

Portal Prodigy[™]
Legislative & Regulatory Calls to Action (LRCA)
Feature in Detail

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

1.1	Introduction.....	2
1.2	The Visitor Experience	4
1.3	Components	7
1.3.1	LRCA Management Page	8
1.3.2	The LRCA Recipients.....	14
1.4	Feature Administration.....	16
1.5	Tutorials.....	16
1.5.1	Prepare an LRCA Response Notification Template.....	16
1.5.2	Activate the LRCA Feature.....	17
1.5.3	Identifying LRCA Contacts.....	19
1.5.4	Loading bulk lists of LRCA Contacts.....	20
1.5.5	Create and Launch a Call to Action.....	25

1.1 Introduction

Rapidly mobilize constituents into a focused force. Broadcast *Calls to Action* messages via email to specified individuals, contact types or interest groups. The messages include a hyperlink recipients can click, bringing them to the website's issue position and education page. Respondents can choose to respond online to their legislative, regulatory, judicial or executive branch representative as pre-determined by an Administration setup function. Each LRCA project can include suggested response messages to aid respondents in developing their own message. Respondents type their message into the website LRCA response form. PortalProdigy uses their zip code entry to determine the respondent's correct legislative, regulatory, judicial or executive branch representative and sends their message.

LRCA feature benefits include:

- Broadcasts *Calls to Action* messages to specified individuals, contact types or interest groups.
- Call to Action message includes a hyperlink to the website's issue position and education page.
- Recipients easily take action by filling in web based form accessed via link in Call to Action message.
- Administrator presets appropriate legislative, regulatory, judicial or executive branch level for responses and system selects specific government contact(s) applicable to respondent based on his/her zip code.
- Your organization can include suggested response messages to aid respondents in developing their own message.
- Respondents' messages are sent from their email program so government interprets the feedback from diverse sources.
- Summary and detail reports are available to administrator, including actual responses.

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

LRCA Management Page

LRCA Details
LRCA Title
LRCA Message
Response Page Message
Suggested Phraseology
Response Notification Email
More Information Document

View More Information

Document
Update More Information
Document
Check-Out More Information
Document
Delete More Information
Document

Search for More Information

Document
Responses: View Responses Link
Selection Criteria
Level

- Local
- County
- State
- Federal

Legislative & Regulatory Call to Action (LRCA) Feature in Detail

Branch

- Administrative
- Legislative
- Judicial
- Regulatory

Geography

- Nationwide
- By States
- By County

The LRCA Recipients

Recipients Button

Contact Types

Special Interest Groups

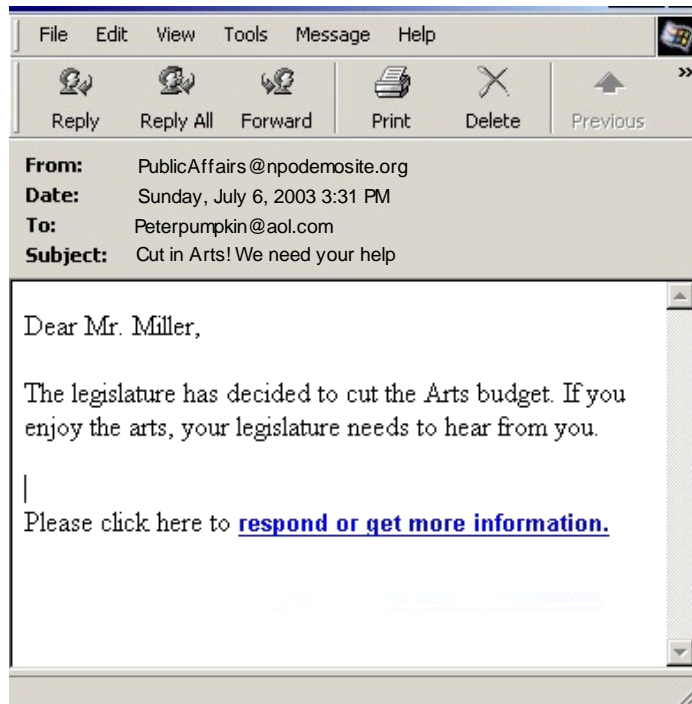
Security Groups

Send LRCA

LRCA Contact

1.2 The Visitor Experience

Constituents, members and other contacts receive email messages generated by an LRCA broadcast initiated by an Administrator.



When the email recipient clicks on the [respond or get more information](#) link, her browser is activated and a connection is made to the organization's website Respond To LRCA page for that specific Call to Action.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

HERE

Discussions Documents Donations Events News

Home SignUp Logout ContactUs AboutUs SiteMap

Job

Release graphics sale on listings

Respond To LRCA

The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their opinion. Type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below.

If you need more information, click here: [More Information](#)

If you'd like to review some sample phraseology for your message, click here: [Sample Phraseology](#)

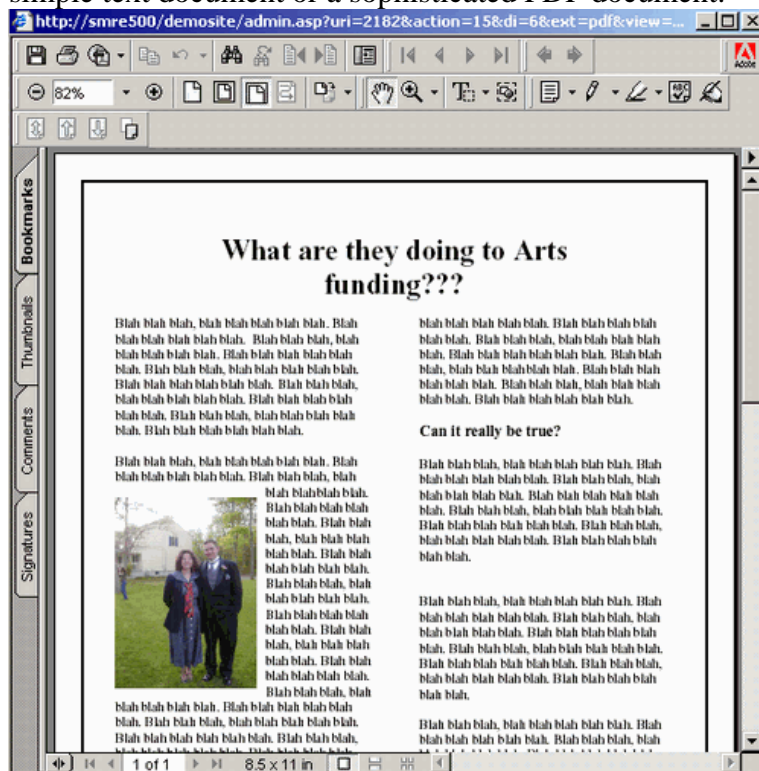
Zip Code:

Email:

Message:

[Cancel](#) [Submit](#)

A respond message is displayed with links to More Information and Sample Phraseology. Clicking on [More Information](#) accesses a page detailing the issues concerned. That page can be a simple text document or a sophisticated PDF document.




Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

Clicking on the Sample Phraseology link accesses a window filled with possible response messages developed by Administration for this specific issue. This is a helpful feature since many recipients will have trouble capturing their own thoughts into a message.

Respondents enter their Zip Codes into the **Zip Code:** field. The data entered into the Zip Code field is used by the system to determine which Legislative, Administrative, Judicial and/or Regulatory contacts are appropriate for this specific respondent's response.

Respondent's enter their personal Email Address into the **Email:** field. The email address entered here will appear in the from and reply fields of the email received


Respondents enter their response into the Message Field.

Clicking  **Submit** button saves the response and provides the respondent with an opportunity to view the recipients that the system selected, revise the message, cancel it or send it.


Legislative & Regulatory Calls To Action

Your Legislative & Regulatory Call to Action has been saved. You may view the recipients and revise your Call to Action using the buttons below. To deliver press the Next button.

 **Recipients**  **Revise**  **Cancel**  **Next**

Clicking the  **Recipients** button displays the Legislative, Administrative, Judicial and/or Regulatory contacts selected by the system.

Legislative & Regulatory C

Limit To:  **Go**

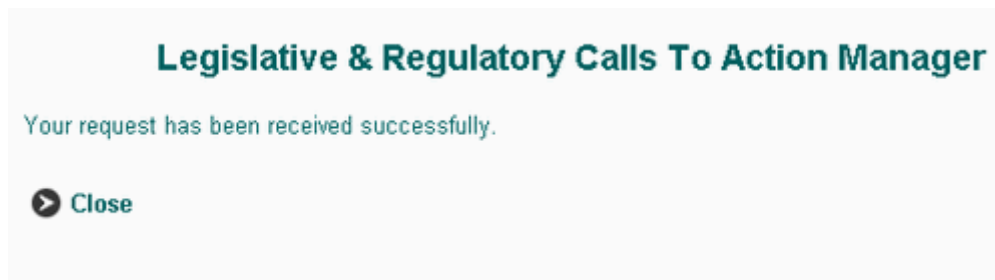
Page 1 of 1		
Select	Last Name	First Name
<input checked="" type="checkbox"/>	Bernsberg	Ellen
<input checked="" type="checkbox"/>	Gumbs	William
<input checked="" type="checkbox"/>	McDonald	Norman
<input checked="" type="checkbox"/>	Perez	Selma
<input checked="" type="checkbox"/>	Ziznewski	Curt

 **Save**  **Cancel**  **Close**

The respondent can uncheck boxes if she wishes to remove certain recipients from the list.



Clicking the button sends the messages on their way.



1.3 Components

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



Add Icon - Activates the Add a New LRCA function.



Browse Icon - Accesses the Search for LRCA function.

Clicking the Browse Icon accesses the LRCA Search Page.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

Search For Legislative & Regulatory Calls to Action

Search Criteria			
LRCA ID:	<input type="text"/>	Title:	<input type="text"/>
Created Date Range:	<input type="text"/> to <input type="text"/>	Modified Date Range:	<input type="text"/> to <input type="text"/>
			Items Per Page: <input type="text" value="10"/>
<input type="button" value="Search"/>			

Quick Search on LRCA Title:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Clicking the button without entering filter criteria locates all LRCA records which are displayed in the Found LRCAs list.

Found LRCAs

Page 1 of 1		Total matches: 1
ID	LRCA Title	Creation Date
1	Cut in Arts! We need your help.	06/02/2003

Clicking on an LRCA Title or clicking on accesses the LRCA Management page.

1.3.1 LRCA Management Page

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

Legislative & Regulatory Calls To Action

LRCA Details

LRCA Title:

Cut in Arts! We need your help.

LRCA Message:

The legislature has decided to cut the Arts budget. If you enjoy the arts, your legislature needs to hear from you.

Response Page Message:

The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their views on the subject. Please, type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below.







Suggest Phraseology:

I am very dissappointed in the recent deciscion by your office to support the recent budget cuts to art funding.


Response Notification Email:

More Information Document:

artsfunding.pdf



6



Responses:

[View Responses](#)

Selection Criteria

Level:

Local

County

State

Federal

Branch:

Administrative

Legislative

Judicial

Regulatory

Geography:

☒ Nationwide

☐ By State

☐ By County

Selection Criteria:

+

-

Federal Level, Legislative Branch, Nationwide

State Level, Legislative Branch, Nationwide

Receipients

Delete

Cancel

Print

Submit

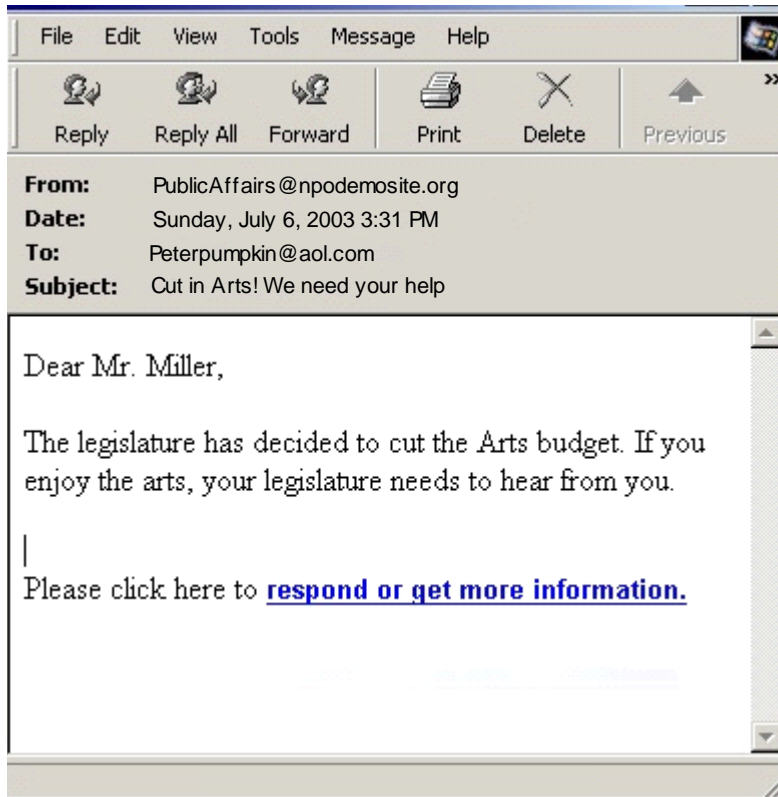
Close

LRCA Details

The Administrator enters the message and issue related content of the Call to Action into the LRCA Details section of the LRCA Management page.

- **LRCA Title** – The Administrator enters the title of the LRCA in this field. The title will be displayed in lists and reports and included in the subject line of the Call to Action broadcast that will be generated by the specific LRCA project.
- **LRCA Message** – The text in this field will be the message sent to recipients of the Call to Action.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail



- **Response Page Message** – The text entered into this field appears at the top of the Respond to LRCA page message which is presented to LRCA recipients who click on the [respond or get more information](#) link in the LRCA message broadcast.

Respond To LRCA

The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their views on the subject. Please, type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below.

If you need more information, click here: [More Information](#)

If you'd like to review some sample phraseology for your message, click here: [Sample Phraseology](#)







Zip Code:


Email:

Message:





- **Suggested Phraseology** – The text entered into this field is presented when a respondent clicks on the Sample Phraseology link on the Respond To LRCA page. When a respondent clicks on the Sample Phraseology link his browser opens a window filled with possible response messages developed by Administration for this specific issue. This is a helpful feature since many recipients will have trouble capturing their own thoughts into a message. The Suggested Phraseology window opens over the Respond To LRCA page so that it is easy for a respondent to copy text from the Suggested Phraseology window and paste it into the message filed.

The screenshot shows a web application interface. At the top is a navigation bar with links: Home, Signup, Logout, Contactus, Aboutus, and Sitemap. On the left is a vertical menu with links: Home, About, Contact, Services, News, Press Release, Photographs, For Sale, Auction, Job Listings, and more. The main content area is titled "Respond To LRCA". It contains the following text: "The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their views on the subject. Please, type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below." Below this text are two links: "More Information" and "Sample Phraseology". There are three input fields: "Zip Code:", "Email:", and "Message:". The "Message:" field is a large text area. Below the form is a browser window showing the URL "http://smre500/demosite/main.asp?uri=1053&tp=phr&di=1" and the text "I am very dissappointed in the recent deciscion by your office to support the recent budget cuts to art funding."

- **Response Notification Email** – Each time the specific Call to Action is responded to, a notification email will be sent to the email address entered into this field. The broadcast template used for this email notification is selected during Administration setup of the LRCA Features Management page.
- **More Information Document** –       - When detailed and sophisticated documentation or a multi media presentation is required, the More Information Document is used. This feature uses the Resource Document library Engine and more details can be learned in the chapter titled *Document Feature in Detail*. Documents or executable applications are accessed or triggered when the respondent clicks on the [More Information](#) link on the Respond To LRCA page.

-  **View More Information Document** – If a document has already been related to the specific LRCA record, it can be viewed by clicking on this button.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

-  **Update More Information Document** – A new document file can be loaded by clicking on this button.
 -  **Check-Out More Information Document** - If a document has already been related to the specific LRCA record, it can be downloaded to the Administrators computer by clicking on this button.
 -  **Delete More Information Document** - If a document has already been related to the specific LRCA record, it can be deleted by clicking on this link.
 -  **Search for More Information Document** – If a desired document is already loaded in the Resource Document Library it can be located by clicking on this icon and then related to the specific LRCA as its More Information Document.
- **Responses: [View Responses](#) Link** – Administrators can revisit the LRCA Management page from time to time after its been broadcast to check for responses by clicking on the [View Responses](#) Link

Legislative & Regulatory Calls To Action Responses	
Limit To: <input type="text" value="20"/>	<input type="button" value="Go"/>
Page 1 of 1	
Total matches: 7	
Contact Name	Creation Date
Pamela Mace	07/06/2003
Jane Cruthers	07/06/2003
John Jones	07/06/2003
Mark Gold	07/06/2003

By clicking on the respondent's name, the administrator can view an individual's actual response message and a list of L&R contacts to which the message was broadcast.

Legislative & Regulatory Calls To Action

Response:


I am very dissappointed in the recent deciscion by your office to support the recent budget cuts to art funding.

Page 1 of 1		
Select	Last Name	First Name
<input checked="" type="checkbox"/>	Bernsberg	Ellen
<input checked="" type="checkbox"/>	Gumbs	William
<input checked="" type="checkbox"/>	McDonald	Norman
<input checked="" type="checkbox"/>	Perez	Selma
<input checked="" type="checkbox"/>	Ziznewski	Curt

 Close

Selection Criteria

The Selection Criteria section allows the Administrator to instruct the system on which LRCA contacts should receive response messages. The Administrator can enter multiple combinations based on the Level, Government Branch, and Geography of LRCA contacts. The logic between the columns is “AND”. Selecting Level = Local, Branch= Legislative and Geography = State indicates that the system should search for contacts within the State of the zip code entered by the respondent

where the contacts are Local Level legislators. Clicking on the  button adds the highlighted Level, Branch and Geography criteria to a row in the Selection Criteria list box. The logic between the rows in the Selection Criteria list box is “OR”.

Selection Criteria

Level:

Local

County

State

Federal

Branch:

Administrative

Legislative

Judicial

Regulatory

Geography:

☒ Nationwide

☐ By State

☐ By County

Selection Criteria:

+ -

Federal Level, Legislative Branch, Nationwide

State Level, Legislative Branch, Nationwide

Recepients

Delete

Cancel

Print

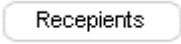
Submit

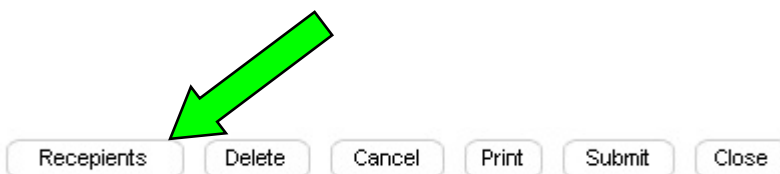
Close

- **Level** – The Level criteria relates to the level of government of the LRCA contacts.
 - **Local** – Mayors, Municipal Judges, Town Councils would be considered Local Level Contacts.


- **County** – Sheriffs, County Supervisors would be considered County Level Contacts.
- **State** – State Senators & Assemblymen, Governors and State Treasurers would be considered State Level Contacts.
- **Federal** – US Senators, the President, and Chief Justices would be considered Federal Level Contacts.
- **Branch** – The Branch criteria relates to the branch of government of the LRCA contacts.
 - **Administrative** – The President, Governors, Treasurers, Cabinet Members and staff, Mayor, etc. would be considered Administrative Branch contacts
 - **Legislative** – Congressmen, Assemblymen, Freeholders, etc would be considered Legislative Branch contacts.
 - **Judicial** – Judges and Magistrates would be considered Judicial Branch contacts.
 - **Regulatory** – Building Inspectors, Heads of Regulatory Agencies, Regulators, etc would be considered Regulatory Branch contacts.
- **Geography** – The Geography criteria relates to the geographic location of the LRCA Contacts.
 - **Nationwide** – Identifies all contacts whose LRCA Geography designation is in the country identified by the respondent's zip code.
 - **By States** – Identifies all contacts whose LRCA Geography designation is in the state identified by the respondent's zip code.
 - **By County** - Identifies all contacts whose LRCA Geography designation is in the county identified by the respondent's zip code.

1.3.2 The LRCA Recipients

Clicking on the  button on the LRCA Management page accesses the LRCA Recipients page which is used to instruct the system on which contacts are to receive the original Call to Action messages.



Legislative & Regulatory Calls to Action (LRCA) Feature in Detail


Recipients can be selected based on geographic location, Contact Type, Special Interest Group and Security Group. The Logic between the variables is “AND”. Multiple Location criteria can be entered. Clicking on the  button adds the highlighted State and County selections to the Location Selection List. The logic between the rows in the Location Selection List is “OR”.

Legislative & Regulatory Calls To Action Recipients

Location

State: National

County: ... All ...

Selection Criteria:  

Check each Contact Type or Group whose members you want to receive your Call To Action:


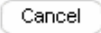
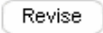

Contact Type:	Special Interest Group:	Security Group:
<input type="checkbox"/> Client	<input type="checkbox"/> Finance and Accounting	<input type="checkbox"/> Admin
<input type="checkbox"/> Contractor	<input type="checkbox"/> Health and Welfare	<input type="checkbox"/> Employee
<input type="checkbox"/> Contributor	<input type="checkbox"/> Production	<input type="checkbox"/> Members
<input type="checkbox"/> Employee		<input type="checkbox"/> Users
<input type="checkbox"/> LRCA		
<input type="checkbox"/> MailingList		
<input type="checkbox"/> Manufacturer		

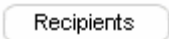

Send the Call to Action

Clicking the  button on the LRCA Management page accesses the LRCA Review Page.

Legislative & Regulatory Calls To Action Manager

Your Legislative & Regulatory Call To Action has been saved and is ready for delivery. Before sending your Call To Action you can View Recipients matching your criteria & Revise if necessary. You may also Cancel delivery. When you are ready to deliver your Call to Action press Send.



Clicking on the  button will display a list of the contacts who will be receiving the Call to Action when the  button is clicked.

Legislative & Regulatory Calls To Action Recipients

Limit To:

Page 1 of 1				Total matches: 12
Select	Last Name	First Name	Company Name	Office Phone
<input checked="" type="checkbox"/>	Bailey	Bill	WRRO Radio	
<input checked="" type="checkbox"/>	Bernsberg	Ellen		
<input checked="" type="checkbox"/>	Claymore	Tom	US Armaments	555.555.7364x666
<input checked="" type="checkbox"/>	Cruthers	Jane	WDDY TV	
<input checked="" type="checkbox"/>	Giagrande	Anita		555.555.7676
<input checked="" type="checkbox"/>	Gold	Mark	Newark Tribune	
<input checked="" type="checkbox"/>	Mace	Pamela		555.555.9879x555
<input checked="" type="checkbox"/>	Pallack	Dana		555.555.0968
<input checked="" type="checkbox"/>	Patel	Arvin	Offshore Programming, Inc.	555.555.7345x111
<input checked="" type="checkbox"/>	Perez	Selma		
<input checked="" type="checkbox"/>	Slick	Tina	Cellular Deluxe	555.555.1254x987
<input checked="" type="checkbox"/>	Ziznewski	Curt		

Recipients can be removed from the broadcast by un-checking the box next to their name.

1.4 Feature Administration

Implementing the LRCA Features involves the following steps:

- Prepare a LRCA Response Notification Template
- Activate the LRCA Feature
- Load LRCA Contacts
- Create and Launch a Call to Action

1.5 Tutorials

The following tutorials describe how to prepare and maintain Legislative and Regulatory Calls to Action.

1.5.1 Prepare an LRCA Response Notification Template

Detailed instructions for using the Broadcasting Feature and preparing a template are located in the chapter titled *Broadcasting Features in Detail*. A Response Notification Template is prepared using the Broadcast Template Feature.

The Response Notification message is delivered when a Call to Action broadcast is complete. Variable Data from the specific event is inserted into the template and delivered to the recipient

designated in the **Response Notification Email:** field on the LRCA Management page for the specific Call to Action.

Sample LRCA Response Notification.

The screenshot displays the 'Broadcasting' interface for sending an email. The 'Type' is set to 'Email'. The 'Sender's Email' is 'LRCA@npodemo.org'. The 'Subject' is 'Someone responded to an LRCA'. The 'Body Format' is set to 'TXT'. The 'Message' field contains the following template text:

Attention LRCA Administrator:

<%CONTACT:FirstName%> <%CONTACT:LastName%>
responded to LRCA "<%LRCARESP:Title%>" with the following message:

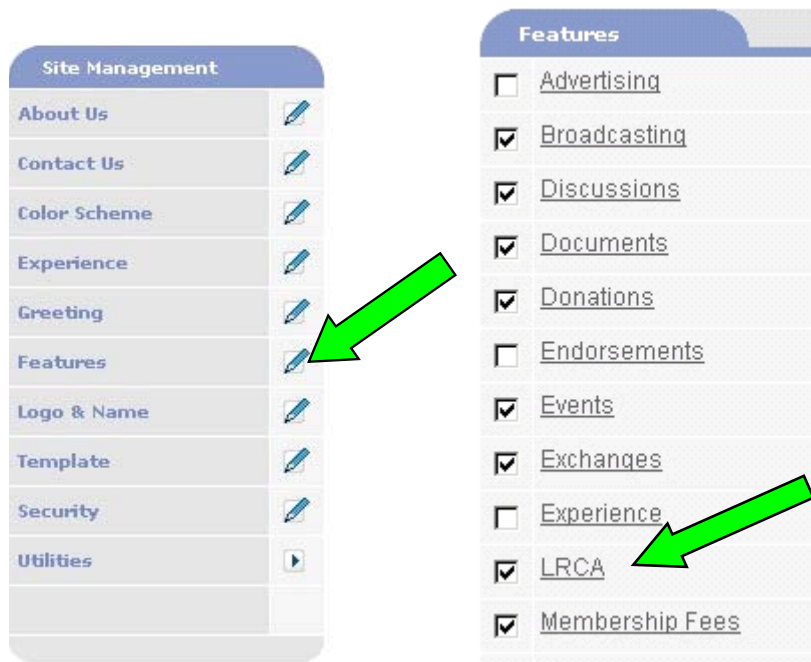
<%LRCARESP:Message%>

The 'Attachments' section is empty.

1.5.2 Activate the LRCA Feature

The LRCA 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 LRCA label on the Features management page and the feature will be activated

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail



Click on the [LRCA](#) link to access the LRCA Feature Management page.

LRCA Features Management

Options	
Output Options:	Email: <input type="text" value="Yes"/>
	Fax: <input type="text" value="No"/>
	Printed: <input type="text" value="No"/>
Administrator Email:	<input type="text" value="LRCA@npodemo.org"/>
Response Notification Template:	<div><div>None</div><div>None</div><div>Someone responded to an LRCA</div></div>
<div>Save Print Cancel Close</div>	

- **Output Options: Selections Fields** - There are three Output Options indicated but only Email is available at the time of this writing. The Output Option for **Email** must be set to *Yes*. All LRCA broadcasts are done via email at this time.
- **Administrator Email Field** – When an LRCA broadcast completes its transfer to an SMTP server (Electronic Mail Sending Server) a success notice will be transmitted to the email address entered into this field.
- **Response Notification Template Field** – The template selected in this field will be used when recipients of the Call to Action execute a response. Each time the specific Call to Action is responded to, a notification email will be sent to the email address entered into the Response Notification Email field of the LRCA Management page.

1.5.3 Identifying LRCA Contacts

Review the chapter titled Contacts, Members, Vendors & Companies Feature in Detail to learn about loading contact records.

An LRCA Contact is one which may receive responses to Calls to Action. Generally these are legislators, judges, regulators and government executives. LRCA Contacts are a specific Member Type of contact. Any contact record can be designated as an LRCA contact by clicking the LRCA Box on the specific contact's Member and Contact Management page.

[Biography](#)

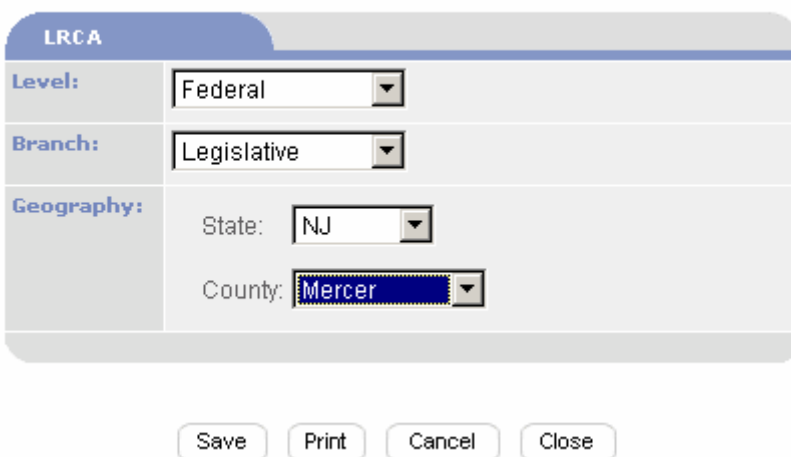
[Security Groups](#)



Member Types	
<input type="checkbox"/>	Client
<input type="checkbox"/>	Contractor
<input type="checkbox"/>	Contributor
<input type="checkbox"/>	Employee
<input checked="" type="checkbox"/>	LRCA
<input type="checkbox"/>	MailingList

In addition to checking the LRCA Box, the Administrator must click on the [LRCA](#) link next to the LRCA Box in order to access the Member LRCA Type Management page.

Member LRCA Type Management



LRCA	
Level:	Federal
Branch:	Legislative
Geography:	State: NJ County: Mercer
<div>Save Print Cancel Close</div>	

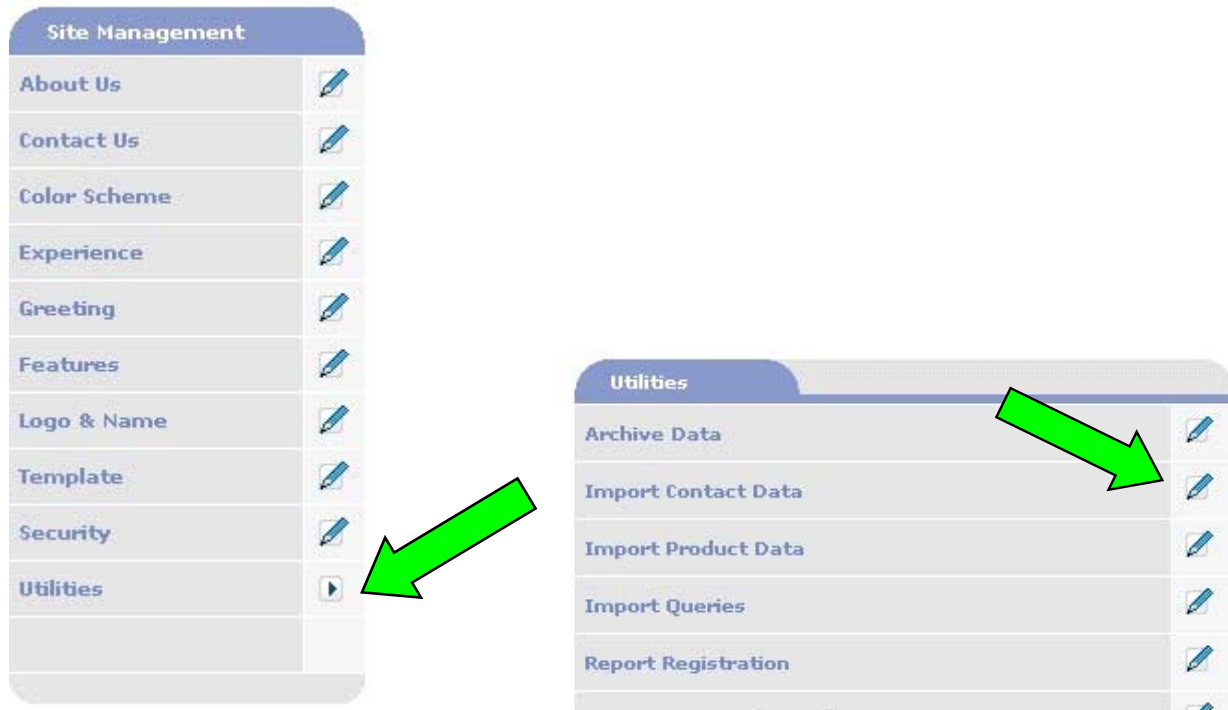
The values should be selected to best describe the Contact's area of responsibility

- **Level** – The Level criteria relates to the level of government of the LRCA contact.

- **Local** – Mayors, Municipal Judges and Town Councils would be considered Local Level Contacts.
- **County** – Sheriffs, County Supervisors would be considered County Level Contacts.
- **State** – State Senators & Assemblymen, Governors and State Treasurers would be considered State Level Contacts.
- **Federal** – US Senators, the President, and Chief Justices would be considered Federal Level Contacts.
- **Branch** – The Branch criteria relates to the branch of government of the LRCA contact.
 - **Administrative** – The President, Governors, Treasurers, Cabinet Members and staff, Mayor, etc. would be considered Administrative Branch contacts
 - **Legislative** – Congressmen, Assemblymen, Freeholders, etc would be considered Legislative Branch contacts.
 - **Judicial** – Judges and Magistrates would be considered Judicial Branch contacts.
 - **Regulatory** – Building Inspectors, Heads of Regulatory Agencies, Regulators, etc would be considered Regulatory Branch contacts.
- **Geography** – The Geography criteria relates to the geographic responsibility area of the LRCA Contacts.
 - **States** – Indicates a contact is responsible to a specific State.
 - **By County** - Indicates a contact is responsible to a specific County or one of its municipalities.

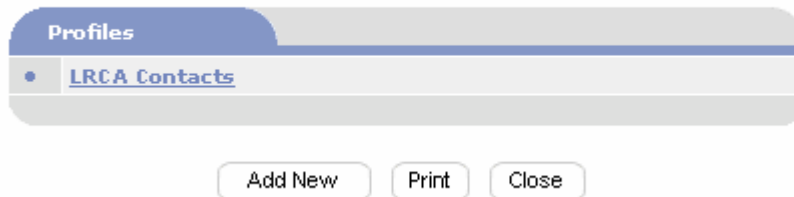
1.5.4 Loading bulk lists of LRCA Contacts

Administrators can load lists of LRCA Contacts in batches using the *Import Contact Data* utility. The utility is accessed from the Administration Menu by clicking on the Utilities Icon of the Site Management column and then clicking on the Import Contact Data Icon on the Utilities page.



Import templates can be created for different Member Types based on the data to be imported. The Import templates are listed on the Member Profiles page

Member Profiles



Click on the appropriate template label or click on [Add New](#) to access the Import Contacts Data Management Page and create a new one.

Import Contacts Data Management Page

The Import Contacts Data Management page sets up the utility to import from a CSV file located on the Administrator's remote computer or network. If the CSV file was setup with the following fields:

1. First Name
2. Last Name
3. Title
4. CompanyName
5. Company Address1
6. Company City
7. Company State
8. Company Zip

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

9. Company Phone
10. Company Fax
11. Company E-mail
12. LRCA Branch
13. LRCA Level
14. LRCA State

(columns in a spread sheet) the appropriate Data Management page would be set up as displayed.

Profile Data

Profile name: LRCA Contacts

Select a CSV file to be imported: Browse...

Select Data Subscription file:

Values Included ☒ Ignore first row which contains column headings

<input type="checkbox"/> 1 FirstName	<input type="checkbox"/> 0 MiddleName	<input type="checkbox"/> 2 LastName	<input type="checkbox"/> 0 Prefix
<input type="checkbox"/> 0 Suffix	<input type="checkbox"/> 0 NickName	<input type="checkbox"/> 0 Home WebURL	<input checked="" type="checkbox"/> 11 Company Email
<input type="checkbox"/> 0 Home Phone	<input type="checkbox"/> 0 Company WebURL	<input type="checkbox"/> 0 Home Email	<input type="checkbox"/> 0 CellPhone
<input checked="" type="checkbox"/> 9 Company Phone	<input type="checkbox"/> 0 Company PhoneExt	<input type="checkbox"/> 0 Home Fax	<input checked="" type="checkbox"/> 10 Company Fax
<input type="checkbox"/> 0 Pager	<input type="checkbox"/> 0 MailToHome	<input type="checkbox"/> 0 MailToOffice	<input type="checkbox"/> 0 Home Address1
<input type="checkbox"/> 0 Home Address2	<input type="checkbox"/> 0 Home City	<input type="checkbox"/> 0 Home State	<input type="checkbox"/> 0 Home Zip
<input type="checkbox"/> 0 Home Country	<input type="checkbox"/> 0 Home County	<input checked="" type="checkbox"/> 5 Company Address1	<input type="checkbox"/> 0 Company Address2
<input checked="" type="checkbox"/> 6 Company City	<input checked="" type="checkbox"/> 7 Company State	<input checked="" type="checkbox"/> 8 Company Zip	<input type="checkbox"/> 0 Company County
<input type="checkbox"/> 0 Company Country	<input type="checkbox"/> 0 OtherSource	<input type="checkbox"/> 0 Comments	<input checked="" type="checkbox"/> 4 Company Name
<input checked="" type="checkbox"/> 3 Title	<input type="checkbox"/> 0 Profession	<input type="checkbox"/> 0 Notes	<input type="checkbox"/> 0 Biography
<input type="checkbox"/> 0 ClosingStatement	<input type="checkbox"/> 0 SignOffStatement	<input checked="" type="checkbox"/> 13 LRCA Level	<input checked="" type="checkbox"/> 14 LRCA State
<input type="checkbox"/> 0 LRCA County	<input checked="" type="checkbox"/> 12 Branch	<input type="checkbox"/> 0 NPOContactID	<input type="checkbox"/> 0 OtherSourceID


Select All Deselect All

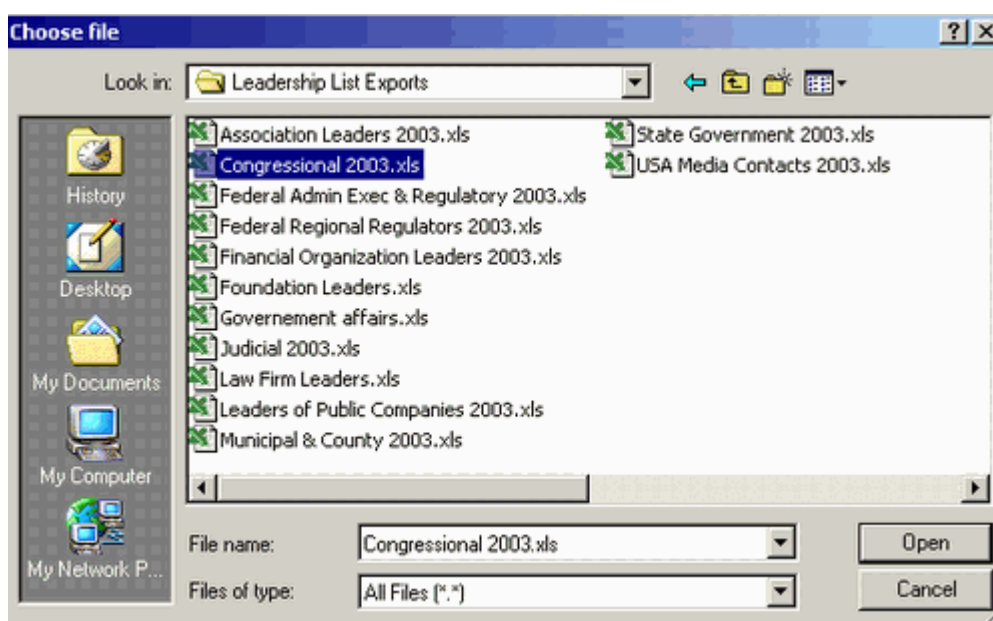
For new contact records the program will automatically assign the users email address as the Login Name. If there is no email address for the imported record, the Login Name will be set to the contact's First Name plus Last Name without a space between them. If the First Name plus Last Name Login Name already exists, a number will be added to make the Login Name unique. For new contact records the password will automatically be set to the First name plus the Last Name.

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

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail


For each field included in your CSV file, enter the number corresponding to the order of the field in the CSV file. A zero is used to indicate that the field is not in your CSV file. Check all fields that should have their existing value replaced by the imported value. Empty fields in existing contacts records will always be updated with the import value. All fields will be imported for new contact records.

- **Profile Name** – The name of the template is entered here. It is the label that displays in the Member Profiles List.
- **Select a CSV file to be imported:** - Clicking on the  button next to the Select a CSV file to be imported: field box activates the MS Windows Choose File dialog which the Administrator uses to locate the CSV file which is to be imported.



- **Select Data Subscription file:** - If the client organization has subscribe to NonProfitOnly's LRCA Contact subscription program, the path to the update file is entered here.
- **Values Included** – For each field included in the CSV file, the Administrator enters the number corresponding to the order of the field in the CSV file. A zero is used to indicate that the field is not in the CSV file. Fields that should have their existing value replaced by the imported value require the box be checked. Empty fields in existing contacts records will always be updated with the import value. All fields will be imported for new contact records.

Values Included	
<input type="checkbox"/>	0 FirstName

Administration checks the appropriate Contact Type, Special Interest Group and Security Group then saves the template by clicking on .

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

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

Contact Type	Special Interest Group:	Security Type
<input type="checkbox"/> Client	<input type="checkbox"/> Finance and Accounting	<input type="checkbox"/> Admin
<input type="checkbox"/> Contractor	<input type="checkbox"/> Health and Welfare	<input type="checkbox"/> Employee
<input type="checkbox"/> Contributor	<input type="checkbox"/> Production	<input type="checkbox"/> Members
<input type="checkbox"/> Employee		<input type="checkbox"/> Users
<input checked="" type="checkbox"/> LRCA		
<input type="checkbox"/> MailingList		
<input type="checkbox"/> Manufacturer		
<input type="checkbox"/> Media		
<input type="checkbox"/> Member		
<input type="checkbox"/> NonProfit		
<input type="checkbox"/> Prospect		
<input type="checkbox"/> Vendor		
<input type="checkbox"/> Volunteer		
<input type="checkbox"/> VolunteerInterest		

Save Print Import Export Cancel Close

Once the template is saved, confirm the data in the *Select a CSV file to be imported* field and then click on .

Creating the CSV file.

The most commonly used method of creating and manipulating a CSV file is using Microsoft Excel Spreadsheet application. For example, a spread sheet with the following columns might be created:

1. First Name
2. Last Name
3. Title
4. CompanyName
5. Company Address1
6. Company City
7. Company State
8. Company Zip
9. Company Phone
10. Company Fax
11. Company E-mail
12. LRCA Branch
13. LRCA Level
14. LRCA State

Individual contacts are entered into concurrent rows in the spread sheet and the saved CSV file would appear similar to the following text when viewed with a text editor such as MS Notepad:

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

First Name,Last Name,Title,CompanyName,Company Address1,Company City,Company State,Company Zip,Company Phone,Company Fax,Company E-mail,LRCA Branch,LRCA Level,LRCA State

Anthony,Anastasio,Administration Director,"Public Defender, Office of the","25 Market St., P.O. Box 850",Trenton,NJ,08625,(609) 292-7046,(609) 777-1795,anastasio_a@opd.state.nj.us,Administrative,State,NJ

Kathleen M.,Kisko,Administrative Director,Administration Division,"225 W. State St., P.O. Box 459",Trenton,NJ,08625-0459,(609) 777-1273,(609) 292-9897,kathleen.kisko@sos.state.nj.us,Administrative,State,NJ


Brian,Goldsmith,Administrative Officer,State Library,"185 W. State St., P.O. Box 520",Trenton,NJ,08625-0520,(609) 984-6714,(609) 984-7898,bgoldsmith@njstatelib.org,Administrative,State,NJ

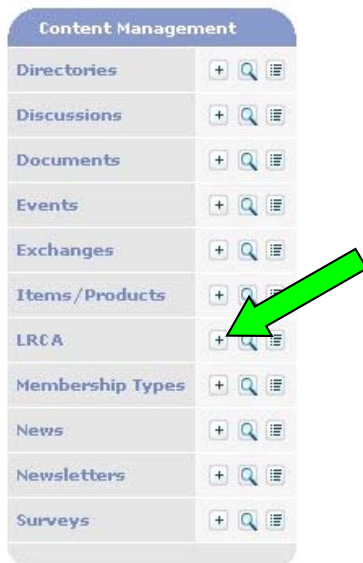
Joseph,Spicuzza,Administrative Services Director,Administration and Technology,"John Fitch Plaza, P.O. Box 110",Trenton,NJ,08625-0110,(609) 292-6810,(609) 292-8202,jspicuzz@dol.state.nj.us,Administrative,State,NJ

Maureen C.,Fullaway,Affordable Housing Council Executive Director,Community Affairs Department,"101 S. Broad St., P.O. Box 800",Trenton,NJ,08625-0800,(609) 292-3000,(609) 984-6696,coah@dca.state.nj.us,Administrative,State,NJ

Hugh,O'Hare,Appeal Tribunal Chief,Income Security,"John Fitch Plaza, P.O. Box 110",Trenton,NJ,08625-0110,(609) 292-2669,(609) 292-7667,hohare@dol.state.nj.us,Administrative,State,NJ

1.5.5 Create and Launch a Call to Action

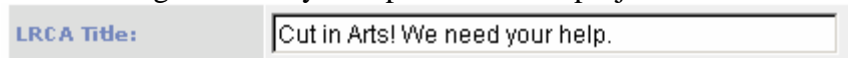
The Administrator Clicks on the LRCA  Icon, located in the Content Management column of the Site Administration Menu, to create a Call to Action Project.



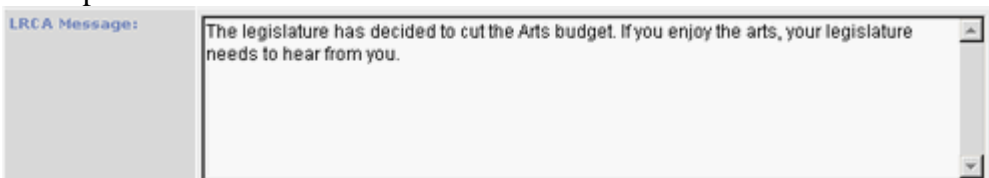
LRCA Details

The Administrator enters the message and issue related content of the Call to Action into the LRCA Details section of the LRCA Management page.

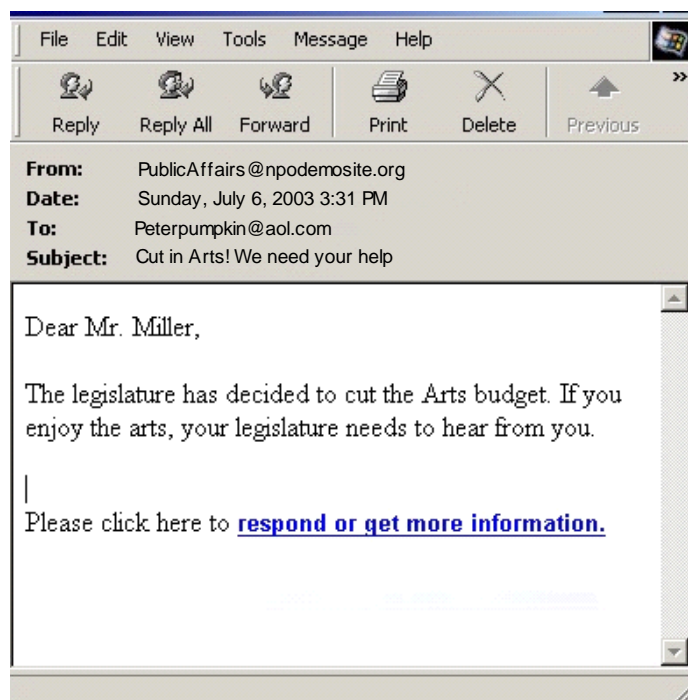
- **LRCA Title** – The Administrator enters the title of the LRCA in this field. The title will be displayed in lists and reports and included in the subject line of the Call to Action broadcast that will be generated by the specific LRCA project.

A screenshot of a web form showing the 'LRCA Title' field. The label 'LRCA Title:' is in blue text on a light gray background. To its right is a text input box containing the text 'Cut in Arts! We need your help.'

- **LRCA Message** – The Administrator enters text in this field, which will be the message sent to recipients of the Call to Action.

A screenshot of a web form showing the 'LRCA Message' field. The label 'LRCA Message:' is in blue text on a light gray background. To its right is a large text area containing the text 'The legislature has decided to cut the Arts budget. If you enjoy the arts, your legislature needs to hear from you.'

Below is an example of what the recipients would see in their email box after the Call to Action is broadcast.



- **Response Page Message** – The text entered into this field appears at the top of the Respond to LRCA page message which is presented to LRCA recipients who click on the [respond or get more information](#) link in the LRCA message broadcast.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

Response Page Message:

The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their views on the subject. Please, type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below.

Below is an example of what the Call to Action recipient would see when she clicked on [respond or get more information](#)

Respond To LRCA

The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their views on the subject. Please, type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below.

If you need more information, click here: [More Information](#)

If you'd like to review some sample phraseology for your message, click here: [Sample Phraseology](#)

Zip Code:

Email:

Message:

Cancel Submit

- **Suggested Phraseology** – The Administrator enters text into this field, which is presented when a respondent clicks on the Sample Phraseology link on the Respond To LRCA page. When a respondent clicks on the Sample Phraseology link his browser opens a window filled with possible response messages developed by Administration for this specific issue. This is a helpful feature since many recipients will have trouble capturing their own thoughts into a message. The Suggested Phraseology window opens over the Respond To LRCA page so that it is easy for a respondent to copy text from the Suggested Phraseology window and paste it into the message filed.

Suggest Phraseology:

I am very disappointed in the recent decision by your office to support the recent budget cuts to art funding.

Clicking on [Sample Phraseology](#) opens a target window in the browser from which the recipient can copy and paste text for her response. Below is an example of the recipient's experience when he clicks on [Sample Phraseology](#).

Home Signup Logout Contacts Aboutus Sitemap

Respond To LRCA

The legislature has decided to cut the Arts budget. We'd like our membership to inform their representatives of their views on the subject. Please, type your opinion into the message box below. The system will determine who your representative is based on the Zip Code you enter below. Your representative may respond back to the email address you enter into the email address field below.

If you need more information, click here: [More Information](#)

If you'd like to review some sample phraseology for your message, click here: [Sample Phraseology](#)

Zip Code:


Email:




Message:



I am very disappointed in the recent decision by your office to support the recent budget cuts to art funding.

http://smre500/demosite/main.asp?uri=1053&tp=phr&di=1 - Microsoft Internet Explorer


- **Response Notification Email** – Each time the specific Call to Action is responded to, a notification email will be sent to the email address entered into this field. The broadcast template used for this email notification is selected during Administration setup of the LRCA Features Management page.

- **More Information Document** –  - The Administrator can attach detailed and sophisticated documentation or a multi media presentation by attaching a More Information Document. This feature uses the Resource Document library Engine and more details can be learned in the chapter titled *Document Feature in Detail*. Documents or executable applications are accessed or triggered when the respondent clicks on the [More Information](#) link on the Respond To LRCA page.

-  **View More Information Document** – If a document has already been related to the specific LRCA record, it can be viewed by clicking on this button.
-  **Update More Information Document** – A new document file can be loaded by clicking on this button.
-  **Check-Out More Information Document** - If a document has already been related to the specific LRCA record, it can be downloaded to the Administrators computer by clicking on this button.

-  **Delete More Information Document** - If a document has already been related to the specific LRCA record, it can be deleted by clicking on this link.
-  **Search for More Information Document** – If a desired document is already loaded in the Resource Document Library it can be located by clicking on this icon and then related to the specific LRCA as its More Information Document.

Selection Criteria

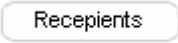
The Administrator instructs the system on which LRCA contacts should receive response messages by making selections on the Selection Criteria Form. The Administrator can enter multiple combinations based on the Level, Government Branch, and Geography of LRCA contacts. The logic between the columns is “AND”. Selecting Level = Local, Branch= Legislative and Geography = State indicates that the system should search for contacts within the State of the zip code entered by the respondent where the contacts are Local Level legislators. Clicking on the  button adds the highlighted Level, Branch and Geography criteria to a row in the Selection Criteria list box. The logic between the rows in the Selection Criteria list box is “OR”.

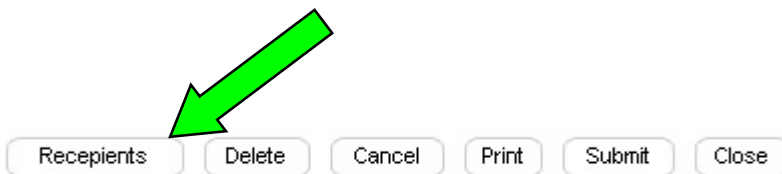



- **Level** – The Level criteria relates to the level of government of the LRCA contacts.
 - **Local** – Mayors, Municipal Judges, Town Councils would be considered Local Level Contacts.
 - **County** – Sheriffs, County Supervisors would be considered County Level Contacts.
 - **State** – State Senators & Assemblymen, Governors and State Treasurers would be considered State Level Contacts.
 - **Federal** – US Senators, the President, and Chief Justices would be considered Federal Level Contacts.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

- **Branch** – The Branch criteria relates to the branch of government of the LRCA contacts.
 - **Administrative** – The President, Governors, Treasurers, Cabinet Members and staff, Mayor, etc. would be considered Administrative Branch contacts
 - **Legislative** – Congressmen, Assemblymen, Freeholders, etc would be considered Legislative Branch contacts.
 - **Judicial** – Judges and Magistrates would be considered Judicial Branch contacts.
 - **Regulatory** – Building Inspectors, Heads of Regulatory Agencies, Regulators, etc would be considered Regulatory Branch contacts.
- **Geography** – The Geography criteria relates to the geographic location of the LRCA Contacts.
 - **Nationwide** – Identifies all contacts whose LRCA Geography designation is in the country identified by the respondent’s zip code.
 - **By States** – Identifies all contacts whose LRCA Geography designation is in the state identified by the respondent’s zip code.
 - **By County** - Identifies all contacts whose LRCA Geography designation is in the county identified by the respondent’s zip code.

Select the LRCA Recipients by Clicking on the  button on the LRCA Management page, which accesses the LRCA Recipients page. Here the Administrator instructs the system on which contacts are to receive the original Call to Action messages.



Recipients can be selected based on geographic location, Contact Type, Special Interest Group and Security Group. The Logic between the variables is “AND”. Multiple Location criteria can be entered. Clicking on the  button adds the highlighted State and County selections to the Location Selection List. The logic between the rows in the Location Selection List is “OR”.

Legislative & Regulatory Calls to Action (LRCA) Feature in Detail

Legislative & Regulatory Calls To Action Recipients

Location

State: County: Selection Criteria:

Check each Contact Type or Group whose members you want to receive your Call To Action:

Contact Type:

- ☐ Client
- ☐ Contractor
- ☐ Contributor
- ☐ Employee
- ☐ LRCA
- ☐ MailingList
- ☐ Manufacturer

Special Interest Group:

- ☐ Finance and Accounting
- ☐ Health and Welfare
- ☐ Production

Security Group:

- ☐ Admin
- ☐ Employee
- ☐ Members
- ☐ Users

Send the Call to Action

Clicking the button on the LRCA Management page accesses the LRCA Review Page.

Legislative & Regulatory Calls To Action Manager

Your Legislative & Regulatory Call To Action has been saved and is ready for delivery. Before sending your Call To Action you can View Recipients matching your criteria & Revise if necessary. You may also Cancel delivery. When you are ready to deliver your Call to Action press Send.

Clicking on the button will display a list of the contacts who will be receiving the Call to Action when the button is clicked.

Legislative & Regulatory Calls To Action Recipients

Limit To:

Page 1 of 1 Total matches: 12

Select	Last Name	First Name	Company Name	Office Phone
<input checked="" type="checkbox"/>	Bailey	Bill	WRRO Radio	
<input checked="" type="checkbox"/>	Bernsberg	Ellen		
<input checked="" type="checkbox"/>	Claymore	Tom	US Armaments	555.555.7364x666
<input checked="" type="checkbox"/>	Cruthers	Jane	WDDY TV	
<input checked="" type="checkbox"/>	Giagrande	Anita		555.555.7676
<input checked="" type="checkbox"/>	Gold	Mark	Newark Tribune	
<input checked="" type="checkbox"/>	Mace	Pamela		555.555.9879x555
<input checked="" type="checkbox"/>	Pallack	Dana		555.555.0968
<input checked="" type="checkbox"/>	Patel	Arvin	Offshore Programming, Inc.	555.555.7345x111
<input checked="" type="checkbox"/>	Perez	Selma		
<input checked="" type="checkbox"/>	Slick	Tina	Cellular Deluxe	555.555.1254x987
<input checked="" type="checkbox"/>	Ziznewski	Curt		

Recipients can be removed from the broadcast by un-checking the box next to their name.

