

3.0 USER MANUAL

The e-Cards platform allows an unlimited number of messages to be delivered. You will be able to send customized e-Cards easily to customers, partners, vendors, employees and friends. The e-Card templates are created and fully customized with your corporate branding. The e-Card platform offers online, powerful greeting software to strengthen friendships, commemorate milestones, and celebrate holidays.

This manual covers the operations of the “Standard” features and work-flow for this e-Card platform. You will learn how to create and verify your secure account, use your settings to control your operations, view the history of your sent messages, setup your address book and import contacts, how to personalize and send your e-Card. If you experience different features, work-flow, or special programmed modules than the stated in this manual, please consult your project manager.

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REGISTRATION AND LOGIN

On your first visit to the e-Cards platform you will be required to register. This registration process is important to supporting the features and functionality of the e-Cards. After you have registered and created your password you will need to verify your email address, and you will be directed to the home page where the e-Card templates are posted on the platform.

REGISTRATION

Click on the “Sign Up” button to start creating your account.

<h3>My Account Login</h3> <p>Please login below to your account using your registered email address and your password. If you don't have an account, please register first.</p> <p>Email Address: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><input type="button" value="LOGIN"/></p> <p><input type="checkbox"/> Remember my email on this computer</p> <p>Forgot your password?</p> <p>Having technical difficulties?</p>	<h3>First Time User?</h3> <p>Take advantage of our new Messages delivery system. Registration is quick and easy, please click on the button below to create your account. You will only need to register on your first visit to the website.</p> <p><input type="button" value="SIGN UP"/></p> 
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In the registration page, you will need to fill-out basic information. Please fill-out the form (Some fields are required).

<h3>Create Your Account</h3> <table><tr><td>First Name: <input type="text"/></td><td>Last Name: <input type="text"/></td></tr><tr><td>Company: <input type="text"/></td><td>Phone (Optional): <input type="text"/></td></tr><tr><td>Title: <input type="text"/></td><td>Department (Optional): <input type="text"/></td></tr><tr><td>Email Address: <input type="text"/></td><td>(You will receive an email to activate your account.)</td></tr></table>	First Name: <input type="text"/>	Last Name: <input type="text"/>	Company: <input type="text"/>	Phone (Optional): <input type="text"/>	Title: <input type="text"/>	Department (Optional): <input type="text"/>	Email Address: <input type="text"/>	(You will receive an email to activate your account.)
First Name: <input type="text"/>	Last Name: <input type="text"/>							
Company: <input type="text"/>	Phone (Optional): <input type="text"/>							
Title: <input type="text"/>	Department (Optional): <input type="text"/>							
Email Address: <input type="text"/>	(You will receive an email to activate your account.)							
<h3>Create Login Password</h3> <table><tr><td>Choose Password: <input type="password"/></td><td>Confirm Chosen Password: <input type="password"/></td></tr></table>	Choose Password: <input type="password"/>	Confirm Chosen Password: <input type="password"/>						
Choose Password: <input type="password"/>	Confirm Chosen Password: <input type="password"/>							
<h3>Security Code</h3> <p>Please enter the numbers as shown in the image: <input type="text"/> 503481</p> <p><input type="button" value="SUBMIT"/></p>								

CREATE YOUR ACCOUNT

Email address is required to identify yourself to the platform. Upon submitting the form, you will receive an email message to activate your account. Please use your corporate email address, or as directed by your project manager, and be sure that you have entered the right email address. When you receive the activation message, please click on the activation link provided in the email message to activate your account. Upon successful activation, you will be prompt to the login page.

CREATE LOGIN PASSWORD

Choose password and re-type the password for confirmation. You will be able to manage and change your password upon login. Your email address and your chosen password will be used as your login information. Please remember and save them for your record.

SECURITY CODE

Please enter the Security Code numbers as shown in the image, and then click once on the “Submit” button to complete your registration. Please note if you see a “Check Box” at the end of the registration page, check this box to agree to the terms and the conditions listed by your corporation.

LOGIN


Use your registered email address and your password to login to your account.

My Account Login

Please login below to your account using your registered email address and your password. If you don't have an account, please register first.

Email Address:

Password:



Remember my email on this computer

[Forgot your password?](#)

[Having technical difficulties?](#)

First Time User?

Take advantage of our new Messages delivery system. Registration is quick and easy, please click on the button below to create your account. You will only need to register on your first visit to the website.

If you would like your computer remembers your login email address, please check that box. You will only need to enter your password every time you login.

If you forgot your password, click on the “Forgot your password” link. A POP window will be displayed to enter your registered email address, and then click on the “Submit” button. Your password we will emailed to you. Please remember you must be a registered user to retrieve your login information.

If you are having technical difficulties, click on the active link for support and help.

HOME PAGE CONTENT

RIGHT INFORMATION COLUMN

Once you have logged into your home page, you will find on the right hand side some useful information.

This column will display different information based on the process of customizing an e-Card to help you out in the process of sending, and choosing another e-Card to customize (If more than one e-Card posted under your account).

The number of the e-Cards you have sent since your first registration.

View the history of the sent e-Cards.

The last e-Card sent (click to view).

View the last the sent e-Card.

The reminders calendar. If you set reminder(s) for the displayed month, the dates will be highlighted (click to view and manage).

View and manage reminders.

Recent History
You have sent **61** e-Cards since February 18 , 2009
[View All](#)

Last e-Card Sent

[The Tree Holidays](#)

Reminders
October, 2014

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

[Manage Reminders](#)

BODY CONTENT

If your platform contains different categories, you will need to select the desired category in order to view the e-Cards posted under the selected category.

If your platform presents only one category such as “Holidays”, you may need to select that category from the home page, or you might see the thumbnails listed as “Step 1” in the customization process.

PERSONALIZE AND SEND AN E-CARD

STEP 1


Select a category

Welcome UserName
Last login: Wednesday, October 15, 2014

This site provides you with customized e-Cards to use with your clients and colleagues.

Step 1 - Get started by viewing the available e-Cards by category.

HOLIDAYS THANK YOU







STEP 2

Select an e-Card from the list

Step 2 - Please select the e-Card that you wish to view and customize.

Holiday e-Cards

		
e-Card Name	e-Card Name	e-Card Name



STEP 3

Customize your e-Card

Choose a different e-Card

Select a different e-Card to view and customize



e-Card Name
Holidays

You can choose a different e-Card from the right column to view and customize (If more than one e-Card posted under your account).

Recipient's name as entered in the filed below.

Personalized message place holder. Your message will appear while typing in the "Message" field below.

It's important to Separate multiple recipient email address(es) with commas for proper delivery:
[email][comma][space][email]

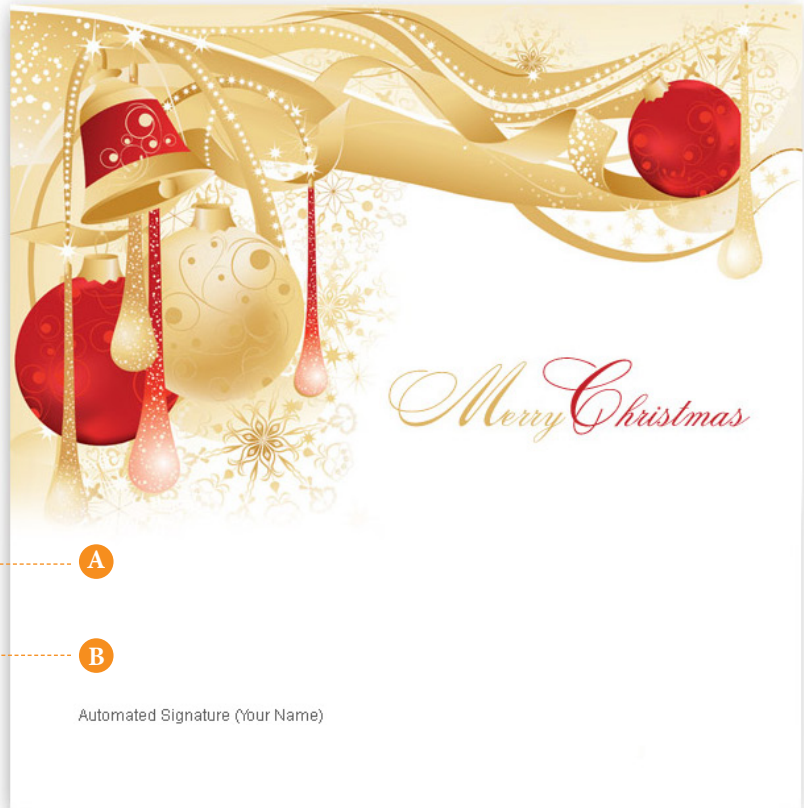
Import contacts from address book (Please see page 7).

Click on the calendar icon to select different delivery date for your e-Card.

After you finish your e-Card customization, click on the "View" button for a chance to review your e-Card before sending.

Customize this e-Card

Step 3 - Write your personalized message by filling in the form fields at the bottom of the page. Click on "Setting" to enable/ disable your auto signature.



A

B

Automated Signature (Your Name)

Recipient's Name: **A** Leave blank if you are sending to multiple recipients.

Recipient's Email Address: Separate multiple recipient email address(es) with commas: **[email][comma][space][email]**

IMPORT CONTACTS

Email Subject Line:

Message: **B**
Click here to add your message.

This e-card should be delivered by: **10/20/2014**

Select Another Date: (MM/DD/YYYY) Clear

Please notify me when my e-Card has been viewed.

VIEW



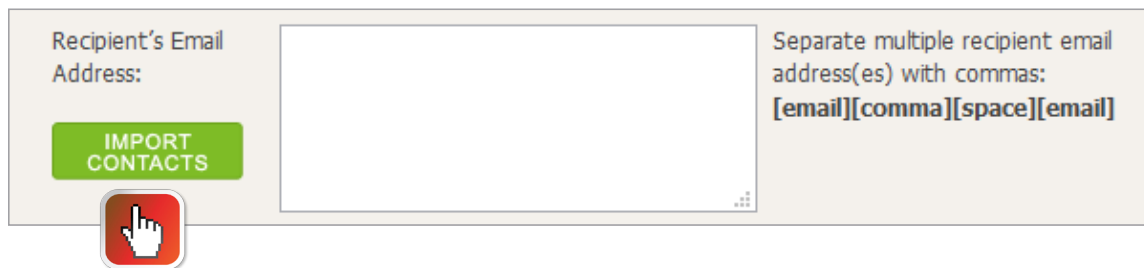
If desired, you can receive an email notification informing you of when a message is read.

October, 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
Select date						

IMPORT CONTACTS FROM YOUR ADDRESS BOOK

To import contacts into the recipient's field while customizing an e-Card, you must first save contacts in your address book. Please refer to the "Address Book" section on page 10 to learn how to import/ save contacts into your address book.

A) Click on the "Import Contacts" button. A POP window with contacts will appear.



Recipient's Email Address:

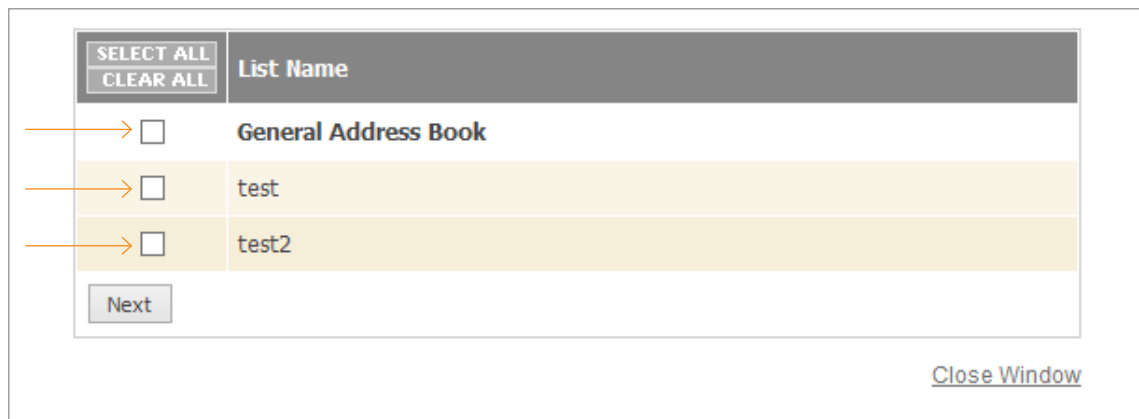
Separate multiple recipient email address(es) with commas:
[email][comma][space][email]

IMPORT CONTACTS

B) If your account features "Distribution Lists" function (Please see page 11 to learn how to create distribution lists). Select the "Check Box" in front of each list you would like to use to import contacts from the selected lists.

Select "General Address Book" option import the entire contacts in your address book including the contacts in your distribution lists.

Click on "Next" to view all the contacts in the selected lists, or in the general address book.



<input type="checkbox"/>	List Name
<input type="checkbox"/>	General Address Book
<input type="checkbox"/>	test
<input type="checkbox"/>	test2

Next

[Close Window](#)

C) Select the “Check Box” in front of each contact or click on the “Select All” button to import the selected contacts into your message (Click on “Add To Message” to finish).

<input type="checkbox"/>	Name	Email Address
<input type="checkbox"/>	Contact Name 1	Email Address1@www.com
<input type="checkbox"/>	Contact Name 2	Email Address2@www.com
<input type="checkbox"/>	Contact Name 3	Email Address3@www.com

[Close Window](#)

Your contacts automatically will be imported to the e-Card customization page.

Recipient's Email Address:

Email Address1@www.com, Email Address1@www.com, Email Address1@www.com

Separate multiple recipient email address(es) with commas:
[email][comma][space][email]

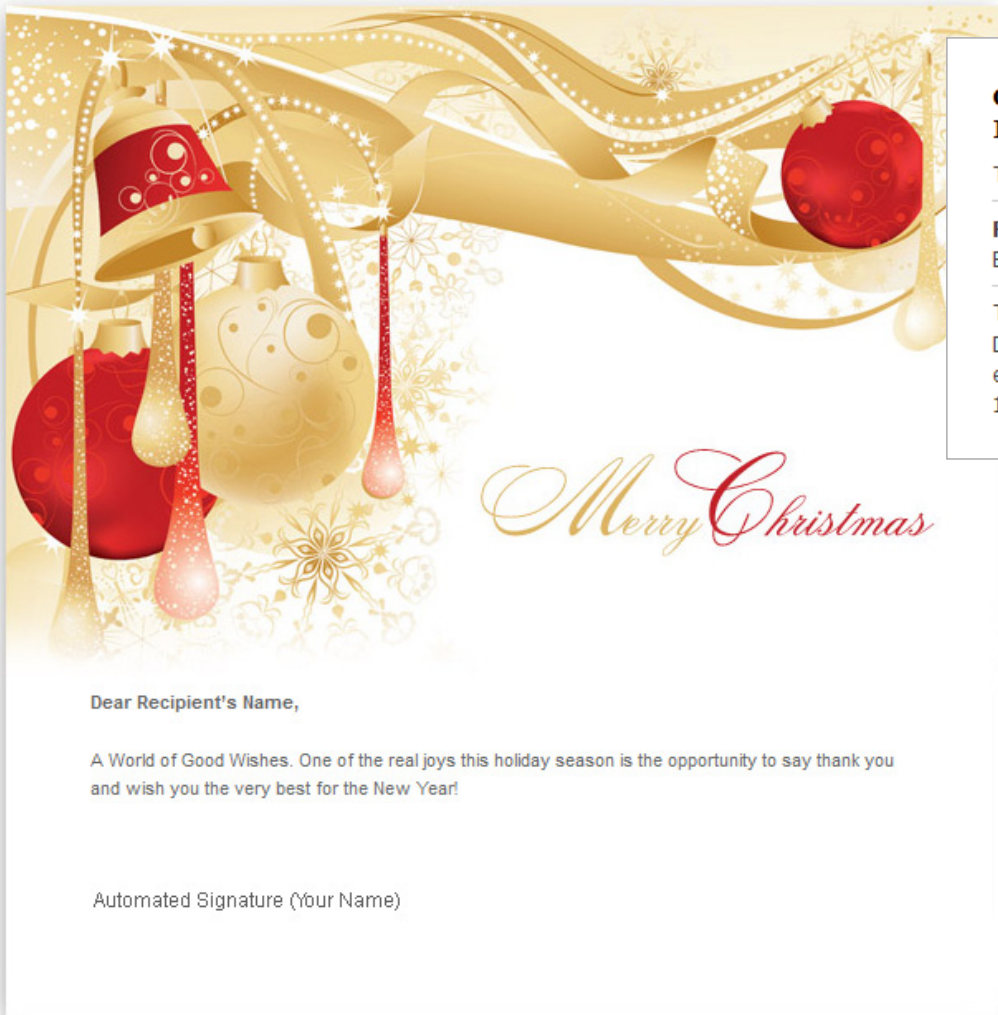
NOTE: If you enter a name in the recipient's name field, and then add more than one email address (Multiple recipients) in the email addresses field, the name you have entered will turn “Blank”. The system will recognize that you are sending to multiple recipients and can't be all under one name.

If your account features “Mail Merge” function, you don't need to enter recipient names, as the names will be auto-populated if the contacts are selected from the address book.

STEP 4

View your e-Card

Take this opportunity to carefully check your spelling, grammar, and view your e-Card before sending. Click on “Send” to finish the process or click on “Back” to make changes.



Confirm Information

This e-Card will be sent to:

Recipient's Name
EmailAddress1@www.com


Total: 1 email addresses
Delivery date for This eCard:
10/24/2014

Dear Recipient's Name,

A World of Good Wishes. One of the real joys this holiday season is the opportunity to say thank you and wish you the very best for the New Year!

Automated Signature (Your Name)

BACK SEND



Information about this e-Card is on the right column of the page. Be sure that you are sending to the right email address(es), and the selected date is correct.

ADDRESS BOOK

If your account is equipped with “Address Book” feature, you will be able to create and save contacts manually, or import contacts from a .CSV file into your address book within the platform. The address book tool allows you importing contacts (recipients) easily into your customized e-Card.

The address book is completely managed with its distribution lists (If applicable). It gives you the ability to add, modify, or delete contacts. Unlimited distribution lists can be created.

SETTING-UP YOUR ADDRESS BOOK

Click on the “Address Book” link on the top navigation.

[DISTRIBUTION LISTS](#)

Address Book

To add a new contact, click on "Add New Contact". To import contacts from an external file, click on "Import Contacts".

[ADD NEW CONTACT](#)[IMPORT CONTACTS](#)

ADD NEW CONTACT

Click on the “Add New Contact” to enter and save each contact manually.

Add New Contact

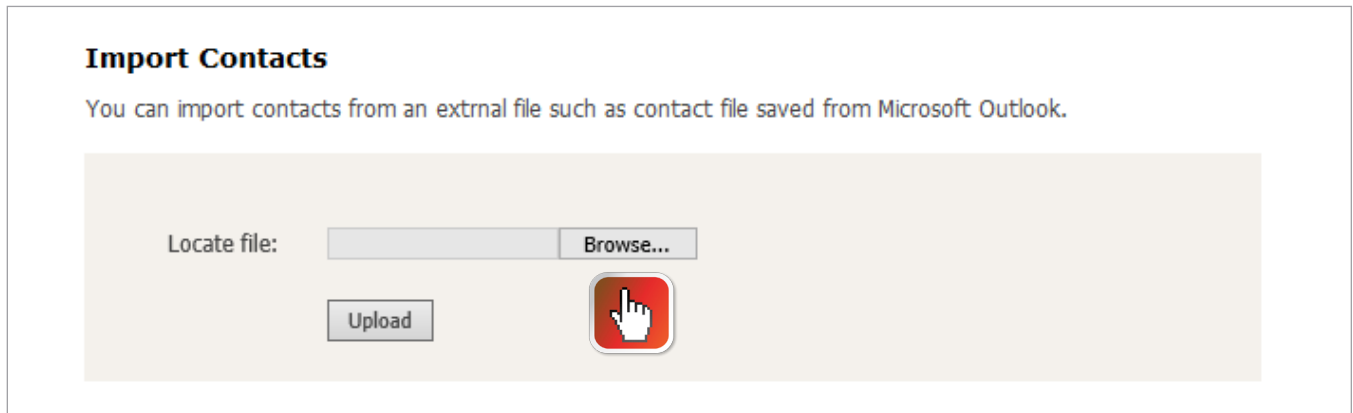
Please fill form below to add a new contact to your Address book. **Email address** field is required.

First Name:	<input type="text"/>	last name:	<input type="text"/>
Email Address:	<input type="text"/>		
Title:	<input type="text"/>	Company:	<input type="text"/>
Telephone:	<input type="text"/>	Fax:	<input type="text"/>

While adding new contact manually, all fields are optional except the email address as this is a mandatory field. Fill the form and click on “Add to Contacts” to save the contact into your address book. Once you have saved the new contact, it will direct you to the main address book page, and your contact will be displayed in the list.

IMPORT CONTACTS

Click on the “Import Contacts” to import contacts from an external saved file.

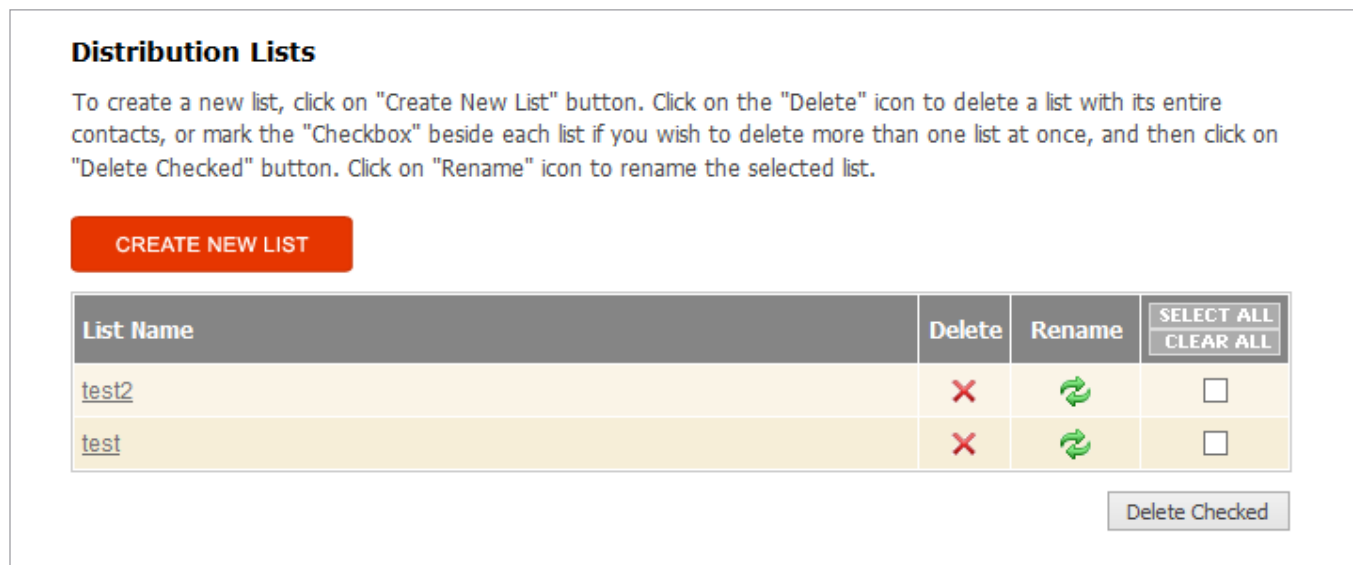


The import process will accept files in .CSV format. Information on how to export and save .CSV files from your outlook is provided. Click on the “Download Instructions” button to learn more.

Once you have your .CSV file ready, click on the “Browse” button, locate your file, and then click “Open”. Click on the “Upload” button, your contacts will be added to your address book. A verification screen will analyze the uploaded contacts, notify you if there are duplicated contacts, and will ask you for the action on how you would like to deal with the duplicated contacts.

DISTRIBUTION LISTS

If your account is equipped with a “Distribution Lists” feature, click on the distribution list button to create your own lists. Distribution lists allow you to sort contacts into groups in order to channel specialized messages to each group.




CREATE A NEW DISTRIBUTION LIST

Start with creating a new distribution list. Click on “Create New List” button. Give your list a name and click on “Add List”. Your lists are managed and you can rename them at any time.

Create New List

Please fill form below to add a new distribution list to your Address book. *List Name field is required.


List Name:



Your new list will be added to your distribution lists. Click on the name of the new list to start add/import contacts into your new list.

Distribution Lists

To create a new list, click on "Create New List" button. Click on the "Delete" icon to delete a list with its entire contacts, or mark the "Checkbox" beside each list if you wish to delete more than one list at once, and then click on "Delete Checked" button. Click on "Rename" icon to rename the selected list.

List Name	Delete	Rename	<input type="checkbox"/>
My New List	✗	↻	<input type="checkbox"/>
test2	✗	↻	<input type="checkbox"/>
test 	✗	↻	<input type="checkbox"/>

There are three options to add contacts into your new distribution list:

1. Add New Contact – Will work as adding new contact into your address book (Refer to page 10 for instructions).
2. Import Contacts – Will work as importing contacts from a .CSV file into your address book (Refer to page 11 for instructions).
3. Address Book Contacts – This will allow you to copy all or some of your contacts from your main address book into your new list.

HISTORY OF MESSAGES

The history of messages section allows the user to:

- View a historical listing of all e-Cards delivered.
- Monitor which recipients have viewed the e-Cards and which have not. If desired, you can also receive an email notification informing you of when a message is read.
- Keep track of which recipients received a campaign to ensure the same message is not sent to them more than once.
- Manage the messages in the history record.
- Sort sent messages by dates, and control the display number.

VIEW YOUR HISTORY OF SENT MESSAGES

Click on the “My Messages” link on the top navigation.



Delivered Messages


You have sent **446** e-Card(s) since 2/18/2009.
[Click Here](#) to view a list of **Scheduled Messages**.

Sort By: The latest Display: 10 e-Cards /page

Select an e-Card to view the details.

Sort sent messages by dates, and control the display number of messages/page.

		<input type="button" value="SELECT ALL"/>
		<input type="button" value="CLEAR ALL"/>
	<p>Thank You (T102) Thank You</p>	<p>e-Card is sent to: Name @emailAddress</p> <p>Delivery Date: 8/14/2014 Confirmation Number: 39060</p> <p><input type="button" value="v"/> <input type="checkbox"/></p>
	<p>Happy Holidays (H101) Holidays</p>	<p>e-Card is sent to: Name @emailAddress</p> <p>Delivery Date: 8/12/2014 Confirmation Number: 39058</p> <p><input type="button" value="v"/> <input type="checkbox"/></p>

 Click to view the sent message.

For each sent e-Card, you will find information about the e-Card such as template name, recipient's name, recipient's email address, delivery date, confirmation number, and the status of the e-Card.

The history of messages will indicate the number of the sent e-Cards since you have registered on the platform, and up-to-date. This will include the “Scheduled Messages”.

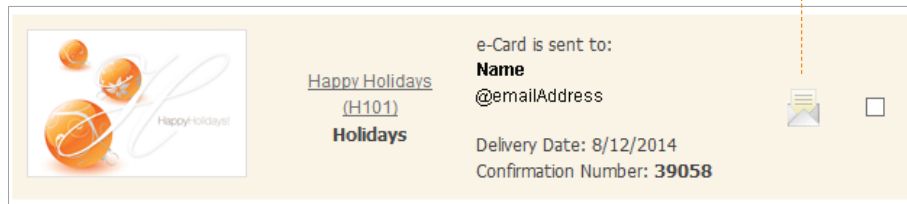
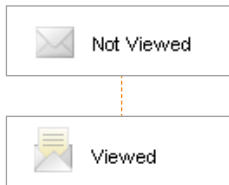
The default page displays the “Delivered Messages”. If you have scheduled e-Cards to be sent in later dates, click on the “Scheduled Messages” link to view the e-Cards. Once the date is due to deliver the scheduled e-Cards, the system will send your e-Cards as scheduled, and will move the records from the “Scheduled Messages” to the “Delivered Messages”.

The right information column provides extra guides on the e-Card status, and the scheduled messages.

In the list of the sent e-Cards you will be able to monitor which recipients have viewed the e-Cards and which have not.

The “Closed Envelope” icon indicates that your e-Card has not been viewed yet.

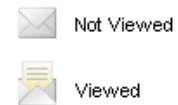
The “Open Envelope” icon indicates that your e-Card has been viewed.



e-Cards Status

To check if the e-Card you have sent is viewed by the recipient or not, please refer to the envelope icon.

Legend:



Scheduled Messages

Scheduled Messages are the messages that you have scheduled to be delivered in a later date than today. Once the messages are delivered, they will be moved to the "Delivered Messages" page.

[View Scheduled Messages](#)



REMINDERS SET-UP

You will be able to create unlimited reminders on the platform. You will also be able to manage the reminders, and the way you would like to get notified about the saved reminders.

VIEW AND MANAGE YOUR REMINDERS

Click on the “Reminders” link on the top navigation.

Reminders

View, edit or set reminders. If you would like to change the delivery method of the notifications, please visit your "Settings" area, and then select the "Reminders" tab.

Date	Category	Description	Edit	SELECT ALL CLEAR ALL
Feb 15, 2011	Event	Send invite e-Card to the marketing group.		<input type="checkbox"/>

Delete Selected

ADD A NEW REMINDER

Click on the “Add New Reminder” button. A pop will present to setup your new reminder.

Click on the “Calendar” icon to select a date for your reminder, select a category from the drop-down list, enter your reminder details, and then click on the “Submit” button.

Add Reminder close or Esc Key

Add Reminder


Date Category (N/A)


submit Cancel

ADD NEW REMINDER

Reminders

View, edit or set reminders. If you would like to change the delivery method of the notifications, please visit your "Settings" area, and then select the "Reminders" tab.

Date	Category	Description	Edit	<input type="checkbox"/>
Feb 15, 2011	Event	Send invite e-Card to the marketing group.		<input type="checkbox"/>

 Delete Selected


EDIT A REMINDER

Click on the "Edit" icon. A pop will present with the details of your reminder.

Click on the "Calendar" icon to select a future date for your reminder, change the category from the drop-down list, edit your reminder details, and then click on the "Submit" button.

Edit Reminder close or Esc Key

Edit Reminder

Date  Category

You can select the check box beside each reminder, and click on "Delete Selected" button to remove the selected reminders from your list. This will automatically stop the notification from reaching you. To manage how you would like to get notified about your reminders, please see page 18 for details.

MANAGE SETTINGS

The platform offers you different tools to manage your profile and settings. These settings will help you manage your login, your auto-signature and your reminders.

MANAGE YOUR PERSONAL INFORMATION

The default tab “Personal Information” will gives you the ability to change your personal information (Previously collected during your registration). You can update your information, except your email address as this is considered as your “User Name” when logging-in.

Settings

At this page, you will be able to update your personal information, change your login password, or enable/disable your signature. If you wish to modify your settings, please select from the following areas.

Personal Information Change Password Auto Signature Reminders

Personal Information

First Name: Last Name:

Company: Phone:

Title: Department:

Email Address:

CHANGE YOUR PASSWORD

To change your login password, click on the “Change Password” tab, enter your old (Current) password, type your new password, re-type your new password for confirmation, and click on the “Submit” button. Your new password will be applied on your next login.

Personal Information **Change Password** Auto Signature Reminders

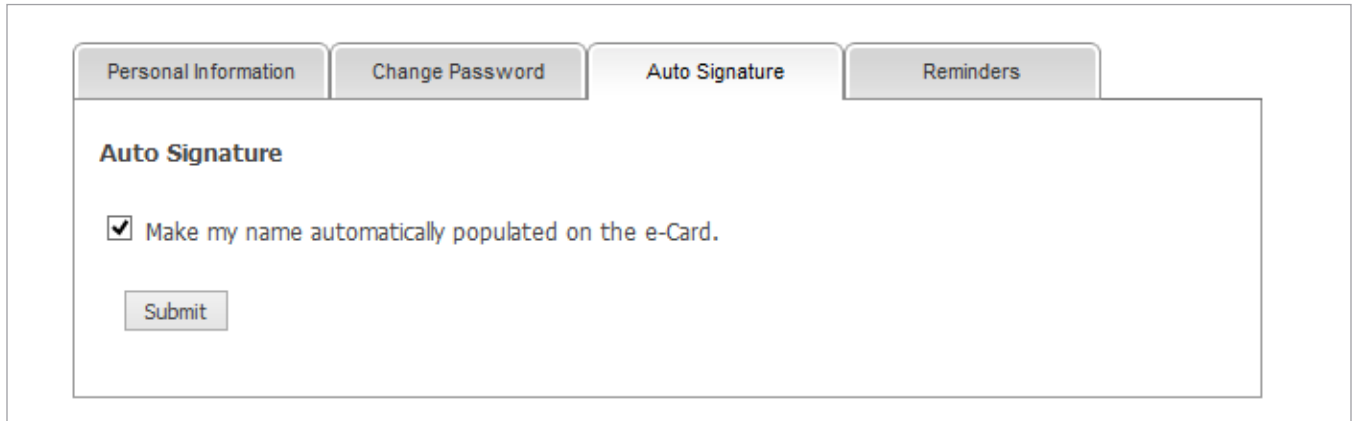
Change Password

Old Password:

New Password: Confrim New Password:

MANAGE YOUR AUTO SIGNATURE

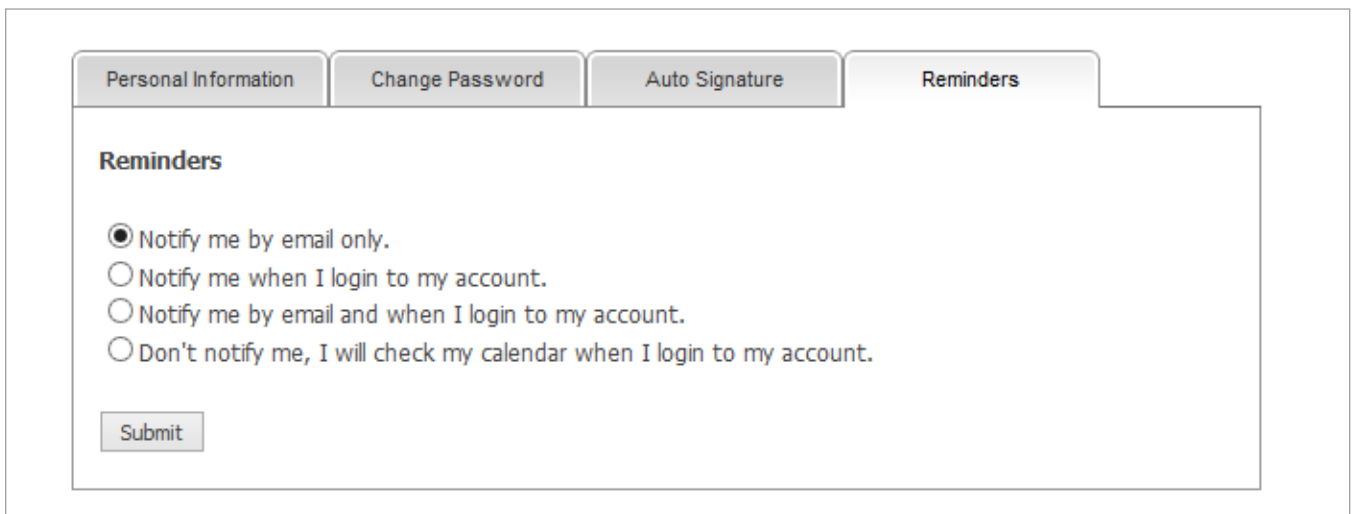
Your auto signature is basically your name as registered. The “Make my name automatically populated on the e-card” option is selected as default. Your name will appear on the e-Card after your greeting message. If you wish to do not include your name on the e-Card, or you wish to sign the e-Card with different name or as a group, select the “Auto Signature tab” and un-check the check box. You can enter different name as a part of your greeting message. Click on the “Submit” button.



The screenshot shows a user interface with four tabs: "Personal Information", "Change Password", "Auto Signature", and "Reminders". The "Auto Signature" tab is selected and highlighted. Below the tabs, the heading "Auto Signature" is displayed. There is a single checked checkbox with the text "Make my name automatically populated on the e-Card." Below this checkbox is a "Submit" button.

MANAGE YOUR REMINDER NOTIFICATIONS

Click on the “Reminders” tab to select how to get notified about your reminders. There are four options available to select from. Make your selection and click on the “Submit” button to save the action.



The screenshot shows a user interface with four tabs: "Personal Information", "Change Password", "Auto Signature", and "Reminders". The "Reminders" tab is selected and highlighted. Below the tabs, the heading "Reminders" is displayed. There are four radio button options: "Notify me by email only.", "Notify me when I login to my account.", "Notify me by email and when I login to my account.", and "Don't notify me, I will check my calendar when I login to my account." Below these options is a "Submit" button.

SUPPORT AND HELP TOPICS

Click on the “Support link on the top navigation for useful information and guides on how to use the platform. Help topics are categorized and provide answers to some basic questions.

If you are having technical difficulties using the platform, or if you have questions after reviewing the answers to frequently asked questions, fill out the support form to reach the vendor directly.

If you don't see the “Support Form”, please contact the your project manager with your request.

FAQ

[Address Book and Contacts](#)

[Account and Settings](#)

[Messages \(e-Cards\)](#)

[Reminders](#)

Support Form

Please use this support form if you have technical difficulties, or to report errors.

Subject:	<input type="text"/>
Category:	<input type="text" value="Please select"/>
Questions:	<input type="text"/>
Marked as:	<input checked="" type="radio"/> Not Urgent <input type="radio"/> Urgent
<input type="button" value="SEND"/>	

THANK YOU

Thank you for using the e-Cards Platform