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Track Messenger - Instruction Manual

Overview:

Thank you for purchasing Portatree *Track Messenger* for your sporting facility! *Track Messenger* allows you to easily communicate with participants, spectators, and personnel through email and text messages. It supports sending messages up to 100 characters in length to a single recipient or to a recipient list. The lists are created based on user preferences (category/entry number and type of information they wish to receive). The *Track Messenger* software also supports remote sign up allowing users to subscribe to the service by simply sending a text message or email to the *Track Messenger* software. Remote send is also available allowing a designated administrator to send messages to recipients through his or her cell phone!
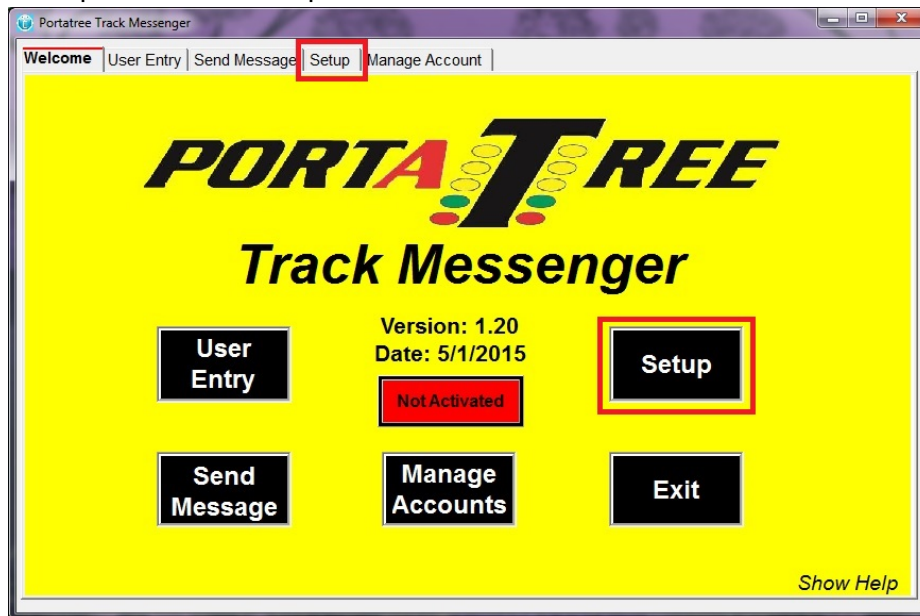
Requirements:

- Computer running Windows XP, 7, 8, 8.1, or 10
- Portatree Soft Lock USB Key
- Email Account

Setup:

- Open the *Track Messenger* software and insert the Soft Lock USB Key into a USB port
- *Setup Soft Lock USB Key:*
    1.) Click the "Setup" button or "Setup" tab

2.) Enter the 16-digit registration number that came with your software
3.) The software automatically detects the COM Port where the USB Key is connected within ~10 sec
   If the COM Port is not detected, perform the following:
   a. For Windows XP users:
       i. Click "Start"
       ii. Click "Control Panel"
       iii. Click "System"
       iv. Switch to the "Hardware" tab
       v. Click "Device Manager"
   b. For Windows 7 users:

   i. Click "Start"
   ii. Click "Control Panel"
   iii. Switch "View by:" to "Small icons"
   iv. Click "Device Manager"
  c. For Windows 8 & up users:
   i. Right click "Start"
   ii. Click "Control Panel"
   iii. Switch "View by:" to "Small icons"
   iv. Click "Device Manager"
  d. Expand "Ports (COM & LPT)" by clicking the arrow on the left side of the icon
  e. Identify the Soft Lock USB Key and enter the COM number
 4.) The software will automatically connect to the Soft Lock USB Key
   Status box will turn green and show "Activated"

- *Setup Email Account:*
 1.) On Setup tab, click "Add/Change Account" to enter an Email account
  a. Click "Automatically Check for Online Entries" if you want the software to automatically check for remote sign ups/sends
  b. Click "Set to Active Account" if you want *Messenger* to use this account for sending/receiving messages
  c. Server information is automatically set for Gmail, Yahoo, MSN, Hotmail, and Outlook accounts

Note 1: Repeat this step up to 5 times to add additional accounts
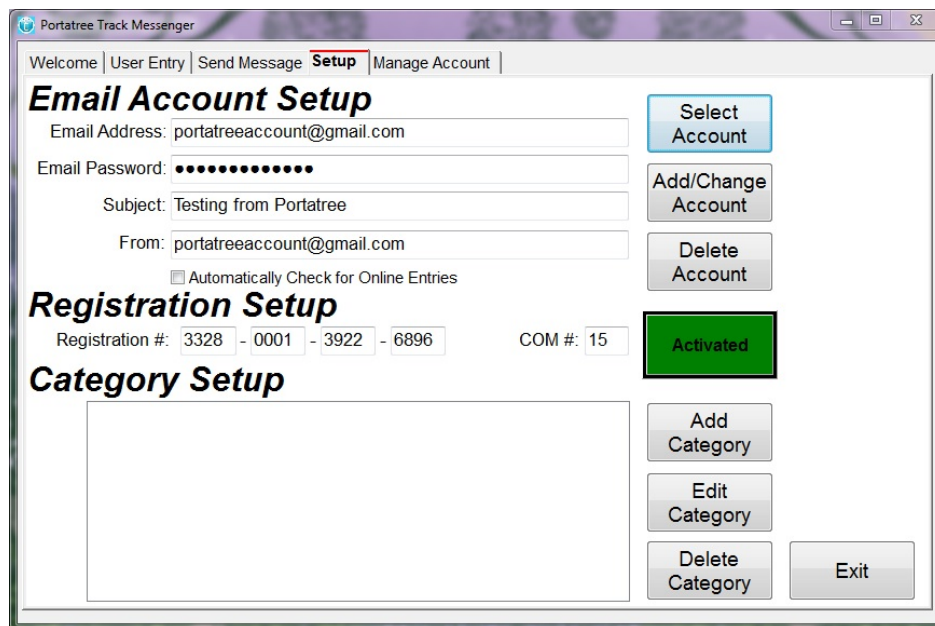**Note 2:** Changes can be made to the Active Account by clicking "Add/Change Account"
Note 3: An Active Account is required to send/receive messages

2.) The active account can be changed at any time by clicking "Select Account"
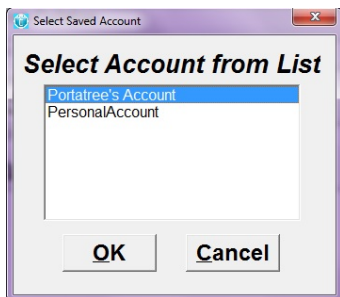
3.) Saved accounts can be removed by clicking "Delete Account"
4.) Verify the correct account is active

- *Setup Message Categories:*
  1.) Click "Add Category" to add a new category

  Note: Categories are numbered 1 to 99 for identification (each cat must have a unique number)
  2.) If a category is added incorrectly, select the category and click "Edit Category"

  Note: The category number can be edited, but it must be changed to an unused category number

3.) To delete a category, select the category and click "Delete Category"

4.) Click the check box next to the category number to activate a category

Note 1: Messages can only be sent to active categories

Note 2: Active categories are saved to each email account

Operation:

After the initial setup, most operations are performed from the "User Entry", "Send Message", or "Manage Account" tabs. The "User Entry" page is used to enter spectators, facility personnel, and participants into the recipient list. It can also be used to view user information. The "Send Message" tab is used to send messages to and receive messages from the registered users. The "Manage Account" tab is used to transfer users between different email accounts.

User Entry:

- Race End Date:
  - Date/time after which messages for the event in progress will no longer be sent
  - Field is highlighted green when a valid future date/time is entered
  - Field is highlighted yellow when the date/time is in the past (has expired)
  - The "Race End Date" is saved upon exiting the program
- Add New Recipient:
  - Enter First Name, Last Name, Phone Number (or Email Address), Category, Message Type, and Account Name
    - If Phone Number entered, must select a Carrier
    - Must select at least one category number or check "All Categories"
    - All categories that are listed on the "Setup" tab are available on the "User Entry" tab
  - Option to choose multiple categories or to enter an entry number to watch
  - Option to choose a date/time for the user to stop receiving messages
    - Checking "Send for Current Race" causes the "Race End Date" to be copied to this field
    - If left blank, the user will be considered Inactive and will not receive messages
  - Option to only send if an entry is still in, in a given category
    - Checking "Only Send if Still Active" causes messages to stop after an entry loses in a given category
  - Option to select an account for the user
    - User will be Active when the selected account is active
    - If "0 – No Account" is selected, the user will be inactive
  - The "Add" Button is enabled once the required information is entered

- Search Recipients:
  - Enter First Name, Last Name, Phone Number, or Email Address on the "User Entry" page
    - The "Search" button is enabled once the required information is entered
  - If a User is found, his/her information can be modified on the "User Entry" page
    - Click "Make Change" to save the edited information

Above: "User Entry" page ready to add new user

Above: "User Entry" making a change during search mode

- Import User Information:
  - Import new recipients from a .txt or .csv file
  - Expected format:
    - Each new recipient is on a separate line
    - Information fields for a recipient are comma separated
    - Unused fields are set to 0
    - Accepted fields include First Name, Last Name, Email/Phone Number, Phone Carrier, All Categories, Cat 1, Entry #, Cat 2, Entry #, Cat 3, Entry #, Cat 4, Entry #, Run Info,

General Info, Still-In, Stop Time, Administrator (see Show Entry Table for examples), Account Number
- o Option to replace existing entries if a phone number/email address conflict is found
- o Option to add all entries to the active account (otherwise they are added to the account specified in the file to import)
- o Click "Open" to browse for the recipient list to import
- o Click "Import" to retrieve the data
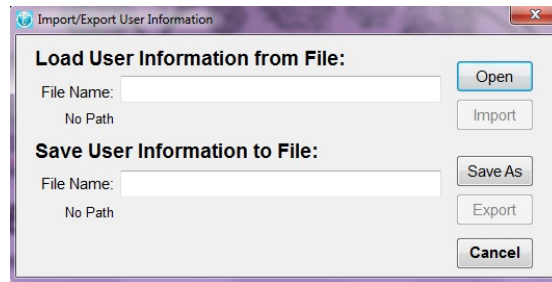
- Export User Information
  - o Export current recipient list to a .txt or .csv file
  - o Click "Save As" to choose a location and enter a name for the file
  - o Click "Export" to save the recipient list to the file
- Active vs. Inactive Recipients:
  - o The field "User Status" on the "User Entry" page identifies whether a user is Active or Inactive
 - o "User Status" is determined based on the following:
    - Categories selected
    - User still racing
    - Date/Time to stop receiving messages
    - Account selected to send/receive messages
  - o **Category Active:** A user is inactive if the categories he/she selected are not designated as active categories on the "Setup" page
  - o **Still-In Active:** A user is inactive if he/she has selected to only receive messages while a particular entry/category is running. Once the entry has been eliminated in the selected category, the user will no longer receive messages
  - o **Time Active:** A user is inactive if the current date/time is later than the date/time selected to stop receiving message OR if no time was selected
  - o **Account Active:** A user is inactive if he/she is not designated to an account or is not designated to the active account (the active account is the account shown on the "Setup" tab)
  - o For a user to be active, his or her category, still-in, account, and time status must be active
  - o "Total Records" displays the total number of recipients in the system
  - o "Active Records" displays the total number of active recipients in the system
- Show Entries:
  - o Click "Show Entries" to view a table of all users
  - o User information can be changed by double clicking a field of the table
  - o Use the "Entry Filters" to limit the users displayed in the table
    - Choose to filter by category, account, or whether or not the user is active
  - o Click "Hide" to close the table of users
- Administrator:
  - o A user can be designated as an administrator by setting the "Administrator" field in the "Show Entries" table
  - o The "Administrator" field is automatically toggled by a double-click
    - Value of '0' means the user is not an administrator
    - Value of '1' means the user is an administrator

o   Administrators are able to send messages to active categories using a cell phone
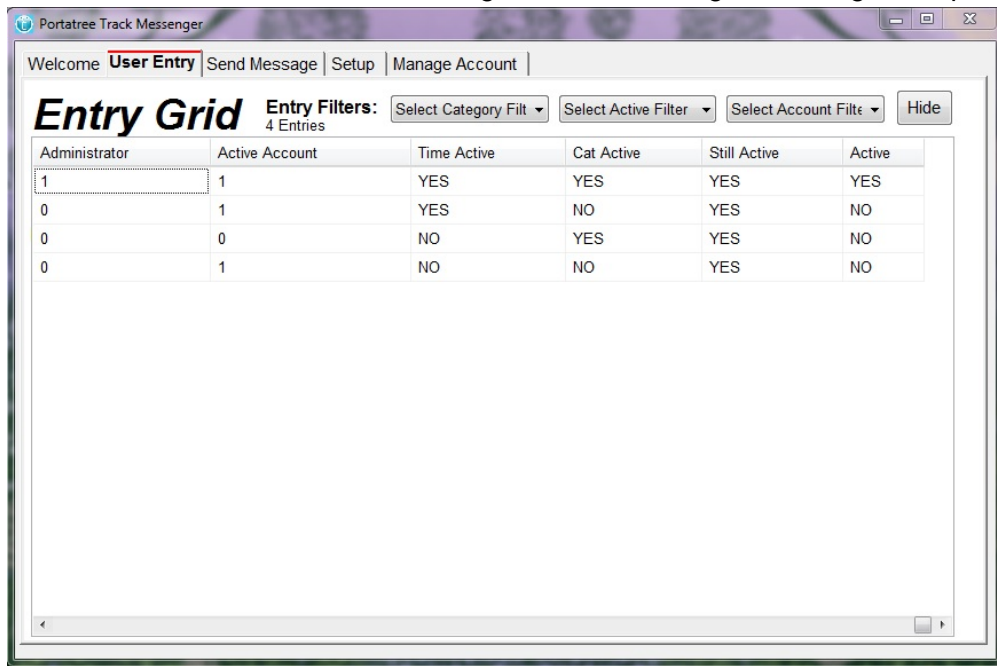
Send Message:

- Send (General Information):
    - Soft Lock USB Key must be connected for send to be enabled
    - A valid Email account must be active for send to be enabled
- Mass Send:
    - Enter a Message, Category, and Message Type
    - The "Send" Button is enabled once the required information is entered
    - Three messages up to 100 characters can be entered on the "Send" page
        - The selected message is sent to the recipients
    - Only the categories designated as "Active" are available on the "Send" page (see Setup)
    - After a send is complete, the result of the send appears in the bottom right of the "Send" page
    - Click "View Message Recipients" to view the recipient list before a send
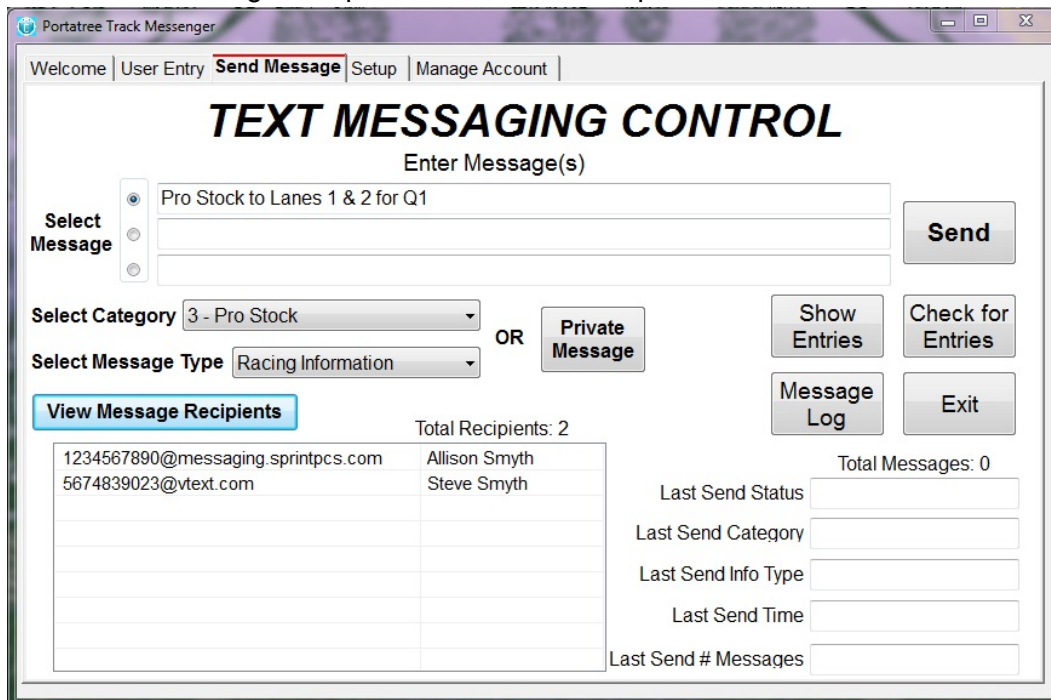
Above: "Send Message" tab before a group send

Above: "Send Message" tab after a group send

- Private Send:
  - Click the "Private Message" button to send a message to a single user
  - Phone Number (or Email Address) and Message are required to send
  - The message field is limited to 100 characters
  - To search for a user, perform the following
    - Enter a last name, first name and last name, or phone number (partial input accepted)
    - Click "Search"/"Next" until user is found
  - After a send is complete, the result of the send displays as the "Send Status"

- Message Log:
  - Click the "Message Log" button to display all messages sent since the program was started
  - Displays category sent to, message sent, type of info sent, send time, and # of recipients

Remote Sign Up/Remote Send:

- Remote sign up and remote send can be automatically or manually controlled in *Messenger*
  - Automatic Control: Check "Automatically Check for Online Entries" on "Setup" tab
    - Select interval to automatically check the account
  - Manual Control: Uncheck "Automatically Check for Online Entries" on "Setup" tab
    - Click "Check for Entries" on the "Send Message" tab to check the account
- Remote Sign Up:
  - Allows users to add, remove, or update their active status
  - User must send an email or text message to the active Email account
    Messenger will read the received messages and perform the commands
  - Commands accepted by *Messenger*:
    - <u>Add</u> <u>First Name</u> <u>Last Name</u> <u>Cat #</u> <u>Cat #</u> <u>Cat #</u> <u>Cat #</u> <u>Info Type</u>
      - Name, category numbers, and info type are optional
      - First time users must send at least their last name
        - If category not received, user will be entered to all categories
        - If info type not received, user will be entered for all information
      - Registered users are only required to send "Add"
        - If category information received, the new category will be appended
        - If info type is received, the existing info type will be replaced
        - If 0 is received, the user will be setup to receive all categories
      - User will be activated until the end of the current race or for 7 days (if a current race end date is not setup)
    - <u>Remove</u> <u>Cat #</u>
      - Category number is optional
      - If category number is not received, the user will be marked inactive
      - If category number is received, user will be removed from the selected category
        - If no categories remain, the user will be marked inactive
    - <u>Watch</u> <u>Cat #</u> <u>Entry #</u>
      - Category and entry number are optional
      - If category and entry number are received, a user will be setup to only receive messages when the entry number is still active in a given category

- If only category received, the user will receive messages for that category even if their entry in that category is not active
- If only watch is received, the user's status will be toggled
  - If the user is watching a particular category and entry, it will be disabled
  - If the user is not watching a category or entry, it will be enabled
- Help Command
  - Command can be either Add, Remove, Watch, or Cat
  - Add, remove, and watch respond with the format of the command
  - Cat responds with the first 5 active categories from the setup screen
    - Allows a user to know the category numbers that can be selected
    - "Help Cat" can be followed by "More" to get additional category info
  - "Help Cat #" is also accepted
    - Returns the category name of the selected category
  - If only "Help" received, system sends the commands accepted
- Remote Send:
  - Allows users designated as Administrators to send messages to a category
  - Format: Send Cat # Message
  - The message must be less than 100 characters or it will be truncated by *Messenger*
  - The system will reply with "Send Successful" or an error message to confirm that the send command was received

Manage Account:

- Copy or move selected user(s) or all users between email accounts
- Copy will make a duplicate copy of the user in the Receiving Account
- Move will remove the user from the Sourcing Account and add the user to the Receiving Account
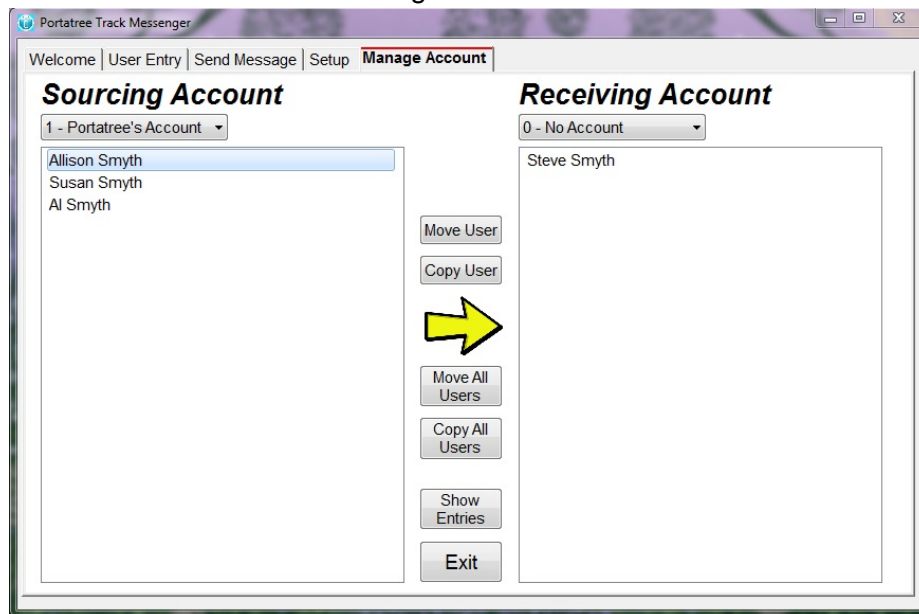
Help:

- The "Show Help" label on the "Welcome" page provides additional information about the operation of the *Messenger* software
- For additional questions, call tech at 508-278-2199 ext. 508 or send an email to tech@portatree.com