Renewal Reminder

User Guide

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1   INTRODUCTION

Renewal Reminder provides you with the functionality to setup email notifications for users that their security role will soon expire. After installing your renewal / security role reminder module you can now setup scheduled notifications to be distributed to your users who will soon be losing one of their security roles.

The reminder notification service can be used to notify users that their security role will soon expire and encourage them to renew their membership or subscription, take action to keep their current level of security, or simply as a reminder to site administrators when a users security role will be expiring.

Check out all of the features below.

Features:

- **Setup as few or as many reminder notifications as you would like**; each notification is based on both a security role and also the number of days before the users role will expire

- **Advanced email properties can be set** for each notification including the email from, email to, email cc, email bcc, email priority, and tokenized email message

- **Role Expiration (days)** - specify the number of days that the user has left within the security role before they should receive the notification

- **Verification Delay** - you can specify the number of days that the system should not notify the user if they have been previously notified

   - **For example**: if the notification is setup to notify the user that they are losing their security role within 14 days, and you specify a verification delay of 7 days then the user would be notified twice that their role was about to expire (assuming the renewal notification schedule process ran nightly)

   - If you specify the verification delay and role expiration delay both to 14 days then the user would only be notified once

- All notifications are distributed via a scheduled process. You can control the schedule and view detailed logging for each notification message distributed

2 INSTALLATION PROCEDURE

Included in your download are either one (If you only purchased the PA) or two (If you purchased the PA and Source Code) zip files. One zip file is the source code to the application, and the other zip file is the module which you can upload to your site.

When you extract the files, you will notice that it extracts two zip files (**note:** only one if you just purchased the PA).

- **DataSprings_ RenewalReminder_V10_DNN43PLUS.zip** - file for installing "Renewal Reminder" with your DNN portal.

- **DataSprings_RenewalReminder_V10_SourceCode.zip** - source zip file you can use in order to make any changes to the application (**note:** meant for advanced users)

In order to install your "Renewal Reminder" module, login with an account to your DNN site as a host or administrator account. Once logged in, Navigate to the Host menu item, and click on the "Module Definition".
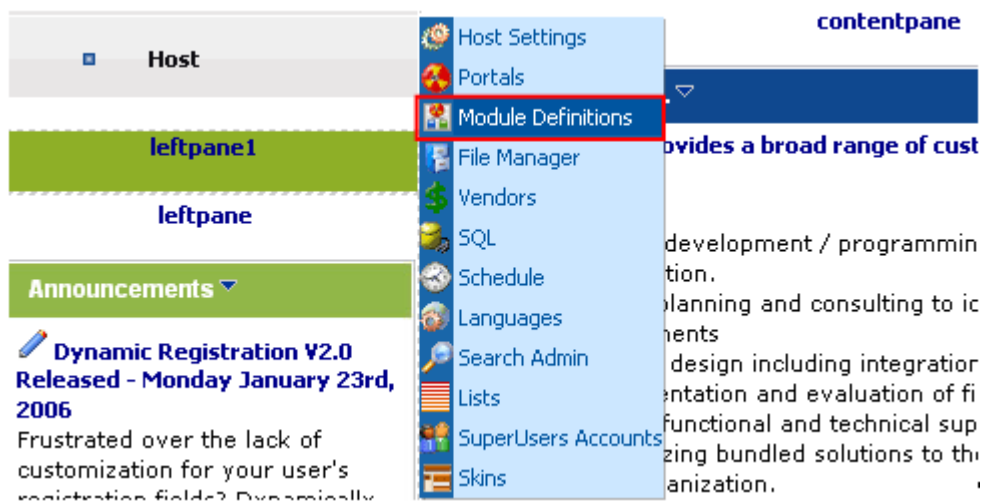

Figure 1: Installation procedure (step 1/6)
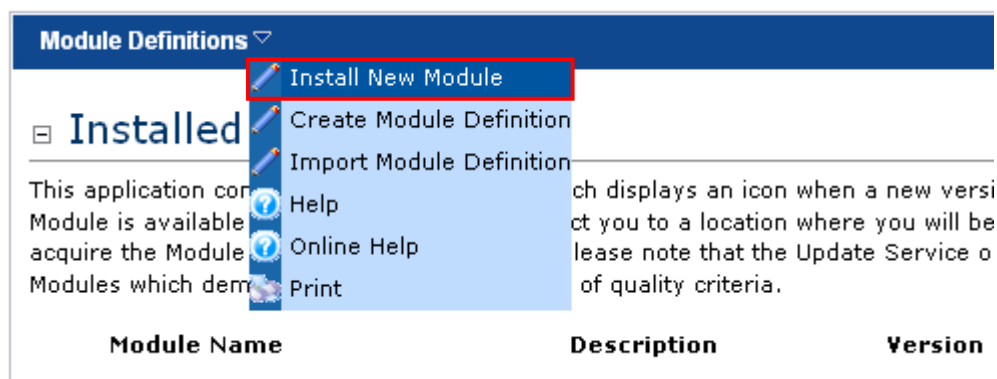
The following screen will be displayed.

Figure 2: Installation procedure (step 2/6)

Click on the "Upload New Module" to continue installing "Renewal Reminder" and the following screen will be displayed.
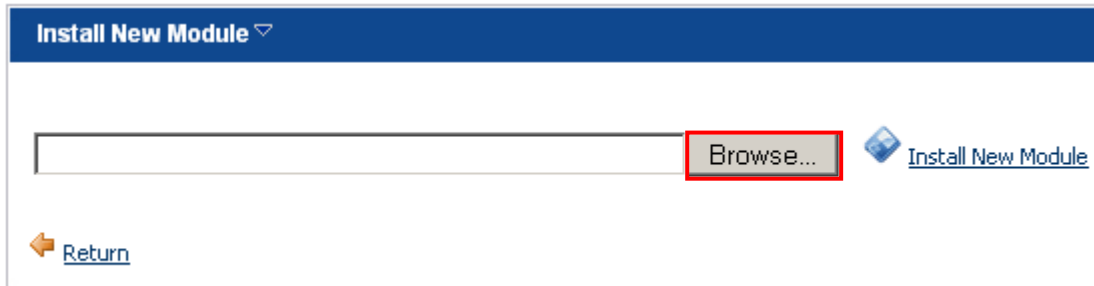
Figure 3: Installation procedure (step 3/6)

Click on the "Browse" button and the dialog window for locating the installation file "**DataSprings_RenewalReminder_Installation.zip**" will be displayed.
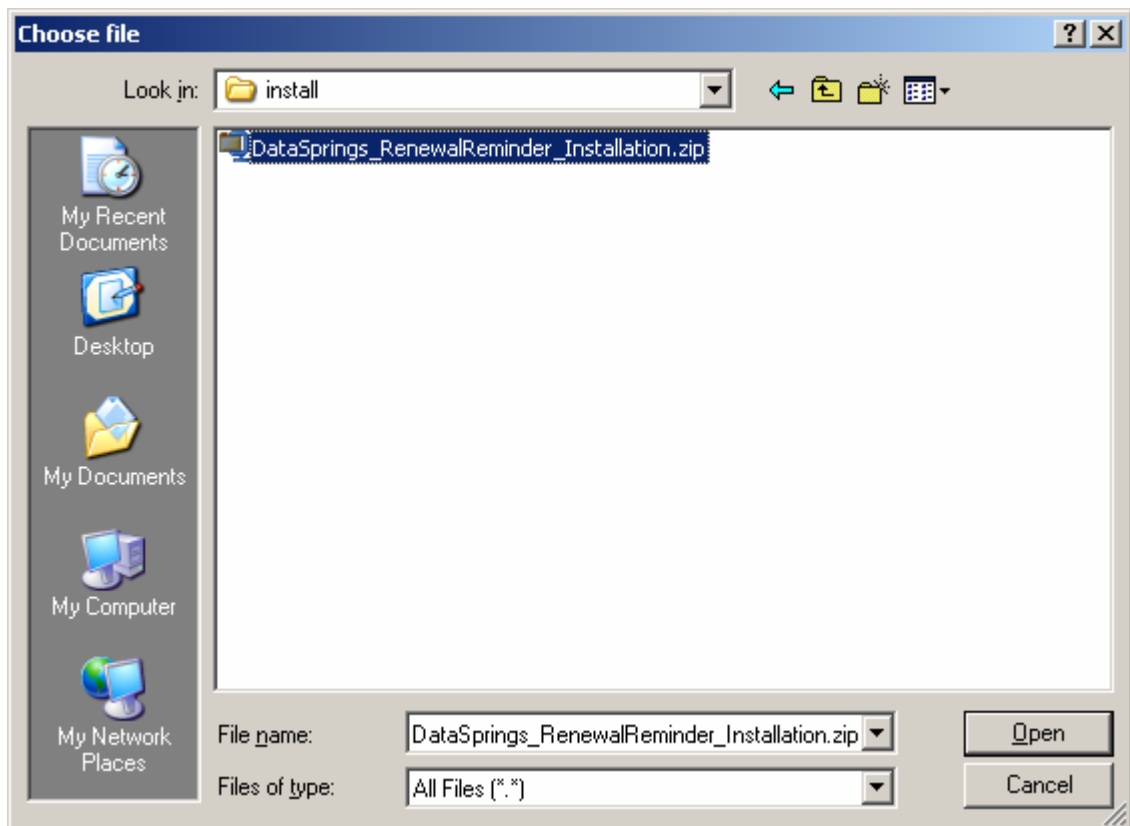

Figure 4: Installation procedure (step 4/6)

Locate the "**DataSprings_RenewalReminder_Installation.zip**" and click on the "Open" button. The following screen will be displayed.
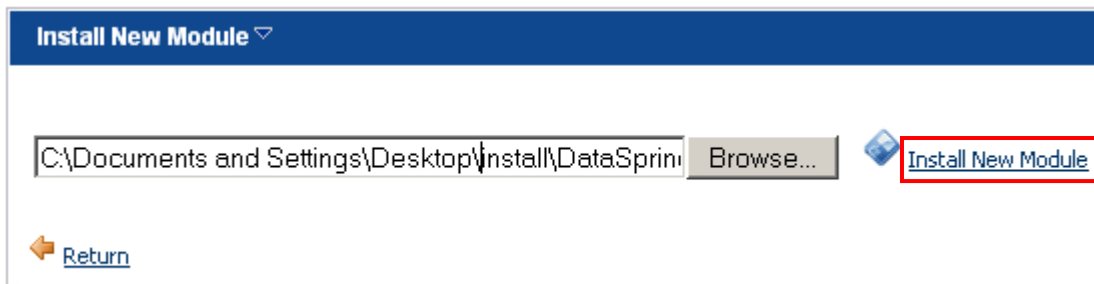
Figure 5: Installation procedure (step 5/6)

Click on the "Install New Module" link. The installation will begin and in couple of moments the screen informing you on successful completion will be displayed.

StartJob Registering DesktopModule
Info   Registering Definitions
Info   Registering Controls
EndJob   Registering finished

EndJob   Installation successfull.

Return

Figure 6: Installation procedure (step 6/6)

Note: please keep track of any errors that appear during the installation. These errors can be helpful if your module has problems.

3   ADDING RENEWAL REMINDER MODULE TO A PAGE

In order to add "Renewal Reminder" module to a desired page follow these steps:

1. Select the "Add New Module" radio button
2. Choose "Renewal Reminder" from the "Module" pull down menu
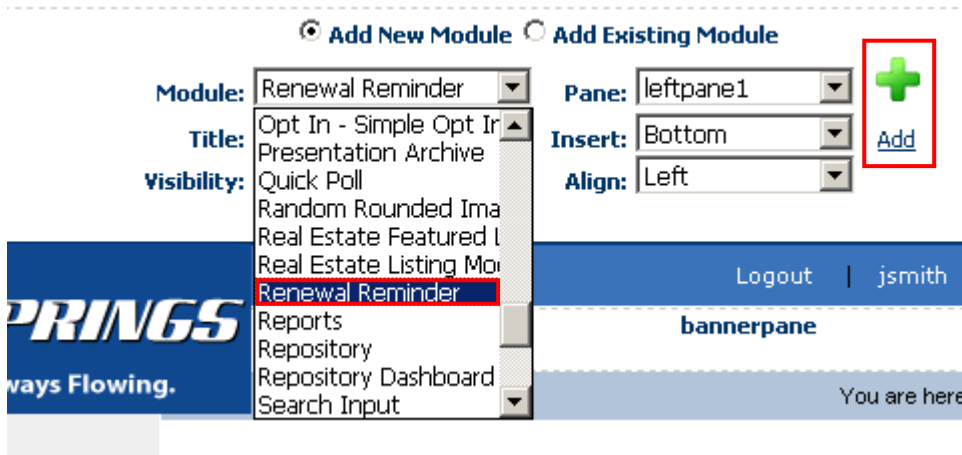3. Click on the "Add" link (or the arrow icon ⬇).

Figure 7: Adding a module to a page

The "Renewal Reminder" module will be added to the page. Click on the arrow next to the title of the module in order to open the main menu.
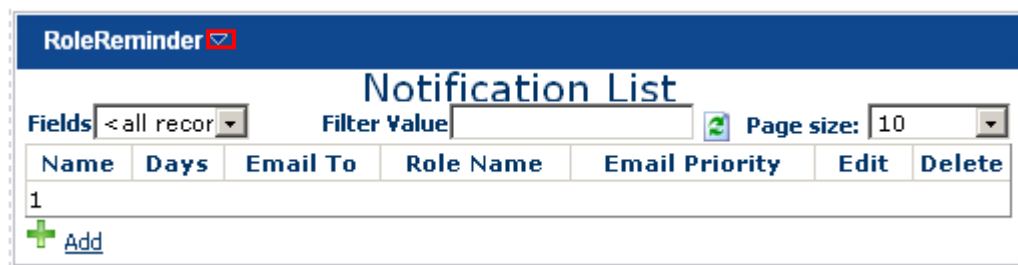

Figure 8: Opening the module main menu

Note: see section 4 for further information on main menu options.

4   RENEWAL REMINDER MAIN MENU

This section of the document will give the definition of the "Renewal Reminder" main menu options. In order to start using the main menu, click on the arrow next to the title "Renewal Reminder".
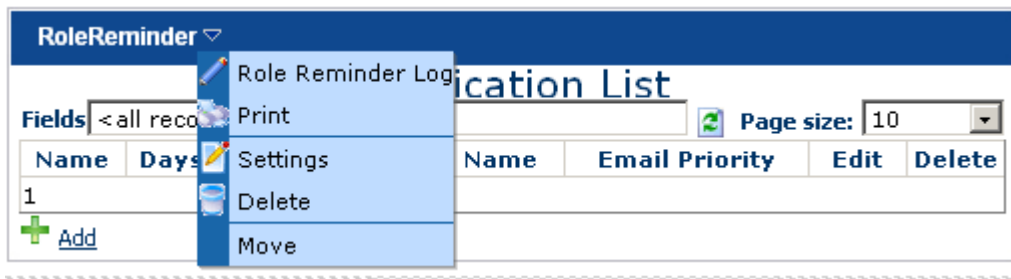
Figure 9: Opening the main menu

The following options are available inside this screen:

- **Role Reminder Log** – option for viewing the role reminder log (see section Error! Reference source not found.)

- **Settings** – option for managing settings (see section **9**)

- **Delete** – option for deleting a module (see section **10**)

- **Move** – option for placing the module in the desired part of the page:
    - Move To leftpane
    - Move To bannerpane
    - Move To contentpane
    - Move To rightpane
    - Move To bottompane
    - Move To bottompane1
    - Move To bottompane2

5   ADDING A NEW NOTIFICATION ITEM

In order to add a new notification item, click on the "Add" link or ✚ within the main page.

Figure 10: Adding a new notification item (step 1/2)

The following screen will be displayed.

Figure 11: Adding a new notification item (step 2/2)

The following parameters are available inside this screen:

- **Name** – enter the desired name for this notification item which will help you differentiate it from other items in the list, this setting is simply used for administrative purposes and is not used for any of the email properties

- **Role / Role ID** – use this pull down menu to select the user Security Role this notification item will be applied to

- **Days** – set the day system should send the notification email by entering the desired number of days prior to expiration

- o **For example:** enter 5 if you want the system to send the notification email 5 days before the role/subscription expires

- o *Tip*: You can setup as many role notifications per role as you would like, so a user could receive 1 notification 30 days out, another 10 days out, and a final one a day before the role expires.

- **Email From** – enter the from email address for the email message

  - o **Tip:** if you leave this setting blank the administrators email address will be used as the from email address

- **Email To** – enter the email address of the user the notification should be sent to

  - o **Tip:** if you leave this setting blank the users email will be replaced at run time, so leaving the email to blank will email the subscriber themselves

  - o **Tip:** The email to property, as well as all email properties, can include tokens based on the listbox along the right hand side of the email message. For example you can specify the email to as $(EmailAddress) or you could separate it semi columns such as $(EmailAddres);YourEmail@yourdomain.com

- **CC/BCC** – use these fields to specify the CC and BCC fields the notification should be sent to

  - o **Tip:** The email cc/bcc property, as well as all email properties, can include tokens based on the listbox along the right hand side of the email message. For example you can specify the email to as $(EmailAddress) or you could separate it semi columns such as $(EmailAddres);YourEmail@yourdomain.com

- **Email Priority** – choose the desired priority of the email message from this pull down menu

- **Email Subject** – choose the desired email subject of the email message

  - o **Tip:** The email cc/bcc property, as well as all email properties, can include tokens based on the listbox along the right hand side of the email message. For example you can specify the email to as $(EmailAddress) or you could separate it semi columns such as $(EmailAddres);YourEmail@yourdomain.com

- **Email Message** – use this text area to enter the body of the email message

  - o **Note:** you can use any of the tokens to further customize the email message (**e.g**. put the [FirstName] inside the body of the email message to address the users by their First name i.e. their first name will be extracted from the database and inserted into the email message

- **Verification Delay** - you can specify the number of days that the system should wait before notifying the user again in case the user has been previously notified

  - o **For example:** if the notification is setup to notify the user that their security role will expire within 14 days, and you specify a verification delay of 7 days then the user would be notified twice within 14 days i.e. once every 7 days

  - o on the other hand if you specify the verification delay and role expiration delay both to 14 days then the user would only be notified once

  - o The verification delay setting is probably one of the most important properties for each role definition, if the scheduler process is setup to run daily you wouldn't want the user to be notified every single day that their role was about to expire, so the verification delay works to make sure that once a user has been notified they will not receive another notification until the verification delay has passed.

After setting the desired parameters, click on the "Save" link and the new notification item will be added.

RoleReminder ▽

Notification List

Fields [All Records ▼]   **Filter Value** [ ] 🔁   **Page size:** [10 ▼]

Name	Days	Email To	Role Name	EmailPriority	Edit	Delete
DSTest Role Reminder	20		DSTest	Low	✏	✕
Arbitrary Role 1 Reminder	30		Arbitrary Role 1	Low	✏	✕
1						

➕ Add

Figure 12: New notification item successfully added

6   VIEWING ROLE REMINDER LOG

In order to view the role reminder log, choose that option from the main menu.
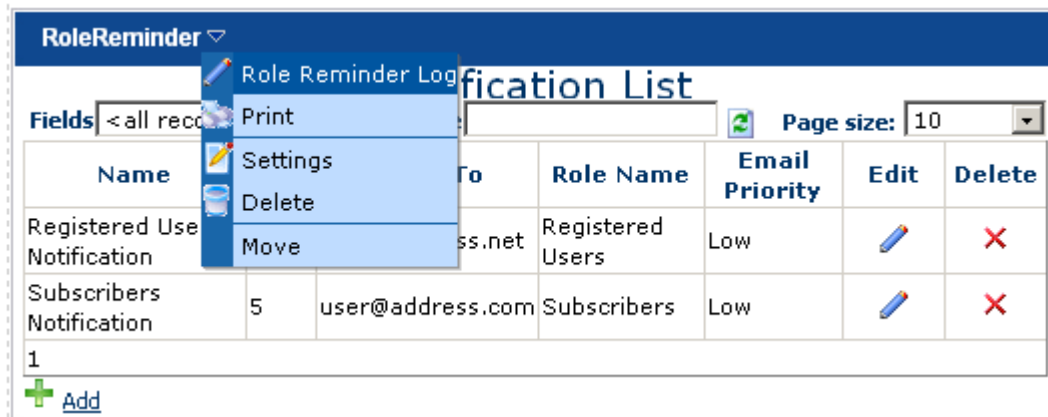
Figure 13: Viewing the role reminder log (step 1/2)

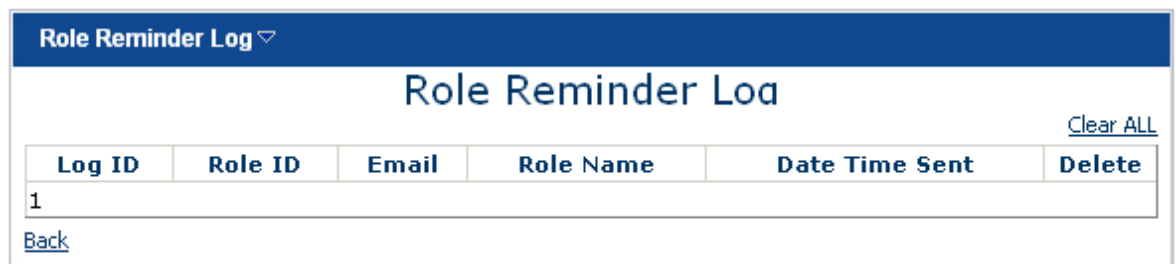The following screen will be displayed.

Figure 14: Viewing the role reminder log (step 2/2)

The following parameters are available inside this screen:

- **Log ID** – ID number of the specific log
- **Role ID** – the security role the item in the log is related to
- **Email** – the email address notification item has been sent to
- **Role Name** – the name of the notification item
- **Date Time Sent** – the date notification item has been sent
- **Delete** – use this option to delete the desired notification item from the log
- **Clear All** – use this option to clear all information from the reminder log

7   MANAGING NOTIFICATION ITEMS

This section of the document will outline all available options for managing notification items.

Figure 15: Managing notification items

The following parameters and options are available:

- **Fields** – choose the field the filter will be applied to from this pull down menu
- **Filter Value** – enter the desired value for the filter, i.e. the keyword the system will use in order to filter the results (**e.g.** "Subscribers"); once you define the desired keyword, click on the refresh icon [icon] to display the results
- **Page Size** – select the desired number notification items you wish to display per page
- [icon] - click on this icon next to the desired notification item to edit its contents (see section 7.1)
- [icon] - click on this icon next to the desired notification item in order to delete it (see section 7.2)
- **Add** – click on this icon to add a new notification item (see section 5)

7.1   Editing a notification item

In order to edit the desired notification item, click on this [icon] icon next to its name in the list.

Figure 16: Editing a notification item

The same screen as when creating the new notification item with all the item parameters will be displayed where you will be able to make the desired changes. See section 5 for further information about the available parameters.

7.2   Deleting a notification item

In order to delete the desired notification item, click on this ✗ icon next to its name in the list.
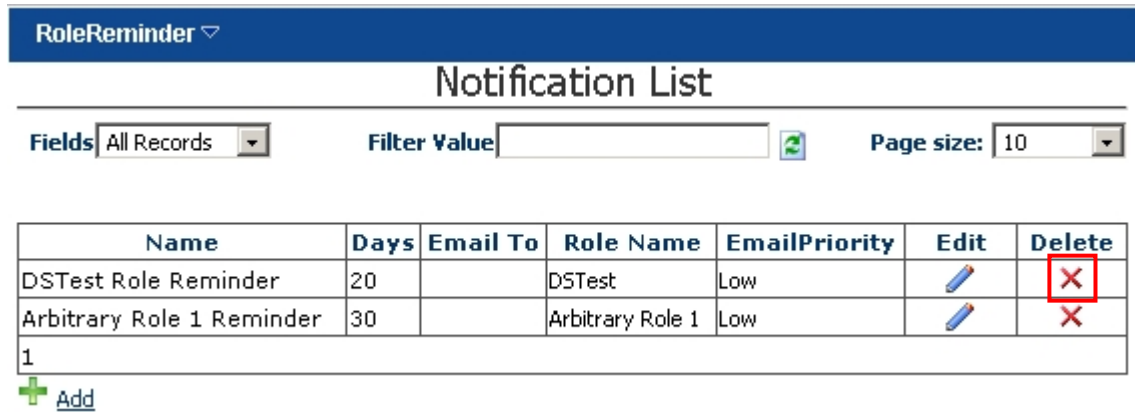

Figure 17: Deleting a notification item (step 1/2)

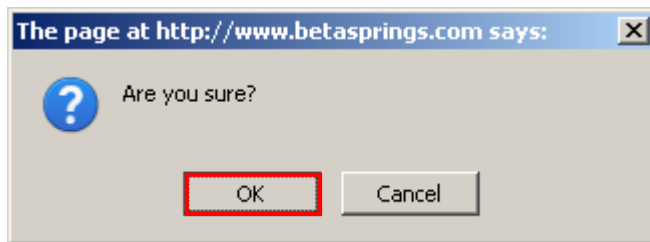The following confirmation dialog will be displayed.

Figure 18: Deleting a notification item (step 2/2)

Click on the "OK" button and the notification button will be deleted.

8 ACCESSING THE SCHEDULER

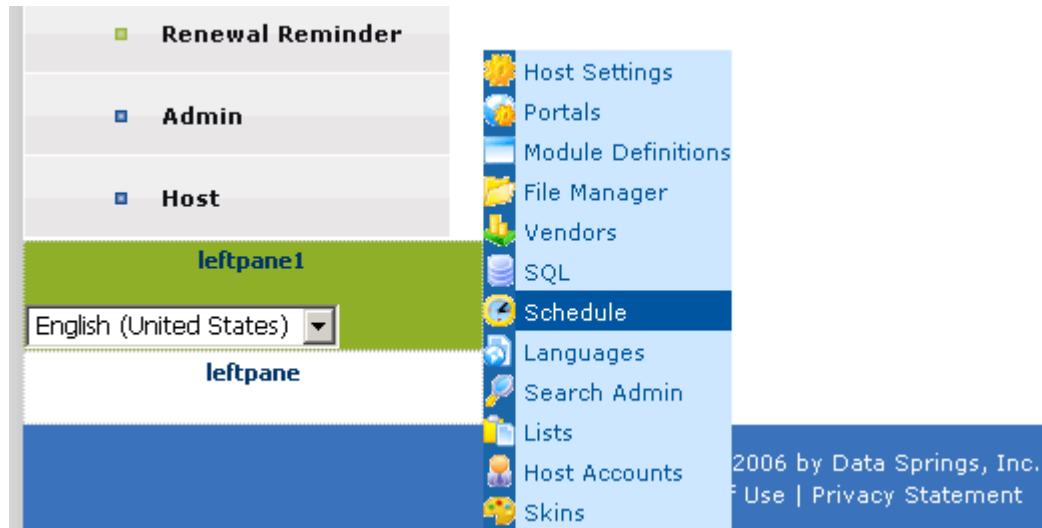In order to access the scheduler, choose option "Schedule" from the "Host" menu.

Figure 19: Accessing the scheduler (1/3)

The following page will be displayed.

Figure 20: Accessing the scheduler (2/3)

Click the "History" link next to the "Role reminder" scheduler and the scheduler history will be displayed.

Schedule History			▾
Description	**Duration (seconds)**	**Succeeded**	**Start/End/Next Start**
DataSprings.DNN.RoleReminder.RoleReminderSchedulerClient,DataSprings.DNN.RoleReminder Start checking. Executing Renewal Reminder For Def:DSTest Role Reminder PortalID: 0 Role ID 16 Renewal ID 1 Collecting Data!: jsmo2 Inside profileprop: Street Inside profileprop: City Inside profileprop: Country Inside profileprop: Cell RoleID: 16 PortalID: 0 UserID: 661 Email From: david@datasprings.com Email To: david@datasprings.com Email CC: Email BCC: Email Subject: jsmo2, please renew your DSTest Role Email Message: HI Smo2, Your membership to DSTest is about to expire. ,,United States, Inside SendMail. HI Smo2, Your membership to DSTest is about to expire. ,,United States, Send notice to: david@datasprings.com Collecting Data!: jsmo1 Inside profileprop: Street Inside profileprop: City Inside profileprop: Country Inside profileprop: Cell RoleID: 16 PortalID: 0 UserID: 660 Email From: david@datasprings.com Email To: david@datasprings.com Email CC: Email BCC: Email Subject: jsmo1, please renew your DSTest Role Email Message: HI Smo1, Your membership to DSTest is about to expire. ,,United States, Inside SendMail. HI Smo1, Your membership to DSTest is about to expire. ,,United States,	6.936	True	S: 4/17/2009 1:30:24 PM E: 4/17/2009 1:30:31 PM N: 4/17/2009 2:30:24 PM

Figure 21: Accessing the scheduler (3/3)

9 MANAGING SETTINGS

In order to start managing the standard module settings choose option "Settings" from the main menu.
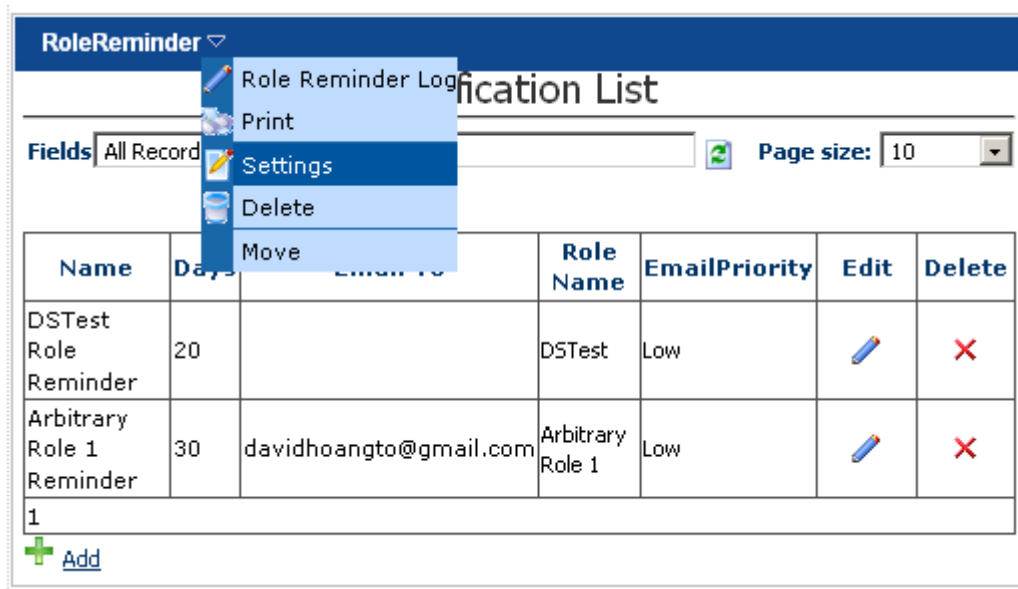

Figure 22: Choosing option "Settings"

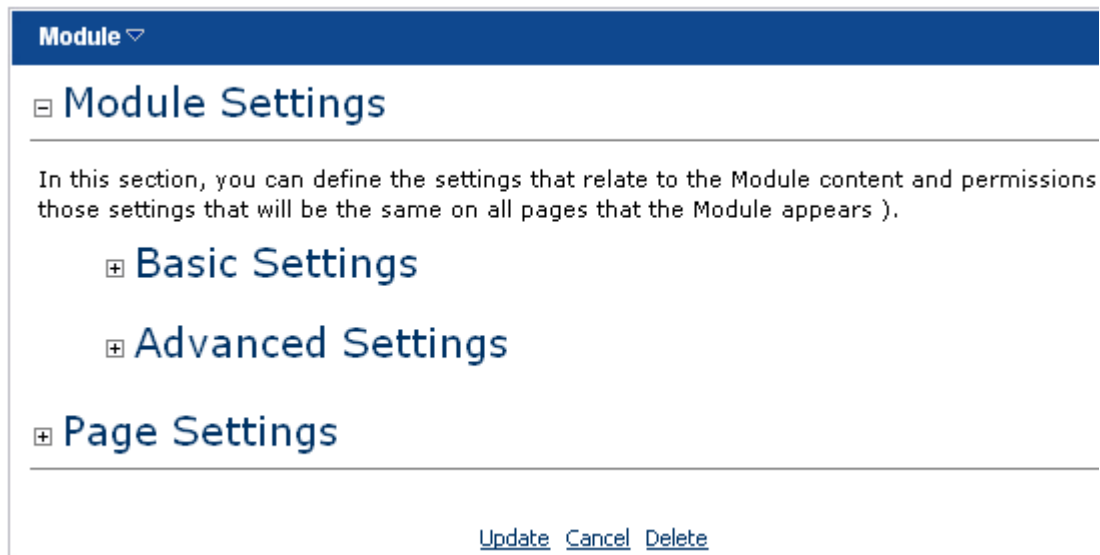The following screen will be displayed.

Figure 23: Managing settings

10 DELETING RENEWAL REMINDER MODULE

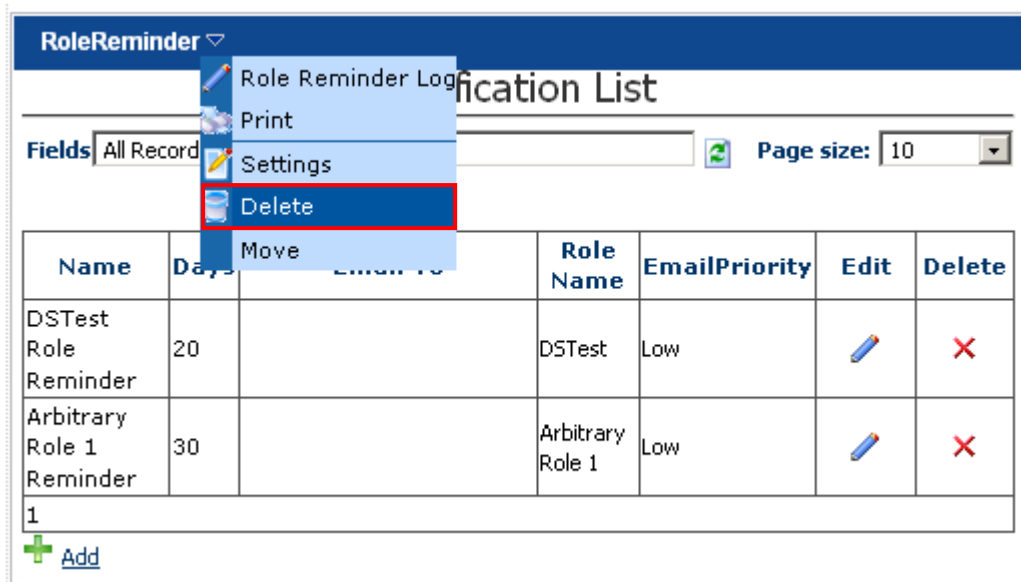In order to delete "Renewal Reminder" module, choose option "Delete" from the main menu.

Figure 24: Deleting Renewal Reminder Module (step 1/2)
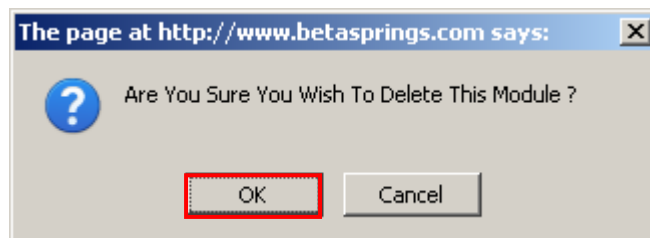
The following screen will be displayed.

Figure 25: Deleting Renewal Reminder Module (step 2/2)

Click on the "OK" button and the module will be deleted.

11 TROUBLESHOOTING

- For the purposes of troubleshooting it is best to always enter an administrator's email address for the email to property. This way the actual user will not be notified.

- Emails not going out? Some email servers require the email "From" to match the domain name. Renewal Reminder uses the same email functions as DotNetNuke, so a good rule of thumb is to try sending an email under Admin, Newsletters with the same email "To" and email "From" as you are attempting for the Renewal Reminder Email

- Detailed logs of each distribution are kept when the scheduler executes. You can find these logs under **Host -> Scheduler** and click 'View History' for the renewal reminder scheduler property

For further assistance, please review the "Renewal Reminder" product forums:

https://www.datasprings.com/Products/ProductForums/tabid/727/view/topics/forumid/28/language/en-US/Default.aspx