

# Online Distribution List Management User Guide

Revised 8/21/2018



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# Introduction

## About Online Distribution List Management

Online Distribution List Management allows clients to manage their STAR report distribution lists. Update email addresses and properties on a distribution list, or request the creation or deletion of a distribution list all through the self-service, online interface. For increased transparency in the distribution list update process, clients can view or edit pending changes and view an audit history of all changes made in the past 90 days.

Additional functionality for web user management is available for users with dSTAR distribution lists.

## **Supported Browsers**

- Chrome
- Internet Explorer 11

# **Quick Reference Guide**

The purpose of this quick reference guide is to provide an overview of the Online Distribution List Management application and to focus on some of the common functionality.

## **Unified View**

Upon logging into Online Distribution List Management, the default landing page is the unified view. This page contains the distribution lists, emails, and properties tables for quick distribution list management all

in one place. To return to the unified view at any time, click the hotel icon if from the left-hand navigation menu.

#### Screen layout

≡		Di	stribution Lists	+			Emails		+
	🕑 0 of 3				🕑 0 of 17				
	Filter				Filter				
อ		List Name $l_z^{\scriptscriptstyle A}$			Email Address 🛓				
	1 ± 0	List 1 (1)			Email0@example.com				
		List 2 (2)			Email10@example.com				
	/ 2 U	LISUZ (2)			Email13@example.com				
	1 ± 0	List 3 (3)			Email14@example.com				
					Email17@example.com				
				Create List	Email19@example.com				
	🕑 0 of 17				Properties				+
	Filter								
	STR ID	File Name	Name 🎝	Brand	City	State	Country	# of Emails	
	10001	File Name A	Property A	Independent	Hendersonville	TN	United States		
	10003	File Name C	Property C	Independent	Hendersonville	TN	United States		
	10005	File Name E	Property E	Independent	Hendersonville	TN	United States		
	10006	File Name F	Property F	Independent	Hendersonville	TN	United States		
	10012	File Name L	Property L	Independent	Hendersonville	TN	United States		
							Clear All	Add Selected	Remove Selected

#### Working with tables

#### Highlighting/selecting records

To make changes to your distribution lists, the appropriate combination of distribution lists, emails, and properties must be selected. Highlighting records provides another layer of filtering. When you highlight a record, the other tables display data filtered by the highlighted record. Highlighting a record also selects the checkbox, enabling the addition or deletion of the selected record.

Click a record in any grid to highlight that record. This filters the other grids by that record and selects the checkbox to enable the addition or deletion of that record.

You can select a record without highlighting it by selecting the checkbox.

*Note:* When a record is highlighted, the other tables display the record being filtered.

T Linked with Email10@example.com ×

*Note:* You can select multiple records, but only one record in each table can be highlighted.

#### Filtering/sorting records

Use the text filter at the top of a grid to refine displayed data. Start entering the filter criteria and the grid will update in real time.

Emails	+
🗹 0 of 17	
Filter	
	0
Email Address $l_z^{\rm A}$	
Email0@example.com	
Email10@example.com	
Email13@example.com	
Email14@example.com	
Email15@example.com	
Email16@example.com	
Email17@example.com	
Email19@example.com	

Click any of the column headings to sort by that column. Click the column heading again to reverse the sort order.

<b>⊠</b> 0 of 14				Properties				+
Filter								
STR ID	File Name	Name 🎝	Brand	City	State	Country	# of Emails	
10002	File Name B	Property B	Independent	Hendersonville	TN	United States	24	
10003	File Name C	Property C	Independent	Hendersonville	TN	United States	2	
10006	File Name F	Property F	Independent	Hendersonville	TN	United States	13	
10008	File Name H	Property H	Independent	Hendersonville	TN	United States	23	
10009	File Name I	Property I	Independent	Hendersonville	TN	United States	24	
10010	File Name J	Property J	Independent	Hendersonville	TN	United States	16	
10012	File Name L	Property L	Independent	Hendersonville	TN	United States	15	
10014	File Name N	Property N	Independent	Hendersonville	TN	United States	17	

#### Table views

When making changes to your distribution lists, there are two ways to view the tables:

#### **DEFAULT VIEW**

By default, the application displays the distribution lists you have access to, as well as all of the emails and properties associated with those lists. Highlighting a record in any of the tables will filter the other tables by that highlighted record.

For example, if you highlight a property, the emails and distribution lists tables will only display email addresses and distribution lists that are linked with that property.

When viewing tables in the default view, the **Remove Selected** button is active, and the **Add Selected** button is deactivated.

Clear All Add Se	cted Remove Selected
------------------	----------------------

*Note:* You can only *remove* emails/properties from distribution lists while in the default table view

#### **FLIPPED VIEW**

In our example above where you highlighted a property, click the plus sign icon on the email table. This will "flip" the table and display all of the email addresses that ARE NOT linked with that property.

When viewing tables in the flipped view, the **Add Selected** button is active, and the **Remove Selected** button is deactivated.



*Note:* You can only *add emails/properties* to distribution lists while in the flipped table view.

Click the return arrow icon on any table to return to the default view.

#### **ADDITIONAL TABLE VIEW NOTES**

The properties table is the only exception to the flipped table view. Rather than showing properties not linked to a distribution list or email address, the properties table provides a search mechanism to find other properties in your portfolio to add them to a list.

	Properties		<b>(</b>
STR ID	STR ID	Search	
	Q Search your portfolio for properties to add them to a distribution list.		

#### **Property file names**

The property file name represents the name that will appear on your delivered report. If the file name is blank, it will default to the STR ID. To edit a property file name:

- 1 Highlight a distribution list
- 2 Click the pencil icon 🖋
- 3 Enter the desired file name
- 4 Click the check mark 🔽 to save changes

STR ID	File Name	Name $l_z^A$
	File Name A	× ×
10003	File Name C	Property C
10012	File Name L	Property L
10018	File Name R	Property R
10025	File Name Y	Property Y

**Note:** When a custom file name is added, you will be unable to delete that file name. You can edit the file name but cannot return to a blank file name.

# Audit History

Audit history is a record of both pending and processed changes to your distribution lists. To access audit history, click the history icon 🤊 from the left-hand navigation menu.

## Screen layout

Last processed: 11/Jan/2018 9:39 AM CST										
	Pend	ding			Processed					
			Pe	ending Changes						
🖼 0 of 5										
Filter										
Requested By	Date Requested ${{\downarrow}_{\mathbb{A}}^{\mathbb{Z}}}$	List	File Name	Property	Email	Operation				
	11/Jan/2018 9:43 AM CST	List 1		10008   Property H	Email20@example.com	Add				
	11/Jan/2018 9:43 AM CST	List 3		10010   Property J	Email15@example.com	Add				
	11/Jan/2018 9:43 AM CST	List 3		10010   Property J	Email10@example.com	Add				
	11/Jan/2018 9:43 AM CST	List 2		10002   Property B	Email11@example.com	Add				
	11/Jan/2018 9:43 AM CST	List 2		10002   Property B	Email10@example.com	Add				

# **Maintaining Distribution Lists**

The following are administrative features, aside from managing the properties and email addresses on a distribution list.

			Distribution Lists	+
🕑 0 of 3	3			
Filter				
		List Name $l_z^{\scriptscriptstyle A}$		
1 2	÷ Ö	List 1 (1)		
1 2	Ē	List 2 (2)		
1 2	Ē	List 3 (3)		
				Create List

## Create a distribution list

Need to create a new distribution list? Follow these steps to submit a request to our team:

- 1 Click Create List
- 2 Enter a reason for the new list and click Submit
- 3 Click Close to acknowledge the successful request to create a list

## Rename a distribution list

Customize your list names to be more memorable and easier to organize:

- 1 Click the pencil icon 🖋
- 2 Enter the new list name and click the check mark

*Note:* The system assigned distribution list name will always appear in parentheses.

## Download a distribution list

Export your distribution list to an Excel workbook:

- 1 Click the download icon 📥
- 2 Open the workbook to view the distribution list data in Excel

## Delete a distribution list

Need to delete a new distribution list? Follow these steps to submit a request to our team:

- 1 Click the trash icon 🛍
- 2 Enter a reason for deletion and click Submit
- 3 Click Close to acknowledge the successful request to delete a list

# **Adding Emails/Properties to a Distribution List**

There are a few different ways to approach adding emails/properties. Here are a few common scenarios:

## Adding a new email address to one list and one property

		Distribution Lists	+		En	nails		*
😼 1 of 3			☑ 1 of 0 ▼ Con	ains pie.com* ×				
			test@example.	com				
	List Name 🎼		2 That email addr	ess wasn't found. Would you l	ike to add this em	ail to the selected distribution	on list/property com	bination?
1 2 0	List 1 (1)		NO	Ves				
/ ± 0	List 2 (2)							
128	List 3 (3)		Create List	0				
8 1 of 17			Pro	penues				
₿1 of 17 Filter			Pro	peras				
1 of 17 ilter	File Name	Name ‡ĝ	Pro	pencis City	State	Cristy	# of Emails	
1 of 17 ilter TR ID 0001	File Name File Name A	Name I± Property A	Pro Brand Independent	City Hendersonville	State TN	Chietry United States	# of Emails 8	
1 of 17 ilter iTR ID 0001 0003	File Name File Name A File Name C	Name Iĝ Property A Property C	Pro Brand Independent Independent	City Hendersonville Hendersonville	State TN TN	United States United States	# of Emails 8 18	
\$ 1 of 17 ilter STR ID 10001 10003 10004	File Name File Name A File Name C File Name D	Name I 2 Property A Property C Property D	Pro Brand Independent Independent Independent	City Hendersonville Hendersonville Hendersonville	State TN TN TN	United States United States United States United States	# of Emails 8 18 17	
\$ 1 of 17 ilter STR ID 10001 10003 10004 10006	File Name File Name A File Name C File Name D File Name F	Name Iĝ Property A Property C Property D Property F	Pro Brand Independent Independent Independent	City Hendersonville Hendersonville Hendersonville	State TN TN TN TN TN	United States United States United States United States	# of Emails 8 18 17 12	
3 1 of 17 Filter 5TR ID 10001 10003 10004 10006 10007	File Name File Name A File Name C File Name D File Name F File Name G	Name I Property A Property C Property D Property F Property G	Pro Brand Independent Independent Independent Independent	City Hendersonville Hendersonville Hendersonville Hendersonville	State TN TN TN TN TN	United States United States United States United States United States	# of Emails 8 18 17 12 11	
<b>3</b> 1 of 17 Filter 5TR ID 10001 10003 10004 10006 10007 10008	File Name File Name A File Name C File Name F File Name F File Name H	Name I t Property A Property C Property F Property F Property H	Pro Brand Independent Independent Independent Independent Independent	City Hendersonville Hendersonville Hendersonville Hendersonville Hendersonville	State TN TN TN TN TN TN	United States United States United States United States United States	# of Emails 8 18 17 12 11 11	
♂ 1 of 17 Filter STR ID 10001 10003 10004 10006 10007 10008 10009	File Name File Name A File Name C File Name D File Name F File Name H File Name H File Name I	Name 12 Property A Property D Property D Property F Property G Property I	Pro Brand Independent Independent Independent Independent Independent Independent	City Hendersonville Hendersonville Hendersonville Hendersonville Hendersonville Hendersonville	State TN TN TN TN TN TN TN TN	United States United States United States United States United States United States	# of Emails 8 18 17 12 11 13 12	

- 1 Enter the new email address to add in the emails table filter
- 2 Select the desired distribution list and property
- 3 Click **Yes** to add the email
- 4 Click **Yes** to confirm the addition



## Adding a new email address to all lists and properties

- 1 Enter the new email address to add in the emails table filter
- 2 Select all distribution lists and properties
- 3 Click Yes to add the email
- 4 Click **Yes** to confirm the addition

Adding	existing	email	addresses
	chisting	Cinan	444105505

	Dis	tribution Lists	+			Emails		5
🗹 1 of 3 🏾 🕇	Linked with Property C	ж		G 4 of 16 T Linked with neither	Property C nor 3 🛪	3 *table sho	own flipped	
Filter				Filter		•		
	List Name <b>↓</b> 2			Email Address $\downarrow_{A}^{z}$				
1 ± 0	1 List 1 (1)			Email8@example.com				$\checkmark$
1 ± 0	1 List 2 (2)			Email5@example.com				1
2 ÷ *	t List 2 (2)		1	Email2@example.com				
~ = =	1 2132 3 (5)		$\sim$	Email24@example.com				
				Email22@example.com				
				Email21@example.com				
			Create List	Email19@example.com				
☑ 1 of 14	Linked with 3 ×			Properties				+
STR ID	File Name	Name 🎝	Brand	City	State	Country	# of Emails	
10002	🖋 File Name B	Property B	Independent	Hendersonville	TN	United States	24	
10003	🖋 File Name C	Property C	Independent	Hendersonville	TN	United States	2	$\checkmark$
10006	🖋 File Name F	(2)	Independent	Hendersonville	TN	United States	13	
10008	🖋 File Name H	Property H	Independent	Hendersonville	TN	United States	23	
10009	🖋 File Name I	Property I	Independent	Hendersonville	TN	United States	24	
10010	🖋 File Name I	Property I	Independent	Hendersonville	TN	United States	5	
						Clear All	Add Selected	emove Selected

- **1** Highlight a distribution list (*filters emails and properties tables by that list*)
- 2 Highlight a property (filters emails and lists tables by that property)
- 3 Click the plus sign icon + to "flip" the emails table the table now displays all emails NOT associated with the highlighted list and property
- 4 Select the emails to add to that combination
- 5 Click Add Selected
- 6 Click Yes to confirm the addition

**Note:** If records are not highlighted, a flipped table view will contain the same records as the default table view. Whether you are selecting or highlighting, you still have to flip a table in order to add records.

**Note:** When working with multiple selections make sure you are selecting records, rather than highlighting them. Highlighting any one of the records will filter the other tables by the highlighted record.

## Adding a new property

Distribution Lists +	Emails	+
S 1 of 1 T Linked with Email@example.com	St 1 of 9 T Linked with 1 X	
Filter	Filter Email Address 12	
🖋 🕹 📋 List 1 (1)	Email0@example.com	<u> </u>
	Email11@example.com	
	Email13@example.com	
	Email18@example.com	
	Email22@example.com	
	Email3@example.com	
Create List	Email5@example.com	
create list	Email/@example.com	
	Properties 4	3 -
STR ID 10024		Search
	Property Found!	5
10024 Property X		Add Property

- **1** Highlight a distribution list (*filters emails and properties tables by that list*)
- 2 Highlight a email address (filters lists and properties tables by that email address)
- 3 Click the plus sign icon + to "flip" the properties table (*in the screenshot, properties table is already flipped*)
- 4 Enter an STR ID and click Search
- 5 Click Add Property
- 6 Click **Yes** to confirm the addition

**Note:** After adding emails or properties, your changes can now be viewed in the audit history processed changes table.

## Cancelling pending changes

If needed, after pending changes have been submitted, you can cancel those changes individually from the unified view. This is particularly useful when needing to cancel one or two changes.

<b>⊠</b> 0 of 3	Linked with both 1 an	d Email0@example.com 🕱		Properties				+
Filter								
STR ID	File Name	Name 🎼	Brand	City	State	Country	# of Emails	$\sim$
10001	ø	Property A	Independent	Hendersonville	TN	United States		0
10002	ø	Property B	Independent	Hendersonville	TN	United States		0
10004	ø	Property D	Independent	Hendersonville	TN	United States		0

- 1 Highlight any combination of the pending change that needs to be cancelled (*ex: highlight a single distribution list and a single email address*) in the case of a pending addition, the record is highlighted in green
- 2 Click the cancel icon Ø to immediately cancel that single pending change

*Note:* For cancelling larger numbers of pending changes, navigate to the audit history pending changes table.

# **Removing Emails/Properties from a Distribution List**

There are a few different ways to approach removing emails/properties. Here are a few common scenarios:



## Removing one email address from all lists and properties

- 1 Highlight the email address to remove (*filters lists and properties table by that email address*)
- 2 Select all distribution lists and properties
- 3 Click Remove Selected
- 4 Click **Yes** to confirm the removal

## Removing multiple emails

Removing multiple email addresses follows the same steps as a single email address, but instead of highlighting a record, use the checkbox to select multiple records.

**Note:** When working with multiple selections make sure you are selecting records, rather than highlighting them. Highlighting any one of the records will filter the other tables by the highlighted record.

- 1 Select the email addresses to remove
- 2 Select all distribution lists and properties from which you wish to remove the email addresses
- 3 Click Remove Selected
- 4 Click **Yes** to confirm the removal

**Note:** After removing emails or properties, your changes can now be viewed in the audit history processed changes table.

# Cancelling pending changes

If needed, after pending changes have been submitted, you can cancel those changes individually from the unified view. This is particularly useful when needing to cancel one or two changes.

🗹 0 of 3	<b>T</b> Lir	nked with both 1 and <b>E</b>	Email8@example.com ×	Prop	perties				+
Filter									
STR ID		File Name	Name 🎼	Brand	City	State	Country	# of Emails	<b>X</b> 🗸 (
10003	an a	File Name C	Property C	Independent	Hendersonville	TN	United States	2	0
10009	an a	File Name I	Property I	Independent	Hendersonville	TN	United States	24	0
10023	(MA)	File Name W	Property W	Independent	Hendersonville	TN	United States	23	0

- 1 Highlight any combination of the pending change that needs to be cancelled (*ex: highlight a single distribution list and a single email address*) in the case of a pending removal, the record is highlighted in red
- 2 Click the cancel icon Ø to immediately cancel that single pending change

**Note:** For cancelling larger numbers of pending changes, navigate to the audit history pending changes table.

# **Viewing Audit History**

Audit history is a record of recent changes to your distribution lists.

## View pending changes

The Pending Changes table displays changes to your distribution lists that have not yet been processed. The most recent processing date is displayed below the page title.

Each record contains information about what was changed, what type of change (add, rename, delete), who made the change, and the option to cancel the pending change. The Pending Changes table is sorted by default from newest to oldest. Click any of the column headers to sort by that field.

### **Cancel pending changes**

Select any of the pending changes checkboxes and click **Cancel Selected** to cancel the selected changes. Click **Yes** to confirm the cancellation.

## View processed changes

The Processed Changes table displays changes that have been made and processed over the last 90 days. The most recent processing date is displayed below the page title.

Each record contains information about what was changed, what type of change (add, rename, delete), who made the change, and whether or not the change was processed successfully. The Processed Changes table is sorted by default from newest to oldest. Click any of the column headers to sort by that field.

**Note:** Pending changes are processed once each business day. After processing, pending changes move to the processed table.

### **Rejected changes**

Any pending changes that are rejected during processing will be reflected in the processed changes table with a status of rejected and an associated rejection message. If your changes are rejected, you will be notified upon your next login to the site.

# Web User Management

**Note:** These features are only available for users with dSTAR distribution lists.

## Overview

## Identifying a dSTAR list

dSTAR distribution lists are indicated by a star icon  $\star$  in the distribution lists table.

			Distribution Lists		+
<b>0</b> 0 o	f 2				
Filter	r				
			List Name $l_z^{\mathbb{A}}$		
ø	Ł	Û	Slate Rock and Gravel (SRG1)	*	
8	÷	Û	Rockhead and Quarry Cave	*	
					Create List

## Web user icons

When a dSTAR distribution list is highlighted, each record in the emails grid displays one of two icons:

#### Add web user ᅪ

This icon is displayed for any email address without web access. Click the icon to grant web access.

#### Edit web user 🚢

This icon is displayed for any email address with web access. Click this icon to view and edit web user information.

## Adding web access

To add web access to a user:

- 1 Select the desired dSTAR distribution list
- 2 Click the add web user icon 🕹 from the emails grid, next to the desired new web user
- 3 Enter the first and last name for the web user
- 4 Click Add

Ad	d Web User For fred@bedrock.com
First Name:	
Last Name:	
	Cancel Add

Upon success, you will be given the user ID for the new web user.

Add Web User For fred@	<pre>@bedrock.co</pre>	m
User ID <b>fflintstone</b> has l	been created	
We've sent a welcome email to the instructions to complete account se	new web user with etup within 3 days.	
Contact us for additional permissio	ons or property a	access.
	Close	Contact Us

*Note:* The new web user must follow the instructions found in the welcome email to complete account setup within 3 days.

## Alternative scenarios

The Add Web User screen will vary depending on the status of the user.

#### **Existing contact information**

If we already have the contact information for the user, the first and last name will be displayed.

Add Web User For fred@b	edrock.com	ו
Do you want to add web access for <b>F</b>	red Flintstone?	
Contact Us	No	Yes

If all info is correct, click **Yes**. Otherwise, contact us to resolve the issue.

#### Inactive user

If an inactive user is associated with the email address, contact us to resolve the issue.



#### Multiple users associated with email address

If multiple users are associated with the email address, contact us to resolve the issue.

Add Web User For fred@b	edrock.co	m
Multiple users are associated with thi Contact us for assistanc	s email address. :e.	
	Close	Contact Us

## Editing web user information

The web user information window displays general web user information and actions that can be taken on the user.

To edit web user information:

- 1 Select the desired dSTAR distribution list
- 2 Click the edit web user icon 着

	Web user information for fred@b	pedrock.com
Last Login:	05-Jul-2018 9:50 AM CST	Reset Password
Welcome Email Sent:	05-Jul-2018 9:33 AM CST	Resend Email
User ID:	fflintstone	Deactivate User
First Name	Fred 🗸	
Last Name	Flintstone 🗸	
Contact us		Cancel Save

The web user's last login date and time, when the welcome email was sent, and the user ID are displayed.

## Web user actions

#### **Reset password**

To reset a password for a web user, click **Reset Password**. This will send an email to the web user where they can reset their password.

**Note:** In the case of a locked user, the web user will remain locked until the reset password workflow has been completed.

#### **Resend welcome email**

To resend the welcome email from STR that allows users to establish their password and security questions, click **Resend Email**.

#### Deactivate user

To deactivate a web user, click **Deactivate User**. Deactivating a web user will remove their access to dSTAR.

*Note:* A web user with additional access beyond dSTAR cannot be deactivated here. Contact us to resolve the issue.

Deactivate	fred@b	edrock.c	om ?		
	Thi	s web user h	as additiona	l access.	
		Contact us	for assistan	ce.	
				Close	Contact Us

#### Edit first/last name

Modify the first and last name as desired and click **Save**.

Name requirements:

- First name length must be between 1-40 characters
- Last name length must be between 1-80 characters
- Uppercase/lowercase letters, apostrophes (single quote), and hyphens are all acceptable