

Daily Plan-It™

Getting Started Guide

Welcome to the Daily Plan-It™! As a new subscriber this guide will assist you in getting started with this exciting, easy-to-use marketing tool. The following checklist contains everything that you need to do in order to get started!

- Export a list of your Daily Plan-It recipients from your practice management system and e-mail to support@topofmind.org. See page 3 of this document for more details or call Tom at (402) 884-1014 if you need any assistance.
- Make sure that you have a business relationship with, or permission to fax to, all fax recipients of the Daily Plan-It. (Please see “Notify Recipients” on page 3)
- Customize the ¼ page template for your firm’s first Daily Plan-It issue. When you are finished, upload the template. (Please see page 12 through 14, along with the Template Size section on page 16 of the FAQ/Manual for specific instructions). Three sample templates can be found on page 18 of the FAQ/Manual.
- Customize a general (non-date specific) ¼ page template and upload it as a Default Template (see page 15 of the FAQ/Manual). This will ensure that your recipients always receive the Daily Plan-It, even if you don’t upload an issue specific template. Since consistency is the key to effective marketing this is important in case you are on vacation, out sick or simply overlook the multiple e-mail reminders for an issue.
- Please review the remainder of this Getting Started Guide and the Daily Plan-It Manual when you have time so that you are familiar with all of the advanced features available on the website.

It’s that easy, you are done!

If you have any questions please contact us at support@topofmind.org or (402) 884-1014.

Deadline & Delivery Dates

The posted deadline date is the last date that you can upload a template for a particular issue. After 11:59 pm Central time on the deadline date you will no longer be able to upload a template for that issue. The next day (the day after the posted deadline date) the issue will be delivered. Processing starts at approximately 10:00 a.m. Central time and takes several hours to run. After the Daily Plan-It system has delivered the issue to your recipients you will receive an e-mail with delivery details.

Setting E-mail Alerts

By default, new subscribers are scheduled to receive e-mails 7, 3 and 1 days before the deadline date for every issue. The e-mail address that receives this notification is the firm e-mail address that you provided when you subscribed to the service. You can add up to two additional e-mails addresses to receive the alert e-mails. To add or change addresses click on “Personal Info” on the left side of the page and then click on the “Change Alerts” button.

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 days before deadline
Enter up to 3 email address to which a warning email shown be sent:
1)
2)
3)

Alert 2 Active
Alert me days before deadline
Enter up to 3 email address to which a warning email shown be sent:
1)
2)
3)

Alert 3 Active
Alert me days before deadline
Enter up to 3 email address to which a warning email shown be sent:
1)
2)
3)

Personal Info Settings

There are five default settings that can be changed by clicking on the “Change Defaults” button on the Personal Information page. The standard settings control (1) how many recipients are displayed on each page, (2) the e-mail subject line for your e-mail recipients, showing either the Volume and Issue Number or the Short Issue Title, (3) the ability to send a different reply e-mail address to recipients, (4) the ability to activate a recipient sorting column which allows you sort and view your recipients by last name, first name and (5) the ability to remove the text “Cost: Priceless” from every issue.

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

Adding Recipients

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

- 1) Recipient Name
- 2) Yes/No to indicate whether the recipient should receive the Daily Plan-It via e-mail
- 3) E-mail address
- 4) Yes/No to indicate whether the recipient should receive the Daily Plan-It via fax
- 5) Fax Number

Notify Recipients

FCC's rules prohibit the transmission of unsolicited faxes. If there is an established business relationship with your firm then permission to receive unsolicited fax advertisements is presumed to exist. You have an established business relationship with a person or entity if they have made an inquiry, application, purchase or transaction regarding products or services that you offer.

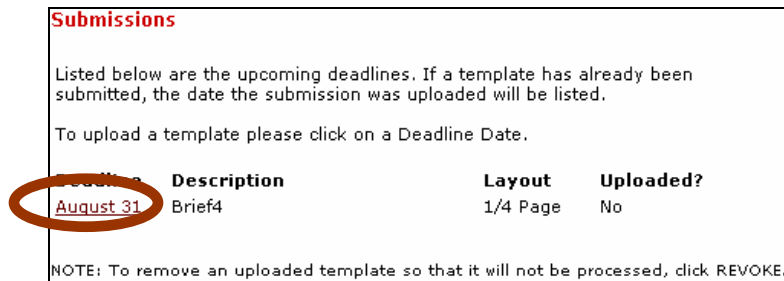
We encourage you to notify recipients that you will be sending them the Daily Plan-It. In order to assist you we have prepared a sample letter that you can use to inform people about this newsletter. A copy of this letter can be downloaded from <http://dpi.topofmind.org/help/introletter.doc>

Submitting Your Template

In order for the Daily Plan-It to be delivered to your recipients you need to upload a ¼ page template. This Template is an MS Word document and can be downloaded by clicking on any deadline in the "Upcoming Deadlines" box and then clicking "here" link. You will also be e-mailed a copy of the template after you signup for the Daily Plan-It.

The template is an MS Word document that has been specially formatted for the exact amount of space available for your personalized section of the Daily Plan-It. It is important to ensure that your information fits in this space and does not wrap onto a second page.

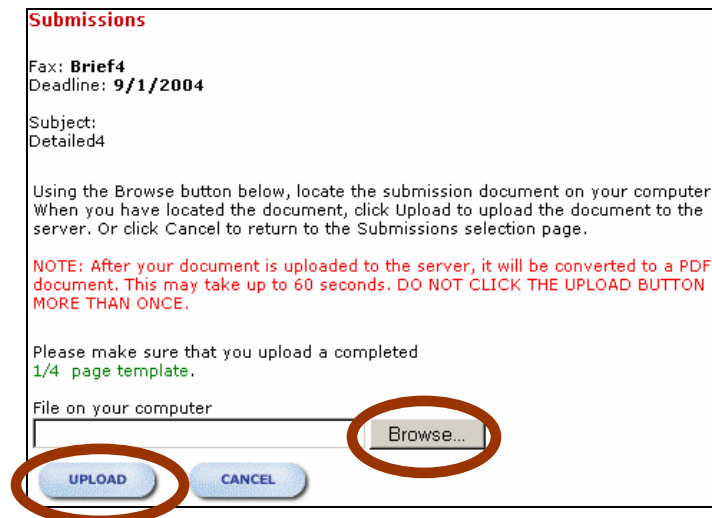
Once you have entered your upcoming workshops, firm information, picture or other information please save and close the MS Word document. Many subscribers find it helpful to save the template for each issue under a different name. Then click on the “Submissions” link and click on the deadline date (circled in the example below).



	Description	Layout	Uploaded?
August 31	Brief4	1/4 Page	No

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

On the next screen please select the file that you want to upload. Please note that the system will only allow you to upload an MS Word document and only the Daily Plan-It template document will fit correctly in the space allotted.



Submissions

Fax: **Brief4**
Deadline: **9/1/2004**

Subject:
Detailed4

Using the Browse button below, locate the submission document on your computer. When you have located the document, click Upload to upload the document to the server. Or click Cancel to return to the Submissions selection page.

NOTE: After your document is uploaded to the server, it will be converted to a PDF document. This may take up to 60 seconds. DO NOT CLICK THE UPLOAD BUTTON MORE THAN ONCE.

Please make sure that you upload a completed
1/4 page template.

File on your computer



After you have uploaded a template the system will show “Yes” under the uploaded column along with the date that the template was uploaded. A proof of the issue will also appear in a separate browser window. You also have the ability to revoke your template, preview the entire issue or have a copy of the preview faxed to you.

Submissions

Submission uploaded

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	Brief4	1/4 Page	Yes (8/30/2004)	REVOKE  Preview  Fax This

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

Default Template

You can also upload a default template that will be used for any issue that you do not upload an issue specific template for. To learn more about this feature please read the Daily Plan-It Manual.