

ChilliDB[®] Web Controls Users Guide

Chilli *DB*

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1 Introduction

ChilliDB provides a collection of web controls which may be integrated into your website by your developers with minimal programming skills and a basic understanding of HTML.

All of the complexities are taken care of by the ChilliDB web controls, which your web developers use to interact with your ChilliDB system.

The following figure shows how visitors to your website would seamlessly interact with the ChilliDB web controls, which in turn would capture information, which in turn would be recorded directly into your ChilliDB system.

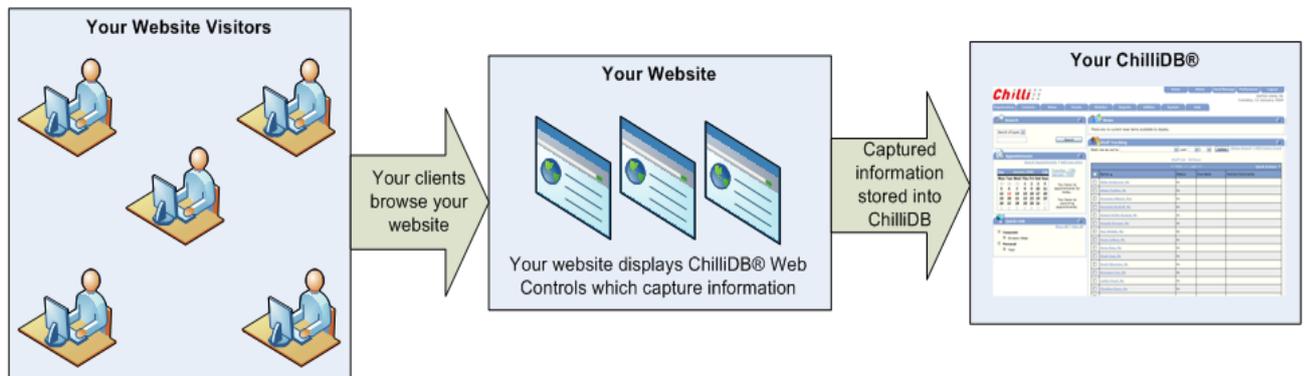


Figure 1: ChilliDB Web Controls capturing data into ChilliDB

This document is intended to provide ChilliDB administrators the information relating to the actual business functions performed by the ChilliDB web controls and the steps necessary to configure ChilliDB to hold the information captured from your website.

A second document called "ChilliDB® Web Controls Developers Guide" provides the information necessary to integrate your website with the ChilliDB web controls which you should provide to your website developers.

1.1 Skills Required

This document assumes that the person following it is experienced with the following:

- ChilliDB
 - Creation and Maintenance of ChilliDB records and reference data

2 Subscription Management

2.1 Overview

This collection of web controls provides the functionality to allow visitors to your website the ability to register onto one or more ChilliDB Distribution Lists which are identified for being connected to your website during the setup stage covered in the Configuring ChilliDB section of this document.

In order to capture subscriptions on your website, the visitors to your website will need to provide some basic information which can be used to create the subscription against the nominated Distribution Lists. If necessary, a Contact record will also be created within ChilliDB at the same time.

The following basic information will be requested of the visitor to your site through the web control form fields:

- Email address – the address which will be registered onto the selected Distribution Lists.
- Given Name – used to create the Contact in ChilliDB if required.
- Surname – used to create the Contact in ChilliDB if required.
- Your Subscriptions – a selection of one or more nominated Distribution Lists from within your ChilliDB system to which visitors can choose to subscribe.

A sample subscription page can be seen in the following figure. This is a default look for this web control and yours may have been styled to look more like your website by your developers.

Subscriptions

Please enter your name and email address.

By entering your email address into the box below you are agreeing to have your email address added to the e-letter subscription list.

You may opt out of any of these services at any time.

We will not use your email address for any other purpose

Given Name	<input type="text"/>
Surname	<input type="text"/>
Email Address	<input type="text"/>
Your subscriptions	
<input type="checkbox"/>	Practices in Division Boundaries
<input type="checkbox"/>	ChilliDB Newsletter
<input type="checkbox"/>	Polymorphic Newsletter
<input type="button" value="Subscribe"/>	

Figure 2: Subscription Management

2.2 Configuring ChilliDB

You will need to configure some data within your ChilliDB to service the online subscriptions which will be processed through the ChilliDB web controls on your website.

You will need to:

- Create a new Organisation or identify an existing Organisation.
 - Any Contacts created during the subscription process will be assigned to this Organisation.
 - For example you could create an Organisation called “Website Subscribers” which is easy to remember and would easily allow you to search for any Contacts linked to that Organisation within ChilliDB and move them around.
- Create new Distribution List(s) or identify existing Distribution List(s).
 - This (these) will be exposed onto your website as potential Distribution Lists to which your website visitors can subscribe.
- Create a new Contact Type or identify an existing Contact Type.
 - Any Contacts created during the subscription process will be categorised with this Contact Type.
 - For example, you could create one called “Website Subscribers”, which is easy to remember and would easily allow you to search for any Contacts created within ChilliDB and move them around.
- Identify a ChilliDB User.
 - This user will receive any ChilliDB Alerts to notify them when new subscriptions have been created within ChilliDB.

Once the above data has been created or obtained, the next stage is to configure the contents of the ChilliDB web controls which are going to appear on your website.

2.3 Configuring ChilliDB Web Controls

The ChilliDB Web Integration Configuration application allows you to modify the content elements of the ChilliDB web controls such as the text of the web control page heading, section heading, page text, alert message, and the list items via a configuration screen. The configuration screen also allows you to customise the notification message of the emails or alerts which you would like to set against the new subscription event.

The screen to configure the ChilliDB web controls contents can be accessed from your ChilliDB system through the “Web Integration Configuration” link when you go to the *System Management* screen.

In order to access the ChilliDB Web Integration Configuration application, you will need to perform the following steps:

1. If you have not logged in, please login into your ChilliDB system using your username and password.

- Navigate to the System Management screen by selecting the following menu item from the ChilliDB top menu:

System > System Management > Manage

Note: If you do not have the menu item specified above, please contact your ChilliDB administrator to enable the permission for you to access the screen.

- Click the “Web Integration Configuration” link on the screen.



Note: If you cannot find the “Web Integration Configuration” link on the screen, please contact the ChilliDB Support Team to enable this link for you. The ChilliDB Support Team can be contacted via email at helpdesk@chillidb.com.

- Clicking the “Web Integration Configuration” link will bring you to the configuration screen for “Subscription Management” as shown below:

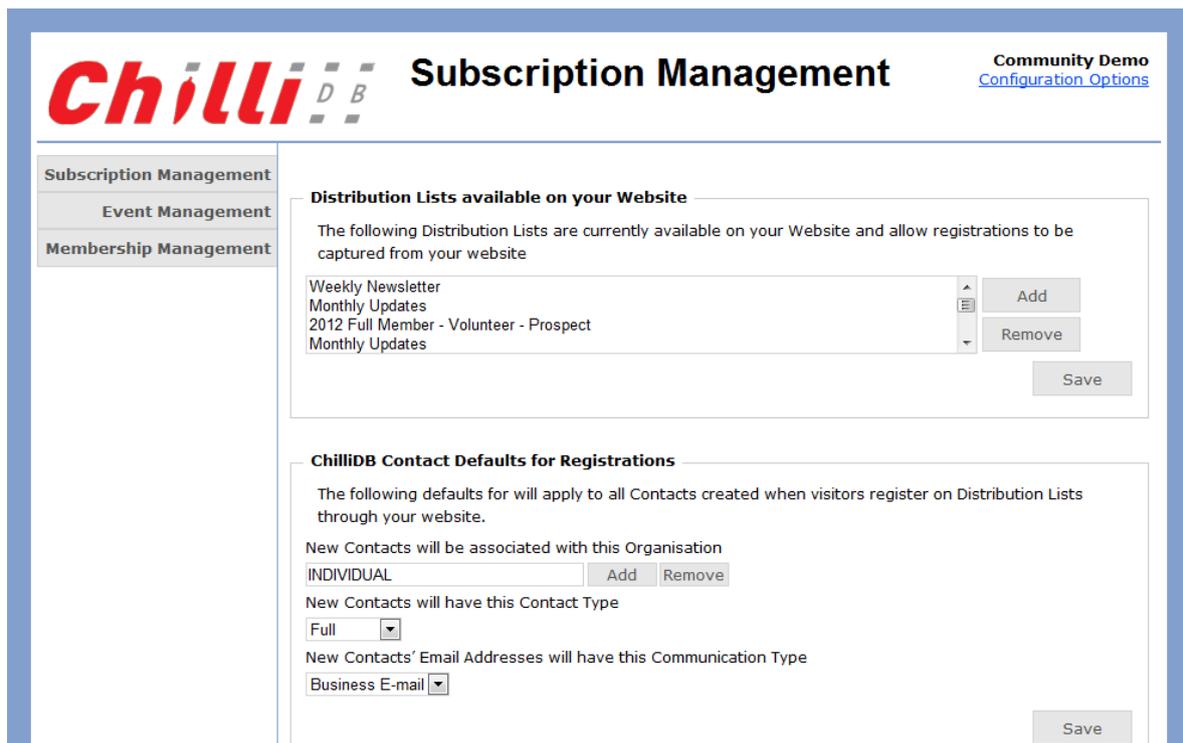


Figure 3 - Subscription Management – Configuration Screen

- The Subscription Management Configuration screen shown in Figure 3 above allows you to configure the information shown on the subscription page on your website, which Distribution List visitors may subscribe to, where new Contacts and Organisations are created, and who is notified when subscriptions are processed.

Each of the configurable areas will be explained in more detail below:

a. Distribution List available on your website:

The section controls the Distribution List items that are going to be exposed as potential lists for the website visitor to subscribe into on your website. The Distribution List items list selection will be obtained from your ChilliDB system.

b. ChilliDB Contact Defaults for Registration:

This section controls the handling of the new Contact registration in the ChilliDB system when the website visitor has opted to subscribe into ChilliDB Distribution List items. The ChilliDB system will automatically create a Contact to be associated with the subscribed visitor and then assign the Contact record to the visitor's selected Distribution List.

The section allows you to assign the default Organisation and Contact Type for the new visitor's registered Contact. It also allows you to assign the default Email Communication Type for the visitor's registered email address.

c. Notifications and Alerts for new Registration:

This section controls the notification and alerts when the new visitor has subscribed to the Distribution List via the web controls.

You will be able to enable email notifications to be sent to the visitors when they have subscribed into the lists from your website. The section offers the capability to customise the email subject and body texts for the email notifications.

The section also allows you to enable ChilliDB Alerts to be sent to your staff when there is a new visitor who has subscribed to the Distribution List via your website. You will be able to configure who will receive the alerts as well as set the alert text, importance, and comments.

d. Customise the ChilliDB Web Controls Website Content:

This section offers the capability to customise the text elements which appear in the ChilliDB Web Controls. You will be able to change the Page Heading, Section Heading, Page Text, and Page Alert text elements to suit your needs.

The styling appearance of these text elements will be explained in detail within the ChilliDB Web Controls Developers Guide document.

6. Once you are satisfied with the changes made to your Subscription Management, you should select the "Save" option to save your changes. You should then refresh the Subscription page on your website to see those changes and test that the process is working how you would like it to. You may then close the Subscription Management screen and return to ChilliDB.

2.4 Processing Rules

Subscriptions to the Distribution Lists are registered into your ChilliDB system using the information entered into the ChilliDB web control. When the user fills out the data collection fields, the subscription web control will:

1. Check if that Contact exists within ChilliDB using the provided Email and Surname values.

If no Contact with that Surname and Email exists, then the new Contact will be created and they will be registered onto the selected Distribution Lists.

Note: All Contacts created are allocated to a pre-nominated Organisation. The email address will be registered in ChilliDB as a “Business Email” address.

If the Contact is found within ChilliDB, then the subscription web control will check if that Contact has previously been subscribed to each selected Distribution List with that email address and:

- If the Contact is already subscribed to the selected Distribution List, then the visitor to your site will be notified that they have already subscribed to this list.
- If the Contact is not already subscribed, then they will be subscribed to the selected Distribution Lists

2. Once the subscription has been processed, a ChilliDB Alert will be created to notify a nominated ChilliDB user that the subscription has been created and, if applicable, if a Contact was also created.
3. The nominated ChilliDB user who received the ChilliDB Alert can then review that subscription and Contact and choose to move them to another Organisation or make any other pertinent changes to the records.

The subscriber to your Distribution Lists will receive a welcome email informing them that they have been subscribed to your Distribution Lists.

2.5 Conclusion

Now that you have configured your ChilliDB system to support online subscriptions, you should have your website developers use the ChilliDB Web Controls Developers Guide to integrate the ChilliDB web controls into your website.

3 Membership Management

3.1 Overview

These controls provide the ability to expose features of the “Membership” Module to visitors to your website.

In order to capture applications on your website, visitors will need to provide some basic information which can be used to create the Member record against the nominated Membership Package. If necessary, a Contact record will also be created within ChilliDB at the same time.

The following basic information will be requested of the visitor to your site through the web control form fields:

- Email address – the address which will be registered onto the selected Membership Packages.
- Given Name – used to create the Contact in ChilliDB if required.
- Surname – used to create the Contact in ChilliDB if required.
- Membership Package – a selection of one or more nominated Membership Packages from within your ChilliDB system to which visitors can choose to apply.

A sample Membership application form can be seen in the following figure. This is a default look for this web control and yours may have been styled to look more like your website by your developers.

Membership Package Registration

Figure 4 - Membership Management

3.2 Configuring ChilliDB

You will need to configure some data within your ChilliDB to allow successful use of the Membership Web Control.

You will need to:

- Create a new Organisation or identify an existing Organisation.
 - Any Contacts created during the application process will be assigned to this Organisation.

- For example you could create an Organisation called “Website Memberships”, which is easy to remember and would easily allow you to search for any Contacts linked to that Organisation within ChilliDB and move them around.
- Create one or more new Membership Packages or identify existing Membership Packages.
 - You will need to choose at least one Membership Package to be exposed onto your website as a potential Membership Package for which you website visitors can apply to join.
- Create a new Contact Type or identify an existing Contact Type.
 - Any Contacts created during the subscription process will be categorised with this Contact Type.
 - For example, you could create one called “Website Members”, which is easy to remember and would easily allow you to search for any Contacts created within ChilliDB and move them around.
- Identify a ChilliDB User.
 - This user will receive any ChilliDB Alerts to notify them when new subscriptions have been created within ChilliDB.

Once the above data has been created or obtained, the next stage is to configure the contents of the ChilliDB web controls which are going to appear on your website.

3.3 Configuring ChilliDB Web Controls

The ChilliDB Web Integration Configuration application allows you to modify the content elements of the ChilliDB Web Controls, such as the text of the web control page heading, section heading, page text, alert message, and the list items. The configuration application also allows you to customise the notification message of the emails or alerts which you would like to set against the new Membership application event.

The screen to configure the ChilliDB Web Controls contents can be accessed from your ChilliDB system through the “Web Integration Configuration” link when you go to the *System Management* screen.

In order to access the ChilliDB Web Integration Configuration application, you will need to perform the following steps:

1. If you have not logged in, please login into your ChilliDB system using your username and password.
2. Navigate to the System Management screen by selecting the following menu item from the ChilliDB top menu:

System > System Management > Manage

Note: If you do not have the menu item specified above, please contact your ChilliDB administrator to enable the permission for you to access the screen.

3. Click the “Web Integration Configuration” link on the screen.



Note: If you cannot find the “Web Integration Configuration” link on the screen, please contact the ChilliDB Support Team to enable this link for you. The ChilliDB Support Team can be contacted via email at helpdesk@chillidb.com.

4. Clicking the “Web Integration Configuration” link then the “Membership Management” menu item on the left-hand side will bring you to the configuration screen for “Membership Management” as shown below:

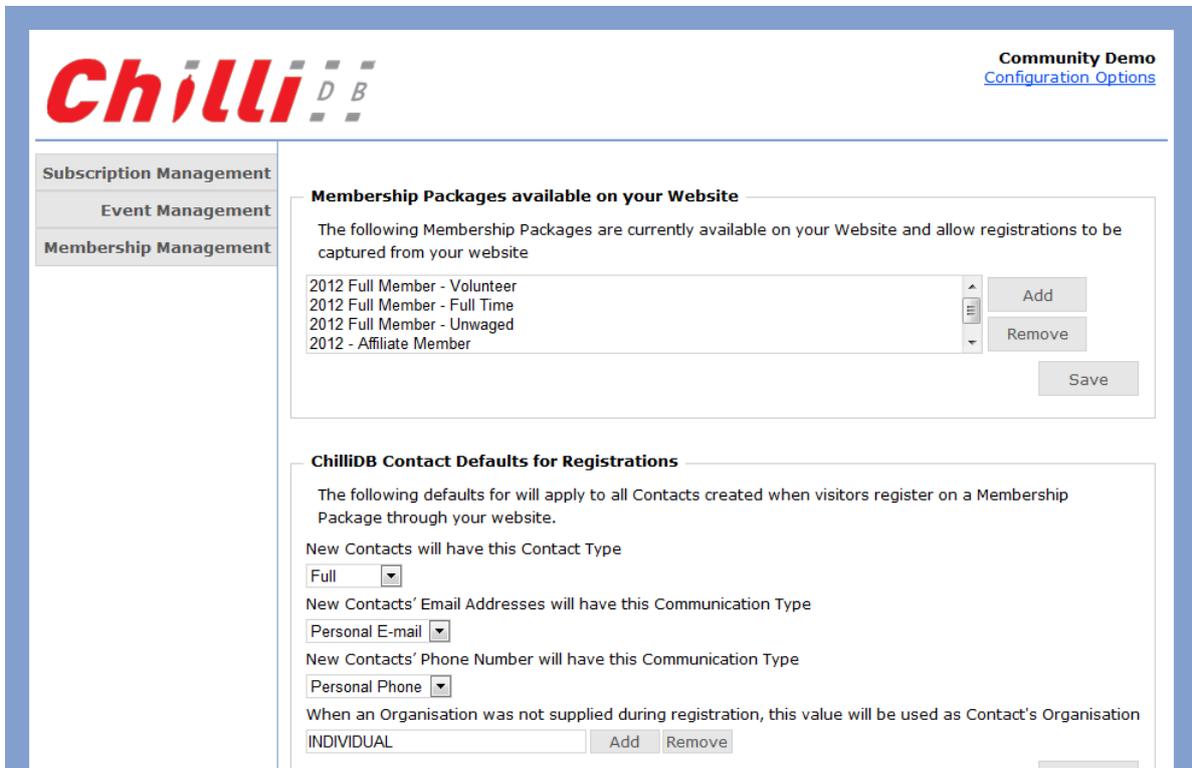


Figure 5 - Membership Management - Configuration Screen

7. The Membership Management Configuration screen shown in Figure 5 above allows you to configure the information shown on the Membership application page on your website, which Membership Packages visitors may apply to, where new Contacts and Organisations are created, and who is notified when applications are processed.

Each of the configurable areas will be explained in more detail below:

a. Membership Packages available on your Website:

This section controls the Membership Package items that are going to be exposed as potential packages for the website visitor to apply to on your website. The

Membership Packages items list selection will be obtained from your ChilliDB system.

b. ChilliDB Contact Defaults for Registrations:

This section controls the handling of the new Contact registration in the ChilliDB system when the website visitor has opted to apply for ChilliDB Membership Package items. The ChilliDB system will automatically create a Contact to be associated with the subscribed visitor and then assign the Contact record to the visitor's selected Membership Package.

This section allows you to assign the default Organisation and Contact Type for the new visitor's registered Contact. It also allows you to assign the default Email Communication Type for the visitor's registered email address.

c. ChilliDB Organisation Defaults for Registrations:

This section controls the handling of the new Organisation registration in your ChilliDB system when the website visitor has opted to apply for ChilliDB Membership Package items. The ChilliDB Web Controls will automatically create an Organisation to be associated with the visitor's Contact record.

d. Notifications and Alerts for new Registrations:

This section controls the notification and alerts when the new visitor has applied to join a Membership Package via the web controls.

You will be able to enable email notifications to be sent to the visitors when they have applied to join packages from your website. The section offers the capability to customise the email subject and body text for the email notifications.

The section also allows you to enable ChilliDB Alerts to be sent to your staff when there is a new visitor who has applied to join a Membership Package via your website. You will be able to configure who will receive the alerts as well as set the alert text, importance, and comments.

e. Customise the ChilliDB Web Controls Website Content:

This section offers the capability to customise the text elements which appears on the ChilliDB Web Controls. You will be able to change the page content to suit your needs.

f. ChilliDB Membership Package Registration Label Text Descriptions:

The field in the ChilliDB Membership Web Control which offers prompts on the form to the visitor of your website are able to be customised here.

Once you are satisfied with the changes made to your Membership Management, you should select the "Save" option to save your changes. You should then refresh the Membership page on your

website to see those changes and test that the process is working how you would like it to. You may then close the Membership Management screen and return to ChilliDB.

3.4 Processing Rules

Information added by users of your website will be added to your ChilliDB system by the Membership Web Control using the following process:

1. If the user supplied an “Organisation Name” value that Organisation record is retrieved or, if it doesn’t exist, created. If the Organisation Name field is blank, the Organisation defined in the configuration is used.
2. ChilliDB is then searched for a Contact record using the “Last Name” and “Email” values supplied by the user. If no contact is found which matches these two fields, a new Contact record is created.

In either case, a Contact being found or a new one created, the Organisation from the previous step is associated with the Contact record if it is not already.

3. Once both the Contact and their associated Organisation are identified, the Member is added to the Membership Package.

3.5 Conclusion

Now that your system is configured with the ability to have Members apply for Membership Packages via the ChilliDB Web Controls, you should have your website developers use the ChilliDB Web Controls Developers Guide to integrate the Membership Web Control into your website.

4 Event Management

4.1 Overview

These controls provide the ability to expose features of the “Events” Module to visitors of your website.

In order to sign-up for Events on your website, visitors will need to provide some basic information which can be used to create an “Attendee” record for the nominated Event. If necessary, a Contact record will also be created within ChilliDB at the same time.

The following basic information will be requested of the visitor to your site through the web control form fields:

- Email address – the address which will be registered onto the selected Events.
- Given Name – used to create the Contact in ChilliDB if required.
- Surname – used to create the Contact in ChilliDB if required.

A sample Membership application form can be seen in the following figure. This is a default look for this web control and yours may have been styled to look more like your website by your developers.

Title : Parenting Program and Support Group

Title : Parenting Program and Support Group - Session 1

Description :

Encouraging the behaviour you would like to see from your child. Dealing consistently and positively with problem behaviour. Easing the stress of being a parent.

Date : 10 Sep 2012
10 Sep 2012

Be on time!! 09:00 AM
End Time : 12:00 PM

Location : Community Centres and Family Support Networks Assoc of QLD
Contact : Smith, Tracey

Title : Parenting Program and Support Group - Session 2

Description :

Your child in your home. Providing a safe home environment for your child.

Date : 11 Sep 2012
11 Sep 2012

Be on time!! 09:00 AM
End Time : 12:00 PM

Location : Community Centres and Family Support Networks Assoc of QLD
Contact : Smith, Tracey

Figure 6 - Event Management

4.2 Configuring ChilliDB

You will need to configure some data within your ChilliDB to allow successful use of the Event Web Control.

You will need to:

- Create a new Organisation or identify an existing Organisation.
 - Any Contacts created during the application process will be assigned to this Organisation.
 - For example, you could create an Organisation called “Website Events”, which is easy to remember and would easily allow you to search for any Contacts linked to that Organisation within ChilliDB and move them around.
- Create one or more new Events or identify existing Events.
 - You will need to choose at least one Event to be exposed onto your website as a potential Event for which you website visitors can apply to attend.
- Create a new Contact Type or identify an existing Contact Type.
 - Any Contacts created during the subscription process will be categorised with this Contact Type.
 - For example, you could create one called “Website Event Attendees”, which is easy to remember and would easily allow you to search for any Contacts created within ChilliDB and move them around.
- Identify a ChilliDB User.
 - This user will receive any ChilliDB Alerts to notify them when new attendee records have been created within ChilliDB.

Once the above data has been created or obtained, the next stage is to configure the contents of the ChilliDB web controls which are going to appear on your website.

4.3 Configuring ChilliDB Web Controls

The ChilliDB Web Integration Configuration application allows you to modify the content elements of the ChilliDB Web Controls, such as the text of the web control page heading, section heading, page text, alert message, and the list items. The configuration application also allows you to customise the notification message of the emails or alerts which you would like to set against the new Event registration event.

The screen to configure the ChilliDB Web Controls contents can be accessed from your ChilliDB system through the “Web Integration Configuration” link when you go to the *System Management* screen.

In order to access the ChilliDB Web Integration Configuration application, you will need to perform the following steps:

1. If you have not logged in, please login into your ChilliDB system using your username and password.

- Navigate to the System Management screen by selecting the following menu item from the ChilliDB top menu:

System > System Management > Manage

Note: If you do not have the menu item specified above, please contact your ChilliDB administrator to enable the permission for you to access the screen.

- Click the “Web Integration Configuration” link on the screen.



Note: If you cannot find the “Web Integration Configuration” link on the screen, please contact the ChilliDB Support Team to enable this link for you. The ChilliDB Support Team can be contacted via email at helpdesk@chillidb.com.

- Clicking the “Web Integration Configuration” link, then the “Event Management” menu item on the left-hand side will bring you to the configuration screen for “Event Management” as shown below:

Figure 7 - Event Management - Configuration Screen

- The Event Management Configuration screen shown in Figure 7 above allows you to configure the information shown on the Event registration page on your website, which Events visitors may apply to, where new Contacts and Organisations are created, and who is notified when registrations are processed.

Each of the configurable areas will be explained in more detail below:

a. ChilliDB Event Defaults for controlling availability of Events on your Website:

This section controls if Event items are going to be exposed on your website or not.

b. ChilliDB Event Defaults for controlling Event appearances on your Website:

This section controls which Event items are going to be exposed on your website and some basics regarding their appearance. This also shows whether the Events or sessions are shown and the number of days ahead events are displayed on the website. Note that at present, the dates used come from the Event, not the session.

c. ChilliDB Contact Defaults for Registrations:

This section controls the handling of the new Contact registration in the ChilliDB system when the website visitor has opted to register for ChilliDB Event items. The ChilliDB system will automatically create a Contact to be associated with the registered visitor and then assign the Contact record to the visitor's selected Event Registration.

This section allows you to assign the default Organisation and Contact Type for the new visitor's Contact. It also allows you to assign the default Email Communication Type for the visitor's email address.

d. ChilliDB Organisation Defaults for Registrations:

This section controls the handling of the new Organisation registration in your ChilliDB system when the website visitor has opted to register for ChilliDB Event items. The ChilliDB Web Controls will automatically create an Organisation to be associated with the visitor's Contact record.

e. Notifications and Alerts for new Event/Session Registrations:

This section controls the notification and alerts when the new visitor has registered on an Event via the web controls.

You will be able to enable email notifications to be sent to the visitors when they have registered on events from your website. The section offers the capability to customise the email subject and body text for the email notifications.

This section also allows you to enable ChilliDB Alerts to be sent to your staff when there is a new visitor who has registered on an Event via your website. You will be able to configure who will receive the alerts as well as set the alert text, importance, and comments.

f. Customise the ChilliDB Web Controls Website Content:

This section offers the capability to customise the text elements which appear on the ChilliDB Web Controls. You will be able to change the page content to suit your needs.

g. ChilliDB Event Label Text Descriptions:

The field prompts the ChilliDB Event Web Control displays to your site visitor on the form are able to be customised here.

Once you are satisfied with the changes made to your Event Management, you should select the “Save” option to save your changes. You should then refresh the Event page on your website to see those changes and test that the process is working how you would like it to. You may then close the Event Management screen and return to ChilliDB.

4.4 Processing Rules

Information added by users of your website will be added to your ChilliDB system by the Event Web Control using the following process:

1. If the user supplied an “Organisation Name” value, that Organisation record is retrieved or, if it doesn’t exist, created. If the Organisation Name field is blank, the Organisation defined in the configuration is used.
2. ChilliDB searches for a Contact record using the “Last Name” and “Email” values supplied by the user. If no contact is found which matches these two fields, a new Contact record is created.

In either case, a Contact being found or new one created, the Organisation from the previous step is associated with the Contact record if it is not already.

3. Once both the Contact and their associated Organisation are identified, an Event Registration record is added with the status of “Registered Not Paid”.

4.5 Conclusion

Now your system is configured with the ability to have visitors request attendance at an Event via the ChilliDB Web Controls, you should have your website developers use the ChilliDB Web Controls Developers Guide to integrate the Event Web Control into your website.