



amatra

*One Source, Infinite Communications.*TM

Amatra SmartSourceTM

**User Guide
for
Self Registration**

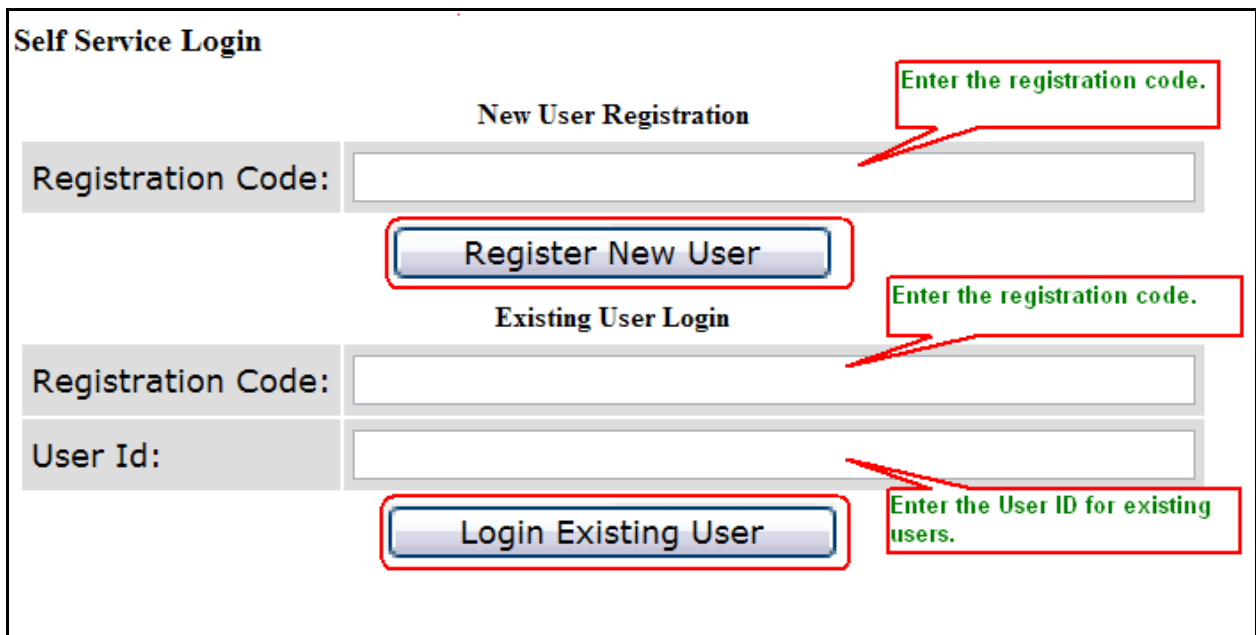
<http://www.amatra.com>

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1. LOGIN AND REGISTRATION

- 1.1. Go to the *Amatra SmartSource™ Self Service Web Page*.
- 1.2. New Users can register by providing the registration code for their organization and clicking on “**Register New User**” button. See *Figure 1: Self Service Login*.
- 1.3. Existing Users can login by providing the registration code for their organization and their User Id and clicking on “**Login Existing User**”.



The screenshot shows a web form titled "Self Service Login". It is divided into two main sections: "New User Registration" and "Existing User Login".

- New User Registration:** Includes a "Registration Code:" input field, a "Register New User" button, and a callout box pointing to the input field with the text "Enter the registration code."
- Existing User Login:** Includes a "Registration Code:" input field, a "User Id:" input field, and a "Login Existing User" button. There are two callout boxes: one pointing to the "Registration Code:" field with the text "Enter the registration code.", and another pointing to the "User Id:" field with the text "Enter the User ID for existing users."

Figure 1: Self Service Login

- 1.4. New Users who are registering will be directed to the *Register New User Page*. See *Figure 2: Register New User*.
- 1.5. The user's need to fill out their details and click on “**Register New User**”.

Register New User

* indicates required fields

Community:	Amatra QA 001
User Id: <small>(User's Id in the Organization) *</small>	<input type="text" value="TESTUSER"/>
First Name: *	<input type="text" value="John"/>
Last Name: *	<input type="text" value="Doe"/>
Preferred Language: *	<input type="text" value="ENGLISH"/> ▼
Zip Code: *	<input type="text" value="98392"/>

Figure 2: Register New User

2. SELF SERVICE MENU

- 2.1. Successfully registered new users and logged in existing users are directed to the *Self Service Menu Page*. See *Figure 3: Self Service Menu*
- 2.2. The Self Service Menu contains 3 tabs titled – ***My Profile***, ***My Communications*** and ***My Group Memberships***.
- 2.3. Users will need to navigate through all these tabs and fill out the relevant information to complete the registration process.

Self Service Menu
Self Service Menu Tabs
Exit

My Profile
My Communications
My Group Memberships

Organization Id:	TESTUSER
Community:	Amatra QA 001
First Name:	John
Middle Name:	
Last Name:	Doe
Gender:	FEMALE
Preferred Language:	ENGLISH
Address 1:	
Address 2:	
Zip Code:	98392
City:	
State:	
Country:	DND
County:	
Region:	
Active:	Y
Latitude:	
Longitude:	
Last Updated:	2011-04-15 13:45:53.573
Created:	2011-04-15 13:45:53.573

Edit Profile

< Previous Tab
Next Tab >

Figure 3: Self Service Menu

3. MY PROFILE

- 3.1. The My Profile Tab allows you to edit your profile information. Click on “**Edit Profile**” button to edit the profile information. See *Figure 4: Edit Profile*.
- 3.2. After editing the profile information click on “**Update Profile**” to submit the form.

Edit Profile

* indicates required fields Exit

User Id: <small>(User's Id in the Organization)</small>	TESTUSER
First Name: *	<input type="text" value="John"/>
Last Name: *	<input type="text" value="Doe"/>
Middle Name:	<input type="text"/>
Organization Name:	<input type="text"/>
Title:	<input type="text"/>
Gender: *	Male ▾
Preferred Language: *	ENGLISH ▾
Address 1: *	<input type="text" value="123 Test Drive"/>
Address 2:	<input type="text"/>
City: *	<input type="text" value="TestCity"/>
State: *	<input type="text" value="TX"/>
Zip Code: *	<input type="text" value="98392"/>
Country: *	<input type="text" value="USA"/>
County:	<input type="text"/>
Region:	<input type="text"/>
Active: *	Yes ▾
Latitude: <small>(Range:-90.000 to +90.000, blank for none)</small>	<input type="text"/>
Longitude: <small>(Range:-180.000 to +180.000, blank for none)</small>	<input type="text"/>

Profile Updated ← On successful update the Profile Updated message is displayed.

Figure 4: Edit Profile

4. MY COMMUNICATIONS

4.1 On registering, a new user will have to navigate to the **My Communications** tab and click on “**Add Communication**”. See *Figure 5: Self Service - My Communications*

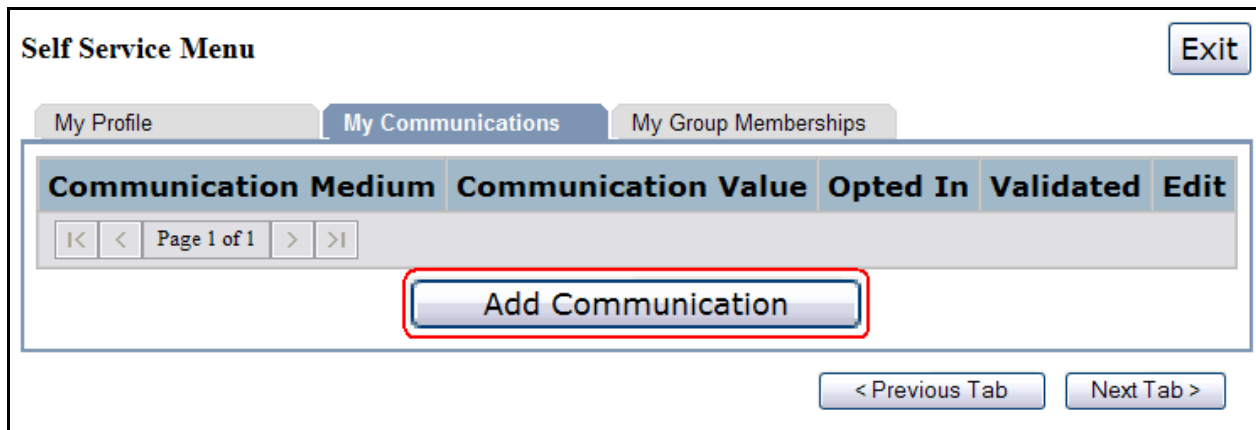


Figure 5: Self Service - My Communications

4.2 The user is directed to the *Edit/Create Communications Page* where the user has to select a communication medium from the drop down. See *Figure 6: Edit/Create Communications*

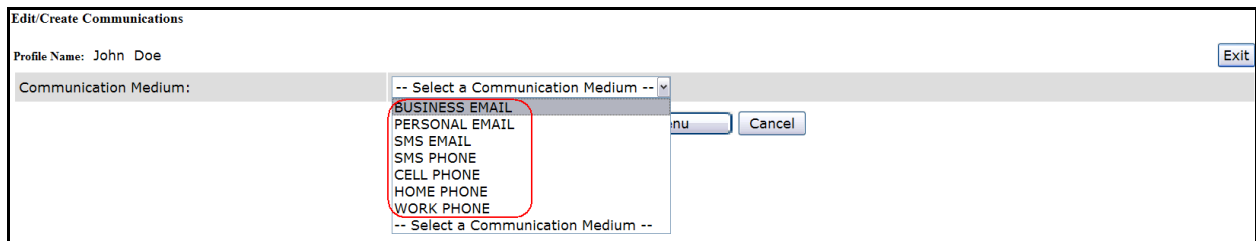


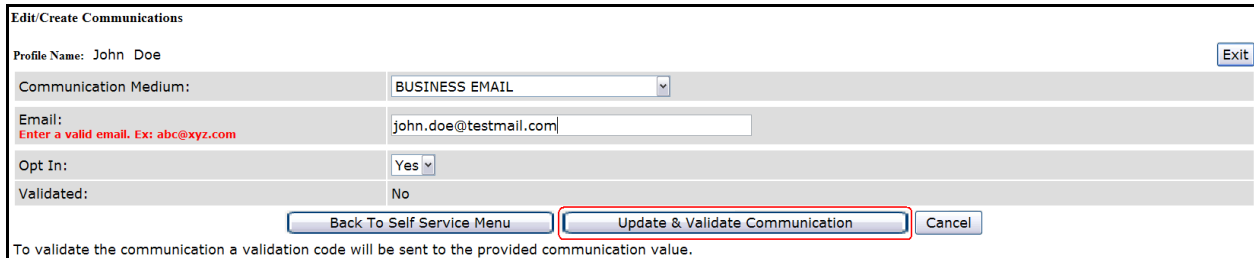
Figure 6: Edit/Create Communications

4.3 The user can add the following types of communication media:

- Email (Business Email/Personal Email),
- SMS (SMS Phone/SMS Email),
- Voice (Cell Phone, Work Phone, Home Phone).

Edit/Create Email Communications

4.4 On selecting a communication medium of type “BUSINESS EMAIL”/“PERSONAL EMAIL” the *Edit/Create Communications Page* prompts the user to enter their email information. The user will need to enter a valid email id, specify their **Opt In** preference (Yes/No) and click on “**Update & Validate Communication**”. If the user elects not to Opt In they will not receive any communication to that id. See *Figure 7: Edit/Create BUSINESS EMAIL/PERSONAL EMAIL Communications*.



Edit/Create Communications

Profile Name: John Doe Exit

Communication Medium: BUSINESS EMAIL

Email: john.doe@testmail.com
Enter a valid email. Ex: abc@xyz.com

Opt In: Yes

Validated: No

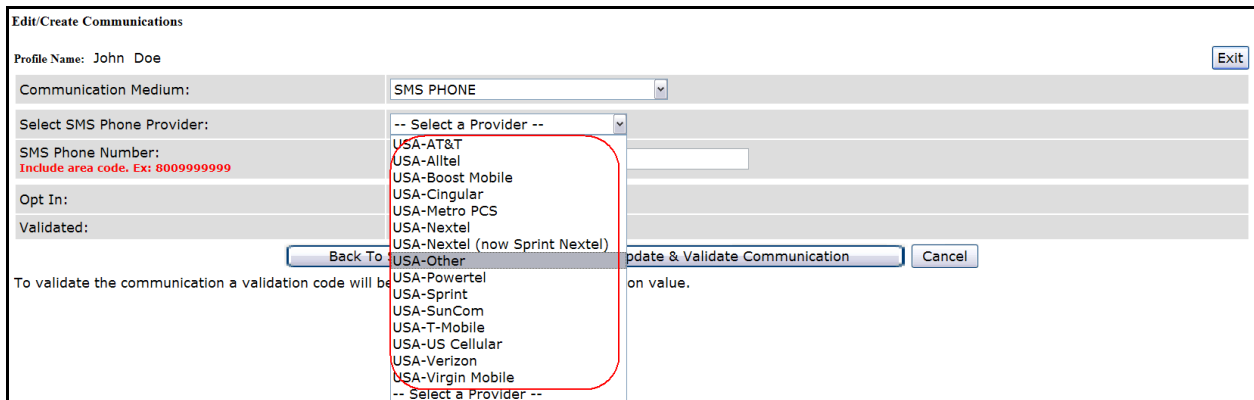
To validate the communication a validation code will be sent to the provided communication value.

Figure 7: Edit/Create BUSINESS EMAIL/PERSONAL EMAIL Communications

- 4.5 On clicking “**Update & Validate Communication**” the user is sent a validation code by email to the specified email id. The user will need to enter this validation code in the *Validate Communication Page*. If the user does not validate their communication or selects not to Opt In they will not receive email notifications to the specified Email id.

Edit/Create SMS Communications

- 4.6 On selecting a communication medium of type “*SMS EMAIL*” or “*SMS PHONE*” the *Edit/Create Communications Page* prompts the user to select their “**SMS Phone provider**” from a drop down list of providers and enter their “**SMS Phone number**”. The user will need to select a valid provider and enter a valid SMS Phone Number.
- 4.7 In case the User cannot find their SMS Phone provider in the drop down list they can select “*Other*” to register an SMS Phone. To register an SMS Email for a provider not specified in the provider list the user will need to email their SMS provider details and SMS Phone number to support@amatra.com . See *Figure 8: Edit/Create SMS PHONE/SMS EMAIL Communications*.
- 4.8 The User also needs to specify their **Opt In** preference (Yes/No) and click on **Update & Validate Communication**. If the user elects not to Opt In they will not receive any SMS communication to that phone.



Edit/Create Communications

Profile Name: John Doe Exit

Communication Medium: SMS PHONE

Select SMS Phone Provider: -- Select a Provider --

SMS Phone Number:
Include area code. Ex: 8009999999

Opt In:

Validated:

To validate the communication a validation code will be sent to the provided communication value.

Figure 8: Edit/Create SMS PHONE/SMS EMAIL Communications

- 4.9 On clicking “**Update & Validate Communication**” the user is sent a validation code by text message to the specified phone number. The user will need to enter this validation code in the *Validate Communication Page*. If the user does not validate their communication or selects not to Opt In they will not receive text notifications to the specified SMS phone.

Edit/Create Voice/Phone communications

- 4.10 On selecting a communication medium of type “CELL PHONE”/“WORK PHONE”/“HOME PHONE” the *Edit/Create Communications Page* prompts the user to enter their phone information. The user will need to enter a valid phone number including the area code, specify their **Opt In** preference (Yes/No) and click on “**Update & Validate Communication**”. See *Figure 9: Edit/Create CELL PHONE/WORK PHONE/HOME PHONE Communications*.
- 4.11 On clicking “**Update & Validate Communication**” the user is sent a validation code to the specified phone number. The user will need to enter this validation code in the *Validate Communication Page*. If the user does not validate their communication or selects not to Opt In they will not receive notifications to that phone.

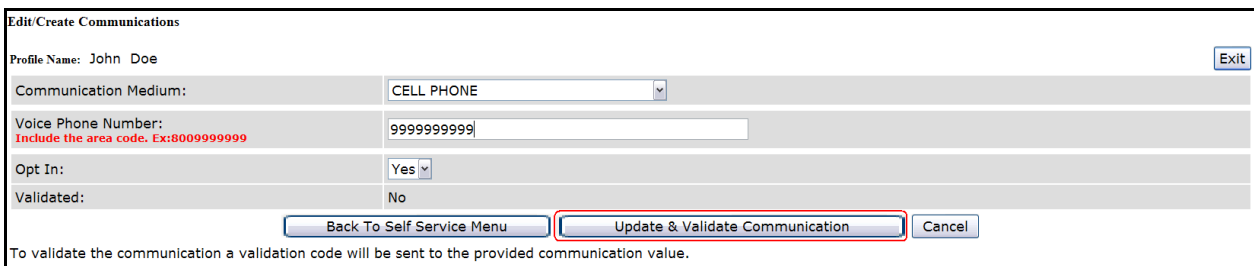


Figure 9: Edit/Create CELL PHONE/WORK PHONE/HOME PHONE Communications

Validate communications

- 4.12 Once a communication is created it will have to be validated. When the user clicks on “**Update & Validate Communication**” button in the *Edit/Create Communications Page* the user is directed to the *Validate Communication Page* and is also sent a validation code to the specified communication. The user is required to enter this validation code in the *Validate Communication Page* and click on **Validate Communication** button. See *Figure 10: Validate Communication*.

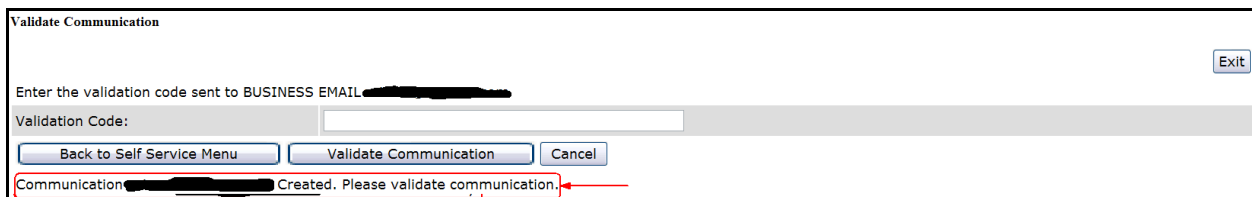


Figure 10: Validate Communication

- 4.13 When the user enters a valid validation code the user’s communication is validated successfully and the message “**Profile Communication <communication value> Validated Successfully**” is displayed. See *Figure 11: Successful Communication Validation*.

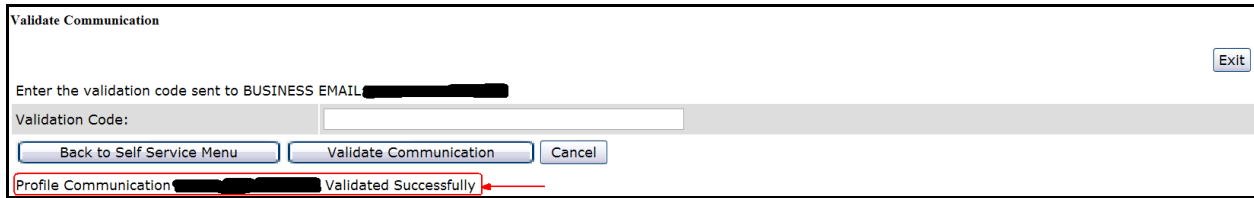


Figure 11: Successful Communication Validation

- 4.14 When the user enters an invalid validation code then the user's communication is not validated and the message "**Invalid Validation Code. Please try again.**" is displayed. See *Figure 12: Invalid Validation Code*

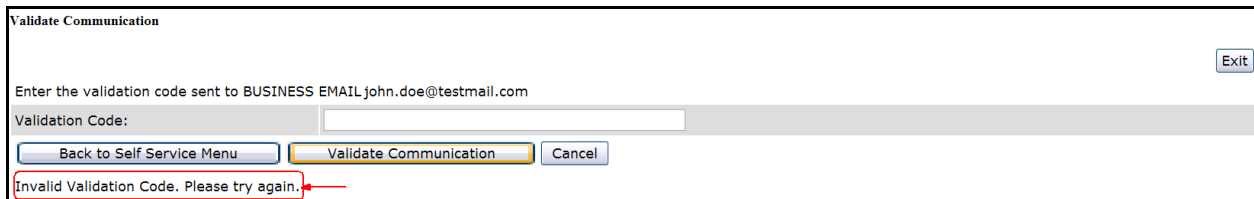


Figure 12: Invalid Validation Code

Edit communications

- 4.15 To edit a communication click on the "**Edit**" communication button next to the communication that has to be edited on the **My Communications** tab. See *Figure 13: Self Service Menu - My Communications*.

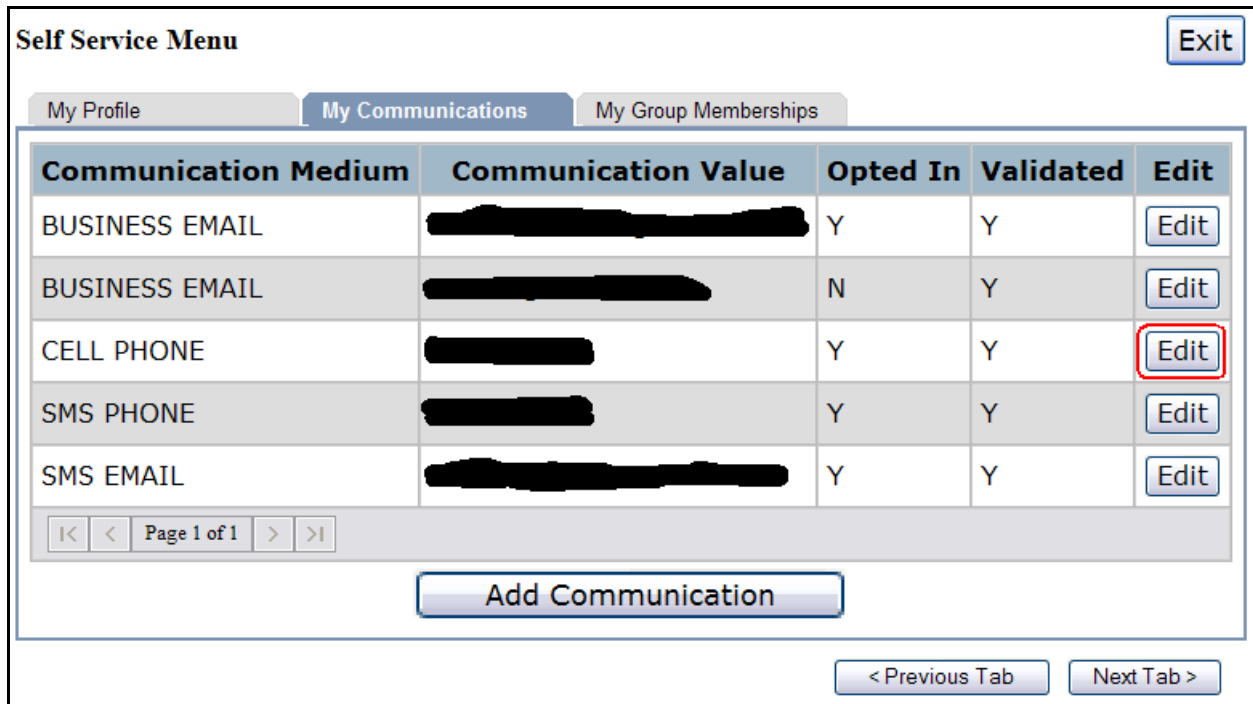


Figure 13: Self Service Menu - My Communications

- 4.16 The *Edit/Create Communication Page* is displayed corresponding to the communication being edited as shown in *Figure 7: Edit/Create BUSINESS EMAIL/PERSONAL EMAIL Communications*, *Figure 8: Edit/Create SMS PHONE/SMS EMAIL Communications*, *Figure 9: Edit/Create CELL PHONE/WORK PHONE/HOME PHONE Communications*.
- 4.17 Once a communication is edited it will have to be validated. When the user clicks on “**Update & Validate Communication**” button in the *Edit/Create Communications Page* the user is directed to the *Validate Communication Page* and is also sent a validation code to the specified communication. The user is required to enter this validation code in the *Validate Communication Page* and click on the “**Validate Communication**” button. See *Figure 10: Validate Communication*.
- 4.18 When the user enters a valid validation code the user’s communication is validated successfully and the message “**Profile Communication <communication value> Validated Successfully**” is displayed. See *Figure 11: Successful Communication Validation*.
- 4.19 When the user enters an invalid validation code then the user’s communication is not validated and the message “**Invalid Validation Code. Please try again.**” is displayed. See *Figure 12: Invalid Validation Code*

5. MY GROUPS

- 5.1 The user needs to select the notification groups they belong to in order to receive the appropriate notifications. Click on the **My Group Memberships** tab to view the list of available groups. The groups for which the check box is already checked are the groups in which the user is already a member. See *Figure 14: Self Service Menu - My Group Memberships*.

- 5.2 The user can choose to become a member by checking the check box next to the group or remove membership from a certain group by un-checking the check box next to the group.
- 5.3 Click on the “**Update Notification Groups Membership**” button to submit updates to group membership.
- 5.4 A message indicating “**Updated Group Memberships**” is displayed. See *Figure 15: Updated group memberships*.

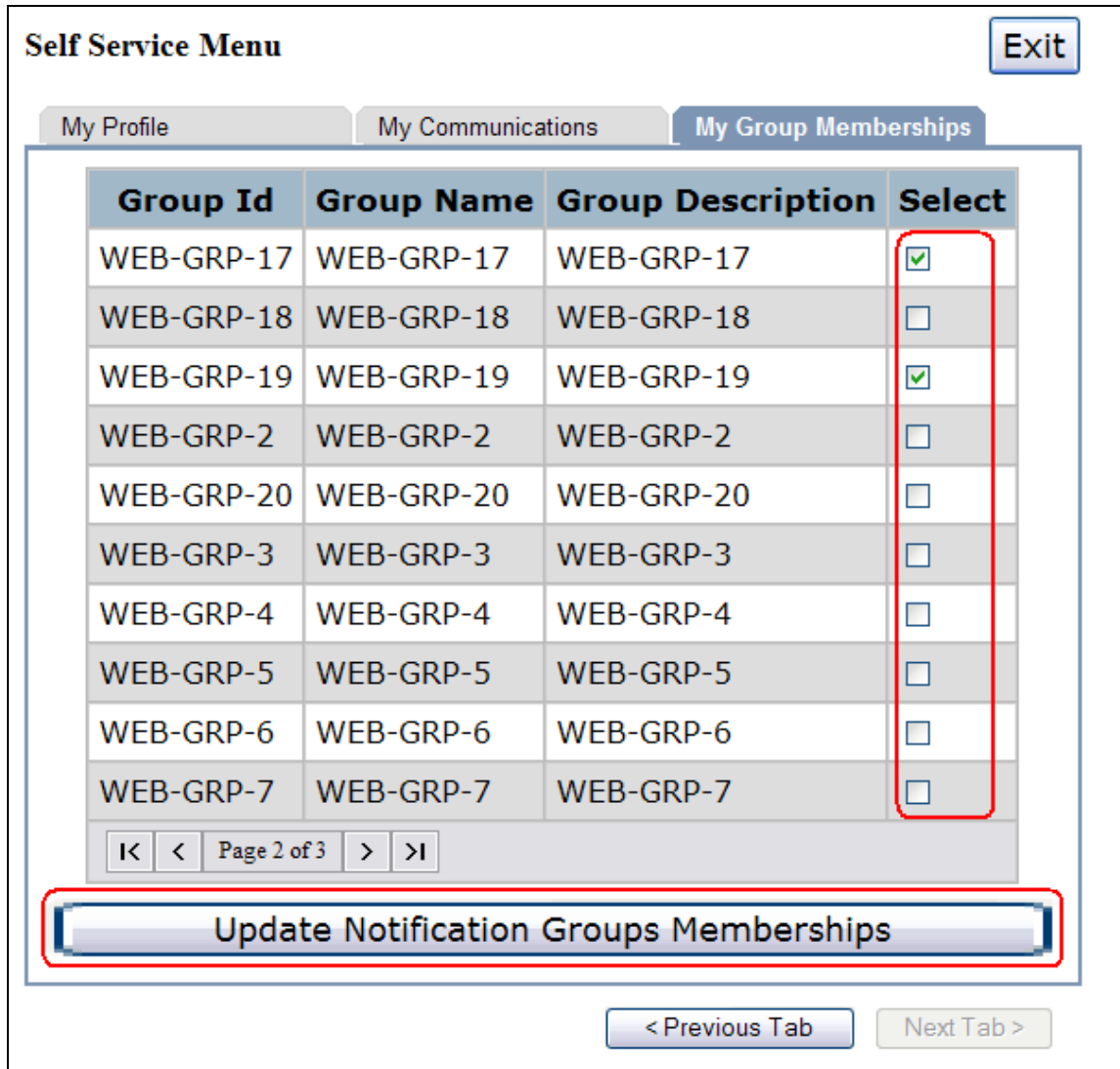


Figure 14: Self Service Menu - My Group Memberships

Self Service Menu
Exit

My Profile
My Communications
My Group Memberships

Group Id	Group Name	Group Description	Select
WEB-GRP-17	WEB-GRP-17	WEB-GRP-17	<input checked="" type="checkbox"/>
WEB-GRP-18	WEB-GRP-18	WEB-GRP-18	<input type="checkbox"/>
WEB-GRP-19	WEB-GRP-19	WEB-GRP-19	<input checked="" type="checkbox"/>
WEB-GRP-2	WEB-GRP-2	WEB-GRP-2	<input type="checkbox"/>
WEB-GRP-20	WEB-GRP-20	WEB-GRP-20	<input type="checkbox"/>
WEB-GRP-3	WEB-GRP-3	WEB-GRP-3	<input type="checkbox"/>
WEB-GRP-4	WEB-GRP-4	WEB-GRP-4	<input type="checkbox"/>
WEB-GRP-5	WEB-GRP-5	WEB-GRP-5	<input type="checkbox"/>
WEB-GRP-6	WEB-GRP-6	WEB-GRP-6	<input type="checkbox"/>
WEB-GRP-7	WEB-GRP-7	WEB-GRP-7	<input type="checkbox"/>

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Update Notification Groups Memberships

Updated group memberships.
←

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Next Tab >

Figure 15: Updated group memberships