

## Broadcast Email+Fax Quick Start Guide

This guide provides information on setting up and submitting an Email broadcast job. There are 5 steps in creating your job and submitting it for distribution.

The five steps are:

1. Selecting a distribution method
2. Creating your message and adding attachments
3. Adding recipients (uploading your list or manual addition)
4. Set the global options for the job
5. Reviewing the job and submitting it

Following are screenshots and directions for completing each step.

### Step 1: Distribution Methods

The screenshot shows the 'Stream Alert' interface. At the top, there's a navigation bar with 'New Broadcast', 'List Manager', 'Reports', and 'Help'. Below that, a progress bar shows five steps: '1. Distribution', '2. Message', '3. Recipients', '4. Options', and '5. Review'. The main heading is 'Distribution Method Selection'. The form contains a text input for 'Broadcast Title: \*' with the value 'Fax and Email Demo'. Below this is a section titled 'Please Select 1 Or More Distribution Methods: \*' with four checkboxes: 'Fax' (checked), 'Email' (checked), 'Survey' (unchecked), and 'Conference Call' (unchecked). A 'Continue' button is located at the bottom right of the form area.

On this page you can set the title for the job. This is used for reference in billing or in viewing job history and does not appear on the emails sent out.

There are two options for sending out your message. In this case we want both so check the checkboxes in front of Email and Fax.

Click on the Continue button at the bottom to move to step 2.

## Step 2: Message Creation/Selection

Stream Alert

New Broadcast | List Manager | Reports | Help | Admin | User | Logout | i

1. Distribution | 2. Message | 3. Recipients | 4. Options | 5. Review

### Message Creation/Selection

Create Text For Your Message:

Subject: \* Fax and Email Demo

Create From Text  
 Import From File  
 Import From Template

Message Text: \*  
Hello,  
The text typed here will be inserted on the cover page of the fax and inside the body of the email message.  
Stream Communications

Add Message

Add Attachment (optional):

The first field in this step is the Subject Line field – this is the subject line on the emails sent out to your audience. It is automatically populated with the job title though you may change it to what you want the email subject line to be.

You have several options for creating the body of your email. The first method is to type in or paste in your message. Click on the radio button in front of “Create from Text”. The Message Text window opens so that you may type in or paste your message. Once you are finished with the message, click the Add Message button to upload the message.

You may also upload a **text** file by clicking on the “Import From File” radio button. This will open a new field so that you may browse to your text file. Once you have selected the file, click the “Add Message” button to upload your message.

The “Import from Template” option will display a list of templates for use as the message text.

Step 2 Continued...

Add Message

Add Attachment (optional):

Import Attachment: \*  Browse...

Add Attachment

Go Back Continue

To add attachments (added to the emails and to be faxed) click the "Add Attachment" check box. Browse to your attachment and click the "Add Attachment" button. Repeat this procedure for adding additional attachments.

Go Back Continue

Your Current Message and Attachment(s)	
File Name	Purpose
<a href="#">View</a>	Message Text
<a href="#">ch931217.gif</a>	Attachment <a href="#">Remove</a>

Your message and attachments will be listed in the bottom section as demonstrated above. Once you have finished, click the continue button to move to step 3.

## Step 3: Recipients

New Broadcast | List Manager | Reports | Help | Admin | User | Logout | i

1. Distribution | 2. Message | 3. Recipients | 4. Options | 5. Review

### Recipients (Use one or more of the following methods to add recipients)

Choose Distribution List:  Add Distribution

Import Recipient List:  Browse... Add List

[Click here to use a starter CSV template](#)

Add Recipient:

First Name: \*

Last Name: \*

Please enter information in at least one of the following

Fax:  (area code required)

Email:

Add Recipient

Go Back

Continue

0 Current Recipient(s)		
Recipient Name	Contact Type	Contact Info

In this step, you will upload your list of email addresses or, optionally, add recipients manually. We will focus on uploading your list.

To begin, click on the browse button next to the "Import Recipient List" text box and browse to your list of recipients (comma separated file with the format: First Name, Last Name, Email1,Fax1). Click the "Add List" button to upload your list. NOTE: This may take a few minutes depending on the size of your list. The **first 50** recipients will be displayed in the bottom section of the page (as shown below) once the upload completes.

1 Current Recipient(s)		
<a href="#">Export Current Recipients</a>		
<a href="#">Manage Recipients</a>		
Recipient Name	Contact Type	Contact Info
eStream Fax	Email	fax@estream.net

To edit the list once it has been uploaded, click on the "Manage Recipients" link. This will open a new window to allow you to edit your list.

Once you have added all of your recipients, click on the Continue button (green arrow) to move to step 4.

## Step 4: Global Options

**Stream Alert**

New Broadcast | List Manager | Reports | Help | Admin | User | Logout | i

1. Distribution | 2. Message | 3. Recipients | 4. Options | 5. Review

### Options

**Broadcast Options**

From: eStream Demo

Confirmation Email: fax@estream.net

Schedule: 10/19/2007

Priority: Normal

Billing Code: 000207

Batch ID:

**Fax Options**

Cover Page: No Cover Page

Resolution: High (200x200)

Retry Scheme: Normal Retry Scheme (3 retries)

Go Back | Continue

In this step you confirm or change the “From” text and the email address that the job confirmation is sent to. You may also schedule the job for broadcasting later or leave as is to launch the broadcast when you complete the job. To change the schedule, click on the calendar icon to set the date and time that you wish the broadcast to be sent.

The Billing Code field should be automatically populated with your customer ID. The Batch ID field is optional and for informational use if needed.

The default Fax options are usually left as is though you may wish to change the number of retries.

Click the “Continue” button to proceed to the last step.

## Step 5: Review and Submit the job

**Stream Alert**

New Broadcast | List Manager | Reports | Help | Admin | User | Logout |

1. Distribution | 2. Message | 3. Recipients | 4. Options | 5. Review

### Review and Submit Broadcast

**Fax and Email Demo**

From: eStream Demo  
Confirmation Email: fax@estream.net  
Schedule: 10/19/2007  
Priority: Normal  
Billing Code: 000207  
Batch ID:  
Distribution Methods: Fax, Email  
Subject: Fax and Email Demo  
Message Text: [View](#)  
Attachment(s): [TEST.doc](#)  
Recipient(s): [View](#)  
Cover Page: No Cover Page  
Resolution: High (200x200)  
Fax Retry Scheme: Normal Retry Scheme (3 retries)

[Go Back](#) [Submit](#)

This step displays the information for your broadcast and gives you the option to view your message, attachments, and recipients. To submit the job, click the “Submit” button. A confirmation will pop up asking you to click OK to complete the submission. After you have confirmed the submission, you will be sent to the Status page. When the job completes, you will receive an email confirmation listing the first 30 recipients and a link to view the full details of the job.

If you need to make any changes, click on the “Go Back” button to get to the appropriate page to make the changes.

**NOTE: Once the Submit button has been clicked and the confirmation approved, you may not make any changes.**