amatra

One Source, Infinite Communications.™

Amatra SmartSource™

User Guide
for
Self Registration
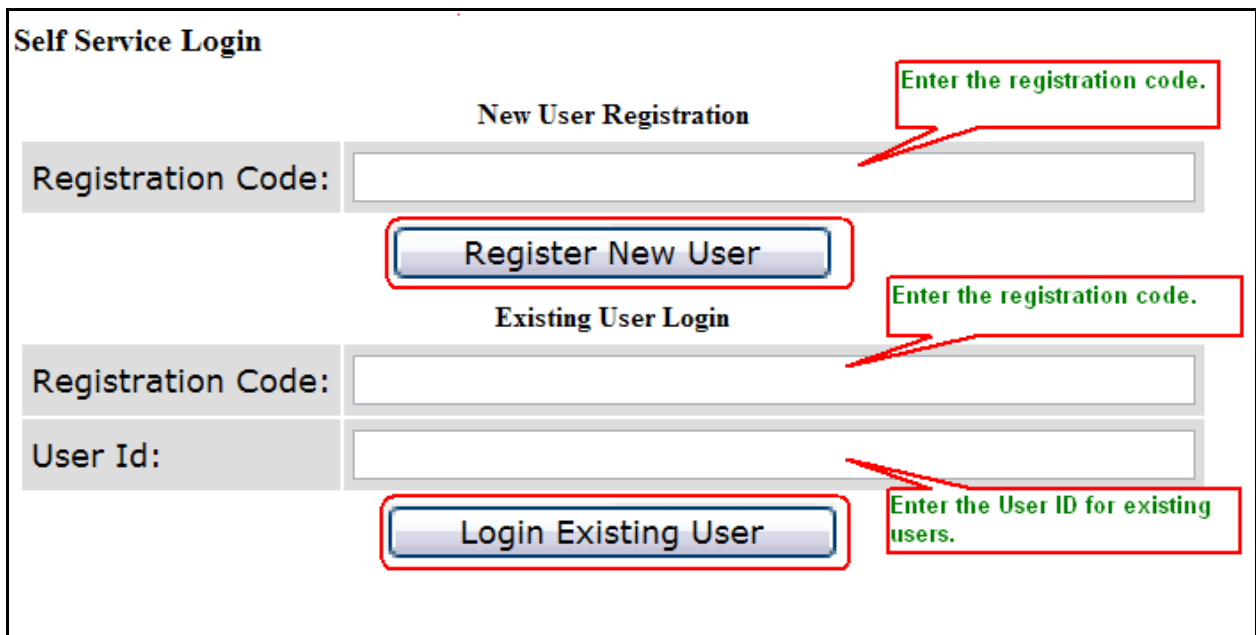
Contents

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"**.

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"**.

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.

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.

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*
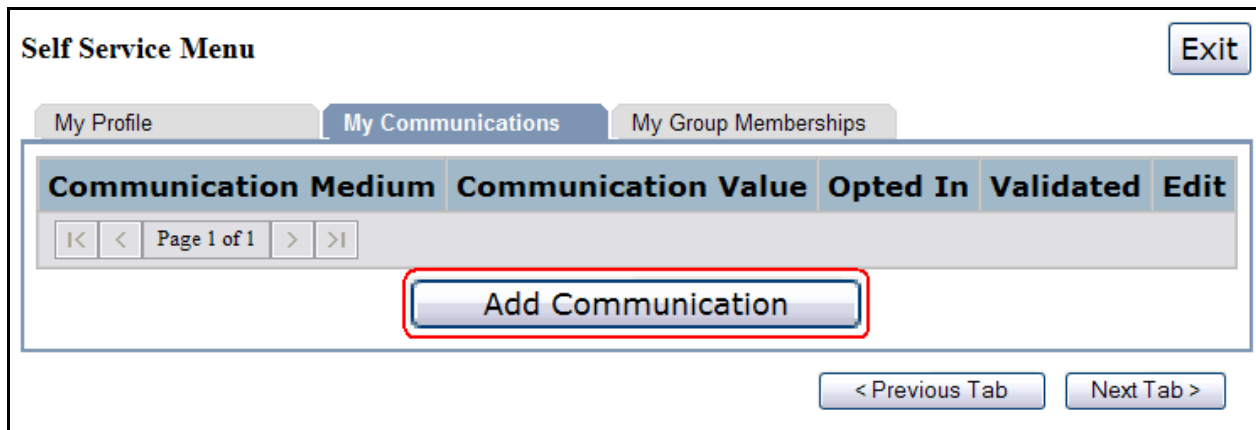
Figure 5: Self Service - My Communications

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*
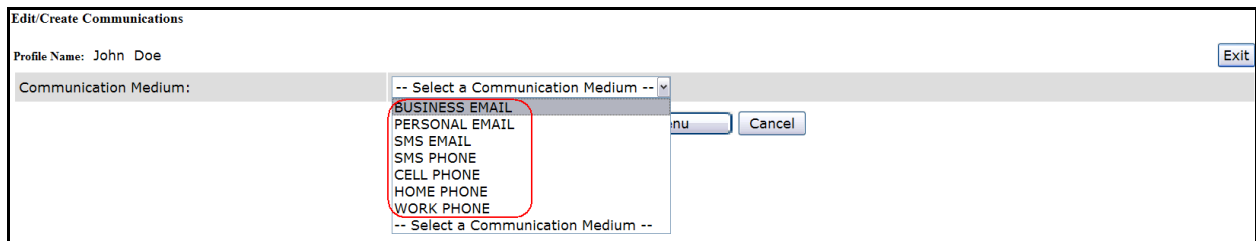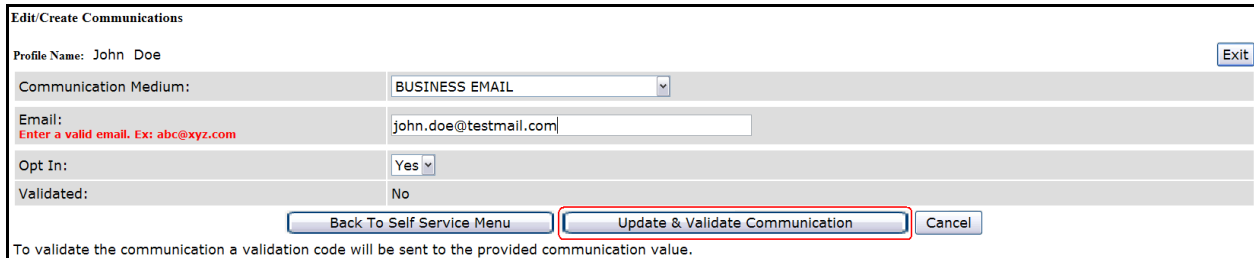
Figure 6: Edit/Create Communications

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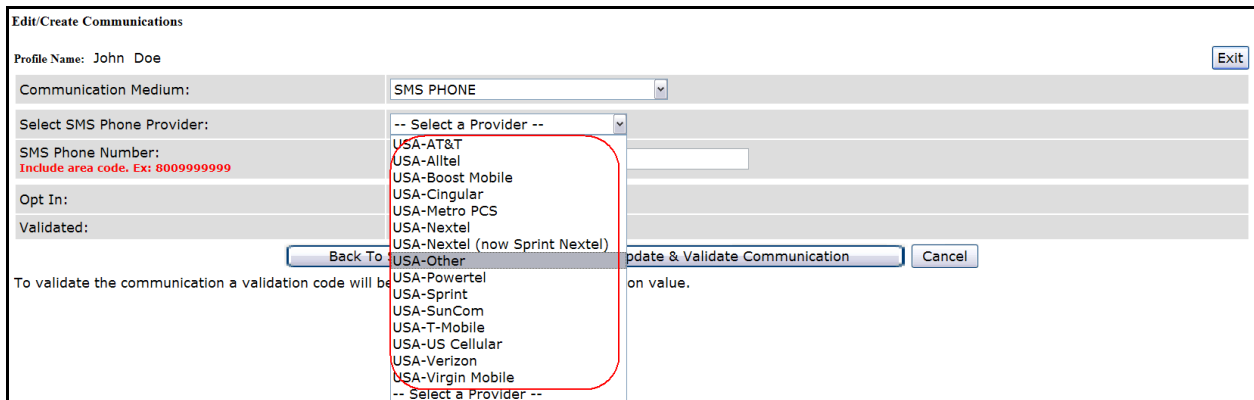
Figure 7: Edit/Create BUSINESS EMAIL/PERSONAL EMAIL Communications

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.

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.
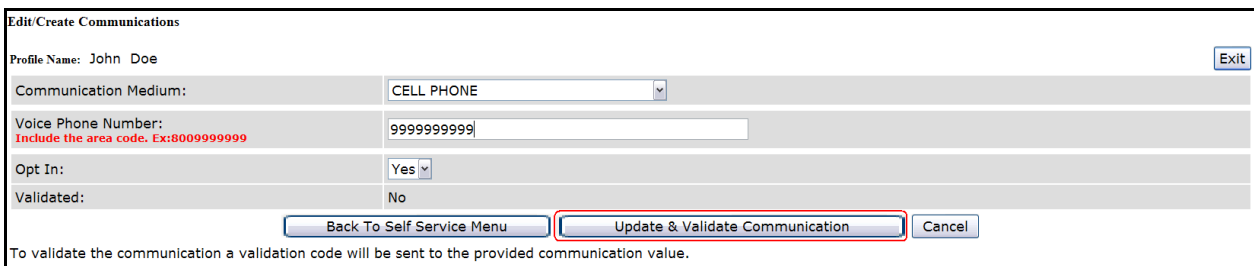

Figure 9: Edit/Create CELL PHONE/WORK PHONE/HOME PHONE Communications

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.*
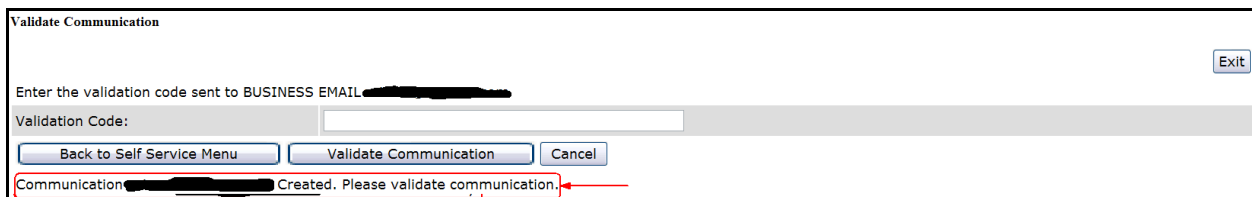

Figure 10: Validate Communication

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.*
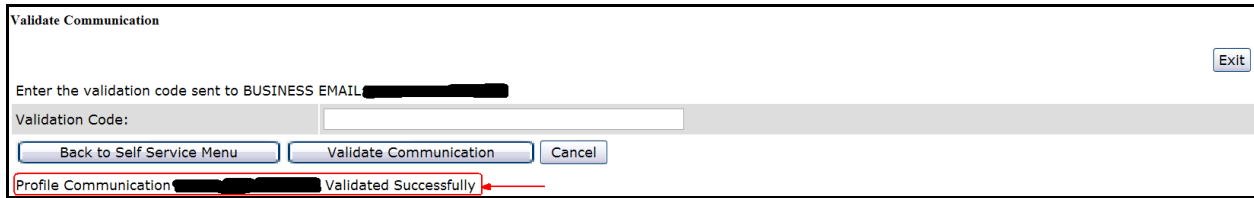
Figure 11: Successful Communication Validation

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*
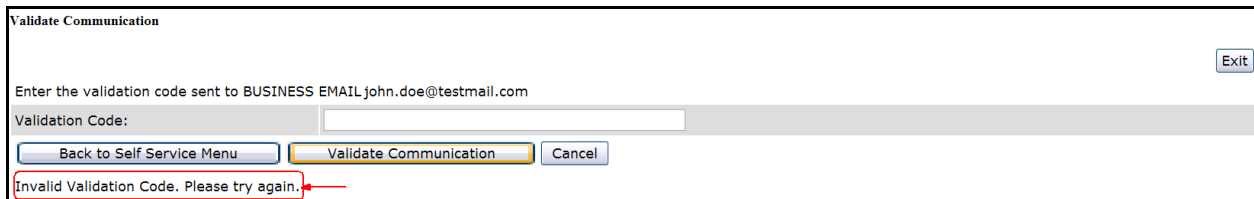

Figure 12: Invalid Validation Code

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.*
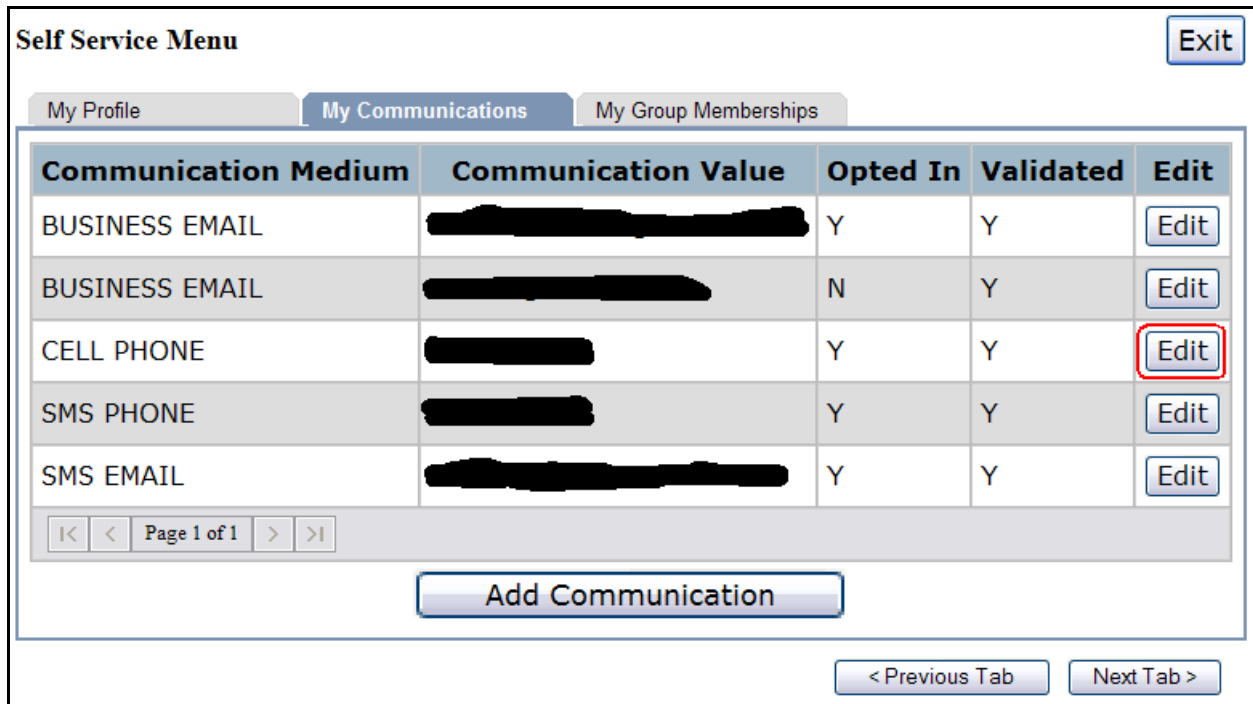
Figure 13: Self Service Menu - My Communications

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.

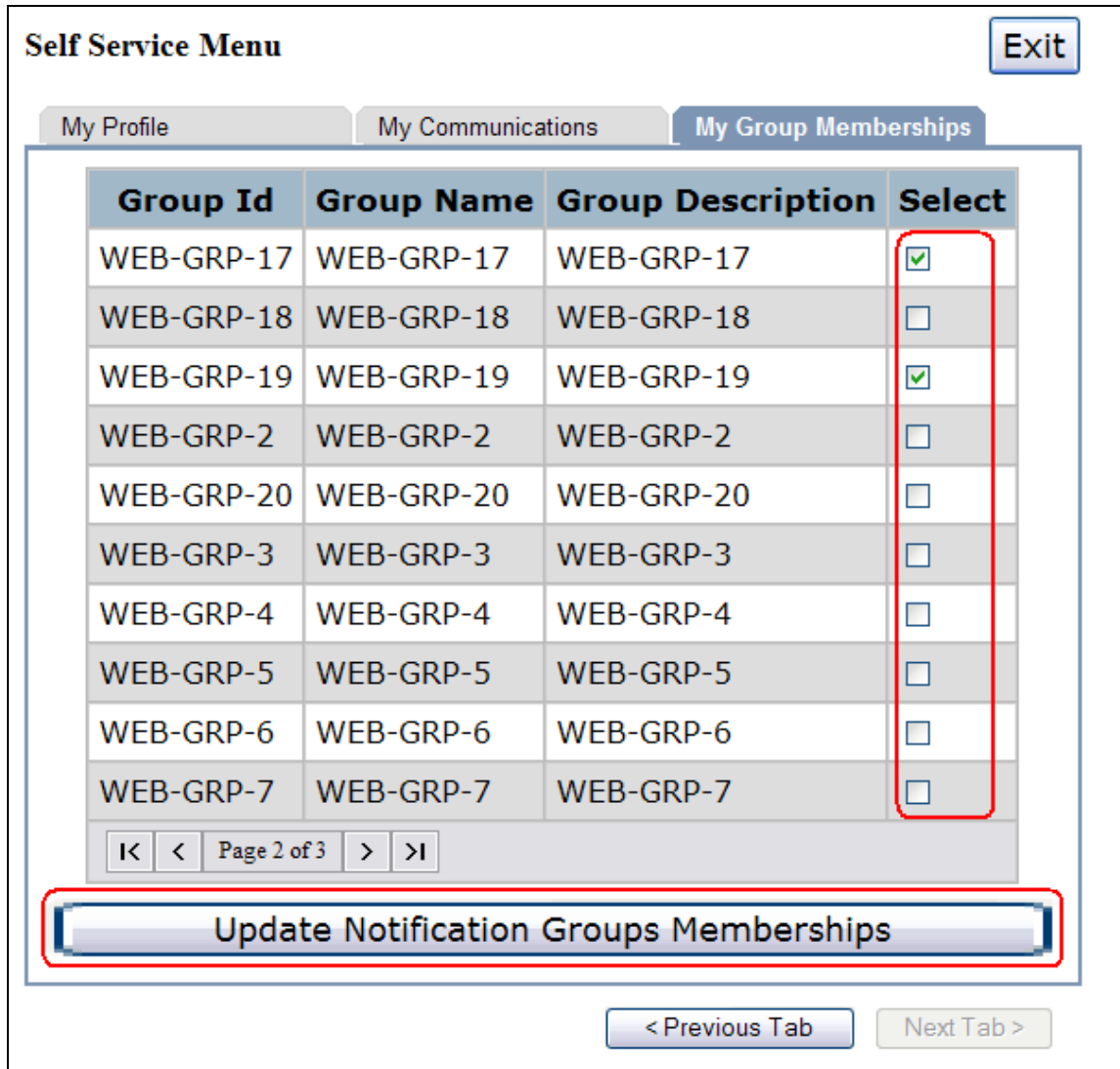5.4   A message indicating **"Updated Group Memberships"** is displayed. See *Figure 15: Updated group memberships.*

Figure 14: Self Service Menu - My Group Memberships

Figure 15: Updated group memberships