Page Options:



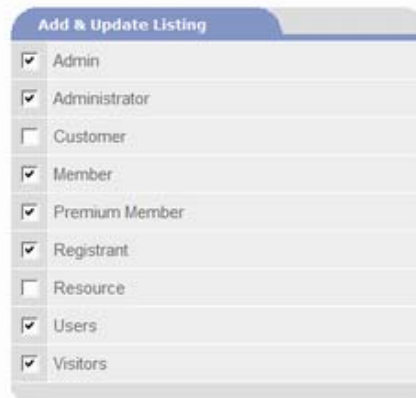
- **Page Title** – used to specify a textual title for the page. The title is placed on the top of the page and displayed using the standard page title format.
- **Instructions** – used to specify instructions to be displayed below the Page Title. Instructions may be entered as plain text or HTML. The HTML Editor  feature may be used to create and edit the Instructions as HTML.

Note the View Listing page returns to the Search Listings page when closed.

Record:



Save Delete Print Cancel Close



- **Created By Field** – Indicates who created the Exchange.
- **Modified By Field** – Indicates who last modified the Exchange.
- **Active Field** – The Active Field can be set to Yes or No. When set to No, the exchange will no longer be displayed on the visitor (public) portion of the website. It also will be excluded

from search results on administrative pages unless the Include deactivated records in search results box is checked. It does not delete the record but tags the record so it will be filtered from display.

- **Chapter ID** – Indicates the chapter of the user who created the exchange. This field is applicable on multi-chapter versions of PORTALPRODIFY.
- **Topic Selection Field** – The Topics Field contains a selection list based on entries made on the Exchanges Topics Management pages. Topics determines which exchanges are grouped together when displayed to visitors.
- **Private Selection Field** - The Private Field can be set to *Yes* or *No*. Selecting *No* indicates that the exchange items may be displayed to all visitors and updated by all visitors. **It is UNLIKELY that you will ever want this to be selected as NO.** Selecting *YES* indicates that only visitors with appropriate privileges may view the exchange listings and causes the Security Groups selection boxes to be displayed at the bottom of the Exchange Management page. Clicking to check the corresponding check box(es) permits specified group members to view the exchange listings on the public portion of the website and to add & update on the public portion of the website..

Security Permissions:

- **View Listing** – Members of the security groups checked here will be able to view listings but not necessarily update and delete listings.
- **Add & Update Listing** – Members of the security groups checked here will be able to view their listings and update and delete their listings.

1.3.2 Add New Listings

Each Exchange creates an Add New Listing page which is used by visitors to enter new listings. This page is automatically created based on the Exchange's settings configured in Exchange Management. The data elements (fields) and the specific order they are displayed on the page, are all specified in Exchange Management. See the Exchange Management Component for additional information.

1.3.3 Search Listings

Each Exchange creates a Search Listings page which is used by visitors to search listings. This page is automatically created based on the Exchange's settings configured in Exchange Management. The criteria data elements (fields) and the specific order they are displayed on the page, are all specified in Exchange Management. See the Exchange Management Component for additional information.

1.3.4 Matches grid on Search Listings

Each Exchange creates a Matches grid which is inserted into the Search Listings page to display the results of a visitors search. This page is automatically created based on the Exchange's settings configured in Exchange Management. The data elements (field columns) and the specific order they are displayed in the grid, are all specified in Exchange Management. See the Exchange Management Component for additional information.

1.3.5 View Listings

Each Exchange creates a View Listing page which is used by visitors to view the details of a listing. This page is automatically created based on the Exchange's settings configured in Exchange Management. The data elements (fields) and the specific order they are displayed on the page, are all specified in Exchange Management. See the Exchange Management Component for additional information.

1.3.6 Update Listings

Each Exchange creates an Update Listing page that can be used by visitors to edit and delete previously entered listings. This page is automatically created based on the Exchange's settings configured in Exchange Management. The data elements (fields) and the specific order they are displayed on the page, are all specified in Exchange Management. See the Exchange Management Component for additional information.

1.4 Feature Administration

Implementing the Exchange Features involves the following steps:

- Activate the Exchange Feature
- Create Category Topics
- Create an Exchange
- Prepare an Exchanges Notification Template
- Add Links to the Exchange (using Menu Builder)

Once an Exchange has been created the following pages are created by PORTALPRODIGY:

- Add New Listing
- Search Listings
- Matches grid on Search Listings
- View Listings
- Update Listings

Note that the actual titles displayed on the pages are the tiles you defined in Exchange Management.

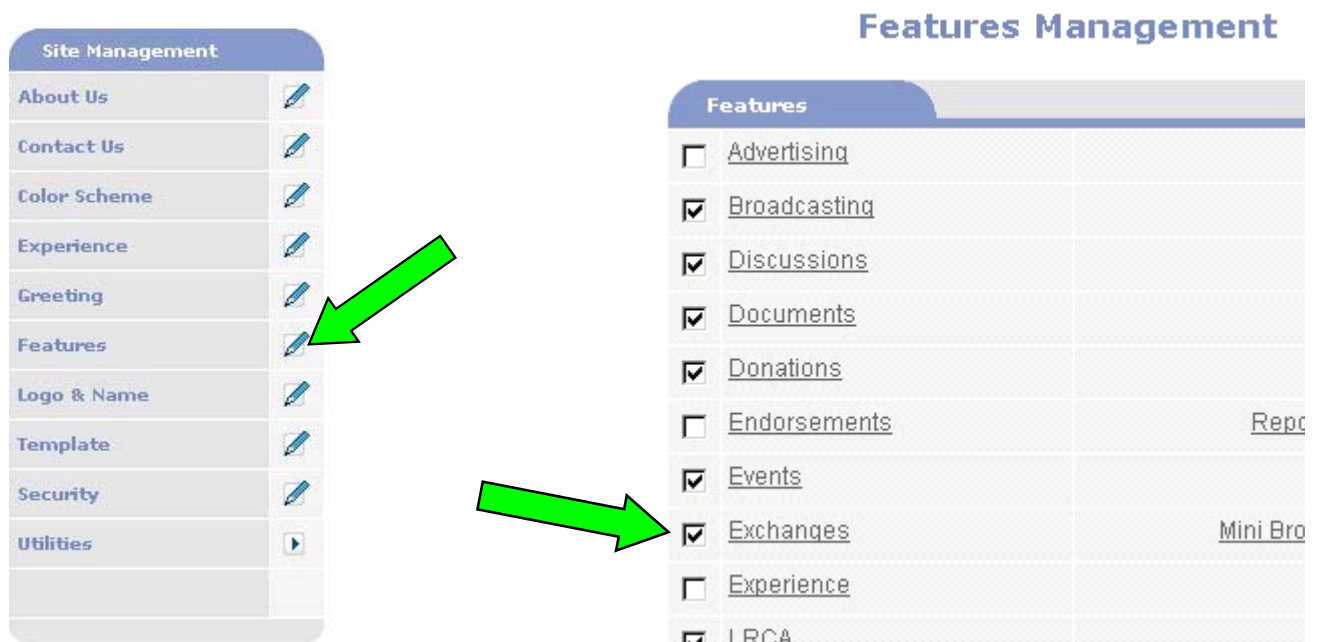
Menu Builder provides options to link directly to the Add New Listing, Search Listings and Update Listings Exchange pages. Exchange Management provides options to specify the page or URL to

return to after the page is closed. E.g. you can specify it to return the visitor to the Home page after the visitor adds a new listing. You could alternatively specify it to return the visitor to the Exchange's Search Listings page after the visitor adds a new listing.

1.5 Tutorials

1.5.1 Activating the Exchange Feature

The Exchange Feature is activated from the Features Management page which is accessed by clicking on the Features link in the Site Management Column of the Administration Menu. Click to check the box next to the Exchanges label on the Features management page and the feature will be activated



1.5.2 Creating Topic Categories

Click on the Exchanges link on the Features Management page to access the Exchanges Features Management page. Click the [Topics](#) link to access the Topics list.

Exchanges Features Management

Options	
Maximum Free Listings:	<input type="text" value="1"/>
New Listing Fee:	<input type="text" value="\$25.00"/>
Renewal Listing Fee:	<input type="text" value="\$15.00"/>
Taxable:	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Topics](#) 

Topic categories should be used if the user organization employs a large number of exchanges. The Topic categories can help organize the display of long lists of exchanges based on areas of interest. Click on the [Add New Topics](#) link to add new topics

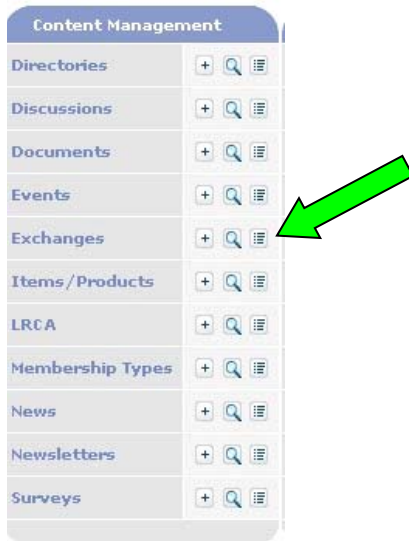
Exchanges Topics Management

[Add New Topic](#)

Details	
Topic:	<input type="text"/>
Sort Order:	<input type="text" value="0"/>
Active:	<input type="button" value="Yes"/>

1.5.3 Create an Exchange

The Exchanges Management Page is reached by clicking on the appropriate icon in the Exchanges row of the Content Management column of the Administration Menu.



Add Icon - Activates the Add a New Exchange function.



Browse Icon - Accesses the Search for Exchanges function.

Clicking on the Browse Icon accesses the Exchanges List.

Exchanges



Add New

Print


Main Menu

Clicking on an Exchange Title accesses the Exchange Management Page for the chosen exchange.



Add New

Clicking on button accesses a blank Exchange Management page and begins the creation of a new exchange.

See the section titled Exchange Management Page in the Components section of this chapter for details regarding the use of each field and link on the Exchange Management page.

Configure the page appropriately for the type of exchange you wish to create and click on the  button.

1.5.4 Prepare a Exchanges Notification Template

If a template is selected in the  field of the Exchange Management page, a message will be broadcast each time an item is added to the exchange. A new template can be created by clicking on the  button. More details regarding broadcast template can be read in the chapter titled Broadcasting Feature in Detail.

Sample Notification Template for Resume Exchange



The screenshot shows the 'Broadcasting' interface. At the top, there's a 'Broadcast' tab. Below it, the 'Type' is set to 'Email'. The 'Sender's Email' is 'Networking@Recruiters Associationxx.org'. The 'Subject' is 'New Resume Added'. The 'Body Format' is set to 'TEXT'. The 'Message' field contains the following text:

```
Dear <%CONTACT.FirstName%> <%CONTACT.LastName%>;

We'd like to inform you that a new resume has been added to the Resume exchange by
<%EXCHANGELISTING:Contact%> who is seeking a position as a
<%EXCHANGELISTING:PositionLabel%>. If you have an interest please visit the exchange at:
http://smre500/demosite/main.asp?url=1041&el=1

Thank You
```

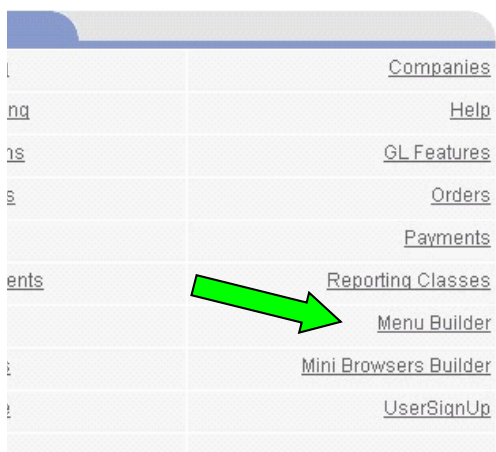
The 'Attachments' section is empty.

1.5.5 Add Links to Side Menu

Click on the Features Management link in the Site Management column of the Administration Menu.



Click on the [Menu Builder](#) link located on the Features management page.



Click on the button on the Search for Menus page and click on the menu title for the menu you wish to add the Exchanges link.

Search for Menus

Search Criteria

Feature:

All

Created Date Range:

 to

Modified Date Range:

 to

Search

Found Menus

Page 1 of 1

Total matches:8

Menu	Type	Sub Type
MR Left Side	Standard Template Menu	Left Side Menu
MR Right Side	Standard Template Menu	Right Side Menu
MenuBarA	Standard Template Menu	Menu Bar A
MenuBarB	Standard Template Menu	Menu Bar B
QuickJump	Standard Template Menu	Quick Jump Menu
UpperDropDownMenu	Standard Template Menu	Upper DropDown Menu
test contact menu	Contacts Menu	
exchange	Exchange Listings	

Click the  button on the Menu Builder page. And enter the desired values.

Menu Item Management

Options

Topic:

Public

Menu Item:

Exchanges

Sort Order:

0

Menu Item Option:

☐ URL

☒ Option

Exchanges

☐ Menu

☐ Administrative Option

Save

Delete

Print

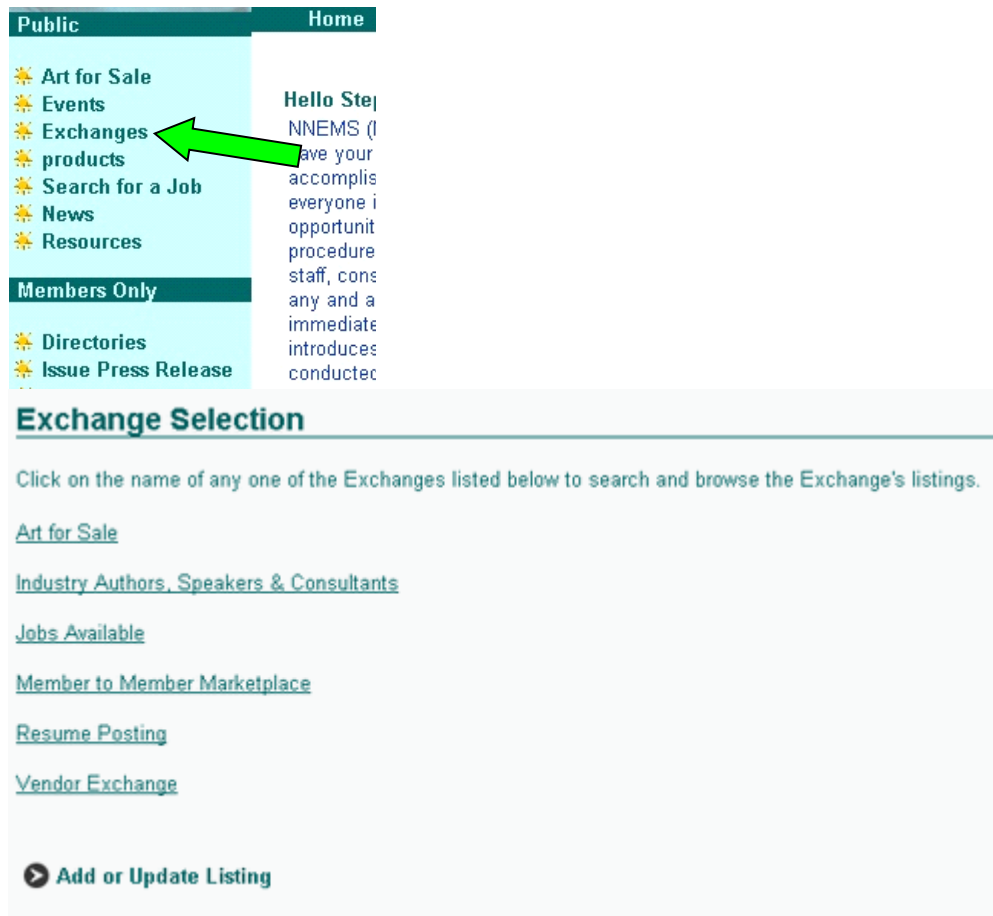
Cancel

Close

See the chapter titled Menu Builder in Detail for more specifics regarding the setup of links on menus.

View versus Add Menu Links for Exchanges

When a visitor clicks on the exchanges link in a menu, on the home page, he is presented with the exchanges list.



It might be desirable to lead visitors to different exchanges based on the activity they want to conduct, for example - Art for Sale, Add Art for Sale, Search for a Job, or Add & Update Jobs.

Exchanges typically have two levels of security: that which is accessible to the public for browsing and searching an exchange; and that which is accessible to a private group for adding and updating items to an exchange. For example, a Job Exchange might allow all visitors (the public) to search for jobs while only allowing member employers (private group) to post jobs. Furthermore, an Art for Sale exchange might allow all visitors (the public) to search for Art while only allowing members (private group) to post art for sale. In such cases, separate links directly to the Search or Update pages can be created.



First, the Administrator must determine the URL for the target location by clicking on the Exchanges link created earlier. Then click on the desired exchange title.

Exchange Selection

Click on the name of any one of the Exchanges list



The *Viewing* URL for exchange is located in the URL Address field of the browser. The Administrator should copy this address which will be pasted into a field in the menu builder.



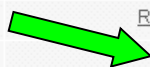
Click on the Features Management link in the Site Management column of the Administration Menu.

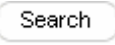


Click on the [Menu Builder](#) link located on the Features management page.

Features Management

	Companies
ng	Help
is	GL Features
s	Orders
	Payments
ents	Reporting Classes
	Menu Builder
t	Mini Browsers Builder
t	UserSignUp



Click on the  button on the Search for Menus page and click on the menu title for the menu you wish to add the Exchanges link.

Search for Menus

Search Criteria

Feature:

All

Created Date Range:

to

Modified Date Range:

to

Search


Found Menus

Page 1 of 1

Total matches:8


Menu	Type	Sub Type
MB Left Side	Standard Template Menu	Left Side Menu
MB Right Side	Standard Template Menu	Right Side Menu
MenuBarA	Standard Template Menu	Menu Bar A
MenuBarB	Standard Template Menu	Menu Bar B
QuickJump	Standard Template Menu	Quick Jump Menu
UserDropDownMenu	Standard Template Menu	Upper DropDown Menu
test contact menu	Contacts Menu	
exchange	Exchange Listings	

Click the  button on the Menu Builder page.

Paste the URL copied in the earlier step and paste it into the URL field and click the URL Radio Button. Make the desired entries into the Topic, Menu Item and Sort Order fields and click on the  button.

Menu Item Management

Options	
Topic:	<input type="text" value="Public"/>
Menu Item:	<input type="text" value="Art for Sale"/>
Sort Order:	<input type="text" value="0"/>
Menu Item Option:	<div><input checked="" type="radio"/> URL <input type="text" value="http://smre500/demosite/main.asp?url=1041&ei=3"/></div> <div><input type="radio"/> Option <input type="text"/></div> <div><input type="radio"/> Menu <input type="text"/></div> <div><input type="radio"/> Administrative Option <input type="text"/></div>



1.6 Confidential Listing Reply

This page is used to reply to Exchange Listings marked as Confidential. It maintains confidentiality by hiding the email address of the recipient. Visitors may paste a message into the reply form and attach up to three files.

Listing Reply

Here you can send your email reply to the exchange listing.

Compose Email Message	
From Name *	<input type="text"/>
From Address *	<input type="text"/>
Message *	<div><div></div><div></div></div>
Attachments: (You may attach up to 3 files)	<div><div><input type="text"/></div><div><input type="text"/></div><div><input type="text"/></div></div> <div><div><input type="button" value="Browse..."/></div><div><input type="button" value="Browse..."/></div><div><input type="button" value="Browse..."/></div></div>
Send a copy to You?	<input checked="" type="radio"/> No <input type="radio"/> Yes