Daily Plan-It

FAQ & User's Manual

Welcome to the Daily Plan-It! This manual has been written to provide detailed explanations of the Daily Plan-It website. If you have any additional questions please contact us at support@topofmind.org

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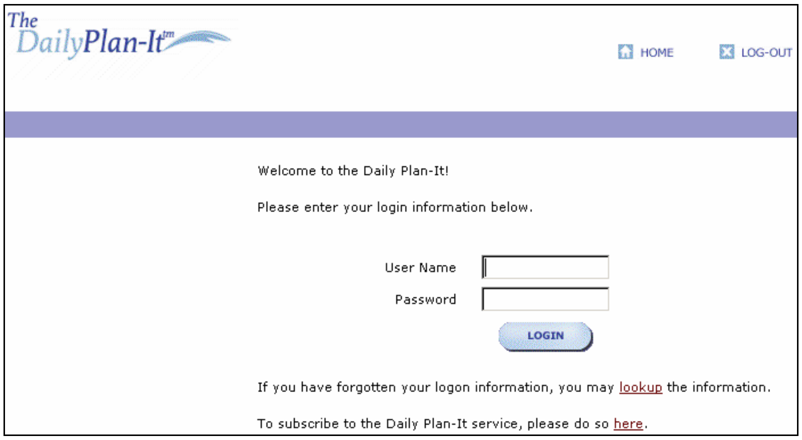
Accessing the Website

To access the Daily Plan-It web site please go to www.topofmind.org. Then simply enter your user name and password and press the “Login” button.

Note: If you have forgotten your login information you can lookup the information by clicking on the “lookup” link below the Login button.



Home Page

When you first log into the Daily Plan-It website you will be taken to the home page. Any announcement messages will appear on this page. To move to another page please use the link buttons on the left side of the page.

Getting Started

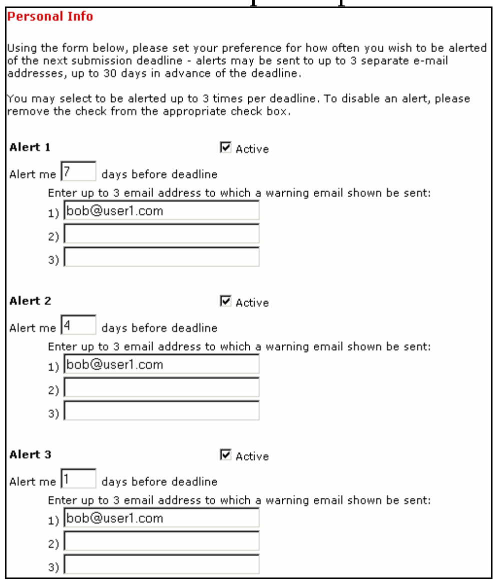
The Getting Started page takes you to a quick start guide that will help you get started with the Daily Plan-It.

Personal Information

The personal information page contains your contact information and several key settings for the system. On the main personal information page you will see all of your contact information. Addition pages are accessible through the buttons that are described below:

> **Change Password –** To change your password (which is displayed on the main Personal Information page) click on the “Change Password” button. On the next screen you will be able to enter a new password.

Change Alerts – The Daily Plan-It is set up to send up to three e-mail alerts before each deadline date. Each alert can be sent to three separate e-mail addresses. In order for an alert to be sent there must be a check in the "Active" box next to that alert. The alert will be sent out a specific number of days before the deadline date, the default is 7, 3 and 1 days. When adding additional e-mail addresses to receive an alert please place each address in a separate box.


Personal Info

Using the form below, please set your preference for how often you wish to be alerted of the next submission deadline - alerts may be sent to up to 3 separate e-mail addresses, up to 30 days in advance of the deadline.

You may select to be alerted up to 3 times per deadline. To disable an alert, please remove the check from the appropriate check box.

Alert 1 ☑ Active

Alert me 7 days before deadline

Enter up to 3 email address to which a warning email shown be sent:

1) bob@user1.com

2)

3)

Alert 2 ☑ Active

Alert me 4 days before deadline

Enter up to 3 email address to which a warning email shown be sent:

1) bob@user1.com

2)

3)

Alert 3 ☑ Active

Alert me 1 days before deadline

Enter up to 3 email address to which a warning email shown be sent:

1) bob@user1.com

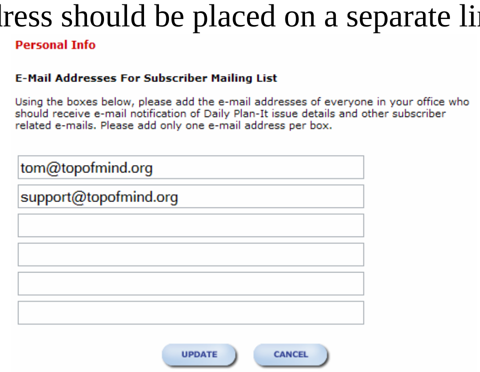
2)

3)

Change Profile – You can update your firm name and contact information by pressing the "Change Profile button. Your firm name can contain up to 100 characters. Long firm names will cause automatic adjustments to the font size of the header and footer lines of the Daily Plan-It issues to ensure that all of the text will appear.

Note: Changes to your firm name will not immediately appear in the preview view of Daily Plan-It issues. However, your next issue will be delivered with the new information. If you want to view an updated preview of a Daily Plan-It issue please contact us at support@topofmind.org.

Subscriber Mailing List – The subscriber mailing list is used to send details about upcoming issues, announce new features and other important messages. Add any e-mail addresses that should receive information about the Daily Plan-It here. Each e-mail address should be placed on a separate line.


Personal Info

E-Mail Addresses For Subscriber Mailing List

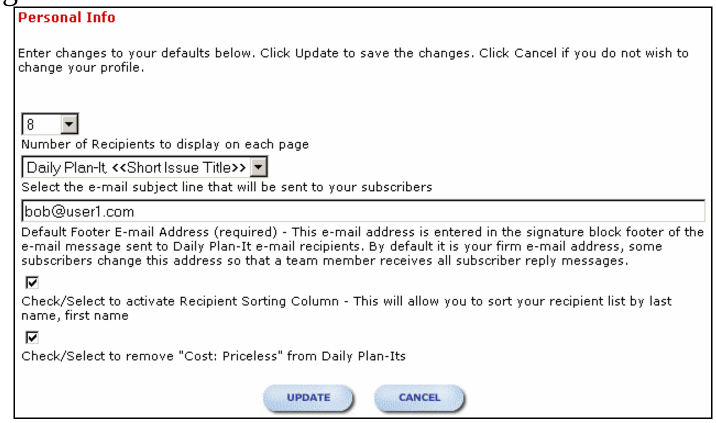
Using the boxes below, please add the e-mail addresses of everyone in your office who should receive e-mail notification of Daily Plan-It issue details and other subscriber related e-mails. Please add only one e-mail address per box.

tom@topofmind.org

support@topofmind.org

UPDATE CANCEL

Change Defaults – The Change Defaults page contains eight different user settings for the Daily Plan-It. Please click the "Update" button to save your changes.



Personal Info

Enter changes to your defaults below. Click Update to save the changes. Click Cancel if you do not wish to change your profile.

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Number of Recipients to display on each page

Daily Plan-It, <<Short Issue Title>>

Select the e-mail subject line that will be sent to your subscribers

bob@user1.com

Default Footer E-mail Address (required) - This e-mail address is entered in the signature block footer of the e-mail message sent to Daily Plan-It e-mail recipients. By default it is your firm e-mail address, some subscribers change this address so that a team member receives all subscriber reply messages.

Check/Select to activate Recipient Sorting Column - This will allow you to sort your recipient list by last name, first name

Check/Select to remove "Cost: Priceless" from Daily Plan-Its

UPDATE CANCEL

Recipient Display – This setting allows you to control the default option for how many recipients will be displayed on each page. You can select to have 8, 25, 50, 100 or All (1,000) recipients displayed on each page. If you have a large number of recipients you may want to increase the recipient display size to avoid having to move between pages. However, increasing the number of recipients shown per page will also increase the time it takes for the page to appear.
While viewing the Recipients page you can also change this setting temporarily.

E-Mail Subject Line – You can select from two different e-mail subject lines to be sent to your e-mail recipients. The first option is "Daily Plan-It, Volume #, Issue #." The second option is the text "Daily Plan-It" followed by the Short Issue Title.

Default Footer E-Mail Address – The default footer e-mail address is used in the signature block of all e-mails sent to your e-mail recipients. You can select to have a different e-mail address sent if you would like another person in your office to receive e-mails from Daily Plan-It subscribers.

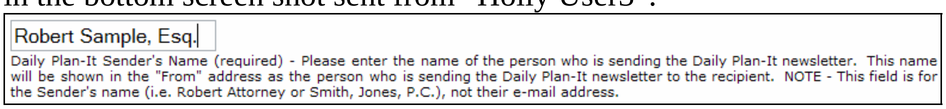
Recipient Sorting Column – The Recipient's page supports a recipient sorting column. This column displays your recipient's names in "last name, first name" format. To activate this feature please select this checkbox.

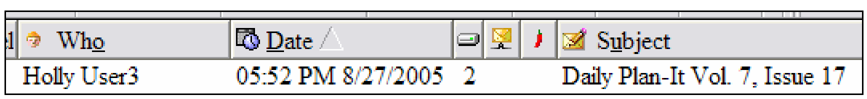
Note: The recipient name field is always used to personally address each Daily Plan-It issue, regardless of whether the Recipient Sorting Column is used. The data in the recipient sorting column is never sent to your recipients.

Cost Priceless Text – The Daily Plan-It contains the text “Cost: Priceless” (see second screenshot below). If you do not wish to have this text added please place a check in this checkbox.

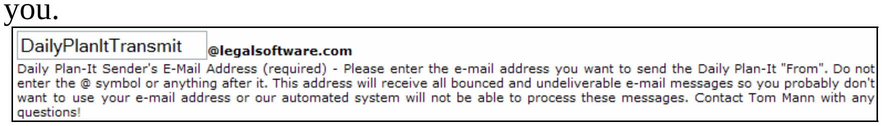
TYIBB Customization – New - All users now have access to the “Lite” customization level. There are two levels of customization available “Full” and “Lite”. Full customization allows you to change the e-mail sender’s name, the From e-mail address, the Reply To e-mail address, the e-mail subject line and the e-mail body. Lite customization allows you to change the e-mail sender’s name, the e-mail subject line and the e-mail body. Please contact support@topofmind.org for pricing information on these customization options.

Daily Plan-It Sender's Name (Full & Lite Versions) – This feature allows you to change the name that the e-mail will appear to be from. You can also add any extra information after the name such as “Esq.” or the office name. The recipient’s in-box will show this information as shown in the bottom screen shot sent from “Holly User3”.

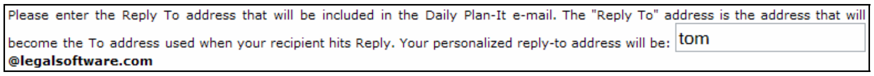




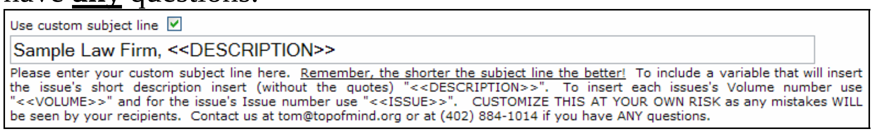
Daily Plan-It Sender's E-Mail Address (Full Version Only) – This is the e-mail address that sends the Daily Plan-It. Your domain name (everything after the @ symbol) will be entered automatically. This address will only receive bounced and undeliverable e-mail messages. As a result you not want to use your e-mail address because our automated bounce processing system will not receive and process these messages for you.



Reply To Address (Full Version Only) - The "Reply To" address is the address that will become the “To” address used when your recipient hits Reply in their e-mail program. You will want to enter your e-mail address here. Your domain name (everything after the @ symbol) will be entered automatically so you only need to add the first portion of your e-mail address.



Custom Subject Line (Full & Lite Versions) – Clicking the checkbox will allow you to enter a custom subject line for Daily Plan-It e-mail recipients. <u>Remember, the shorter the subject line the better!</u> To include a variable that will insert the issue's short description use the following: "<<DESCRIPTION>>" (without the quotes). To insert the volume number use "<<VOLUME>>" and for the issue number use "<<ISSUE>>". The sample below shows the firm name, a comma and then the issue's short description. Contact support @topofmind.org if you have <u>**any**</u> questions.



Custom E-Mail Body (Full & Lite Version) – Clicking the checkbox will allow you to enter a custom e-mail body for your Daily Plan-It e-mail recipients. To include a variable that will insert the issue's long description insert "<<LONGDESC>>" (without the quotes). To insert the issue's short description please use "<<DESCRIPTION>>". The short description is one sentence long. The long description is a paragraph in length and designed to provide enough detail to encourage the reader to read the newsletter. To insert the recipient's name please use "<<RECIPIENTNAME>>". To insert the volume number use "<<VOLUME>>" and for the issue number use "<<ISSUE>>". We recommend that you leave the text in telling the recipient how to download Adobe Acrobat.
NOTE: Your firm's signature block with contact information cannot be changed and is shown in blue.

Optional Title (Full & Lite Versions) – Clicking the checkbox will allow you to add an optional title after your name ("Bob User1" in the example above) in the footer of the e-mail sent to Daily Plan-It recipients. This option is helpful when the name of the Daily Plan-It account is a team member and not the attorney.

Use optional title ☑

Funding Coordinator

Add an optional title after your name (Bob User1) in the footer of the e-mail sent to Daily Plan-It recipients.

Recipients

The Recipients page allows you to view and manage your recipients. This page has a number of innovative features to make it easier for you to manage your recipients.

Mass Upload - If you have a list of recipients that you exported from a contact management program we can upload the entire list for a small fee. To have your data imported please send it to support@topofmind.org in Excel format with the following columns of data:

1) Recipient Name
2) Yes/No for whether the recipient receives the Daily Plan-It via e-mail
3) E-mail address
4) Yes/No for whether the recipient receives the Daily Plan-It via fax
5) Fax Number
6) (Optional) Any comments you would like to have uploaded for the recipient

NOTE: You can also send two separate lists, one with your fax recipients and the other with your e-mail recipients. However, if you have recipients who receive the Daily Plan-It via both e-mail and fax they will be listed on the recipient list twice (once for their e-mail address and the other for their fax number).

Fax & Email Recipients

ALL RECIPIENTS

To edit a recipient, click on the recipient name. Recipients shown in RED are suspended.

View ALL Suspended Recipients

Add a New Recipient

8 25 50 100 ALL

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Limit by Letter ☐

Recipient Sort View	Fax Number	Email	Fax?	Email?	Suspended Date	Suspended Reason	
Bayer, Barbara		BBayerCreative@aol.com	No	Yes			
Jones, George		robertpeters@thestrategiccounsel.net	No	Yes			
Mann, Tom		tom@topofmind.org	No	Yes			
Packard, Corey		bettysue@omahaplanning.com	No	Yes			
Peters, Marcus		becky@specialjourneys.org	No	Yes			
Smith, Peter	402-555-5555	test2@topofmind.org	Yes	No	6/11/2005 11:15:00 PM	FAX Manual suspension	Resend Last Fax
Smith, Peter	949-260-2533	tom@omahaplanning.com	Yes	Yes			

7 Recipients. Page 1 of 1. NEW LOOKUP

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Change Sorting Field

Download recipients.

View Bounce History

(Screen Shot of Recipients Page)

Setting the Number of Recipients Displayed Per Page – You can temporarily change the number of recipients displayed on the page by selecting the relevant numbered button.

Jump to a New Page – There are two ways to move to a new page. The first is to enter the desire page number in the box next to the "Jump to Page" button. After entering the desired page number press the "Jump to Page" button.

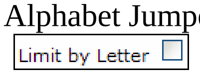
The second method is to use the double arrow buttons below the list of recipients.

Alphabet Jumper – The alphabet jump feature allows you to easily jump to the desired area of your recipient list. If a recipient exists with a first name that begins with a particular letter then that letter will be available to click on. Pressing a letter will take you to the first recipient beginning with that particular letter.

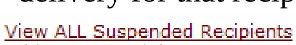
Note 1 – If you are using the Recipient Sorting column, the alphabet is based on the first letter of the recipient's last name.

Note 2 – If you have all of your recipients displayed on one page the alphabet jumper will jump you down to the desired letter if it is off-screen.

Limit By Letter - Clicking the "Limit by Letter" checkbox will allow you to limit any alphabet search to just that specific letter. For example, if you check the "Limit by Letter" checkbox and then press "S" on the Alphabet jumper you will see only the recipients with "S" who begin with that letter. To return to viewing the entire list of recipients you will need to uncheck the "Limit by Letter" box and then press any letter on the Alphabet Jumper.



View All Suspended Recipients - This page allows you to view and all of your suspended recipients in one location. <u>In order to reactive the recipient you MUST uncheck the "Suspend Fax" or Suspend E-Mail" box</u> in order to restart delivery for that recipient.



Managing Recipients – The Recipients page provides you with a complete display of each recipient and their key information. It will also allow you to add new recipients and edit or delete existing recipients. The first three columns show the recipients name, fax number and e-mail address. The next two columns show whether the recipient should receive the Daily Plan-It by fax and/or e-mail. The last two columns show whether the recipient has been suspended for exceeding the maximum number of undeliverable faxes or bounced e-mails along with the delivery problem.

Note: Recipients appearing in red will <u>not receive</u> the Daily Plan-It because they have been suspended for excessive delivery failures.

Recipient	Fax Number	Email	Fax?	Email?	Suspended Date	Suspended Reason
Frank Iam		Frank@jones.com	No	Yes		
Harry Yu		e@a.com	No	Yes		
Holly User3	402-555-5555	holly@user3.com	Yes	Yes		
Jean Beers		jean@peters.com	No	Yes		
Jim Jum		jim@peters.com	No	Yes		
Joe Yugo		joe@peters.com	No	Yes		
John Smith		john@smith.com	No	Yes		
Justin Uno		justin@peters.com	No	Yes		

If you click on a recipient you can view more information about them. To edit a recipient press the "Edit" button.

After pressing the edit button you can edit the recipient's information. As shown below, if the Recipient Sorting Column is activated you will have an additional field for the sorting column.

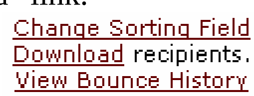
Clicking the checkbox after "Fax Delivery" or "E-Mail delivery will set this recipient to receive the Daily Plan-It by that method (you can choose one or both methods of delivery). A check in the "Do not send E-Mail" or "Do not send Faxes" overrides the delivery checkbox. If a recipient is suspended for exceeding the number of bounced e-mails or undelivered faxes this box will be checked. If a recipient has been automatically suspended we highly recommend that you update their fax number or e-mail address before un-checking this box. You can also manually set this option if you wish to ensure that a particular recipient will not receive the Daily Plan-It by that method(s) of delivery.

Adding a New Recipient – Adding a new recipient is as simple a clicking the "New" button. On the next screen you will be able to enter the recipient's information. If you have activated the recipient sorting column this field will automatically fill in for you. You can also add a new recipient by clicking on the text link at the top of the recipient's page.

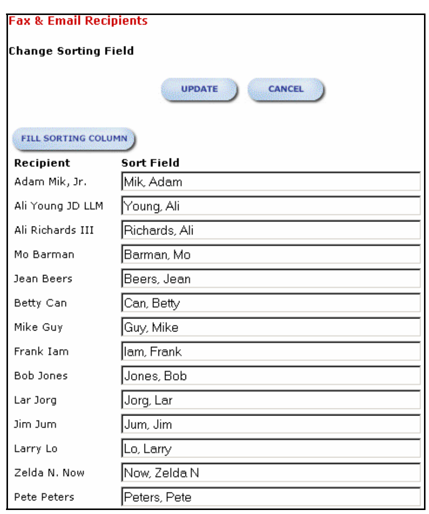
OR


Lookup a Recipient – You can locate a recipient by name, phone number or fax number by clicking on the "Lookup" button. Enter the recipient's name (any portion of first or last name), phone number (in 123-456-7890 format) or e-mail address and press "Ok". Any recipient(s) that match this data will appear. To return to the list of all recipients press the "Show All" button.

Change Sorting Field - If you want to change the data in the sorting field press the "Change Sorting Field" link.



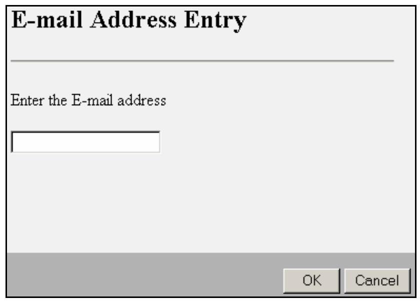
On the next screen press the "Fill Sorting Column" button, manually edit any field (if desired) and then press the "Update" button to return to the list of recipients.



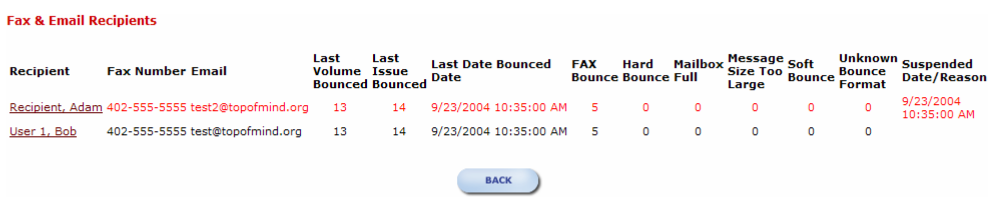
Note 1: The system will automatically remove most suffixes from a recipient's name to make the list easier for you to read the list.

Note 2: The data in the sort field will never be sent to your recipients, the data in the recipient's name field is used to personally address the Daily Plan-It issues.

Download Recipients – To receive a file containing all of your recipient and their data press the "Download Recipients" link. Next, enter the e-mail address that you wish to send the list to and press "Ok". You will receive a CSV file containing your data that can be opened in Microsoft Excel.



Bounces – To see a report on undeliverable faxes and e-mails click the "View Bounce History" link below the recipient list. The list will show details about the number and types of undeliverable faxes and e-mails.

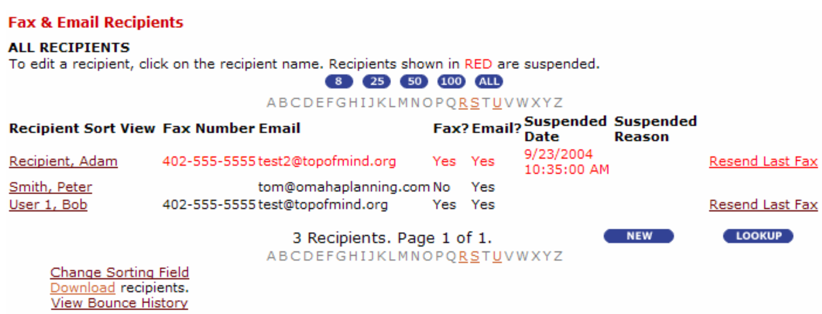


Fax & Email Recipients

Recipient	Fax Number	Email	Last Volume Bounced	Last Issue Bounced	Last Date Bounced Date	FAX Bounce	Hard Bounce	Mailbox Full	Message Size Too Large	Soft Bounce	Unknown Bounce Format	Suspended Date/Reason
Recipient, Adam	402-555-5555	test2@topofmind.org	13	14	9/23/2004 10:35:00 AM	5	0	0	0	0	0	9/23/2004 10:35:00 AM
User 1, Bob	402-555-5555	test@topofmind.org	13	14	9/23/2004 10:35:00 AM	5	0	0	0	0	0	

BACK

Resend Last Fax – To resend the last failed fax to a recipient click the "Resend Last Fax" link that appears to the left of a recipient's name. This link will only be available within 5-8 days of the delivery date for an issue and it is only possible to refax the last Daily Plan-It issue. Please note that there is an additional charge for this service.



Fax & Email Recipients

ALL RECIPIENTS

To edit a recipient, click on the recipient name. Recipients shown in RED are suspended.

8 25 50 100 ALL

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Recipient Sort View	Fax Number	Email	Fax?	Email?	Suspended Date	Suspended Reason	
Recipient, Adam	402-555-5555	test2@topofmind.org	Yes	Yes	9/23/2004 10:35:00 AM		Resend Last Fax
Smith, Peter		tom@omahaplanning.com	No	Yes			
User 1, Bob	402-555-5555	test@topofmind.org	Yes	Yes			Resend Last Fax

3 Recipients. Page 1 of 1. NEW LOOKUP

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Change Sorting Field
Download recipients.
View Bounce History

Upcoming Deadlines

The upcoming deadline list appears below the buttons on the left side of the page. The next two deadlines will always be displayed in this location. You can click either deadline to find out more information about a particular issue.

The information page shows the short and detailed description for the issue and the size of the subscriber template being used. The page also contains a link that will allow you to download the template that you will use to add your upcoming workshops, firm contact information, a photo or whatever information you want to send to your recipients.

The Daily Plan-It has always used a ¼ page template for subscribers. You will receive a copy of the template when you signup for the service or you can download an additional copy on the link shown below.

Fax: **Brief Description4**
Deadline: **8/31/2004**

Subject:

Detailed Description4

This issue uses the 1/4 page template. Please click here to download the 1/4 page template.

To upload your information please click the "Submissions" button on the left side of the page.

NOTE: Depending on your browser configuration, your browser may attempt to open the template in the browser. To save the template on your computer Right-Click the above link and select "Save Target As" (IE) or "Save Link As" (NS).

Submissions

The submissions page is the place where you upload your template for each issue. The screenshot below shows what the page looks like when no template has been uploaded.

Submissions

Listed below are the upcoming deadlines. If a template has already been submitted, the date the submission was uploaded will be listed.

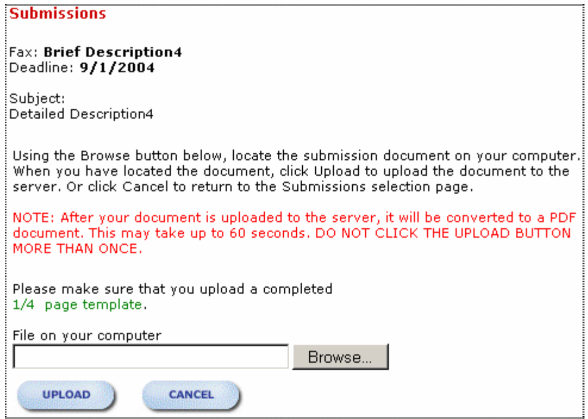
To upload a template please click on a Deadline Date.

Deadline	Description	Layout	Uploaded?
August 31	Brief Description4	1/4 Page	No
September 14	Brief Description5	1/4 Page	No

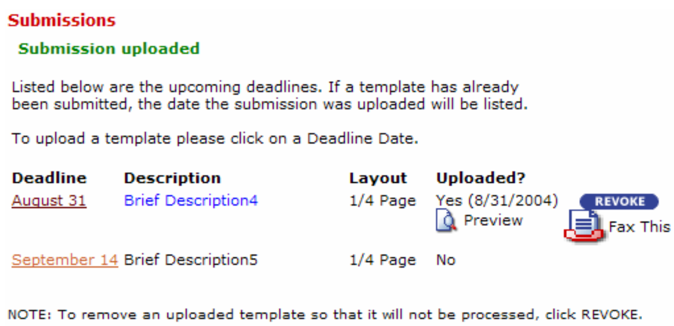
NOTE: To remove an uploaded template so that it will not be processed, click REVOKE.

Uploading a Template – To upload a template for an issue please click on the deadline date. The next screen (shown below) will allow you to select the template file that will be uploaded. Press the "Browse" button, select the desired template file and click "Open'. When you have selected the file press the "Upload" button and your template will be uploaded.

Note: Do not click the upload button more than once. It may take up to 60 seconds for the upload process to complete. When the process is completed a preview version of the issue will appear in your browser window.



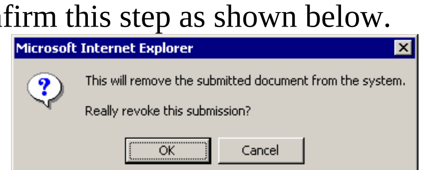
After you have uploaded your template the Uploaded column will show "Yes" along with the date the template was uploaded. After a template has been uploaded you will have three buttons to select from (as shown below for the August 31st deadline).



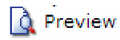
Revoke – If you wish to revoke your submission please press the "Revoke" button. You may want to revoke a template if you plan on uploading another version later. You may also want to revoke a template if you do not want a Daily Plan-It to go be delivered to your recipients.

Note 1: A Daily Plan-It issue will only be delivered if you have a template uploaded before the deadline date passes. If you do not upload a template or if you revoke the uploaded template the issue will not be delivered to your recipients. The default template feature is an exception to this rule and is described below.

Note 2: If you choose to revoke a previously uploaded template you will need to confirm this step as shown below.



Preview – Press the preview button to preview a Daily Plan-It issue. After the issue appears in your browser window you can also select to save or print the file.

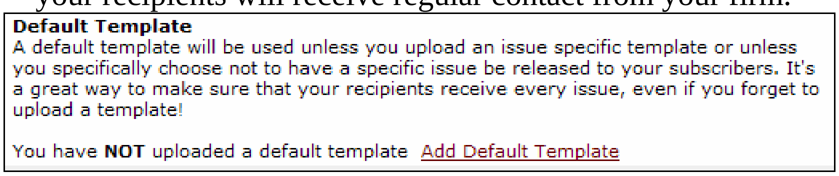


Fax Preview – If you want to receive a preview copy of the Daily Plan-It you can select to have a copy faxed to you by pressing the “Fax This” icon.

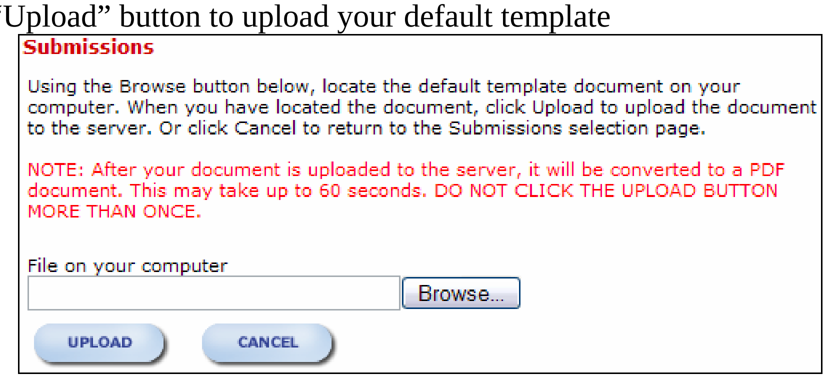
Note – There is a small cost for this service. Pressing the preview button and printing the issue is a quicker way to see the issue.

Default Template – The Daily Plan-It supports a default template that will be used if you do not upload an issue specific template. The screenshot below shows an example where a default template has not been uploaded.

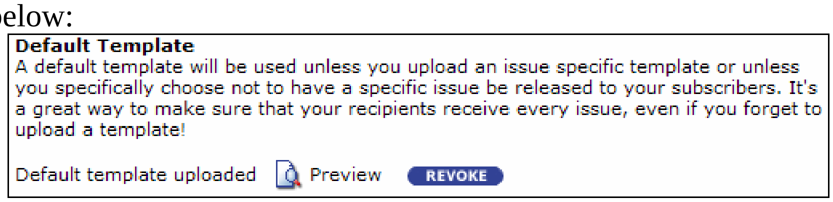
Note: The default template is designed for two situations. First, if you always use the same template the default template will allow to avoid having to upload your template for every issue. Second, if you want to ensure that every Daily Plan-It issue is delivered (even if you forget to upload your template) you can upload a default template and know that your recipients will receive regular contact from your firm.



To upload a default template press the “Add Default Template” link. Press the “Browse” button, locate the file and then press “Open”. Finally, press the “Upload” button to upload your default template



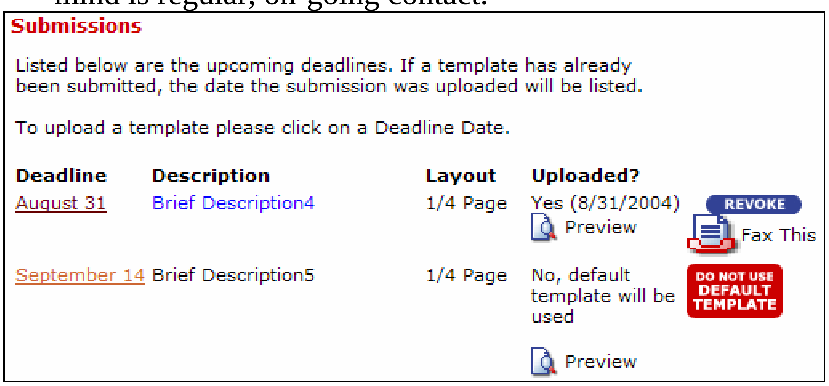
When a default template has been uploaded the screen will appear as shown below:



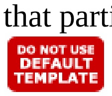
Deadlines and Default Templates – If a default template has been uploaded each deadline will either use the default template or a separate issue specific template that you upload. In the example below the subscriber has uploaded an issue specific template for the August 31st issue. Most subscribers will do this to publicize upcoming workshops or other time sensitive information.

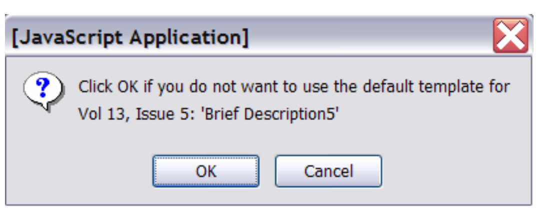
For the September 14th deadline shown below the default deadline is being used. If the subscriber uploads an issue specific template the screen will change to resemble the August 31st issue. If not, the September 14th issue will be delivered using the default template. Either way, the issue will be delivered to the recipients.

Note: There is nothing wrong with uploading a default template and also uploading an issue specific template for each issue. Most subscribers upload an issue specific template because they want to keep their recipients aware of their upcoming workshops. However, if they forget to upload a template the issue will still be delivered using the default template. Remember, the best way to say on the top of a rainbroker's mind is regular, on-going contact.



Keeping an issue from being delivered & default deadlines – If you have a default template uploaded and you do not want an issue to be delivered press the red "Do not use default template" button. You will be asked to confirm this in a pop-up. The next pop-up will remind you not to upload an issue specific template. After completing these steps the uploaded column will show "No, issue will not be delivered" for that particular issue.

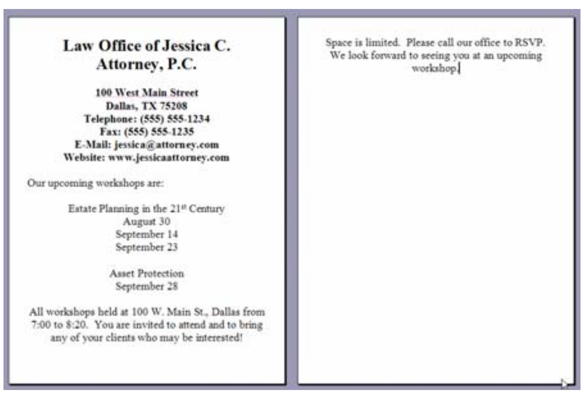




If you decide that you want an issue to go out after pressing the "Do not use default template" button you can either upload an issue specific template or press the "Use Default Template" button. The uploaded column for that deadline will then read "No, default template will be used".

Template Size – It is very important to not change the size of the template or any settings under the Page Setup area in Word. In addition, it is critical to ensure that the template not go beyond one page. If you find that your content flows to a second page (as shown in the "incorrect" template example below) you will need to edit it until it fits on a single page (as shown in the "correct" template example below).

INCORRECT

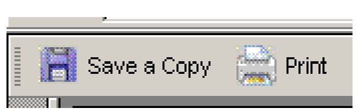


CORRECT

Template Tips – We recommend that you name each issue specific template with a separate file name. This will easily allow you to edit the template if you need to make a change after you have uploaded it.

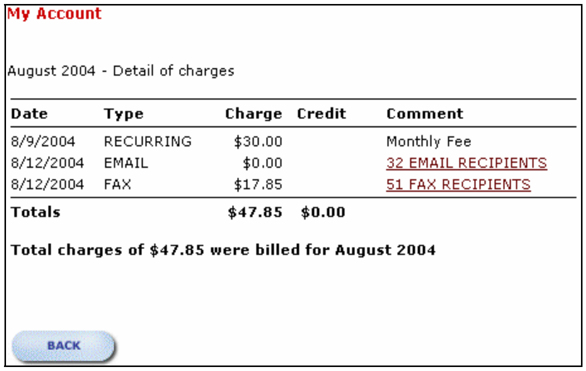
Archive

You can view, print and save old issues of the Daily Plan-It by going to the Archive page. Click on the desired issue date and that issue will open in your browser. Click "Print" or "Save a Copy" from the Adobe toolbar that will appear in your browser window.



Accounting

The accounting page displays billing information for each month. To view the details for a specific month please click on that month. To see the e-mail and fax recipients for each issue in that month please click on the linked text.


My Account

August 2004 - Detail of charges

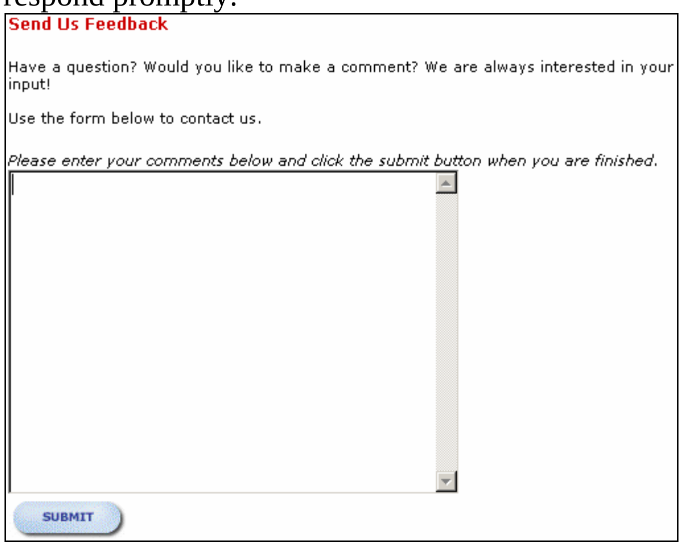
Date	Type	Charge	Credit	Comment
8/9/2004	RECURRING	$30.00		Monthly Fee
8/12/2004	EMAIL	$0.00		32 EMAIL RECIPIENTS
8/12/2004	FAX	$17.85		51 FAX RECIPIENTS
Totals		**$47.85**	**$0.00**	

Total charges of $47.85 were billed for August 2004

BACK

Feedback

To leave feedback, comments or suggestions please use the Feedback page. Type your comments in the box and press the “Submit” button. Our team members will receive your message and respond promptly.


Send Us Feedback

Have a question? Would you like to make a comment? We are always interested in your input!

Use the form below to contact us.

Please enter your comments below and click the submit button when you are finished.

SUBMIT

Sample Subscriber Templates

The contents of the Daily Plan-It ¼ page template can be customized for your individual firm's needs. The majority of subscribers use the ¼ page template to advertise their upcoming seminars and workshops. Other subscribers include a biography and/or information about their firm. You can also include a photograph in your template if you wish. Listed below you will find a few examples of the ¼ page templates that subscribers use:

<u>¼ Page Template Examples</u>:

Law Office of Jessica C. Attorney, P.C.

100 West Main Street
Dallas, TX 75208
Telephone: (555) 555-1234
Fax: (555) 555-1235
E-Mail: jessica@attorney.com

Our upcoming workshops are:

Estate Planning in the 21st Century
August 30, September 14 & 23

Asset Protection
September 28

All workshops held at 100 W. Main St., Dallas from 7:00 to 8:20. You are invited to attend and to bring any of your clients who may be interested!

Space is limited. Please call our office to RSVP. We look forward to seeing you at an upcoming workshop.

UPCOMING WORKSHOPS

<u>Estate Planning Basics</u>
Wellesley, MA
Wellesley Country Club
Tuesday, August 10th - 1:00pm to 3:00pm

Concord, MA
Emerson Hospital
Wednesday, August 25th - 7:00pm to 8:30pm

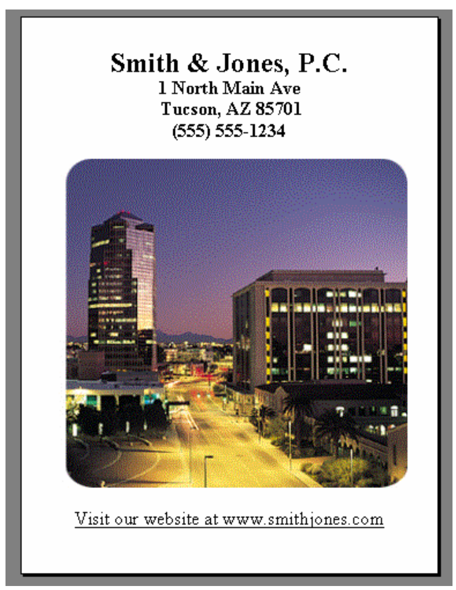
<u>Medicaid Planning</u>
Bedford, MA
Bedford Senior Center
Tuesday, August 24th – 1:00pm to 3:00pm

Concord, MA
Concord Senior Center
Thursday, August 12th – 1:00pm to 3:00pm

Space Limited, Reservations Required

Our Firm Name
(555) 555-1234
info@firm.com

¼ Page Template Example



Smith & Jones, P.C.
1 North Main Ave
Tucson, AZ 85701
(555) 555-1234

<u>Visit our website at www.smithjones.com</u>

¼ Page Template Example

Issue Details

When the article for each Daily Plan-It issue is uploaded the administrator will send an e-mail to all subscribers. This e-mail will contain the descriptions for the issue, font sizes used for text and headings as well as contents of the article. If you have comments, suggestions about a particular issue please contact us via the feedback page.

Distribution Details

All submissions for a deadline date must be uploaded by 11:59 pm Central time on the deadline date. After that time the deadline date will no longer appear on the website. If you forgot to upload your template on time please notify us at support@topofmind.org.

All issues are distributed on the day after the deadline date and the date printed on each issue is dated one day past the deadline date (so the subscribers receive an issue dated the same day). The distribution process starts at approximately 10:00 am Central. After the system processes your issue and sends it to all of your recipients you will receive an e-mail message. This e-mail message will notify you that the distribution process is completed and it will list the total number of e-mails and faxes that have been sent.

The system takes several hours to distribute all of the Daily Plan-It issues. Therefore, it may take most or all of the day before you receive the e-mail message notifying you that the distribution process has been completed for your recipients.

Special Distributions

Special distributions allow you to schedule and send special, one-time distributions of custom material to your recipients. Special distributions are completely separate from the regular Daily Plan-It, you must provide all material to be distributed (in PDF format), you specify the date it is to be delivered and you provide the subject line and body sent to e-mail recipients. The special distribution feature allows you to utilize your existing recipient list and also avoid the issues, delays and problems association with sending large numbers of faxes and e-mails. Simply put, you provide the material – we do the work!

The PDF file can contain one or more pages and we recommend that the file size be less than 250KB. There is an additional cost of $25.00 for each special distribution, plus any actual fax charges. If you have any questions about this service please e-mail support@topofmind.org.

Special Distributions

This page allows you to schedule special, one-time distributions of custom material to your recipients. This area is completely separate from the regular Daily Plan-It, you must provide all material to be distributed in PDF format and you specify the date it is to be delivered. The PDF file can contain one or more pages and we recommend that the file size be less than 250KB. There is an additional cost of $25.00 for each special distribution, plus actual fax charges. If you have any questions about this service please e-mail support@topofmind.org or call Tom at (402) 884-1014.

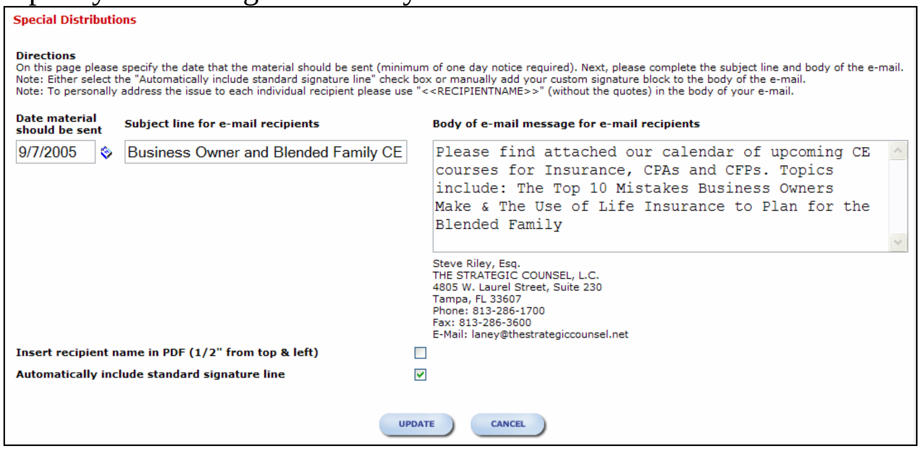
Date material should be sent	Subject line for e-mail recipients	Body of e-mail message for e-mail recipients	Insert recipient name in PDF (1/2" from top & left)	Automatically include standard signature line	PDF Document Status	Remove Distribution
9/2/2005	Business Owner & Blended Family CE Courses	Please find attached our calendar of upcoming CE courses for Insurance, CPAs and CFPs. Topics include: The Top 10 Mistakes Business Owners Make & The Use of Life Insurance to Plan for the Blended Family Steve Riley, Esq. THE STRATEGIC COUNSEL, L.C. 4805 W. Laurel Street, Suite 230 Tampa, FL 33607 Phone: 813-286-1700 Fax: 813-286-3600 E-Mail: laney@thestrategiccounsel.net	yes	yes		

To add a new special distribution, please click the “Add” button at the bottom of the page.

Enter the information for the date the material should be sent (must be at least one day from the date uploaded) and the subject line and body of the e-mail message. To personally address the issue to each individual recipient please use "<<RECIPIENTNAME>>" (without the quotes) in the body of your e-mail.

If you have fax recipients you may want to check the box to insert each recipient’s name in the PDF document. You will need to ensure that the material you provide has space (starting ½” down and ½” over from the upper left corner of the first page) for the entire name.

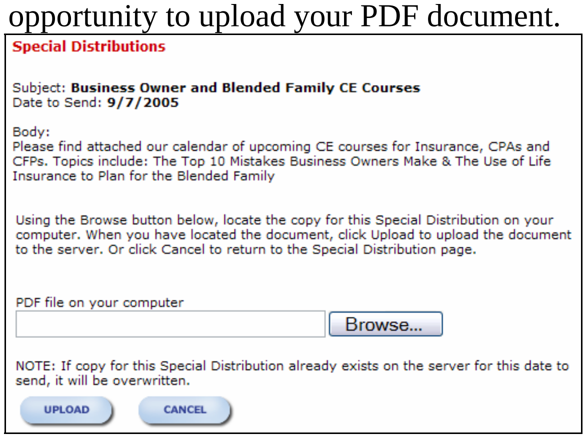
The system will default to "automatically include your standard signature line". If you want to prepare your own signature line you can uncheck this box.



After adding all of the information please click the "Update" button.

On the next screen, click the "Upload" link in the right side "PDF Document Status".

You will now have an opportunity to upload your PDF document.



Modifying a Special Distribution

You can modify a special distribution by changing the information shown on the Special Distribution page and then clicking the "Update" button at the bottom of the page. Once your PDF document has been uploaded you will be able to preview or revoke the document by clicking on the icons under the "PDF Document Status" column.

If you want to completely remove and delete a special distribution please click the "Remove Entry" button immediately to the right of your special distribution.

Distribution of Special Distributions

Our team will automatically be notified that you have uploaded a special distribution. On the date that you specify your special distribution will be delivered to your fax and e-mail recipients. The special distributions are typically processed and delivered in the morning of the date you specified. If your special distribution needs to be sent out at or by a specific time please contact support@topofmind.org.

Troubleshooting

AOL Users

After you have logged on to the Internet you will need to minimize your AOL browser and open Internet Explorer. Internet Explorer must be used to upload your submissions to the Daily Plan-It.

Error Message on Upload (not Word doc, timeout, conversion error)

If you receive an error while uploading your template for an issue please e-mail a copy of your template to support@topofmind.org. Please make sure that your template is an MS Word document that has a ".doc" file extension before you upload it.

Adobe Reader

The Daily Plan-It works with Adobe Acrobat 6.x & 7.x. The issues can be viewed with either Adobe Reader or Adobe Acrobat Professional. Your recipients only need to have Adobe Reader to view the issues. Adobe Reader can be downloaded for free from www.adobe.com. This information is sent out with every issue of the Daily Plan-It so that new recipients will always be able to read the issue.