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Registering with NetSolutions

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NetSolutions is currently comprised of NetInquiry and NetMail. With NetInquiry, you can customize an inquiry form on your Web site for prospective applicants and parent/guardians to complete to receive more information about your school. With NetMail, you can create, send, and track email messages to applicants, students, faculty/staff, and individuals.

To keep your hardware requirements to a minimum, Blackbaud servers host NetSolutions. For NetInquiry, this includes hosting your Web pages and collecting the data entered on your Web pages for you to download. For NetMail, this includes processing your emails and allowing you to download information about undeliverable emails and people opting out of receiving future emails.

System Requirements

- An Internet connection.

**Note:** Users of your NetInquiry inquiry pages can use any HTML 3.2-compliant browser. However, because you set up the pages in Internet Explorer, they may look different when viewed in Netscape or Firefox.

- The latest version of The Education Edge.
- Internet Explorer 6.x or higher for setting up your inquiry pages and downloading inquiries.
- No additional hardware requirements beyond what you need to run The Education Edge.

Security

To protect your users entering information on your inquiry pages, Blackbaud uses Secure Sockets Layer (SSL) technology, the leading industry protocol that provides security for transmitting personal information over the Internet, keeping your users’ personal information secure.

In Administration in The Education Edge, you establish security settings for accessing the components of NetSolutions and adding records through NetInquiry.
Accessing NetSolutions. For NetSolutions to appear on the navigation bar for a group of users, mark NetSolutions in Shared Components for the security group.

To control rights to the individual functions listed on the NetSolutions Options page, select NetSolutions and click Options.

Adding records. If you have NetInquiry, after you download inquiries, you can match the downloaded information to existing records in your database. You can also select to create new applicant, individual, and organization records using the information.

The same security rights you have for adding records through Records in The Education Edge also apply to adding records from downloaded inquiry information. If you can add applicant records through Records in Admissions Office, you can create these records from downloaded inquiry information. If you can add individual or organization records through Records in Admissions Office or Registrar’s Office, you can create these records from downloaded inquiry information.
You must have the appropriate security rights to view the Social Security number on a inquiry in NetInquiry or to send email in NetMail using an export that includes the Social Security number field. If you do not have personal information rights, the numbers are masked.

For more information about security groups and users, see the Security chapter of the Administration Guide for The Education Edge.

Registering NetSolutions

Before you start working in NetSolutions, you must register with Blackbaud. Once you complete the registration page and submit it to Blackbaud, your account is activated and you are free to work in NetSolutions.

- **Registering NetSolutions**

  1. On the navigation bar, click **NetSolutions**. A message appears if you have not purchased NetSolutions. Click **OK** and a Web site appears with more information about the program. Return to this procedure once you have purchased NetSolutions.

  2. If you purchased NetSolutions but have not registered, a message appears directing you to complete the registration form. Click **OK** and the NetSolutions Registration page appears.

  3. In the **School Registration Information** section, enter basic information about your school. You must complete all required fields. Required fields include an * after the field name.

     - The name, address, and phone information defaults from the General page in Configuration. You can optionally enter a fax number.

     - In the **Email** field, enter a general email address for your school.

     **Note:** We recommend you select a login ID and password for NetSolutions different from what you use to log into The Education Edge.

     - In the **Login ID** field, enter a login ID to use to connect to Blackbaud. Login IDs must be unique. If you get a message stating that the login ID is in use, another school is already using that ID.

     - In the **Password** field, enter a password to use to connect to Blackbaud. Enter your password again in the **Retype password** field.
• In the **Education Edge S/N** field, the serial number of your program appears.
• In the **URL** field, enter your school's Web site address beginning with http://.

4. In the **NetSolutions Primary User Contact Information** section, enter information about the person Blackbaud should call when we need to contact your organization. Required fields include an * after the field name.

5. Click **Submit**.

6. A page appears confirming your registration. A confirmation email is also sent.

7. Close the Registration page to return to the NetSolutions Options page. You can get started by clicking the **Configure and Customize** link.
Configuring and Customizing

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After registering *NetSolutions* with Blackbaud, your next step is to set up your configuration.

## Configuring and Customizing NetSolutions

Using the **Configure and Customize** link, you can enter your login ID and password for *NetSolutions* and test the connection. You can customize your Web pages to look like the rest of your Web site, select default data to appear on new records, and add your own text to the Tell a Friend page.

- **Configuring and customizing NetSolutions**
  1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.
2. On the NetSolutions Options page, click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears, open to the Account Information tab.

![NetSolutions Configure and Customize](image)

3. In the **Login ID** and **Login password** fields, enter the ID and password established when you registered NetSolutions with Blackbaud.

4. To confirm your connection with Blackbaud, you can click **Click here to test connection**.

   The serial number of the database you are connected to appears for informational purposes only in the **Serial number** field.

5. In the **Title** field, enter the title to appear on your Web pages. In **NetInquiry**, this is a default on inquiry pages that you can change per page. In **NetMail**, this affects the page that appears after a user clicks the **Click here if you do not want to receive further email** link.

6. In the **Page header** field, enter the page header to appear on your Web pages. In **NetInquiry**, this is a default on inquiry pages that you can change per page. In **NetMail**, this affects the page that appears after a user clicks the **Click here if you do not want to receive further email** link.

7. If you have **NetInquiry**, in the **Email** field, enter the default email address to appear in the **From** field of the confirmation emails you send from **NetInquiry**.

   If you have **NetMail**, this is the default email that appears on the first email you create. You can change the email address per email. When you create subsequent emails, the last email address you entered appears by default. You do not have to enter a default email address if you have **NetMail** only.

   If you have both **NetInquiry** and **NetMail**, be sure to leave this default set for the confirmation emails in **NetInquiry**.

8. If you have **NetInquiry**, in the **Home URL** field, enter your school’s Web address beginning with http://. This is a default only, you can change this per page.
9. Select the Site Customization Defaults tab.

![Site Customization Defaults](image)

10. In the **Page section** field, select the section of the Web page to customize. In *NetInquiry*, this affects inquiry pages. In *NetMail*, this affects the page that appears after a user clicks the **Click here if you do not want to receive further email** link.

11. The customization options change depending on the page section you select. All of these sections apply to *NetInquiry*, but only the Logo and Body page sections apply to *NetMail*.
   - If you select “Background”, you can select a background image and its position on the page.
     
     You can mark **Tile image** so the image replicates itself from its initial position on the page. You can also mark **Watermark** so the image remains in the same place while the page content scrolls. If you do not mark **Watermark**, the image scrolls along with the content.
     
     You can also select colors for the background and hyperlinks.
   - If you select “Logo and Title”, you can select the page title’s font, colors, and alignment. You can include a logo. You also have the option of hiding the logo and title.
   - If you select “Image”, you can customize the font, colors, and alignment of captions for images added.
   - If you select “Page Header”, you can customize the font and colors of the page header.
   - If you select “Body”, you can customize the font and colors of body text.
   - If you select “Table Legend”, you can customize the font and colors of the table legend.
   - If you select “Table Headers”, you can customize the font and colors of table and table row headers.
   - If you select “Table Text”, you can customize the font and colors of text in tables.
   - If you select “Error text”, you can customize the font and colors of error text.

12. You can preview your changes in the pane at the right of the screen. Use the magnifying glasses to zoom in and out of the pane, or click **Preview** to view the sample in a new window.
13. If you have *NetInquiry*, select the Data Defaults tab.

![NetInquiry Screenshot]

14. In the **Applicant Defaults** frame, select default values for fields on new applicant records you create from downloaded inquiries. Required fields have a blue background.
   - In the **Address description** field, enter a description of the address.
   - In the **Address type** field, select a type of address.
   - In the **Home phone type** field, select a phone type to use for the home phone.
   - In the **Fax phone type** field, select a phone type to use for the fax number.
   - In the **Email phone type** field, select a phone type to use for the email address.
   - In the **Applicant status** field, select a status to use on the applicant record.
   - In the **Contact method** field, you can select how to contact the applicant.
   - In the **Notepad type** field, select a notepad type to use for comments entered.
   - In the **Notepad description** field, you can enter a description to use for comments entered.
   - In the **Attributes comment** field, you can enter a comment to use for attributes.

15. In the **Individual Defaults** frame, select default values for fields on new individual records you create from downloaded inquiries.
   - In the **Address description** field, enter a description of the address.
   - In the **Address type** field, select a type of address.
   - In the **Home phone type** field, select a phone type to use for the home phone.
   - In the **Fax phone type** field, select a phone type to use for the fax number.
   - In the **Email phone type** field, select a phone type to use for the email address.

16. In the **Organization Defaults** frame, select default values for fields to appear by default on new organization records you create from downloaded inquiries.
   - In the **Address description** field, enter a description of the address.
   - In the **Address type** field, select a type of address.
17. If you have *NetInquiry*, select the Tell a Friend tab.

18. You can enter text to appear at the top of the Tell a Friend page.

19. To send your changes to Blackbaud, click **Submit**.

20. You receive a message confirming you want to submit these settings. Click **Yes**.

21. You receive a message when the update is complete. Click **OK**.

22. To close the NetSolutions - Configure and Customize screen, click **Close**.
NetInquiry

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With NetInquiry, you can provide an inquiry form on your Web site for prospective applicants and parent/guardians to complete to receive more information about your school.

You can customize the inquiry page to look like the rest of your Web site, providing a seamless transition between your school’s Web site and the Blackbaud-hosted inquiry page. Through the Manage NetInquiry Pages link, you can add, edit, delete, and preview inquiry pages. You save your changes directly to the Blackbaud server.

You also customize the confirmation message that appears after the prospective applicant or parent/guardian clicks Submit on the inquiry page.

Managing NetInquiry Pages

Note: You must set up your account information and define data defaults through the Configure and Customize link before you can customize your inquiry pages.

A default page appears automatically for you to customize. You can also add other inquiry pages. For example, if you have multiple schools, you can create a separate inquiry page for each school.

Page customization and style options you set through the Configure and Customize link appear by default. Also, if you add a new page, certain information defaults from the default inquiry page.

- Customizing an inquiry page
  1. On the navigation bar, click NetSolutions. The NetSolutions Options page appears.
2. On the NetSolutions Options page, click **Manage NetInquiry Pages**.

3. To edit the default inquiry page, click **Default Inquiry Page**; or to create new page, click **New Page** on the action bar. The Inquiry Page Wizard opens and the Page Customization screen appears.

4. If you are adding a new page, enter a name for the page in the **Page Name** field. “Default Inquiry Page” appears by default, but each page must have a unique name.

5. In the **Description** field, enter a description of the inquiry page. This is for your reference only, this does not appear on the inquiry page.

**Note:** You can preview your changes in the pane at the right of the screen. Use the magnifying glasses to zoom in and out of the pane, or click **Preview** to view the sample in a new window.
6. In the **Title** field, enter the title of the page. If you entered a title on the Account Information tab of the NetSolutions - Configure and Customize screen, that title appears by default.

7. In the **Page header** field, enter a header. If you entered a page header on the Account Information tab of the NetSolutions - Configure and Customize screen, that page header appears by default.

8. In the **Home URL** field, enter your school's Web address beginning with http://. If you entered a home URL on the Account Information tab of the NetSolutions - Configure and Customize screen, that home URL appears by default.

9. In the **Image/Caption** fields, you can browse and select an image to appear on the page and enter a caption for the image.

10. To add a link on the main page to a Tell a Friend page, mark **Display Tell a Friend link**. For more information about the Tell a Friend page, see “Tell A Friend Page” on page 25.

**Note:** To edit the Page Style of the Default Inquiry Page, you must edit the Site Customization Defaults tab through the **Configure and Customize** link.

11. Click **Next**. The Page Style screen appears.

12. In the **Page section** field, select the section of the inquiry page to customize. The customization options change depending on the page section you select.
   - If you select “Background”, you can select a background image and its position on the page.
     You can mark **Tile image** so the image replicates itself from its initial position on the page. You can also mark **Watermark** so the image remains in the same place while the page content scrolls. If you do not mark **Watermark**, the image scrolls along with the content.
     You can also select colors for the background and hyperlinks.
   - If you select “Logo and Title”, you can select the page title’s font, colors, and alignment. You can include a logo. You also have the option of hiding the logo and title.
   - If you select “Image”, you can customize the font, colors, and alignment of captions for images added.
   - If you select “Page Header”, you can customize the font and colors of the page header.
   - If you select “Body”, you can customize the font and colors of body text.
• If you select “Table Legend”, you can customize the font and colors of the table legend.
• If you select “Table Headers”, you can customize the font and colors of table and table row headers.
• If you select “Table Text”, you can customize the font and colors of text in tables.
• If you select “Error text”, you can customize the font and colors of error text.

Note: If you add a new table entry in Configuration after initially setting up a page, it does not appear on the page until you go through the Inquiry Page Wizard again.

13. Click Next. The Table Entries screen appears.

Note: If you have multiple schools, consider creating separate inquiry pages for each school. For each inquiry page, you can select the individual school on the Table Entries screen and select to hide the School apply field on the Miscellaneous screen, so the program automatically uses the selected school in the School apply field on the applicant record.

14. You can select to include only certain table entries in the Board Types, Schools, Grades Apply, Years Apply, Relationship Types, Sources, Activity Categories, Activities, Suffixes, and Titles fields on the inquiry form.
15. Click **Next**. The Applicant Attributes screen appears.

**Warning**: Do not use the same attribute for more than one question. Only one value can be downloaded for an attribute.

16. In the **Attribute to Use** column, select an attribute. You can select from all applicant attributes with a data type of Yes/No or Text. For example, you may have an attribute called “Parent is Alum” where the values can be Yes or No.

   If you select an attribute with the data type of Yes/No, a checkbox appears on the inquiry form. A marked checkbox equals Yes, and a Yes value will be downloaded for the attribute. However, a No value is not downloaded if the checkbox is not marked.

   If you select an attribute with the data type of Text, a text field appears on the inquiry form.

17. In the **Question** column, enter the text to appear for the attribute on the inquiry form. For example, if you included a “Parent is Alum” attribute, you can enter “Are either of your parents alumni?” as the question to appear on the form.
18. Click **Next**. The Miscellaneous screen appears.

![NetInquiry 19 Miscellaneous Screen]

Note: If you have one school only, school-related fields do not appear in the Inquiry Page Wizard or on the inquiry page.

19. In the **Show the following optional fields on the Inquiry page** frame, you control whether certain optional fields, including Gender, Board type, School apply, Financial Aid, and Activities, appear on your inquiry page.

20. In the **The following fields will be required on the Inquiry page** frame, mark checkboxes for the fields to make required on the inquiry page.

21. In the **Header** field in the **Source** frame, enter the text to appear above the **Source** field on the inquiry page.

22. In the **Confirmation** frame, you can customize the email message that is sent after a person clicks **Submit** on the inquiry page. For more information about customizing the confirmation message, see “Customizing the Confirmation Message” on page 25.
23. Click **Next**. The Finish screen appears.

24. Review your changes and click **Finish** to publish the changes.

**Note:** We recommend that someone experienced with your Web page design add this code.

25. When the page has been published, the Congratulations screen appears.

26. The code for linking to this inquiry page appears. To copy this code from this screen to the Windows clipboard, click **Copy**.
27. A message appears stating that the code has been copied. Click **OK** to return to the Congratulations screen.

28. To close the screen and return to the NetSolutions Options page, click **Close**.

**Previewing an inquiry page**

1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

2. On the NetSolutions Options page, click **Manage NetInquiry Pages**.
3. Under the inquiry page to preview, click **Visit this inquiry page**. The inquiry page launches in a new browser window.

![Image of inquiry page](image)

- **Deleting an inquiry page**
  
  1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

![Image of NetSolutions Options](image)

**Warning:** You cannot delete the default inquiry page.
2. On the NetSolutions Options page, click Manage NetInquiry Pages.

![NetSolutions Options page](image)

3. Under the inquiry page to permanently delete, click **Delete this inquiry page**.

4. A message appears confirming you want to delete the page. Click **OK**.

**Note:** After you delete a page, any links to that page go to the default inquiry page instead.

- **Linking to an inquiry page**
  1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.
2. On the NetSolutions Options page, click Manage NetInquiry Pages.

3. Under the inquiry page you want to link to, click View link properties for this inquiry page. The Link Properties screen for the page appears.

4. The code for linking to this inquiry page appears. To copy this code from this screen to the Windows clipboard, click Copy.

5. A message appears stating that the code has been copied. Click OK to return to the Link Properties screen.

6. To close the Link Properties screen and return to the NetSolutions Options page, click OK.
Tell A Friend Page

When customizing an inquiry page, you can select to include a link to the Tell a Friend page. On the Tell a Friend page, the applicant or parent/guardian can enter information about others that may be interested in your school. Blackbaud will send a link to your inquiry page to each email address entered.

The Tell a Friend page uses the same Page Style settings as the inquiry page. You can customize the text that appears at the top of this page through the Configure and Customize link (see the highlighted box on the picture below).

Customizing the Confirmation Message

From the Miscellaneous screen of the Inquiry Page Wizard, you can customize and preview the confirmation message that appears after the user clicks Submit on the Inquiry page.
This message is also sent via email. The program sends a confirmation message to the email addresses entered on the inquiry page. If the applicant and the parent/guardian have the same email address, the program sends only one email.

Customizing the confirmation message

1. To edit the message, click Customize Layout. The Confirmation screen for the inquiry page appears.
2. In the From field, the address entered in the Email field of the Miscellaneous screen appears. To change this email address, you must do so on the Miscellaneous screen.

3. In the Subject field, enter the purpose of the email. This appears in the subject line of the email message.

4. The default confirmation message appears in the right pane of the Confirmation screen. Fields from the inquiry page that comprise the message are designated within << >> symbols. To preview the message including sample data instead of the field names enclosed in symbols, click Preview email on the toolbar.

5. Edit and format the text in the right pane as you would in a word processing program. When editing, text automatically wraps to the next line. To create a new paragraph, press ENTER.

6. To include a field, place your cursor where you want to add the field. Then click the plus sign to the left of the field category under Available Fields in the tree view, and double-click a field to move the field into the box on the right.

7. To add an email address to the message, place your cursor in the text where you want to add the email address. In the tree view on the left, under General Links, click the plus sign beside Email Addresses to expand it.

8. Double-click <New Email Address Link>. The Insert Email Address screen appears.

9. In the Name field, enter how the email address will appear on the confirmation message.

10. In the Address field, enter the email address to link to.

11. Click OK. After you add an email address, it appears in the tree view so you can double-click and select it again.

12. To add a Web page link to the message, place your cursor in the text where you want to add the link. In the tree view on the left, under General Links, click the plus sign beside Web Pages to expand it.


14. In the Description field, enter how the Web link will appear on the confirmation message.

15. In the Address field, enter the URL for the Web link beginning with http://.

16. Click OK. After you add a Web page link, it appears in the tree view so you can double-click and select it again.

17. To add an image, place your cursor in the text where you want to add the image. In the tree view on the left, under General Links, click the plus sign beside Images to expand it.

19. In the **Description** field, enter a description of the image.

20. In the **Image File** field, click the browse button to search for and select the image.

21. In the **Alignment** field, select how to align the image with the text.

22. Click **OK**. After you add an image, it appears in the tree view so you can double-click and select it again.

23. To insert a link to one of your inquiry pages, place your cursor in the text where you want to add the link. In the tree view on the left, double-click the inquiry page under **NetInquiry Links**.

24. To insert the system date in the email, place your cursor where you want to add the date and select **Insert, System Date** from the menu bar.

25. To reset the message to the default at any time, click **Insert, Reset to Default Confirmation** from the menu bar.

26. To close the Confirmation screen and return to the Miscellaneous screen, click **Save and Close**.

- **Previewing the confirmation message**
  
  1. To preview the confirmation message, click **Preview Confirmation**. The Preview Confirmation screen appears, open to the HTML Format Preview tab.

  2. Use the magnifying glasses to zoom in and out of the pane, or click **Preview** to view the sample in a new window.
3. To preview the message in text format, select the Text Format Preview tab.

![Preview Confirmation dialog box]

William, thank you very much for inquiring about Sample Organization

Here are some contacts and resources you may find useful:

Address: 24 Independent School Avenue
Suite 1

Phone: (543) 555-0123

4. To close the Preview Confirmation screen and return to the Miscellaneous screen, click Close.
With NetMail, you can create, send, and track email messages to applicants, students, faculty/staff, and individuals.

If you have NetMail, you can also enable email in Faculty Access for the Web for teachers and advisors. For more information about the email capabilities in Faculty Access for the Web, see the Administration Guide for Faculty Access for the Web and the User’s Guide for Faculty Access for the Web.

Managing Emails

NetMail works with export files you create in The Education Edge. Using Export, you select the group of people from your database to whom you want the message sent. You also select the Education Edge fields you want available for your message. The export file functions as a data source in NetMail. You access the export file through the Select export field in NetMail. All the fields you include in your export file are available in the tree view under Available Fields.

For example, if you include First Name and Last Name in your export file, in NetMail, when composing your email message, you can enter “Dear” then move <First Name> and <Last Name> from the tree view pane into your message box. The message is personalized with the person’s first and last name (Dear Robert Datko or Dear Linda Kennedy).

The email editor included in NetMail makes this possible. The process is similar to that used when doing a mail merge in your word processor. With this editor, in addition to including exported fields in your message, you can include images and include links to email addresses and Web pages.

After you create the email message, you submit the message to Blackbaud. A Blackbaud server sends the email to all the people included in the export file. If for some reason an email address does not work and the message returns to Blackbaud’s server, you can download and troubleshoot this information. For more information, see “Downloading Transactions” on page 45.

After an email is sent, you can view important statistics about the email, for example, how many emails were sent.

Once you create and save an email, you can make a copy of the email to use as a starting point for a new email. If you no longer need a saved email, you can delete it entirely. Keep in mind that emails sent through Faculty Access for the Web are also visible in NetMail. To avoid an extremely lengthy list of emails in NetMail and Faculty Access for the Web, consider setting a policy for how long Faculty Access for the Web users should keep sent copies of their emails. For example, you may recommend that users delete emails that are more than four months old.

Note: You must set up your account information through the Configure and Customize link before you can use NetMail.
Composing an email

1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

![NetSolutions Options page](image)

**Note:** The Education Edge is compliant only with MAPI email software, such as Microsoft Outlook.

2. On the NetSolutions Options page, click **NetMail**. The NetMail screen appears.

![NetMail screen](image)
3. Click **New Email**. The New Mail screen appears.

![New Email screen](image)

**Note:** To send an email to an organization, use the individual that is the organization’s primary contact.

4. In the **Select export** field, select the export file containing the people to whom you want to send this message and the fields you want to include in your message. Click the binoculars to access the Open screen.

Email addresses for the people do not need to be included in the export, the program will automatically access the email address from each included record’s primary address when sending the messages.

![Open screen](image)
5. In the Find Exports that meet these criteria frame, enter criteria to narrow the export file search, and click Find Now. For example, you can enter an Export type and Export format. Or, you can leave the criteria fields blank, and click Find Now to access all export files saved in your database. All exports satisfying the selected criteria appear in the export grid. For more information about using the Open screen, see the Program Basics Guide.

6. Select an existing export and click Open. Or

Warning: If you change the export file, you may invalidate fields already in the email. For example, you first select an export with the field <Last Name>, and you insert this field into your email (Dear Mr. <Last Name>). You then change to a second export that does not include <Last Name>. A message appears warning you some fields are invalid and the invalid fields are highlighted.

Click Add a New Export to create a new export file.

Once you select or create an export, the export name appears in the Select export field on the New Mail screen.

7. In the Name field, enter a name for this email. This name appears on the NetMail screen when you save and close the email.

8. In the From field, enter your email address. When you create the first email, the email address defaults from the Email field on the Account Information tab of Configure and Customize. When you create subsequent emails, the last email address you entered appears by default.

9. In the Subject field, enter the purpose of the email. This appears in the Subject field of the sent email message.

10. In the Email type field, select the email type used to designate the email address you want to send the emails to. The program sends the email to the email addresses of this type associated with the person’s primary address.
The options available depend on the table entries with a phone number type of “Email Address” in the Phone Types table in Configuration in The Education Edge. If you select “<First Available>”, the program sends the email to the first email address on the primary address record.

11. To create a query of all people to whom the email was sent, mark the Create static query when submitted checkbox. You can access the query in Query in The Education Edge. When you open the query, you will need to add first and last names to the output so you can identify the records.

12. Select whether to send a copy of the email. This sends a blind copy of the email, meaning the email address to copy does not appear on the emails sent. The copy sent is a copy of the first email sent, complete with field information. Copies are not counted as sent emails.
   • To send a copy of the email to the email address you entered in the From field, mark Send copy of email to From address.
   • To send a copy of the email to a different email address, mark Send copy of email to this address and enter the email address in the field.
   • To not send a copy of the email, mark Do not send a copy of this email.

13. Write and format the text in the right pane as you would in a word processing program. When writing, text automatically wraps to the next line. To create a new paragraph, press ENTER.

14. To include an exported field, place your cursor where you want to add the field. Then click the plus sign to the left of the field category under Available Fields in the tree view, and double-click a field to move the field into the box on the right.

15. To load information from another file (in .htm, .html, or .txt format), select File, Load from File.
   It is possible to paste export fields into the email, but the export fields will work only if the export fields are included in the selected export. Otherwise, you will receive a warning message when you attempt to submit the email.

16. To add an email address to the message, place your cursor in the text where you want to add the email address. In the tree view on the left, under General Links, click the plus sign beside Email Addresses to expand it.
17. Double-click **<New Email Address Link>**. The Insert Email Address screen appears.

```
**Insert Email Address**

Name:  
Address:  

OK  Cancel
```

18. In the **Name** field, enter how the email address will appear on the confirmation message.
19. In the **Address** field, enter the email address to link to.
20. Click **OK**. After you add an email address, it appears in the tree view so you can double-click and select it again.
21. To add a Web page link to the message, place your cursor in the text where you want to add the link. In the tree view on the left, under **General Links**, click the plus sign beside **Web Pages** to expand it.
22. Double-click **<New Web Page Link>**. The Insert Link to a Web Page screen appears.

```
**Insert Link to a Web Page**

Description:  
Address:  

OK  Cancel
```

23. In the **Description** field, enter how the Web link will appear on the confirmation message.
24. In the **Address** field, enter the URL for the Web link beginning with http://.
25. Click **OK**. After you add a Web page link, it appears in the tree view so you can double-click and select it again.
26. To add an image, place your cursor in the text where you want to add the image. In the tree view on the left, under **General Links**, click the plus sign beside **Images** to expand it.
27. Double-click **<New Image Link>**. The Insert Image screen appears.

```
**Insert Image**

Description:  
Image File:  
Alignment:  Left  

OK  Cancel
```

28. In the **Description** field, enter a description of the image.
29. In the **Image File** field, click the browse button to search for and select the image.
30. In the **Alignment** field, select how to align the image with the text.
31. Click **OK**. After you add an image, it appears in the tree view so you can double-click and select it again.
32. If you have *NetInquiry*, to insert a link to one of your inquiry pages, place your cursor in the text where you want to add the link. In the tree view on the left, double-click the inquiry page under *NetInquiry* Links.

33. When you have finished composing the email, click **Save and Close** to save your message and return to the NetMail screen; or select **File, Submit** from the menu bar to send your message. For more information on submitting your message, see “Submitting an email” on page 38.

**Submitting an email**

1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

2. On the NetSolutions Options page, click **NetMail**. The NetMail screen appears.

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**Note:** For instructions for creating an email message, see “Composing an email” on page 33.
3. Open an existing email by clicking the name of the email or create a new email by clicking **New Email**.

4. After you complete your email message, select **File**, **Submit** from the menu bar. The Submit Email screen appears.

5. On the HTML Format Preview tab, you can see how your message appears on systems accepting HTML format. On the Text Format Preview tab, you can see how your message appears on systems accepting text format.

6. If you know most of the recipients cannot accept HTML emails, mark the **Send as text only** checkbox.
7. Click **Submit**. If you marked **Create static query** when creating your email, the Save Static Query screen appears.

![Save Static Query](image)

8. Enter a **Query name** and **Description** to help you remember the content of the query. You can mark the **Other users may run this query** and **Other users may modify this query** checkboxes.

9. Click **Save**. When the upload is complete and the information is submitted, a confirmation message appears stating how many emails were sent.

10. To return to the email, click **OK**. The fields of the email are now disabled.

11. Click the “X” in the upper right corner to close the Mail screen and return to the NetMail screen.

12. If for some reason an email address does not work and the message returns to Blackbaud’s server, NetMail saves this information. To see which email addresses failed, you can download transactions and review undeliverable email.

   A **Click here if you do not want to receive further email** link appears on each email sent. If someone clicks this link, they can remove themselves from receiving further email. You can download transactions, review these email opt-outs, and update their records with this information.

   For information about downloading transactions and reviewing undeliverable email and email opt-outs, see “Downloading Transactions” on page 45.

- **Copying an email**

  1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.
2. On the NetSolutions Options page, click **NetMail**. The NetMail screen appears.

3. To help locate the email, in the **Sort by** field, you can sort the emails by date submitted, name, subject, or user who added the email. In the **Show** field, you can select to show all emails or only emails you created.

4. Under the email you want to copy, click **Copy this email record**. A copy of the email opens. The **Name** field is blank.

5. In the **Name** field, enter a new name for this email and make the necessary changes.
6. Click **Save and Close**. Both emails appear on the NetMail screen.

![NetMail screenshot with email statistics]

7. To exit the NetMail screen and return to the NetSolutions Options page, click the “X” in the upper right corner.

- **Viewing email statistics**
  1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.
2. On the NetSolutions Options page, click **NetMail**. The NetMail screen appears.

3. To help locate the email, in the **Sort by** field, you can sort the emails by date submitted, subject, or user who added the email. In the **Show** field, you can select to show all emails or only emails you created.

4. Under the email for which you want to view statistics, click **Show statistics for this email record**.

5. Statistics appear under the email:
   - Number of emails sent - the number of individual emails generated and sent.
   - Number of hard bounces - the number of emails returned because of an invalid address.
   - Number of soft bounces - the number of emails returned from a valid address, for example, due to full mailboxes or size restrictions.
   - # Hits: If you inserted a link in the email, this tracks how many times the link was accessed.

6. To not show the statistics information, click **Hide statistics for this email record** under the email.

7. To exit the NetMail screen and return to the NetSolutions Options page, click the “X” in the upper right corner.
Deleting an email

1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

2. On the NetSolutions Options page, click **NetMail**. The NetMail screen appears.

3. To help locate the email, in the **Sort by** field, you can sort the emails by date submitted, subject, or user who added the email. In the **Show** field, you can select to show all emails or only emails you created.

4. Under the email you want to delete, click **Delete this email record**. A warning message appears.

5. To permanently delete the record, click **Yes**. You return to the NetMail screen.

6. To exit the NetMail screen and return to the NetSolutions Options page, click the “X” in the upper right corner.
Downloading Transactions

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When downloading transactions, you are downloading information stored on our servers. If you have NetInquiry, this includes the data entered on your inquiry pages. If you have NetMail, this includes information about undeliverable emails and people who selected to opt-out of receiving future emails.

## Downloading Transactions

When you click the **Download Transactions** link on the NetSolutions Options page, the program downloads the information stored on the server since your last download. A message appears stating the number of new transactions downloaded.

Transactions include inquiries for NetInquiry and email opt-outs and undeliverable email for NetMail. Under the View Inquiries, View Email “Opt-Outs”, and View Undeliverable Email links, you can see the number of new transactions to review.

## Viewing Inquiries

You can either link the downloaded inquiry data to existing records in your *Education Edge* database or select to create new records. When you view the downloaded inquiry data, each inquiry submission appears as a row in a grid. In the grid, you can view how the downloaded information corresponds to records in your database.

Information entered in the Applicant Information section of the inquiry page corresponds to an applicant record. Information entered in the Parent/Guardian Information section corresponds to an individual record. Information entered in the Education Information section corresponds to an organization record.

The program automatically checks if any of the downloaded information matches records already in your database, using the duplicate criteria established in Configuration of Admissions Office for applicant, individual, and organization records. When checking for applicant records, the program checks other record types as well.

**Note:** If you set the business rule to automatically generate IDs for the record type, the program automatically creates the ID on the new record.

If the records do not currently exist in your database, you can manually add new applicant records from the grid or the program creates the records automatically when you click Add Selected Now. When you click Add Selected Now, the program also creates the necessary relationships among the records.

- A relationship is created between the applicant and parent/guardian. If Use same address as applicant? is marked, the addresses, phone, and fax numbers are linked (unless Do not share phone numbers of this type is marked for the phone type table entry in Configuration).
- A track may be added to the applicant’s record if you selected a default applicant status that is selected in the Automatically add this track when applicant status is changed to field on a track record.
- For education information entered, an education record is added to the applicant record.
- For activity information entered, an activity record is added to the applicant record. For the application year and grade, a row is added to the Participation grid with the Wants to Participate checkbox marked. If a grade is not selected, the program adds the activity record, but without a row in the Participation grid.
- If Are you interested in Financial Aid? is marked in the Applicant Information section, a financial aid record is created on the applicant’s record for the application year selected.
- If additional comments are entered on the inquiry page, these become a note on the applicant record.
Downloading inquiries

1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

2. On the NetSolutions Options page, if you want to download the latest information, click **Download Transactions**.

3. A message appears stating the number of new transactions downloaded. Click **OK**. (Transactions include inquiries for **NetInquiry** and email opt-outs and undeliverable email for **NetMail**.)

   **Note:** To export the information in the grid for review, right-click the grid and select **Export Inquiry Grid** or **Export Inquiry Grid to Excel**.

4. To review downloaded inquiry information, click **View Inquiries**. The Download Inquiries screen appears.

   Each inquiry submission downloaded appears in a separate row in the grid.
Information about the prospective applicant appears in the Applicant Information column. Information downloaded from the inquiry page appears in the From Web page subcolumn. If this matches any record already in your database, that record appears in the Education Edge subcolumn.

Information about the prospective applicant’s relation appears in the Parent/Guardian Information column. Information downloaded from the inquiry page appears in the From Web page subcolumn. If this matches an individual record already in your database, that record appears in the Education Edge subcolumn.

Information about the prospective applicant’s school appears in the Education Information column. Information downloaded from the inquiry page appears in the From Web page subcolumn. If this matches an organization record already in your database, that record appears in the Education Edge subcolumn.

Comments entered on the inquiry page appear in the Comments From Web page column. These will become notes on the associated applicant record.

5. You must match the downloaded information in the grid to records in your Education Edge database or select to create new records.

- To search for an existing record to match the information to, select the row, click Search for on the action bar, and select Applicant, Individual, or School.

Note: If the program identifies a record as a match that you do not want to be a match, search for a different record or add a new record manually.

6. To open an applicant record to review, select the row and click Open Applicant on the action bar.

7. To delete the non-applicant parts of information in a row, select the row, click Clear on the action bar, and select Clear Parent/Guardian Information, Clear Education Information, or Clear Comments. For example, you may want to add applicant records and add individual records for the parent/guardians, but do not want to create an organization record for each school entered.

8. To delete all the information in a row, select the row and click Delete Row. If you already added a record from part of the row, that record is not deleted.

9. When you are ready to add records and finalize the relationships among records, click Add Selected Now. A message appears stating how many records were added or not added. If a row was completely matched, either with existing records or by adding new records, the row disappears. Rows that are not complete remain on the grid.

If there are errors for a row, an explanation appears in the Status column.

Resolving Errors

This section provides a list of possible errors that may appear in the Status column after you click Add Selected Now, and gives you information about how to resolve them.
‘A field’ is required. If you make a field required in Configuration in Admissions Office that is not available on the inquiry form, you will not be able to automatically add a record without a value in that field. To resolve this error, you can either add the new record manually and add a value in that field, or unmark the Required checkbox for the field in Configuration.

‘School apply’ is required. If you hid the School apply field on the inquiry form, but multiple schools are possible for the field, this message will appear. To resolve this, add the record manually and select the correct school. To prevent this from recurring, if you want to keep the School apply field hidden, select only one school on the Table Entries screen of the Inquiry Page Wizard.

The grade applied is not available for the school selected. The grade selected in the Grade Applying For field is not associated with the school selected in the School Applying For field. To resolve this error, you can add the new record manually and select the correct grade and school combination on the record. To prevent this from recurring, we recommend you set up a separate inquiry page for each school and include only the applicable grade levels.

Field is read only. If you get a message that a field is read only, this means that you do not have rights to add the record. Someone with rights needs to add the record, or you need to be assigned the appropriate rights. The same security rights you have for adding records through Records in The Education Edge apply to adding records from downloaded inquiry information.

SSN must be unique. The social security number is already used on a record in the database. To resolve this, add the new record manually with the correct social security number.

Invalid Code table entry: State. The state selected on the inquiry form is not in your State table in Tables in Configuration. To resolve this, either add the state to your State table or add the record manually with the correct state.

Warning: The record is already in your database. A matching record is already in your database. If this is not the record you want, you can search for a different record or add a new record manually.

Warning: The records matches other records in your database. More than one matching record is already in your database. If this is not the record you want, you can search for a different record or add a new record manually. You should also clean up any duplicate records already in your database. For more information about searching for duplicates in Administration, see the Administration Guide for The Education Edge.

Viewing Email Opt-Outs

A Click here if you do not want to receive further email link appears on each email sent through NetMail. If users select this link, they can click a Remove button to stop receiving emails from your school. You can import this information and automatically mark the Requests no email checkbox on their records in your database. This only prevents emails from being sent through NetMail or Faculty Access for the Web.

Keep in mind that the downloaded transactions include emails sent by teachers in Faculty Access for the Web. Users in Faculty Access for the Web cannot import email opt-outs.
Viewing email opt-outs

1. On the navigation bar, click **NetSolutions**. The NetSolutions Options page appears.

2. On the NetSolutions Options page, if you want to download the latest information, click **Download Transactions**.

3. A message appears stating the number of new transactions downloaded. Click **OK**. (Transactions include inquiries for **NetInquiry** and email opt-outs and undeliverable email for **NetMail**.)

4. On the NetSolutions Options page, click **View Email “Opt-Outs”**. The Import Email “Opt-Outs” screen appears with a row for each email address.

   - If the program finds a match with an existing record in **The Education Edge**, the record appears in the **EE Record** column. To view the record, click in the cell and click **Open Record** on the action bar.
   - To search for a matching record, click in the **EE Record** column and click **Search For** on the action bar.
   - To delete a row, select a row and click **Delete Row** on the action bar.
   - In the **Show** field, you can select to show all emails or only emails you sent.

5. To mark the **Requests no email** checkbox on the records appearing in the grid, click **Import Now**.
Viewing Undeliverable Email

You can review and troubleshoot emails that were not delivered. You can review the type of bounce and the failure message. A hard bounce is when an email is returned because of an invalid address. A soft bounce is when an email is returned from a valid address, for example, due to full mailboxes or size restrictions.

When you view the downloaded information, you can create queries of the records so you can work with those queries in Query in The Education Edge. You may need to update the records with the correct information or find another method to contact those people. When queries are created, notes are also added to the affected records about the undeliverable email.

Keep in mind that the downloaded transactions include undeliverable emails sent by teachers in Faculty Access for the Web. Users in Faculty Access for the Web can view their undeliverable email, but cannot create queries. Someone will need to routinely handle these transactions from The Education Edge.

- Viewing undeliverable email
  1. On the navigation bar, click **Netsolutions**. The NetSolutions Options page appears.

  2. On the NetSolutions Options page, if you want to download the latest information, click Download Transactions.

  3. A message appears stating the number of new transactions downloaded. Click OK. (Transactions include inquiries for NetInquiry and email opt-outs and undeliverable email for NetMail.)
4. To review downloaded information about undeliverable email, click **View Undeliverable Email**. The Import Undeliverable Email screen appears with a row for each email address.

- If the program finds a match with an existing record in *The Education Edge*, the record appears in the EE Record column. To view the record, click in the cell and click Open Record on the action bar.
- To search for a matching record, click in the EE Record column and click Search For on the action bar.
- To delete a row, select a row and click Delete Row on the action bar.

5. Before creating queries, in the Show field, select “<All Emails>” or “My Email”. This allows you to work with all emails or just the emails you sent.

6. Make sure all the email addresses appearing in the grid are linked to records, then click Create Queries. Separate queries are created for hard bounces and soft bounces.

   Once a record is added to a query, the row is removed from the grid. Also, a note about the undeliverable email is added to each affected record.

7. In Query, open the query and troubleshoot the undeliverable email addresses on the included records. You can open records directly from the Results tab of a query.

   Remember that you selected an email type on the email message, and that *NetMail* sends the emails to the email address of that type associated with each person’s primary address.

8. When you have finished updating records, create a new export based on the export that you included in the original email. Include only the students in the query that you used to troubleshoot.

9. Create a new email based on the original email, and include the new export instead. Resubmit the email.
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