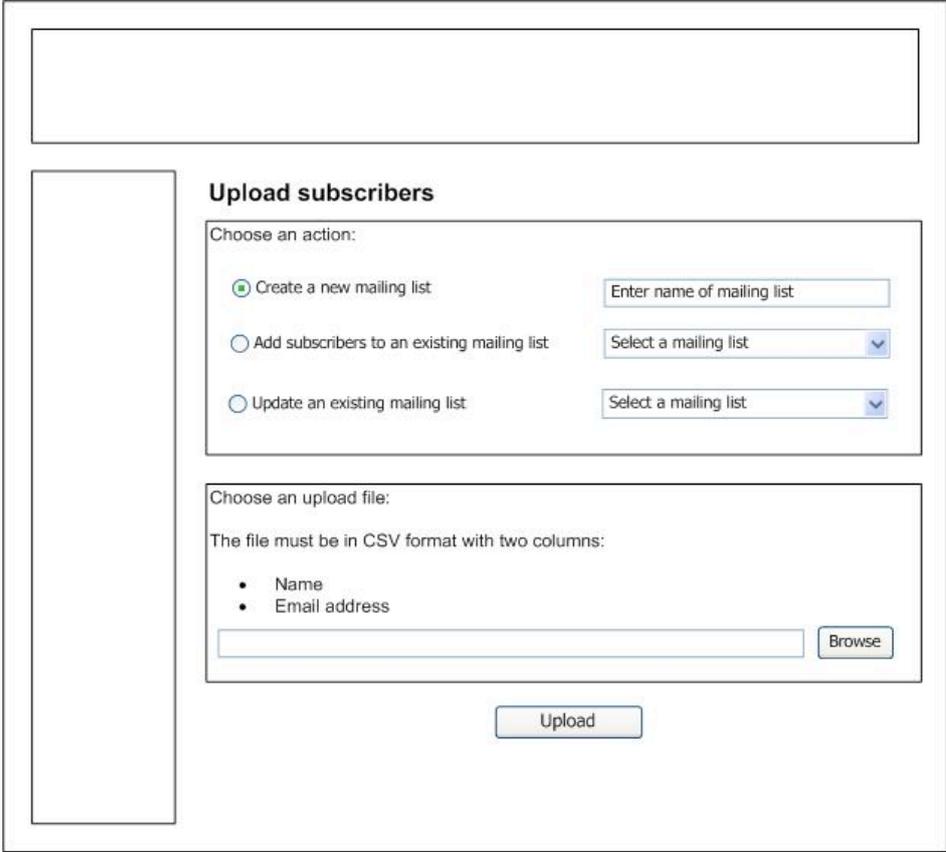


1 New function: Upload subscribers

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| Overview | This function will allow the user to either select an existing mailing list, or provide a name for a new list, and then upload a file. |
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1.1 Upload Subscribers screen

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| Overview | This page allows the user to enter the name of a new mailing list or select an existing mailing list, and select the upload file. |
| Wireframe ("Update" option added) |  <p>The wireframe shows a page layout for the 'Upload subscribers' screen. At the top is a large empty rectangular box. Below it is a vertical sidebar on the left. The main content area is titled 'Upload subscribers' and contains two sections. The first section, 'Choose an action:', has three radio button options: 'Create a new mailing list' (selected), 'Add subscribers to an existing mailing list', and 'Update an existing mailing list'. To the right of these options are three input fields: a text box labeled 'Enter name of mailing list', and two dropdown menus labeled 'Select a mailing list'. The second section, 'Choose an upload file:', includes a note: 'The file must be in CSV format with two columns:' followed by a bulleted list: 'Name' and 'Email address'. Below this is a text input field and a 'Browse' button. At the bottom center of the main content area is an 'Upload' button.</p> |

| Validations | <p>When “Upload” is clicked, the system will carry out the following tests. As per standard formatting, the error message will appear above the relevant field.</p> <table border="1" data-bbox="451 331 1428 1238"> <thead> <tr> <th data-bbox="451 331 932 365">Test</th> <th data-bbox="932 331 1428 365">Message if test fails</th> </tr> </thead> <tbody> <tr> <td data-bbox="451 365 932 506">If ‘create new list’ is selected, that a list name as been entered. (This cannot be “Enter name of mailing list”)</td> <td data-bbox="932 365 1428 506">Please enter a name for the new mailing list.</td> </tr> <tr> <td data-bbox="451 506 932 611">If ‘create new list’ is selected, that the list name is unique</td> <td data-bbox="932 506 1428 611">This list name is already in use. Please enter a different name.</td> </tr> <tr> <td data-bbox="451 611 932 714">If ‘add to existing list’ is selected, that a list has been selected.</td> <td data-bbox="932 611 1428 714">Please select which mailing list you’d like to add the new subscribers to.</td> </tr> <tr> <td data-bbox="451 714 932 819">If ‘updating an existing list’ is selected, that a list has been selected.</td> <td data-bbox="932 714 1428 819">Please select which mailing list you’d like to update.</td> </tr> <tr> <td data-bbox="451 819 932 891">That an upload file has been selected.</td> <td data-bbox="932 819 1428 891">Please select a file to upload.</td> </tr> <tr> <td data-bbox="451 891 932 994">That the selected upload file is a CSV file.</td> <td data-bbox="932 891 1428 994">The upload file is not in the correct format. It must be a CSV file.</td> </tr> <tr> <td data-bbox="451 994 932 1099">Email addresses in second column have valid format.</td> <td data-bbox="932 994 1428 1099">Your file contains an invalid email address in row [ROW NUMBER].</td> </tr> <tr> <td data-bbox="451 1099 932 1238">The upload file has two columns of data exactly. (Not 1 or 3 or more.)</td> <td data-bbox="932 1099 1428 1238">Your file must only contain 2 columns. Please check the instructions above and try again.</td> </tr> </tbody> </table> | Test | Message if test fails | If ‘create new list’ is selected, that a list name as been entered. (This cannot be “Enter name of mailing list”) | Please enter a name for the new mailing list. | If ‘create new list’ is selected, that the list name is unique | This list name is already in use. Please enter a different name. | If ‘add to existing list’ is selected, that a list has been selected. | Please select which mailing list you’d like to add the new subscribers to. | If ‘updating an existing list’ is selected, that a list has been selected. | Please select which mailing list you’d like to update. | That an upload file has been selected. | Please select a file to upload. | That the selected upload file is a CSV file. | The upload file is not in the correct format. It must be a CSV file. | Email addresses in second column have valid format. | Your file contains an invalid email address in row [ROW NUMBER]. | The upload file has two columns of data exactly. (Not 1 or 3 or more.) | Your file must only contain 2 columns. Please check the instructions above and try again. |
|---|--|------|-----------------------|---|---|--|--|---|--|--|--|--|---------------------------------|--|--|---|--|--|---|
| Test | Message if test fails | | | | | | | | | | | | | | | | | | |
| If ‘create new list’ is selected, that a list name as been entered. (This cannot be “Enter name of mailing list”) | Please enter a name for the new mailing list. | | | | | | | | | | | | | | | | | | |
| If ‘create new list’ is selected, that the list name is unique | This list name is already in use. Please enter a different name. | | | | | | | | | | | | | | | | | | |
| If ‘add to existing list’ is selected, that a list has been selected. | Please select which mailing list you’d like to add the new subscribers to. | | | | | | | | | | | | | | | | | | |
| If ‘updating an existing list’ is selected, that a list has been selected. | Please select which mailing list you’d like to update. | | | | | | | | | | | | | | | | | | |
| That an upload file has been selected. | Please select a file to upload. | | | | | | | | | | | | | | | | | | |
| That the selected upload file is a CSV file. | The upload file is not in the correct format. It must be a CSV file. | | | | | | | | | | | | | | | | | | |
| Email addresses in second column have valid format. | Your file contains an invalid email address in row [ROW NUMBER]. | | | | | | | | | | | | | | | | | | |
| The upload file has two columns of data exactly. (Not 1 or 3 or more.) | Your file must only contain 2 columns. Please check the instructions above and try again. | | | | | | | | | | | | | | | | | | |
| Functionality – check for duplicate emails | <p>The system will check to see if any of the emails in the upload file already exist in the client’s database.</p> <p>If so, if any of the duplicate emails have a different Subscriber Name in the upload file to the existing Subscriber Name, they will need to be included on the ‘Conflict Resolution’ screen which appears next.</p> <p>(In the earlier version of this document, duplicate emails with a status of ‘Deleted’ were also to appear on the conflict resolution screen, but as of version 1.2, these users will no longer exist.)</p> | | | | | | | | | | | | | | | | | | |
| “Private list” field – creating new lists | <p>The database contains a field for “private list” which indicates whether the list should be displayed on the front-end or not. When creating a new list, this field should be set so that the list is private by default. (If the user does wish the new list to appear on the front-end, they can alter this setting via the Manage Subscribers section.)</p> <p>When a new list is not being created (i.e. when the user is updating or adding to an existing list) the “private list” field should remain as it is.</p> | | | | | | | | | | | | | | | | | | |
| Functionality – in | If the user has selected the “Update existing list” function, then the system will check | | | | | | | | | | | | | | | | | | |

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| <p>'Update' process, check for deletions</p> | <p>to see if there are any emails in the existing mailing list which are absent from the new upload file. If so, these emails will need to appear on the 'Conflict Resolution' screen which appears next</p> |
| <p>Uploading subscribers</p> | <p>If there are no conflicts to be resolved then the new subscribers will be uploaded, and the system will go straight to the "Successful upload" page.</p> <ul style="list-style-type: none"> • The system will not create any duplicate emails in the database. If an email address already exists (but doesn't have any conflicts to be resolved) then the Subscriber ID will be added to the new or selected mailing list. • The system will automatically create a random password for each subscriber as they are uploaded. Any existing subscribers will keep their existing password. • The extranet user permissions to the uploaded list will be applied in the following way: <ul style="list-style-type: none"> ○ If there are no permissions on any of the existing lists, then all the extranet users will get permission for the new list. ○ If there are permissions on the existing lists, then permission will be granted to all groups of which the uploading user is a part. |

1.2 Conflict Resolution screen

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| Overview | This page allows the user to resolve conflicts which may occur between the upload file and the existing database. If there are no conflicts to resolve, then this screen will not appear. |
| Conditions | <p>This page only appears if there are conflicts to resolve.</p> <p>That is, if there are:</p> <ul style="list-style-type: none">• Emails in the upload file that already exist in the database and have a different Subscriber Name to the existing one• If the 'Update list' function is being used, and there are emails in the existing mailing list which are absent from the upload file. <p>If neither of these conditions occur, then the system will go straight to the "Successful Upload" page, without displaying this page.</p> <p>(Note: In the earlier version of this document, duplicate emails with a status of 'Deleted' were also to appear on the conflict resolution screen, but as of version 1.2, these users will no longer exist.)</p> |

Wireframe

(Changes:

- the “previously deleted subscribers” table has been removed
- the “Subscribers to be removed” table has been added
- ‘cancel’ button has been added)

Upload subscribers

Please note the following differences between the your upload file and the existing subscribers.

Emails with different subscriber name

These email addresses already exist in the system but have a different subscriber name to the one you are uploading. If you'd like to use the new name, then select them below:

| Existing name | Name in file upload | Email | Select to change |
|------------------|---------------------|---------------------|--------------------------|
| James Oliver | Jim Oliver | james@dickens.co.uk | <input type="checkbox"/> |
| Will Shakespeare | William Shakespeare | bills@globe.com | <input type="checkbox"/> |
| Isaac Newton | Zac Newton | newts@physics.com | <input type="checkbox"/> |

Subscribers to be removed from this mailing list

These subscribers are in the existing version of the list you're updating, but not in your upload file. They will be removed from this mailing list. If you want them to remain on the list, you should cancel now, and add them to your upload file.

| Subscriber name | Email |
|------------------|-------------------|
| Ben Johnson | BJ@thing.co.uk |
| Will Shakespeare | bills@globe.com |
| Frank Bacon | fbacon@shops.com |
| Liz Tudor | liz@royalty.co.uk |
| John Dee | jd@magik.com |

Table – Emails with different subscriber name

This lists all subscribers in the upload file (identified by email address) who are already in the database, and who have a subscriber name which is different to the subscriber name in the upload file.

This table will not appear if there is no content for it.

The user can select these to overwrite the existing subscriber name with the new one.

Table – Subscribers to be removed

This table is only relevant when the “Update list” function is being used. It lists the emails which appear in the existing list, but not in the upload file.

This table will not appear if there is no content for it.

It only lists the emails, there is no functionality to keep these subscribers. If the user wishes to keep them, they need to cancel the process and adjust their upload list. This is to ensure that the updated mailing list is exactly the same as the list which has been provided.

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| Action buttons | <ul style="list-style-type: none"> ▪ “Cancel” – stops the process and returns the user to the “Upload subscribers” screen ▪ “Continue” – carries out the upload |
| Functionality – uploading the list | <p>Rules for uploading:</p> <ul style="list-style-type: none"> • If subscribers who are duplicated have a different subscriber name, the new name will be written into the database if the subscriber has been selected on Conflict Resolution screen. • If the ‘Update list’ function is being used then: <ul style="list-style-type: none"> ○ Any emails which are in the existing mailing list but not in the upload file will be removed from the mailing list ○ If any of these users are <i>not</i> on any other mailing list, then they will be deleted from the database. • As discussed earlier, the system will not create any duplicate emails. If an email address already exists (but doesn’t have any conflicts to be resolved) then the Subscriber ID will be added to the new or selected mailing list. • The system will automatically create a random password for each new subscriber as they are uploaded. Any existing subscribers will keep their existing password. • The extranet user permissions to the uploaded list will be applied in the following way: <ul style="list-style-type: none"> ○ If there are no permissions on any of the existing lists, then all the extranet users will get permission for the new list. ○ If there are permissions on the existing lists, then permission will be granted to all groups of which the uploading user is a part. |

1.3 Successful Upload screen

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| Successful upload screen | <p>Once the upload has been successfully completed, a new screen with either of the following messages will be displayed:</p> <p><i>If a new list has been created:</i> “The new mailing list, [LIST NAME], has successfully been created.”</p> <p><i>If the subscribers have been added to an existing list:</i> “The new subscribers have successfully been added to the mailing list, [LIST NAME].”</p> <p><i>If the mailing list has been updated:</i> “The mailing list, [LIST NAME] has been updated with the new subscribers.”</p> |
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2 New function: Delete a mailing list

| Overview | <p>This function allows users to delete mailing lists from the system.</p> <p>The mailing list is deleted from the database altogether, not just given a status of 'Deleted'.</p> <p>Subscribers who are on this list, but who do not appear on any other mailing lists, will also be deleted from the database.</p> | | | | |
|-----------------------------------|---|------|-----------------------|-----------------------------------|--|
| Wireframe |  | | | | |
| Validations | <p>When "Delete list" is clicked, the system will carry out the following tests. As per standard formatting, the error message will appear above the relevant field.</p> <table border="1" data-bbox="451 1424 1431 1532"> <thead> <tr> <th>Test</th> <th>Message if test fails</th> </tr> </thead> <tbody> <tr> <td>A mailing list has been selected.</td> <td>Please select a mailing list for deletion.</td> </tr> </tbody> </table> | Test | Message if test fails | A mailing list has been selected. | Please select a mailing list for deletion. |
| Test | Message if test fails | | | | |
| A mailing list has been selected. | Please select a mailing list for deletion. | | | | |
| Confirmation screen | <p>Before the list is deleted, a confirmation screen will be presented with this message:</p> <p>"Are you sure you want to delete the mailing list [LIST NAME]? This operation cannot be undone. [OK] [Cancel]"</p> | | | | |
| Functionality | <p>The mailing list will be deleted from the database.</p> <p>Any subscriber on the list who does not appear on any other mailing list will also be deleted.</p> | | | | |
| Successful deletion screen | <p>Once the mailing list has been deleted, a new screen will be presented with this message.</p> <p>"The mailing list, [LIST NAME], has been deleted."</p> | | | | |