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# District and Club database

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## Personalized Email (PMail) User Documentation

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## 1. Introduction

Enhance your ability to communicate with your club and/or district by using **PMail** (Personalized Email). DaCdb PMail gives you an easy way to communicate with each of the members in your District, Club, Committees or Event with personalized message content.

This feature allows for mass-emails to be sent out with personalized information integrated into the text at the click of a button.

### 1.1 Overview

The purpose of this document is to provide user-level documentation on sending PMail. All facets of PMail are covered in this document, including:

- How to send a PMail
- Using templates
- Creating your own templates
- Composing messages
- Creating PMail groups
- Tracking PMail sent

### 1.2 Audience / Affected Groups

The target audience for this document is:

- Committee Chairs (level 2 security)
- Event Moderators (level 3 security)
- Club Officers (level 4 security)
- Area Assistant Governors (level 5 security)
- District Officers and Data Administrators (level 6 security)

### 1.3 Scope / Limitations

PMail is intended to be a mass-email program with the benefits of personal / individualized messages that save the user time. Once the user sets parameters for the message, information is pulled from the DaCdb system with a few simple mouse-clicks and a personal message will be sent to everyone requested in a matter of minutes.

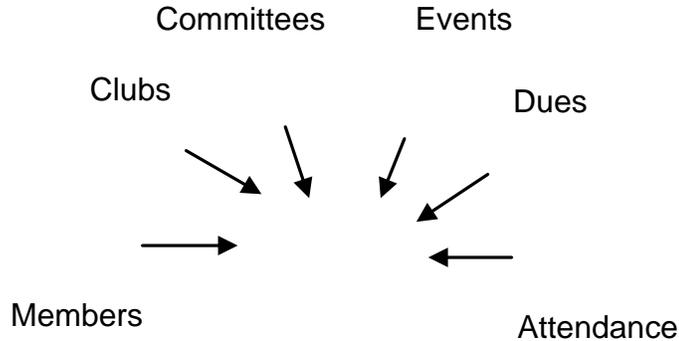
PMail is not an email network like Yahoo or Gmail. Your members do not have a mailbox on DaCdb that they must set up and check. All PMail's are sent directly to the member's designated email address.

PMail is meant for club and district related activities only. All PMail activity is tracked by DaCdb in the transaction log.

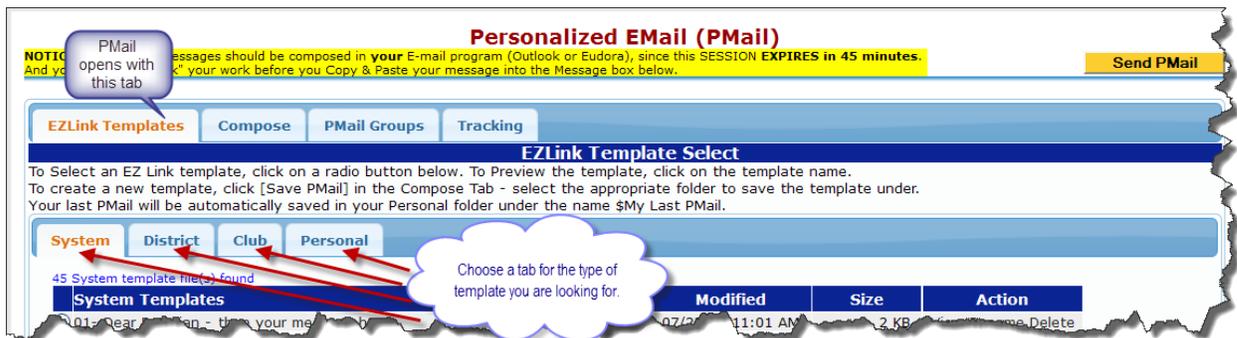
# Personalized Email (PMail)

## 2. PMail Quick Start

Personalized Email (PMail) can be invoked from the PMail main menu tab and from a number of other locations within the DaCdb program.



PMail starts with the EZ-Link Templates tab in PMail's main window.



Select a template from the System, District, Club or Personal tabs. Select a template to start with, and the system will immediately switch to the Compose tab.

### 2.1 Sending a PMail - The Basics

There are three basic steps to sending a PMail.

- 1) Select a template (or start with a blank template)
- 2) Enter your message –including the customized tags that allow you to personalize your message to your member(s)
- 3) Send your PMail

#### 2.1.1 Step #1 - Select a Template

Select an EZ-Link template to start with by clicking on the **radio** button. See section 3 for more detailed information on templates.



# Personalized Email (PMail)

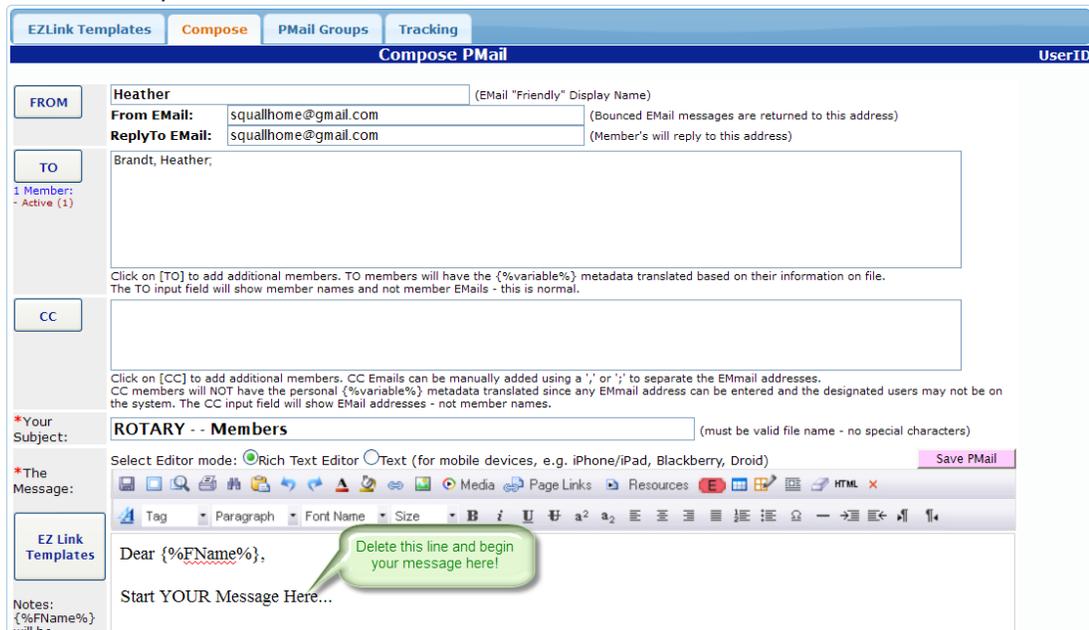
Choose a template from the System, District/Account, Club/Chapter or Personal tabs by clicking on one of the radio buttons on the left side the template name. As soon as you select a template, the Compose tab will automatically open with the template and various known information already imbedded into various text boxes – all this information may be modified at this time. Information that will automatically be entered includes sender info and email addresses of those who are to receive the PMail. Information can vary based on the location PMail was accessed from (Members, Clubs, Committees, Events, Dues, Attendance).

Optionally, just click the Compose tab to bypass the EZ-Link template selection and start entering your own message. A short default message is in the compose window when you bypass selecting a predefined EZ-Link template. Delete this default message to write your own message.

## 2.1.2 Step #2 - Compose your PMail

Compose your message using the WYSIWYG HTML Editor.

- Click on the  button to change the person sending the email (for example if you are sending a message on behalf of another person (e.g., District Governor or Club President)).
- Click on the  button to add members or groups you desire your message to be sent to. A pop-up window will open when you click the TO button and you may search the database for members to add to your PMail. Members can also be deleted from the PMail in the pop-up window. The TO list is driven from the member's email as they setup on the system. Only the member's name will be shown in the TO field, not their email address.
- Click on the  button to add to the Carbon Copy (CC) list. Directly edit the CC list to add member emails or other emails that might not be on the DaCdb system (e.g., event vendors). The CC list works on email lists. This means that you must enter the actual email address of the users you want to CC, in the CC field.
- Click on the  button to switch to the EZ-Link Template tab to select a different available template.



# Personalized Email (PMail)

Use one or more of the editor functions to format the contents of your message. **DO NOT** directly “copy” and “paste” a document you created in Outlook or Word.

If you compose your message in Outlook or Word, use the Word Paste  icon to cut in your message contents.

## 2.1.3 Step #3 - Send the PMail

Send the PMail to the list of members on the TO and CC lists. Click on the Send PMail button at the top of the screen.

### Personalized Email (PMail)

**NOTICE:** Long PMAIL messages should be composed in your E-mail program (Outlook or Eudora), since this SESSION EXPIRES in 45 minutes. And you can “spell check” your work *before* you Copy & Paste your message into the Message box below.

 Send PMail



You will receive a confirmation screen when the PMail was successfully sent. For details on the confirmation you will receive, and options you can do for members who did not receive the PMail, refer to section 4.8 of this document.

## 2.2 PMail Recommendations



### RECOMMENDATION:

It is pretty simple to compose a basic PMail using the Editor feature. However, when composing more complicated messages with banner graphics and embedded images, you may need to use the HTML edit function. Click on the **HTML** ICON to bring up the HTML content of your message.

If you don't know the basics of HTML, you should consider buying the “Dummies Guide to HTML” or something similar at your local book store. There are hundreds of books already written and readily available at your local bookstore that can explain the basics of HTML.

If you anticipate your email will be printed, you must consider some printability issues:

- If you do not use any tables with hard coded width values (“width”=700), your PMail should probably print OK. Most print drivers will format output to fix the size of the printable output.
- If you do use tables with hard coded values – keep the width of the entire PMail less than 700 (we actually recommend 675 pixels wide or less). This will allow most printers to successfully print the email received without clipping the right side. You can accomplish this by putting all the content inside one table cell that has a hard coded width dimension for the rest of the document.

## 2.3 A few Do's and Don'ts

### 2.3.1 Do's

- Do use the HTML Editor editing functions provided on the PMail screen to color text, underline words, set font style and size, etc. Avoid using Outlook or Word whenever possible.
- Do save your work - frequently -- every 30 minutes (you actually have an hour, but we are telling you 30 minutes so you have a 100% time buffer). Use the Save ICON  on the Editor toolbar or the Save PMail button to save your work into your personal folder (or club or account folders).

# Personalized Email (PMail)

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- Do fine tune your message using the HTML edit capability -  ICON. Yes, for professional looking messages, you may just have to fine tune the HTML. Consider purchasing something like the "Dummies Guide to HTML" (approximately \$20.00 at Amazon.com)

## 2.3.2 Do Not's

- DO NOT paste a Microsoft Word document directly into the Editor. Instead, use the Paste  ICON to paste in a Word document. This process attempts to clean up the code Microsoft Word generates and will improve (it's not 100%) the success of your email being generated correctly. Incorrectly pasting a document into the Editor accounts for roughly 90% of the problems associated with PMail.
- If you are composing your PMail in Word first, compose the PMail in the Web Layout page view. For reasons only known to Microsoft, the normal view will not properly generate the HTML data for it to be rendered properly within the Editor.

## 3. PMail EZ-Link Templates

Creating a PMail starts with EZ-Link templates, conveniently found on the main page of the PMail function. PMail templates are organized under four (4) tabs:

- **System** – templates that are shared across all accounts and districts using the DaCdb system. These templates are created and maintained by the DaCdb support team and cannot be modified by users. However, they can be accessed and then saved into other folders that users can maintain (e.g. Personal tab).
- **Account** – templates are shared across all users within an Account/District. All users can view and use these templates; only Level-6+ users can modify and save templates into the Account/District folder.
- **Club** – templates are shared across all users within the club. All club users can view and use these templates. Only Level 4+ users can modify and save templates into the Club folder. A Level-5 AG or Level-6 district admin can view these templates only if they emulate the club.
- **Personal** – these templates are unique to each member and can only be viewed by each member. Personal templates are unique within the District/Account.

Users that switch between Districts (Zone) or Accounts will find the messages are unique within each Account.

**Personalized Email (PMail)**

**NOTICE:** Long PMAIL messages should be composed in your E-mail program (Outlook or Eudora), since this SESSION EXPIRES in 45 minutes. And you can "spell check" your work *before* you Copy & Paste your message into the Message box below.

Send PMail

EZLink Templates Compose PMail Groups Tracking

**EZLink Template Select**

To **Select** an EZ Link template, click on a radio button below. To **Preview** the template, click on the template name. To create a new template, click [Save PMail] in the Compose Tab - select the appropriate folder to save the template under.

System District Club Personal

39 System template file(s) found

System Templates	Modified	Size	Action
<input type="radio"/> 01- Dear Rotarian - then your message.htm	08/30/09 08:03 PM	1 KB	View Rename Delete
<input type="radio"/> 02- Dear Rotary Alumnus - then your message.htm	06/18/08 09:05 AM	2 KB	View Rename Delete
<input type="radio"/> 05- EZ LogOn for Members.htm	01/23/10 07:37 AM	6 KB	View Rename Delete
<input type="radio"/> 06- EZ LogOn for ClubOfficers.htm	09/01/09 03:44 PM	12 KB	View Rename Delete
<input type="radio"/> 07- EZ LogOn for ClubSecretarys-for Attendance.htm	09/01/09 05:06 PM	7 KB	View Rename Delete
<input type="radio"/> 09.0- I need HELP inserting IMAGES into PMAIL	07/04/09 05:25 AM	2 KB	View Rename Delete
<input type="radio"/> 09.1- I need HELP Saving a PMAIL template	10/27/09 07:53 AM	1 KB	View Rename Delete
<input type="radio"/> 09.2- I need HELP clearing the IMAGES CACHE in the Firefox browser	10/20/09 01:19 PM	2 KB	View Rename Delete
<input type="radio"/> 10- Club MISSED YOU AT OUR MEETING.htm	09/01/09 05:07 PM	1 KB	View Rename Delete
<input type="radio"/> 11- Club Proposed NEW Member Notification.htm	09/01/09 05:07 PM	1 KB	View Rename Delete
<input type="radio"/> 12- Club Notification of Approved NEW MEMBER.htm	09/01/09 05:07 PM	2 KB	View Rename Delete
<input type="radio"/> 16- Dear Rotarian - Invoice for Club Dues attached.htm	11/15/09 10:21 AM	1 KB	View Rename Delete
<input type="radio"/> 16c- Dear Rotarian - Invoice for Club Dues and PAY via CC	11/25/09 02:13 AM	1 KB	View Rename Delete
<input type="radio"/> 17- Dear Rotarian - Statement for Club Dues attached.htm	07/29/09 06:03 AM	1 KB	View Rename Delete

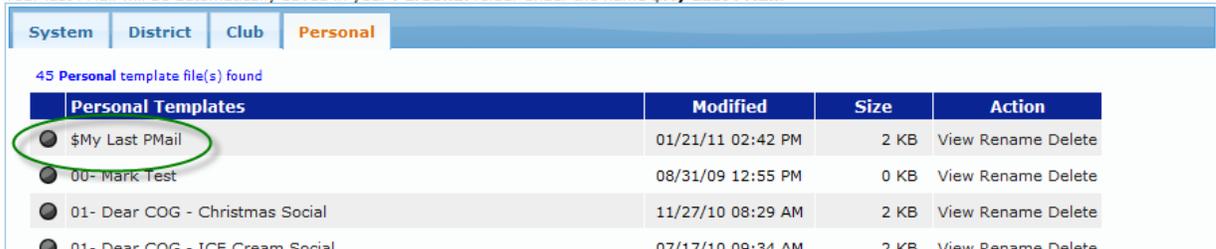
**Note:**

- Templates are listed in numerical/alphabetical order under each tab. The column titles (Templates, Modified, Size) are hyperlinked, and the selected column will sort in ascending order when the title is clicked. Clicking the title a second time will reverse-sort the selected column.
- The system will remember your last tab selection. So if you normally work using templates in the Personal tab, the Personal tab will be selected the next time EZ-Link Templates is invoked.
- Templates are saved with user-defined metadata – From Name, From Email, Reply To, Subject, Comments, Created By and Modified are saved as part of the EZ-Link document.

## 3.1 My Last PMail

When a PMail is sent, the system will automatically save the last PMail in your Personal folder under a file name called "\$My Last PMail". This name was chosen so that the saved PMail will sort to the top of your personal template list.

Your last PMail will be automatically saved in your **Personal** folder under the name **\$My Last PMail**.



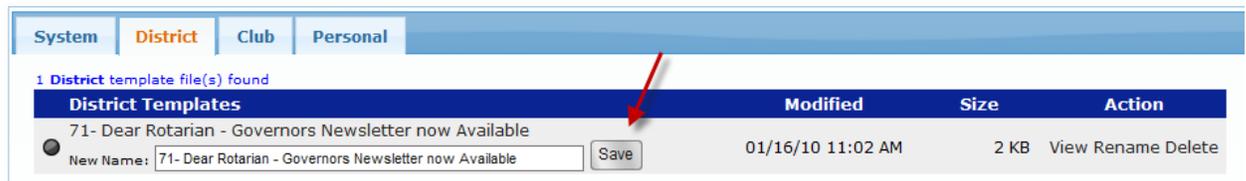
Personal Templates	Modified	Size	Action
<input checked="" type="radio"/> \$My Last PMail	01/21/11 02:42 PM	2 KB	View Rename Delete
<input type="radio"/> 00- MARK Test	08/31/09 12:55 PM	0 KB	View Rename Delete
<input type="radio"/> 01- Dear COG - Christmas Social	11/27/10 08:29 AM	2 KB	View Rename Delete
<input type="radio"/> 01- Dear COG - ICF Cream Social	07/17/10 09:34 AM	2 KB	View Rename Delete

This PMail is just like any other template and can be reused and resent by clicking on the Radio button.

 **Note:** The saved \$My Last PMail is not currently saved with Metadata or distribution lists. The content is saved, but the distribution lists will need to be re-created.

## 3.2 Renaming Templates

To rename a template, click on the Rename hyperlink in the Action column. An input field will open up under the existing name with the current template name. Modify the name, and click on the Save button. The file will be renamed and the screen will refresh.



District Templates	Modified	Size	Action
<input type="radio"/> 71- Dear Rotarian - Governors Newsletter now Available New Name: <input type="text" value="71- Dear Rotarian - Governors Newsletter now Available"/> <input type="button" value="Save"/>	01/16/10 11:02 AM	2 KB	View Rename Delete

 **Note:** The template file will likely change position within the listing since the name was changed. Remember, the templates are listed in numerical/alphabetical order by the template's name, so changing the name can move it immediately on your list. The ability to click on the hyperlinked column heading to resort the templates by date modified can help in the event you forgot what you renamed the template.

## 3.3 Creating Templates

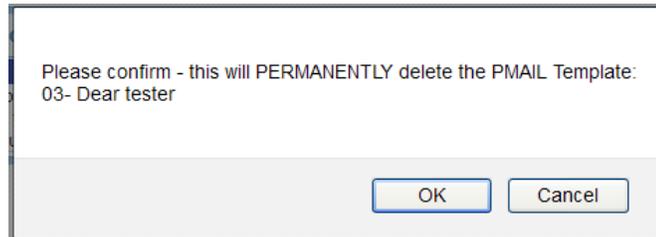
To create a template, you may begin with either an EZ-Link Template or go immediately to the Compose tab to start from scratch. The key to creating a successful template is understanding and utilizing Tags appropriately. For further details on tags and utilizing the Editor, refer to section 7 of this document, as well as Appendix A and B.

If you are willing to put the time, effort, and thought into creating a template from scratch, it is possible. It is extremely helpful to have background knowledge of HTML basics, and you will want (or need) to use the HTML ICON to modify or add to the HTML that is being generated under the cover of the Editor.

Keep in mind, building a professional template may take hours and be a very frustrating experience, especially for the first time user. However, once the template is built and saved, it can be reused many times over. (see section 8 for template examples)

## 3.4 Deleting Templates

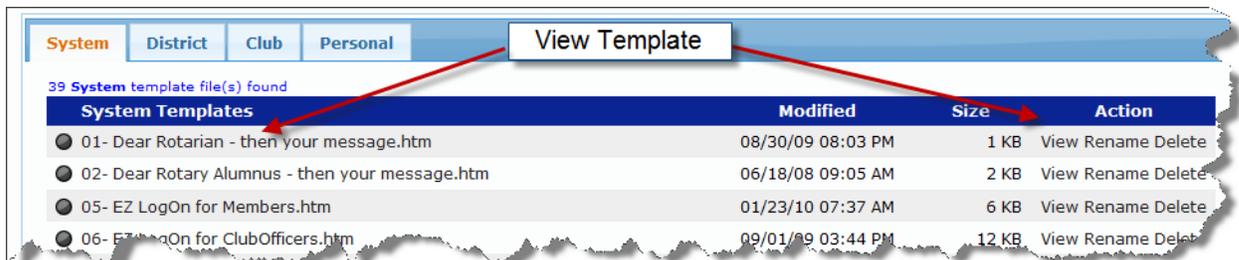
To delete a template, click on the Delete hyperlink in the Action column. A pop-up message will appear. If you click Cancel, the file will not be deleted – a confirmation will be displayed stating that the file was not deleted. Clicking OK will delete the selected file. The file you are deleting is shown on the 2<sup>nd</sup> line of the message as in the example below.



 **Note:** Once you click OK above, the template file is PERMANENTLY deleted. There is no backup or recovery of deleted files. However, call Support – as we might have a copy.

## 3.5 Viewing a Template

To View a template, click on either the template name or click on the VIEW action link.



Click on the hyperlink to pop-up the template.

There are two types of templates – ones that contain metadata and ones that do not.

What is metadata? Metadata is data about data. In this case, a saved PMail template can optionally contain information pertaining to the sender (FROM), ReplyTo, Subject and optional comments.

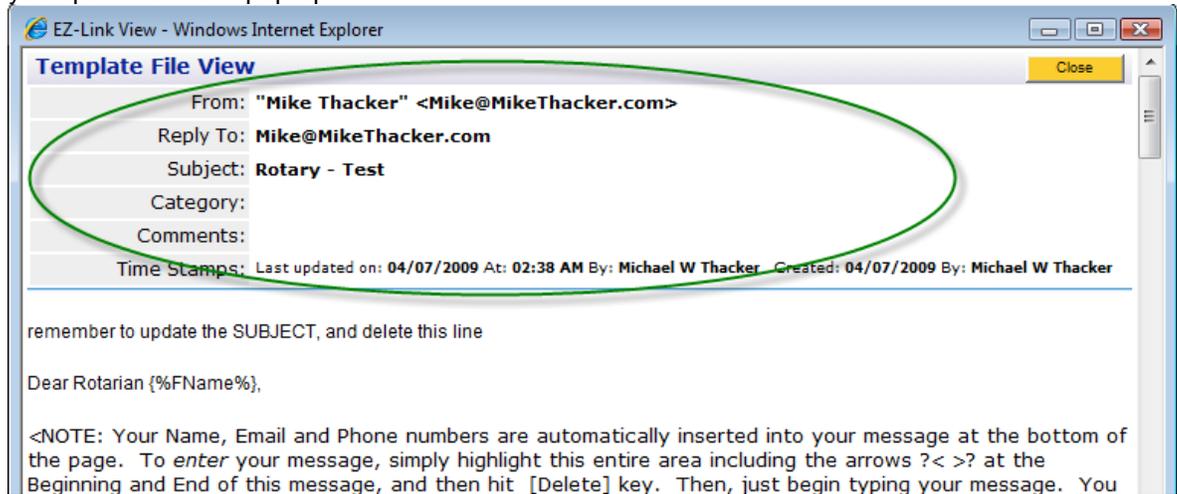
### 3.5.1 No Metadata

The templates without metadata (such as the From, Reply To, Subject, and timestamps. This will be reflected at the top of the view pop-up with “No template Metadata Found”.



## 3.5.2 New Templates

PMail templates containing metadata information will be shown at the top of the screen when you open the 'View' pop-up.



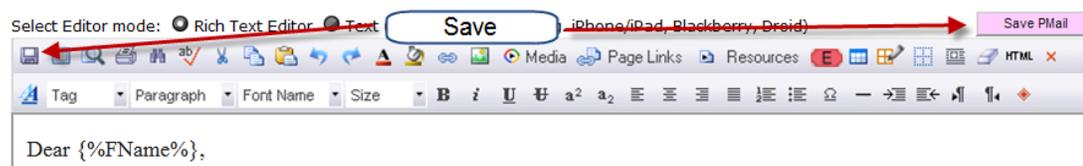
Why do we care about metadata? For the most part – you don't. However, if you are responsible for sending out PMAILs on behalf of another person, you might consider using this feature. By entering the FROM, ReplyTo, and Subject once, and then saving the PMail **with** the metadata option checked, you can save the PMail template with this information – so the next time you use the template, those fields are already pre-populated.

The downside of saving templates with metadata is that other users who use the saved template might inadvertently leave your previously defined FROM, Reply TO and Comments. We do however, warn you (actually them) when this situation occurs, and it's for those same reasons we recommend that you only save PMAILs with metadata in your Personal folder.

## 3.6 Saving Templates

As stated in section 3.1, the last template you worked with will automatically be saved under your Personal tab in the EZ-Link Templates section after it has been sent.

If you are unable to complete your message before sending it, it is possible to save your work to finish at a later time. A save icon is located on the Editor screen, or you may also click the Save PMail button. Either button will bring up the following pop-up screen, allowing you to save the PMail under whichever file name or location you desire.



The SAVE Dialog box will open showing a screen similar to:

# Personalized Email (PMail)

**Save PMAIL Message** [Cancel] [Save Pmail]

This function saves a custom or modified PMAIL message for re-use at a later time. Depending on your security level, the PMAIL message may be saved into folder areas that are shared by users on this system.

**From:** Heather Lee Brandt Display Name

**From Email:** heatherleebrandt@gmail.com Bounced e-mail go here

**ReplyTo Email:** heatherleebrandt@gmail.com Member replies go here

**\* Subject:**  PMail subject line

**Comments:**

Enter optional comments that apply to this template -- for reference only

**\* File Name:**  (Note: The file name must be valid -- characters and numbers ONLY; Special characters are NOT permitted)

Replace existing file?

**Save Folder:** (Access based on your security level)

District Folder - Visible to all PMAIL users in this District

Club Folder - Visible to all PMAIL users within your Club

Personal Folder - Visible only to yourself (default)

**Option:**  Save template with metadata?

If you check this, the template will be saved with the From Name, From Email, ReplyTo, Comment and Subject entered above. This options if unchecked by default. If you are saving into a District, Club folders.

The most important selection here is where to save the PMail as a template. Depending on your security level you will have 1 to 3 options (District, Club or Personal) folders. By default, the personal folder is checked.

Make sure all the information (From, Subject, Comments, and FileName) is filled in. The comment field is optional, can contain some comment or notes about what this template should be used for.

The following fields are saved as part of any new PMail created or any existing PMail saved.

Metadata Fields	Description
From	This is the display name of the person sending the PMail
From Email	This is the email of the person sending the PMail. Because of the way email works, this is the address that bounced emails will be returned to.
ReplyTo	When a member that receives the email successfully, and responds with a Reply, the reply will be returned to this address. You probably want this to be an email address that you frequently check.
Subject	The subject or title of the PMail
Comments	This is an informational field, where descriptive information about the PMail template can be included.
Message	The actual message content of the PMail template
Created By	Author of the original PMail template
Created Tmstmp	The creation date and time of the PMail template
Modified By	The last person to modify the PMail template
Modified Tmstmp	The date and time of the last modification to the PMail template

 **Warning:** When you save a PMail template into a Club, District/Account or System folder, you may not want to save the template with your own Email data. When someone else uses the PMail, your data will be restored when the PMail is selected. However, this may be exactly what you want to happen when sending out a monthly newsletter on behalf of someone else.

# Personalized Email (PMail)

## 4. PMail Compose

PMail can be sent using portable devices (e.g., iPhone, iPad, Blackberry and Droid).

The Compose tab contains all the functions to compose and send your PMail. After selecting a PMail EZ-Link template, the screen will automatically switch to the Compose tab.

 **Note:** If the selected template is large, this switch may take a second or two, and will depend on the speed of your computer.

**Personalized Email (PMail)**

**NOTICE:** Long PMAIL messages should be composed in your E-mail program (Outlook or Eudora), since this SESSION EXPIRES in 45 minutes. And you can "spell check" your work **before** you Copy & Paste your message into the Message box below.

**Send PMail**

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**EZLink Templates**   **Compose**   **PMail Groups**   **Tracking**

**Compose PMail** UserID

**FROM:** Michael W Thacker (EMail "Friendly" Display Name)  
**From Email:** Mike@MikeThacker.com (Bounced EMail messages are returned to this address)  
**ReplyTo Email:** Mike@MikeThacker.com (Member's will reply to this address)

**TO:** Thacker, Michael W;  
1 Member:  
+ Add+RSS (1)

**CC:**

**\*Your Subject:** ROTARY - - Members (must be valid file name - no special characters)

**\*The Message:** Select Editor mode:  Rich Text Editor  Text (for mobile devices, e.g. iPhone/iPad, Blackberry, Droid) **Save PMail**

**EZ Link Templates**

Notes: { %FName% } will be replaced with the first name or badge/nick name.

Click on the  icon to spell check your document with **ieSpell**. (IE Only)

Download the integrated spell checker **ieSpell** [here](#).

**Attachments:** PMAIL attachments limited to 5MB each ([Why -- Click Here?](#))  
If you need to send a larger attachment, use the  ICON above to upload and then create a link to your uploaded file.

 Attach a file (up to 5 files can be attached)

**Send Options:**

- Send **Only Me** a Test EMail - EMail **WILL NOT** go to TO/CC list (the first "TO" person will be used as an example)
- Show ALL TO Members on EMail
- Un-check this if you do not want to see a list of all member(s) being PMAiled.
- Include List Source? ([What is this?](#))
- Track All members in PMail? ([What is this?](#))
- Include Opt-Out link in PMail? ([What is this?](#))

**Send PMail**



**IMPORTANT:** DO NOT take too long to compose your PMail in the editor. Your session may time out if you take longer than 30-minutes to compose your email and *all work will be lost at that time*. Open another tab and do something within the program to keep your session alive if necessary.

## 4.1 FROM

The FROM section contains three fields, as shown below. The information in this section comes from the session data of the currently logged-in user.

The screenshot shows the 'Compose PMail' interface. The 'FROM' section is highlighted with a yellow box. It contains three fields: 'Thacker, Michael W CDP' (with a note '(Email "Friendly" Display Name)'), 'From EMail: Mike@MikeThacker.com' (with a note '(Bounced EMail messages are returned to this address)'), and 'ReplyTo EMail: Mike@MikeThacker.com' (with a note '(Member's will reply to this address)').

- **Sender Name** – Name of the person sending the message is initially displayed. This is the “Friendly” name that will appear in the email your members will receive – as opposed to the email address.
- **From Email** – this is the email address of the currently logged in Member. This address is where bounced or undelivered emails will go back to.
- **Reply-To Email** – this is typically the same as the From Email. When a member replies to your email, this is the email address the member will send back to. It does not have to be the same as the From Email.

### 4.1.1 Send As (Change the Sender)

Level-4 Club Officers and above have the ability to send PMAILs under another name. For example, the District secretary can send out a PMail under the name of the District Governor.

The person logged on and creating the PMail is automatically applied in the FROM information. To change the Sender, click on the FROM button. This will bring up a screen where you can search for the name of the person that you want the PMail to be sent from by entering a couple of characters from the person’s name, club or business.

The screenshot shows the 'From Member' dialog box. It has a title bar 'From Member' and a 'Close' button. The text inside says: 'Change FROM Member. To change the PMail FROM, enter at least two (2) characters of the members name below. Only one member can be selected and the member must have a valid email address.' There is a search field with 'thac' entered and a 'Global?' checkbox. Below the search field, it says '4 Members matched.' and shows a table with columns 'District 7710', 'Club', and 'MemberType'. The first row shows 'Hockney, Terry L', 'Cary Rotary Club', and 'Active-PRE'.

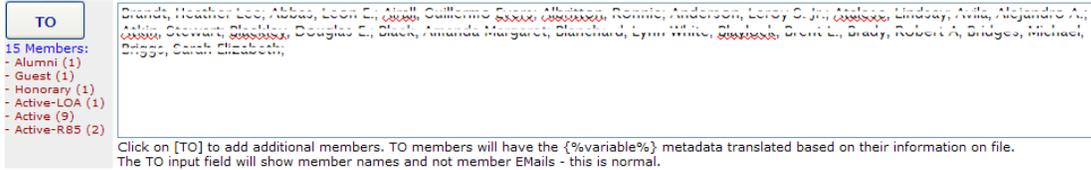
Since only one person can be selected as the new sender, clicking on one of the radio buttons will select the member, dismiss the screen, and enter the new sender information into the FROM fields. If the Global checkbox is available, clicking this will search members across all the districts.

Level 4 club members can select a new sender from their club. Level-5 AG’s can select from members in their region/area, and Level 6+ users can select from anyone in the district.

**Note:** PMail’s are logged in the system transaction log. So misuse of this capability can be tracked back to the individual user and original sender.

## 4.2 TO

The **TO** list should already be populated based where you invoked PMail from. The **TO** list consists of the members selected – and this list will vary greatly based on where PMail was invoked. All **TO** members must be members on the system and have a valid email address.



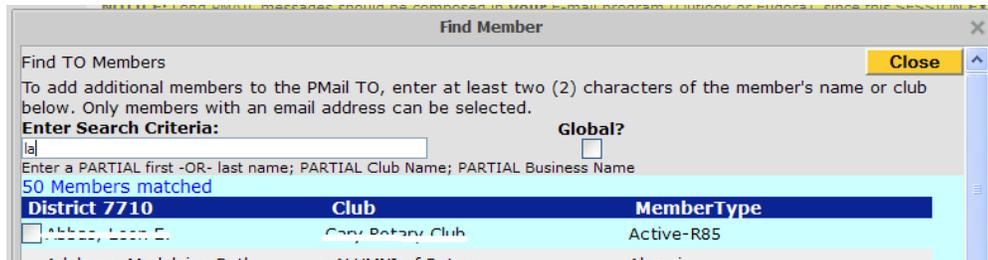
Some **TO** statistics are detailed under the TO Button, showing:

- Number of members that are about to be PMAiled (18 in the example above)
- Member Types with the quantity count in parentheses.
- The names of the members being PMAiled in the text box area.

Often it is necessary to make adjustments to the TO list. For example, some clubs do not want to send out PMAils to guests or non-active members (Honorary, Inactive-LOA). Or sometimes additional members needed to be included.

### 4.2.1 Adding Members

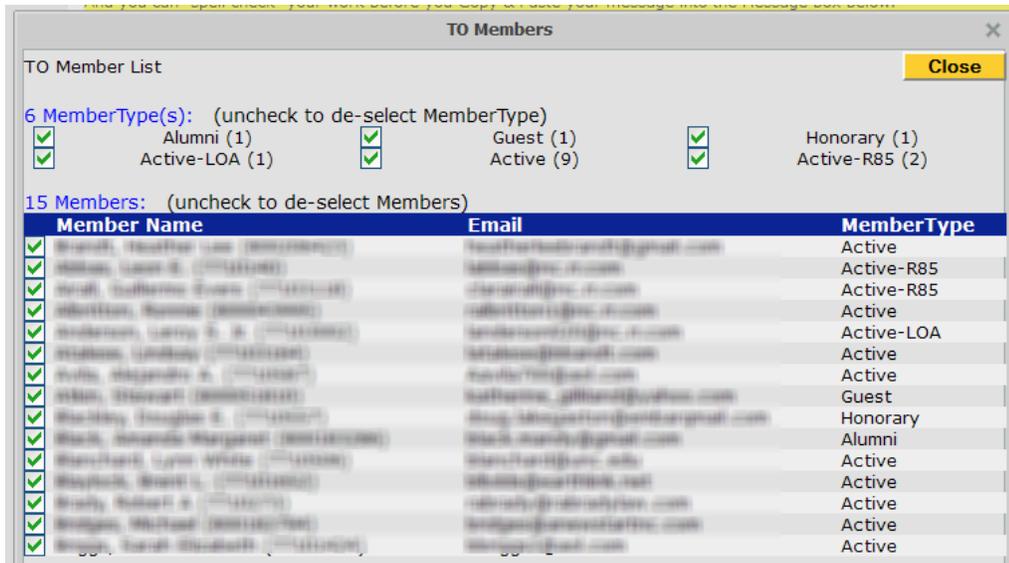
To include additional members, click on the  button, search for additional members and check off the ones that need to be added.



### 4.2.2 Removing Members

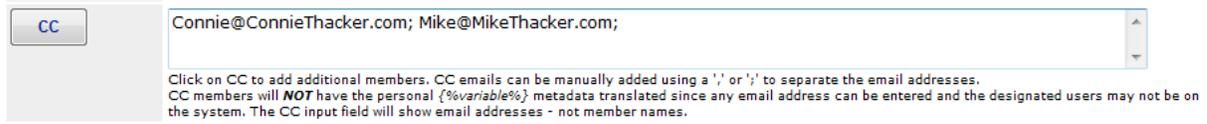
To edit the list and remove members, click into the text area list of the members. On the Pop-Up screen, member types can be unchecked and/or individual members can be unchecked and removed from the list.

# Personalized Email (PMail)



### 4.3 CC

Carbon Copy (CC) operates slightly different than the TO members. CC members are added by entering their individual email addresses. The reason for this is so that members or users that are not part of the DaCdb system (e.g., guests, event planners, caterers) can be addressed.



Clicking on the CC button will bring up a panel similar to the TO selection. Individual DaCdb members can be found and added to the CC list as a helpful assist since we know their email address. Other individuals can be added directly into the CC area by simply entering their email address separated by a semi-colon.

 **Note:** In summary, the TO list works off a list of members. You cannot directly enter a TO EMail address. You must select the TO from the list. CC operates on email addresses. While the CC function allows you to easily add member addresses, one-off addresses can be typed into the CC window directly (e.g. copying a caterer on an email regarding an event). This is an important distinction that we want you to be aware of.

### 4.4 Subject

The subject is a required field. It is initially populated with an Account/District default – or the previous subject from the selected template saved with Metadata.



### 4.5 Message

The message body is the content of the message your selected members will receive. Section 7 in this document goes into depth with the toolbar features.

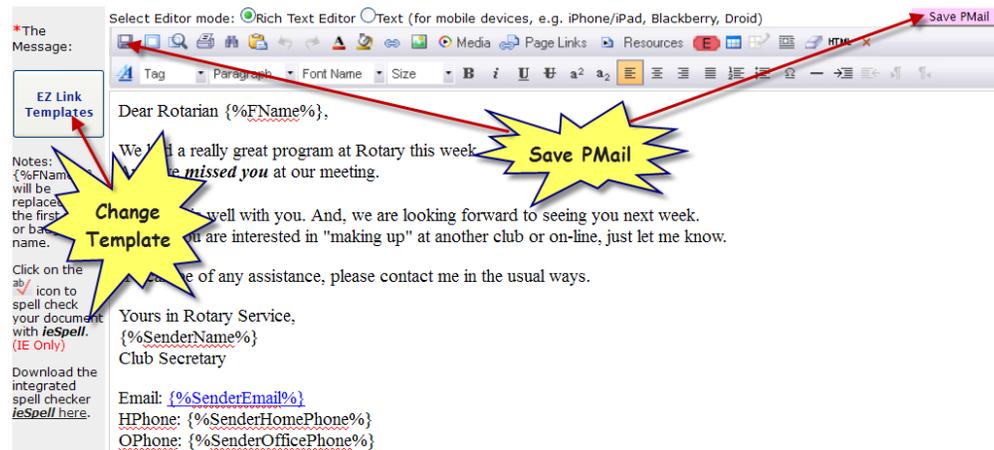
Two features that need to be pointed out:

- **Save PMail** – the ability to save the PMail (or work in progress) for a later time can be accomplished using the Save ICON or the Save PMail button. Either one accomplishes the

# Personalized Email (PMail)

same task. The save function will save metadata associated with each template. (see section 3.5 for further details)

- **EZ-Link Templates** - You can now change templates without leaving PMail. Simply click on the EZ Link Template button to switch the template library. A new template from the System, Account/District, Club or Personal folder can be selected. The contents of your old message will be lost however.



## 4.6 Attachments

Up to five (5) attachments can be sent with any PMail. However, because large attachments use significant system resources, we have limited the size of each attachment to 5MB.

Attachments: PMAIL attachments limited to 5MB each ([Why -- Click Here?](#))

If you need to send a larger attachment, use the  ICON above to upload and then create a link to your uploaded file. 

Click on the paper clip icon to attach a file (up to 5 files can be attached)

 Attach a file (up to 5 files can be attached)

To attach a file on your local PC/Desktop, click on the Paperclip ICON. An entry box will appear along with a browse button. Use the Browse button to find the file on your PC/Desktop that you want to load up to the server and attach to the document.



Click on the "Attach another file" hyperlink to add a 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> or 5<sup>th</sup> attachment. Click on "Remove" to delete a previously attached document. If you Remove a document, it WILL NOT be included in the PMail being sent.

There are a number of issues you should be aware of in sending attachments to your members:

- Member mailbox size constraints may cause a message with a large attachment to be rejected
- Messages without attachments can be delivered and downloaded quicker
- Some personal PDA type devices do not deal well with attachments (especially large attachments)
- And, let's be honest – some users never look at the document that is attached. So why waste all the bits and bandwidth and take up room in the member's mailbox.

### 4.6.1 Sending Links

If the size of your attachments is too big, we do have a solution to send everything you want to send! Simply upload the document to our server and send them as a link in your PMail.

# Personalized Email (PMail)

There are two ways to accomplish this:

- 1) Use the  ICON to reference club bulletins or district news letters that have already been loaded
- 2) Use the  ICON to upload a new document and link to it.

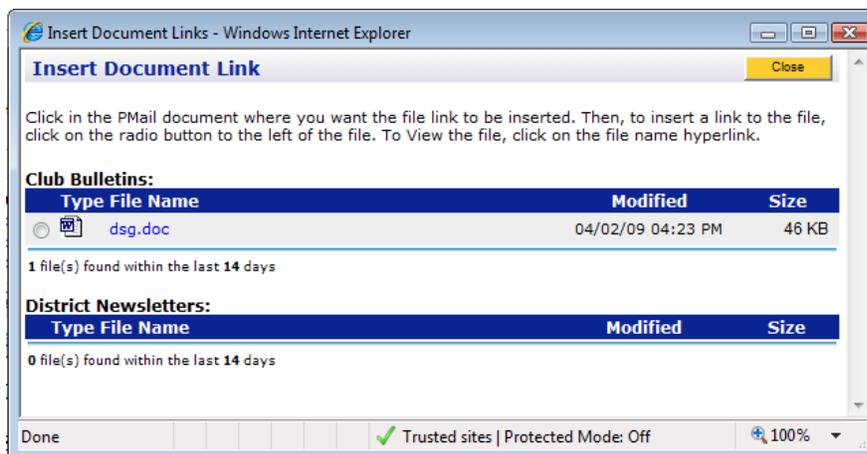
To use either option, place your cursor in the text box of the message at the location where you would like the link to your file to appear. Click on the  ICON or the  Link ICON in the text Editor.

For the Page Links  icon:

Page Links is used to reference and insert previously saved Club Bulletins and District Newsletters.



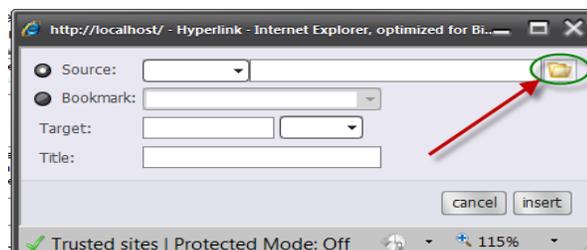
Clicking on the Page Links ICON will bring up a dialog box in which you can select a radio button to insert either a club bulletin or a district newsletter into the PMail you are working on.



Close the window and a link will be where the cursor was on your PMail.

For the Link  icon:

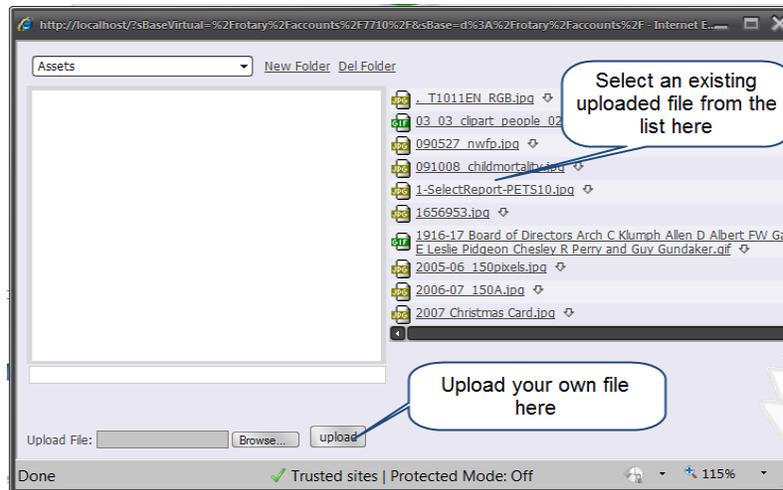
Click on the Link icon in the Editor tool bar. This brings up a dialog box:



Click on the File ICON (circled), and another dialog box is presented.

# Personalized Email (PMail)

 **Note:** Do NOT use the Source drop-down menu in the "Hyperlink - Web Page Dialog" window.



From this dialog panel, you can click on one of the existing assets from the list at the top right, or you can upload your own file to add to this list by browsing for your file on your local system and then clicking the upload button. Use the dropdown menu in the upper left to select the folder where your file is located (where it was uploaded to).

 **Note:** To insert an asset into your document, you must first have clicked into your compose window exactly where you want to insert the document. If after uploading (or selecting an existing asset) nothing happens, chances are you did not click in the document where the insert should occur.

Depending on what type of file it is, a preview of the file will be displayed in the left half of the Asset manager dialog window. Underneath the preview area the link (URL) to the file will be displayed.

Once you have uploaded/selected the file or image you wish to insert, click the OK button in the very bottom right corner of the Asset Manager screen. If you do not see the OK button,

maximize your screen. 

The Asset manager dialog window will close, and the link (URL) will be displayed in the right-hand field for Source in the "Hyperlink - Web Page Dialog".

Click the "insert" button.

A link to your document/file will be inserted into the text editor at the cursor's location.

 **Note:** There is **NO** restriction on the number of document links that can be sent in an email. A link to a document takes only a handful of bytes. A link (hyperlink) to a 5 MB document is the same to a link to a 200K document – basically nothing.

## 4.7 PMail Send Options

All PMail options are organized in one section.

Send Options:

- Send Only Me a Test Email - EMails WILL NOT go to TO/CC list (the first "TO" person will be used as an example)
- Show ALL TO Members on Email
- Un-check this if you do not want to see a list of all member(s) being PMAiled.
- Include List Source? ([What is this?](#))
- Track All members in PMail? ([What is this?](#))
- Include Opt-Out link in PMail? ([What is this?](#))

### 4.7.1 Send Only Me a Test Email

When you are creating a PMail with links and complicated content, we recommend that you first send yourself a test PMail to ensure all links are correct, images displayed properly, etc. To facilitate this, a checkbox is available at the top of the Send Options to complete this function.

When "Check to Send Me Test Email" is checked, ***only you*** (the sender) will receive a copy of the PMail that is generated. The first person (we had to pick on someone) that you are Pmailing will be used as the test case for generating the PMail. This means that any tags (explained in section 7.1.1), document links, and user information will be directed towards the first person on your send list. This is only intended to be a representative example of what the other PMAils will be.

### 4.7.2 Show "ALL TO" Members on Email

PMAils are personalized to all members designated in the TO box. As such, an individual message is sent to each member, translating the "TAG Data" (see section 7.1.1 for further detail on tags) for each member. A member receiving the message has no idea who else received the message.

If you want your members to know who else received the message, then check this option.

### 4.7.3 Un-check this if you do not want to see a list

When a PMail is sent, there is a confirmation screen that is shown. On that screen, is potentially a very long list of members that were sent a PMail. By default, if the number of members being sent is greater than 100, the checkbox is unchecked. Checking this checkbox will show the complete list of members that were sent a PMail. When sending to 3,000 members in the Account or District -- we recommend that you leave this unchecked. TMI!

### 4.7.4 Include List Source

PMail can be invoked from many locations within DaCdb. The list source identifies the primary source of the TO list that is being used to send this PMail. This might be a Club Name, Committee Name or Event Name.

### 4.7.5 Track All Members in PMail

PMail will normally track the members that have opened / read their PMAils sent to them. By checking the Track ALL option, Pmail will write to the tracking log all the members being sent a PMail. Open / read information will then be added to the tracking information as the PMAils are opened. The downside of doing this is a typical PMail might get a 40% read rate. Tracking all members may clutter this list.

## 4.7.6 Include Opt-Out Message

PMail now supports the ability to include a message at the bottom of the email sent for recipient's to Opt-Out of PMail's. The message and corresponding link to opt-out will not be sent unless this option is checked. If you are corresponding to potential members, this link should be checked so that if they want, their opt-out flag will be set so they do not receive future emails.

When this is checked, the following message will be appended at the bottom of your message:

---

You are receiving this email because you are a member on DaCdb. To unsubscribe to future emails, please click on this link: [Unsubscribe](#) .

Click on the Unsubscribe link will automatically set the Opt-Out flag in the member record and will display the following message.

### **Opt-Out**

Thank you, you have elected to opt-out of future emails from DaCdb. This means your club officers and district administrators will no longer be able to send you a Pmail.

If you click this link in error, please send an email to DaCdb support at: [support@directory-online.com](mailto:support@directory-online.com). Alternatively, you can log into DaCdb and update your Opt-Out setting under the Contact Tab in your own personal profile.

## 4.8 PMail Confirmation (Sending Summary)

As a confirmation of the messages being sent, a sending summary is displayed when PMail completes sending all the messages. In some cases, particularly when PDF files (invoices and statements) are being generated, the sending summary may take a minute or two to appear.

 **Note:** The message content of your last message sent is saved automatically in your personal folder. This enables you to quickly retrieve the last message and resend it should there be an error or mistake in the message.

### Send Personalized Email (PMail)

[Print the summary for your records](#)

#### Sending PMail:

Date: **07/18/2011 03:17 PM**  
Sent From: **Michael W Thacker** (Display Name)  
From Email: **Mike@MikeThacker.com** (Bounced e-mail messages are returned here)  
Reply To: **Mike@MikeThacker.com** (Member's will reply to this address)  
Subject: **ROTARY -**

#### Sending To:

Recipient	Name	Email Address	Unformatted Partial Message / Comments
Bashear, David	David		Skipped, email blank
Bell, Bruce	Bruce	jbbell@gloryroad.net	Dear Bruce, Start YOUR Message Here.....
Bugg, Sears	SEARS	searsbugg@embarqmail.com	Send Via PostOffice
Raiford, William Patrick Jr.	PAT	raiford@nc.rr.com	Member Opt-Out
Scott, Spencer	Spencer	sscott@vance.net	Dear Spencer, Start YOUR Message Here.....
Shinabarker, Michelle	Michelle	pistolexit1@hotmail.com	Dear Michelle, Start YOUR Message Here.....
St.Louis, Roger	Roger	RStLouis110@gmail.com	Hand Deliver

#### BCC To:

- Mike@MikeThacker.com

#### Manual Delivery List(s):

Missing Email List:	List	Select for a printable list of unaddressed emails.
	3-Col	Select mailing label [5160-3 column] list in MSWord.
	2-Col	Select mailing label [5161-2 column] list in MSWord.
Post Office List:	Print	Post Office Invoices (HTML)
Hand Deliver List:	Print	Hand Deliver List (HTML)

#### Sending Summary:

- 14 of 17 Email(s) sent to members addressed
- 2 Email(s) addresses were blank
- 1 Email(s) skipped because Member Opt-Out setting
- 2 Invoices/Stmts need to be delivered to Post Office
- 2 Invoices/Stmts need to be hand delivered
- NO CC Email defined or sent
- 1 BCC Email(s) sent

#### Message Summary:

Dear {%FName%},  
Start YOUR Message Here...

Note: variables ("{%tag%}") above where replaced with values appropriate for each recipient.

#### Done - PMail Sent

 **Note:** Print this screen for your records (if you want). However, you should receive a BCC copy of the message that was sent.

# Personalized Email (PMail)

## 4.8.1 Sending PMail

The “Sending PMail” section summarizes the message being sent. Remember, this can be changed to a person other than yourself if you have a security level 4+. **In that case, the person listed on the From Email is the person that will receive this email confirmation.**

### Sending PMail:

Date:	04/14/2009 05:49 PM
Sent From:	Michael Thacker (Display Name)
From Email:	Mike@MikeThacker.com (Bounced e-mail messages are returned here)
Reply To:	Mike@MikeThacker.com (Member's will reply to this address)
Subject:	Rotary - District Notice

## 4.8.2 Sending To

The “Sending To” section will summarize who the message is sent to. The UserName, First Name or Nick Name, Email Address and 128 characters of the message (unformatted – no HTML) is shown.

### Sending To:

Recipient	Name	Email Address	Unformatted Partial Message / Comments
Thacker, Michael W	Mike	Mike@MikeThacker.com	Dear Mike, Start YOUR Message Here.....

A line similar to the above is listed for every person that is sent an email.

 **Note:** If you un-checked the box shown below under send options, the above detail will not list members that had an email – which when mailing the District/Account could be several thousand members long. Instead, only an exception list will be generated of members with no-emails or members that “opt-out” of PMail mailings.

**Send Options:**

- Check this to Send Me Test Email
- Un-check this if you do not want to see a list of all 1 member(s) being PMAiled
- Include List Source? (What is this?)

By default, this box is un-checked if over 100 members are being PMAiled.

## 4.8.3 Manual Delivery List(s)

The PMail sending summary may contain a Manual Delivery List(s) section if it is necessary to manually handle the messages being sent. This situation occurs when:

- a member email is missing
- one or more members have indicated they want to opt-out of receiving PMail’s
- one or more members indicated they wanted their invoice or statement hand delivered
- one or more members indicated they wanted their invoice or statement sent via US Post Office

# Personalized Email (PMail)

## Manual Delivery List(s):

Missing EMail List:	List	Select for a printable list of unaddressed emails.
	3-Col	Select mailing label [5160-3 column] list in MSWord.
	2-Col	Select mailing label [5161-2 column] list in MSWord.
Post Office List:	Print	Post Office Invoices (HTML)
Hand Deliver List:	Print	Hand Deliver List (HTML)

In these situations, the missing or opt-out email lists can be viewed, printed, or formatted in a 2 or 3-column Avery label format using MS Word. In the case of invoices/statements that need to be printed for Post Office or Hand Delivered lists, they can be generated and printed.

## 5. PMail Groups

A PMail Distribution Group allows members to create and maintain an unlimited number of lists of members to PMail. Prior to this release, a committee might have been created to maintain a list of members for purposes of P mailing. While this can still be done, PMail Distribution Groups offer an alternative option without cluttering up the committee listings with extra committees.

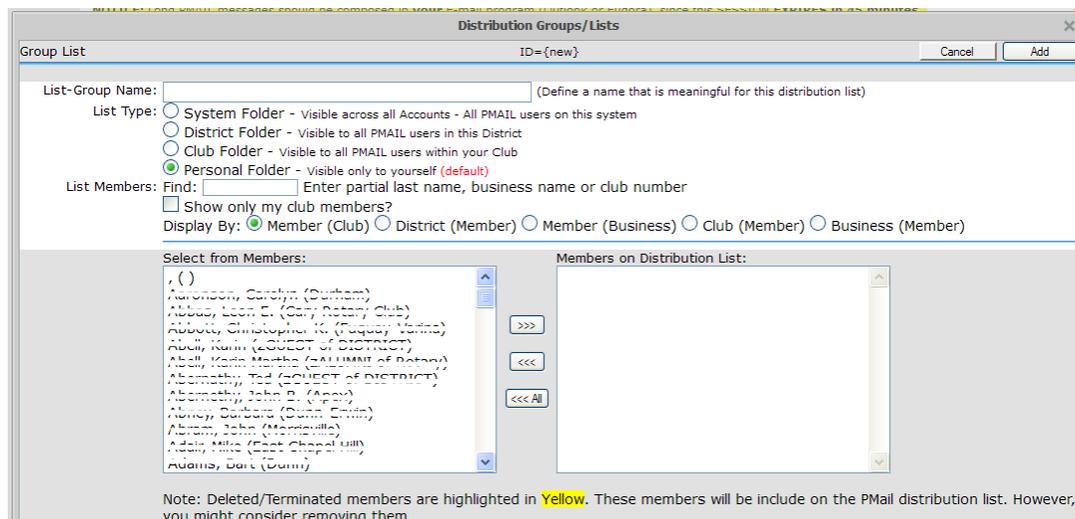
PMail Distribution Groups are similar to PMail EZ-Link templates, but operate slightly differently -- mainly because of security reasons to control access to email addresses. Distribution Groups can be created at the District (Account), Club (Chapter) or Personal levels depending on your security level within the system.

- **District** – level lists are available only to level 6+ members. This means that a District/Account list can be created with members across the district but any members with security level 5 or below will not be able to View or use this list. Any level 6+ can View, Add, Edit, and/or delete from any District/Account list.
- **Club** – level lists are available only to level 4+ members. Each club has its own set of club-level distribution lists. All level-4+ members of a club can View, Add, Edit and/or Delete from the Club/Chapter lists.
- **Personal** – lists are personal and can only be seen by individual members who create them. Depending on the Member's security level, lists can only be created from the Member's club listing (Level 1-3) and/or from the entire District/Account (Level 6+)



### 5.1 Adding a New Distribution List

To create a new distribution list, click on the red 'plus' icon at the top right of the PMail Groups screen. This will bring up a dialog window similar to:



# Personalized Email (PMail)

This dialog window should look similar to the Add Committee dialog. The List-Group Name must be entered, the List Type (District/Account, Club/Chapter, or Personal) must be selected and the members you want on the list need to be selected from the list on the left to the list on the right. To do this, click on a members name to highlight it, then click the ">>>" button. To highlight/select multiple members at once, hold down the "Ctrl" button on your computer and click the names with your mouse. When you are done, click the ">>>" button.

Click the Save button to create the new distribution list. The list should appear under the List Type folder you designated.

## 5.2 Using a Distribution List

Once you have created a distribution list, it will sit under the PMail Groups tab in the List Type folder you designated. To automatically input the distribution list into the PMail you wish to send to them, you must first have the PMail open in the Compose tab.

Next, open the PMail Groups tab. Find the distribution list you wish to use and select the radio button next to the list's name. A pop-up will open giving you options on how you want to add the list to the PMail. Clicking OK will clear any names already in the PMail TO list and only those on the current distribution list will be placed in the TO field. Clicking CANCEL will allow all named on this distribution list to be added to any names already existing in the field – this allows you to send a PMail to multiple distribution lists at once.



After selecting one of these options, you will automatically be brought back to the Compose tab and the TO text field will be filled with all the names on the distribution list.

## 5.3 Viewing a Distribution List

Under Action, click on the View link to obtain a list of members that are on the distribution list.

1 Personal distribution groups(s) found

Personal Distribution Group	Modified	List Size	Action
<input checked="" type="radio"/> Carnival Event	07/12/11 02:57 PM	10	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

Distribution Groups/Lists

Group List ID=1 Cancel

List-Group Name: Carnival Event

Member Name	Member Type	Club Name	District
Abbott, Christopher K. (N)	Active	Fuquay-Varina	7710
Adell, Karli Martina (N)	Alumni	zALUMNI of Rotary	7710
Adair, Mike (N)	Active	East Chapel Hill	7710
Adelman, Richard (N)	Active	North Raleigh	7710
Aguilar, Newman (N)	Active	Durham	7710
Ahern, Bonnie Danette (N)	Alumni	zALUMNI of Rotary	7710
Alphin, Peggy M. (N)	Active	Dunn-Erwin	7710
Andrews, Russ Ray (N)	Active	Cary-Kildaire	7710
Avitabile, Steven (N)	Active	Morrisville	7710
Balle, David (N)	Active	Cary-Kildaire	7710

Note: Deleted/Terminated members are highlighted in **Yellow**. These members will be include on the PMail distribution list. However, you might consider removing them.

# Personalized Email (PMail)

If any Member is highlighted in **Yellow**, this Member was terminated sometime in the past and is a candidate to be removed from the list. The system does not automatically do this. Thus, periodic review of the distribution lists is highly recommended.

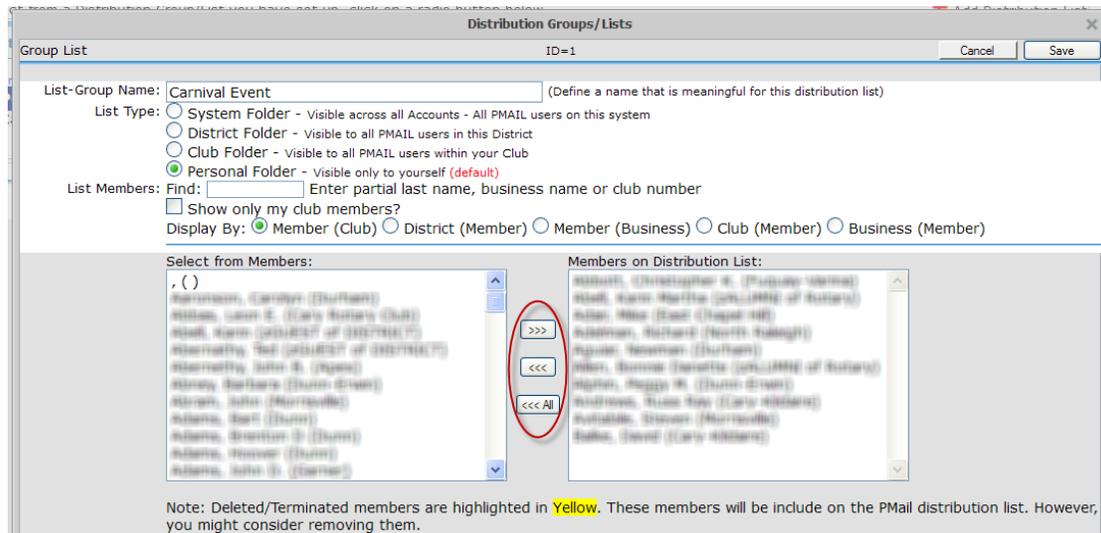
## 5.4 Editing a Distribution List

To Edit members from a list, click on the Edit link under Action.

1 Personal distribution groups(s) found

Personal Distribution Group	Modified	List Size	Action
Carnival Event	07/12/11 02:57 PM	10	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

The pop-up dialog is exactly the same as the Add dialog window. Add members to the distribution list by highlighting their name from the left and click the ">>>" button to move to the right. Remove members by highlighting their name on the right side and click the "<<<" button to move them to the left side.



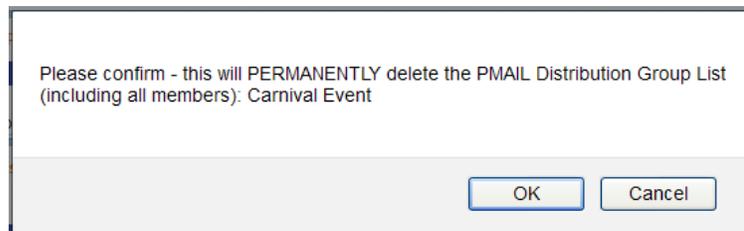
## 5.5 Deleting a Distribution List

To Delete a distribution list, click on the delete link under Action.

1 Personal distribution groups(s) found

Personal Distribution Group	Modified	List Size	Action
Carnival Event	07/12/11 02:57 PM	10	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

A confirmation pop-up will be presented and if OK is clicked, the distribution list and all members that are on that list will be deleted.



There is no recovery from this operation, short of recreating the distribution list.

## 6. PMail Tracking

Tracking (or some call it Campaign Tracking) allows users to track the results of PMAILs that are sent out. The most recent 45-days of PMail sends (campaigns) are shown on the list under the Tracking tab.

EZLink Templates   Compose   PMail Groups <b>Tracking</b>								
PMail Campaign Tracking								
The most recent 45-days of PMail sends (campaigns) are shown below. The No Read (and % Read) statistics are approximate numbers of PMAILs opened (not necessarily read) by members. Your read rate could be higher than what is reported. What is reported is a positive indication of PMAILs being opened. PMAILs opened off-line or on PDA's with no connectivity will not be included in the statistics below. Also, some email programs do not allow for open tracking and others allow the recipient to choose whether to allow or disallow open tracking.								
4 PMail Campaigns found								
Subject	No Sent	No Blank	No OptOut	No Read	% Read	Time	Action	
Sent: Monday, July 11 2011   Age: 1 days ago								
<input type="checkbox"/> testing, again	1	0	0	0	0.00%	11:48 PM	View	Delete
<input type="checkbox"/> Test	1	0	0	0	0.00%	11:46 PM	View	Delete
Sent: Friday, July 08 2011   Age: 4 days ago								
<input type="checkbox"/> tester tester	1	0	0	0	0.00%	03:44 PM	View	Delete
<input type="checkbox"/> test	1	0	0	0	0.00%	12:15 AM	View	Delete

The tracking will summarize:

- No Sent -- the number of members (TO) sent this email.
- No Blank - the number of blank or missing emails encountered when sending this PMail
- No OptOut - the number of members that Opted out of receiving PMAILs
- No Read - the number of members that opened (and presumably read) the PMail that was sent to them.
- % Read - the percentage of PMAILs opened and read
- Time - the time the PMail was sent.

 **Note:** The No Read (and % Read) statistics are approximate numbers of PMAILs opened (not necessarily read) by members. Your read rate could be higher than what is reported. What is reported is a positive indication of PMAILs being opened. PMAILs opened off-line or on PDA's with no connectivity will not be included in the statistics. Also, some email programs do not allow for open tracking and others allow the recipient to choose whether to allow or disallow open tracking.

After 45-days, the system will automatically delete the statistics, keeping only the most recent 45-days of activity.

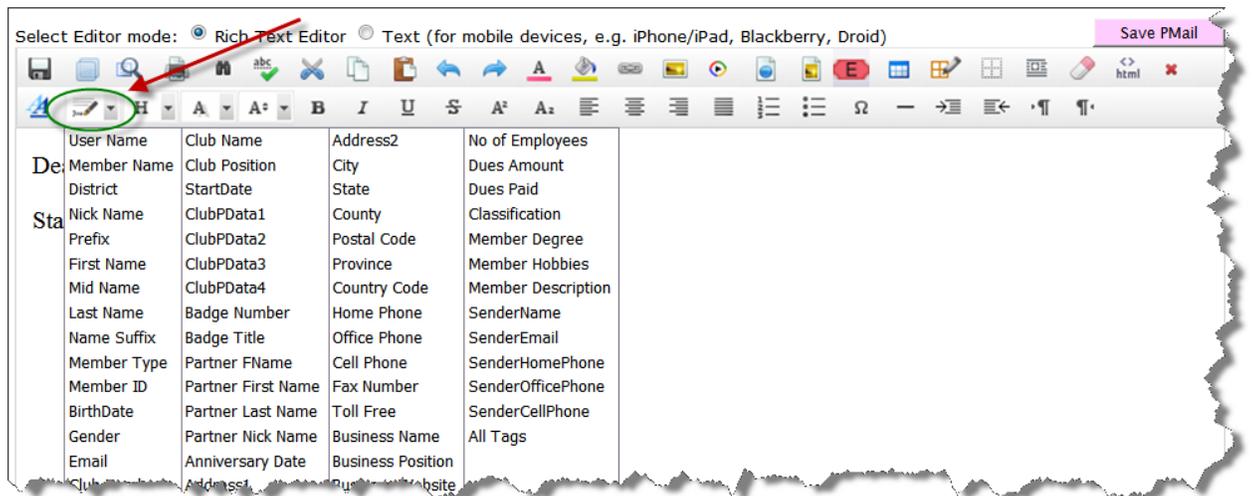
## 7. PMail Editor Toolbar

The secret sauce for composing a professional PMail is understanding all the tools that you have available to you, plus some time and patience to construct a good PMail message. This section of the document will cover some of the major toolbar options in the PMail editor. The remainder of the Editor options are summarized in the attachment at the end this document.

### 7.1 Tags

The personalization part of PMail comes from using Tags. Tags are variables that can be inserted into a PMail message that are translated during the send process as the PMail is sent to each member. All variables are in the form: `{%VariableName%}`

The available tags for a message can be selected from the Tag pull-down as shown below.



Depending on where PMail was invoked from, the list of available Tags (variables) will change. PMail coming from a club link will contain Member and Club information. PMail invoked from a Committee link will have Committee information. Likewise, Event links will contain Event information.

When highlighting your message content, it is mandatory that the variables name (e.g., `{%VariableName%}`) remain intact. For example, to add a BOLD attribute to a variable, it is important to select the entire variable (bracket to bracket) to make the variable bold. Selecting part of the variable will have undesirable consequences. Meaning, at the HTML level, the editor will insert a `<strong>` tag (this is the HTML equivalent of making something bold) in the middle of the tag. So the Tag might look like:

```
{%<STRONG>FName%}, <BR></STRONG>
```

When we go to translate the variable and search for `{%FName%}` we do not find the variable because of the `<strong>` in the middle the variable.

A complete list of the Tag metadata is available in Appendix A to this document.

### 7.2 Full Screen

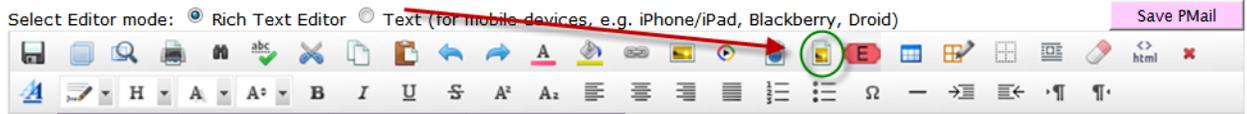
Click the Full Screen ICON to compose the page in full screen mode. This will provide a larger document area in which you can compose your PMail. Click the Full Screen ICON again to return to normal page mode.

# Personalized Email (PMail)

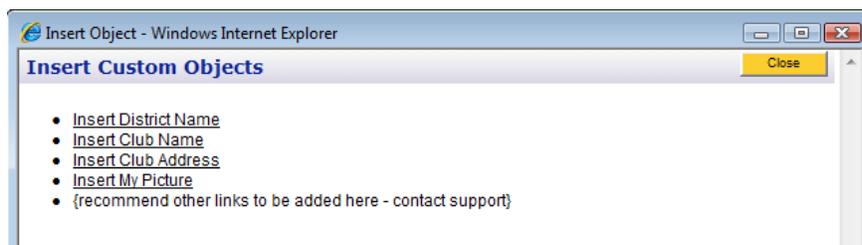


## 7.3 Objects

Objects allows a user to insert common custom objects into a PMail.



Clicking on Resources link will bring up the custom object window, where one item can be selected.



 **Note:** We are looking for suggestions/recommendations for other objects to include on this list. Do you have one? -- Send a note to Support.

## 7.4 Event Links

Use the E-Ticket ICON to insert event links into your PMail. Event links can provide your members with a hyperlink that will log them into the system and take them directly to the event to register.



 **Note:** Level 6+ members are required to login for security reasons. Level 5 and below will be logged into DaCdb and taken directly to the event registration screen for the selected event.



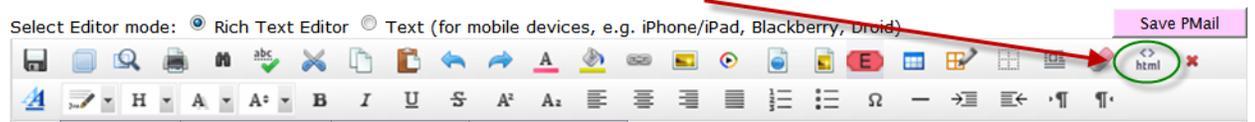
Selecting one of the events will put a one-click registration link and ICON into your PMail.

 [Register NOW](#) for **Zone 33 - TRF Leadership Training Seminar - June 04, 2010**

 **Note:** Your cursor must be positioned in the body of the message where you want the link to appear. If the ICON/Link above does not seem to work, click into the body of your message and try again.

## 7.5 HTML

All Pmails sent from DaCdb are sent as HTML. Using HTML, incredibly complex Pmails can be created containing styled text, images/graphics, audio and video links.



In general, using the Editor toolbar features, Pmails can be created without any knowledge of HTML. In reality, you are going to want to know some HTML basics and you will want (or need) to use the HTML ICON to modify or add to the HTML that is being generated under the cover by the Editor.

There is no doubt – that building a professional template may take hours and be a very frustrating experience – especially for the first time user. However, once the template is built and saved, it can be reused many times over.

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## 8. PMail Template Examples

PMail templates can range in simplicity from PMail #01- [Dear Rotarian - then your message.htm](#)

```
remember to update the SUBJECT, and delete this line

Dear Rotarian {%FName%},

<NOTE: Your Name, Email and Phone numbers are automatically inserted into your message at the bottom of the page. To enter your message, simply highlight this entire area including the arrows ?<>? at the Beginning and End of this message, and then hit [Delete] key. Then, just begin typing your message. You may also remove the automatically inserted lines below, if you desire, and put in your own personal closing information.>

Yours in Rotary Service,

{%SenderName%}

Email: {%SenderEmail%}
HPhone: {%SenderHomePhone%}
OPhone: {%SenderOfficePhone%}
```

To very professional looking PMAILs (e.g., DG Newsletters), which might look something like:

**Rotary District News**  
THE FUTURE OF ROTARY IS IN YOUR HANDS  
Aug/Sept 2009

**District Links**

- [Rotary District](#)
- [Rotary International](#)
- [District Calendar](#)
- [DaCdb Log In](#)
- [DaCdb Info](#)
- [Club Resources](#)
- [Suggestion Box](#)

**ROTARY YOUTH EXCHANGE**

Every year over 8,000 students from 80 countries around the world have the experience of a lifetime by being exchange

Dear {%FirstName%},

August was Membership Month. Membership in North America is declining. As a result of this decline, our Zones (Districts) were restructured. By the way, our Zone number has changed from 29 to 31. Why is that relevant to us? As has been pointed out by PDG [Photo] brought at our Membership Seminars, as our membership declines, so does our representation on the Rotary International Board.

**District Governor [Photo] with District President [Photo]**

Our District did a great job with membership last year. This was

The basic idea behind creating a template is re-use. Create the template once (spending the effort to do it right) and re-use it time and again on future messages (like weekly and monthly newsletters).

## Appendix A - PMail Metadata (Tags)

Metadata means data about data -- metadata describes other data. It provides information about a certain item's content. To customize an Invoice or to construct a PMAIL to send to members, you must have some understanding about the metadata being used.

The following variable metadata is available for your use. These allowable tags can be found under the Tag pull-down in the PMail editor toolbar.

### 8.1.1 Member Data

Variable	Description
{%Today%}"	Today's date in the format: mmm dd, yyyy
{%UserID%}"	UserID
{%UserName%}	The member's name in the format: last name, first name, middle name suffix
{%FName%}	Member First Name (or Badge Name, when available)
{%Prefix%}	Mr., Mrs., Miss, etc
{%FirstName%}"	Member First Name
{%MidName%}"	Member Mid Name
{%LastName%}"	Member Last Name
{%NameSfx%}"	Member Name Suffix
{%MemberType%}"	Member Type (Active, Honorary, Guest, etc.)
{%MemberID%}"	Member ID – e.g. RI member ID number
{%BirthDate%}"	Member's Birth date, format mmm-dd (no year)
{%Gender%}"	Member's Gender
{%EMail%}"	Member's E-mail
{%AccountID%}"	Members Account or District number
{%ClubID%}"	ClubID (the club number assigned by RI)
{%ClubName%}"	Club Name
{%ClubPosition%}"	Club Position
{%StartDate%}"	Member's start date
{%BadgeNumber%}"	Badge Number
{%BadgeTitle%}"	Badge Title
{%PartnerFName%}	Partner First or Nick Name (similar to Member FName)
{%PartnerFirstName%}	Partner First Name
{%PartnerLastName%}	Partner Last Name
{%PartnerNickName%}	Partner Nick Name
{%AnniversaryDate%}	Anniversary Date (format defined by District/Account)
{%Address%}"	Member Address (composite of address field 1 and 2)
{%Address1%}"	Member Address line 1
{%Address2%}"	Member Address line 2 (if used)
{%City%}"	Member City
{%StateCode%}"	Member State Code (e.g. AZ, CO, FL)
{%County%}"	Member County
{%Province%}"	Member Providence or Other
{%PostalZip%}"	Member Postal Zip (zip code)
{%CountryCode%}"	Member Country Code
{%HomePhone%}"	Member Home Phone
{%OfficePhone%}"	Member Office Phone
{%FaxNumber%}"	Member Fax Number
{%CellPhone%}"	Member Cell Phone
{%TollFreeNumber%}"	Member Toll Free Number

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{%BusName%}	Member's Business Name
{%BusPosition%}	Member's Business Position
{%Employees%}	Number of Employees at Business
{%BusWeb%}	Business Website URL
{%DuesAmt%}	Dues Amount (not used in Rotary)
{%DuesPaid%}	Dues Paid (not used in Rotary)
{% Degree%}"	Degree
{% Hobbies%}"	Hobbies
{% Description%}"	Description

## 8.1.2 Sender Data (Changing the From will Change this Data)

Variable	Description
{%SenderName%}"	Sender's Member Name (FirstName MI FirstName, NameSfx)
{%SenderUserName%}"	Sender's User Name (LastName, FirstName, MI NameSfx)
{%SenderClubID%}"	Sender's Club Number
{%SenderFName%}"	Sender's First Name or Nick Name (if provided)
{%FirstName%}"	Sender's First Name
{%LastName%}"	Sender's Last Name
{%SenderMidName%}"	Sender's Middle Name
{%SenderEmail%}"	Sender's Email Address
{%SenderHomePhone%}"	Sender's Home Phone
{%SenderOfficePhone%}"	Sender's Office Phone
{%SenderCellPhone%}"	Sender's Cell/Mobile Phone
{%SenderName%}"	Sender's AccountID or District Number

## 8.1.3 Originator Data (This is the logged-in User's Information)

Variable	Description
{%SESSION.MemberName%}"	Originator's Member Name (FirstName MI FirstName, NameSfx)
{% SESSION.SenderUserName%}"	Originator's User Name (LastName, FirstName, MI NameSfx)
{%SESSION.SenderClubID%}"	Originator's Club Number
{%SESSION.SenderFName%}"	Originator's First Name or Nick Name (if provided)
{%SESSION.FirstName%}"	Originator's First Name
{%SESSION.LastName%}"	Originator's Last Name
{%SESSION.MidName%}"	Originator's Middle Name
{%SESSION.Email%}"	Originator's Email Address
{%SESSION.HomePhone%}"	Originator's Home Phone
{%SESSION.OfficePhone%}"	Originator's Office Phone
{%SESSION.CellPhone%}"	Originator's Cell/Mobile Phone
{%SESSION.AccountID %}"	Originator's AccountID or District Number

# Personalized Email (PMail)

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## 8.1.1 Invoice Data

Variable	Description
{%Date%}"	Today's date
{%OrgYear%}"	The current org-year (e.g., 2008-09)
{%Invoice%}"	Invoice group (e.g., INV-00001)
{%DueDate%}"	Invoice due date
{%Period%}"	Invoice period
{%Description%}"	Invoice description
{%InvoiceDate%}"	Invoice date
{%SubTotal%}"	Invoice sub-total (excludes tax)
{%SalesTax%}"	Invoice sales tax
{%TotalAmt%}"	Invoice total amount (subtotal + sales tax)
{%InvoiceMsg%}"	Invoice message
{%MemberMsg%}"	Member's individual message

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## Appendix B - WYSIWYG Editor ICONS

The editor toolbar used in PMail is arranged in the following layout.

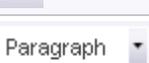


Each of the built-in ICONs have the following meaning. Page Links, Resources, and the E-Ticket (event insert) were described earlier in the document.

Icon	Name	Description
	"Save" button.	Save message so far
	"Full Screen" button.	Enlarge message box to fit entire screen
	"Preview" button.	Preview message
	"Print" button.	Print message
	"Search" button.	Search document for a word or phrase
	"Spell Check" button.	Spell Check (IE Only)
	"Style & Formatting" button.	Style And Formatting
	"Cut" button.	Cut highlighted portion out of message
	"Copy" menu item.	Copy highlighted portion of message
	"Paste" button.	Paste
	"Paste from Word" button.	Paste Word document into message
	"Paste Text" button.	Paste Text
	"Undo" button.	Undo the last step
	"Redo" button.	Redo the last step
	"Text Color" button.	Fore Color – change color of text
	"Text Background Color" button.	Back Color – change color behind text
	"Bookmark" button.	Add a Bookmark
	"Hyperlink" button.	Add a Hyperlink
	"Custom Tag" button.	Custom Tags - variables that are replaced during the send operation
	"Image" button.	Upload/insert image (JPG, GIF)
	"Flash" button.	Upload/insert Flash

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Icon	Name	Description
	"Media" button.	Insert a Media clip into message
	"Internal Link" button.	Internal Link/Page link – insert a link from document loaded into DaCdb system somewhere else.
	"Custom Object" button.	Insert Custom Object/Resource – club name, address, your photo, etc.
	"Table" button.	Table
	"Guidelines" button.	Guidelines
	"Absolute" button.	Absolute
	"Special Characters" button.	Characters for accented letters
	"Horizontal Line" button.	Line
	"Form" button.	Form
	"Remove Formatting" button.	Remove Format
	"Source Editor" button for full HTML editing.	XHTML Full Source
	"Source Editor" button for HTML BODY content editing.	XHTML Source
	"Clear All" button.	Clear everything in the message box
	"Style Selection" button.	Change how text looks
	"Paragraph" dropdown.	Paragraph organization
	"Font" dropdown.	Font Name – name for the style of writing
	"Font Size" dropdown.	Font Size – change height of text
	"Bold" button.	Bold text
	"Italic" button.	Italicize text
	"Underline" button.	Underline text
	"Strikethrough" button.	Strikethrough text
	"Superscript" button.	Superscript
	"Subscript" button.	Subscript
	"Justify Left" button.	Text aligned to the Left
	"Justify Center" button.	Text aligned in the Center
	"Justify Right" button.	Text aligned to the Right

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Icon	Name	Description
	"Justify Full" button.	Justify Full (like newspaper columns)
	"Numbering" button.	Chose numbering style (e.g. regular or roman numerals)
	"Bullets" button.	Chose how you would like Bullet points listed
	"Indent" button.	Indent
	"Outdent" button.	Outdent
	"Left to Right" button.	Left to Right
	"Right to Left" button.	Right to Left