

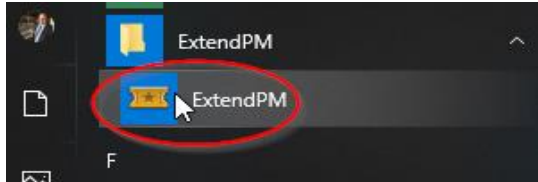
ExtendPM is a Windows application written in Visual Basic. It has been tested on Windows 10 however it should work on Windows 7 or 8 as well. Sensitive information (passwords and security tokens) are stored in an encrypted state by the app.

- 1 Download the Setup file (ExtendPM\_Setup\_1.0.msi) from GitHub:

<https://github.com/JoeGleason-NH/ExtendPM>

- 2 Double-click on the msi file to install.

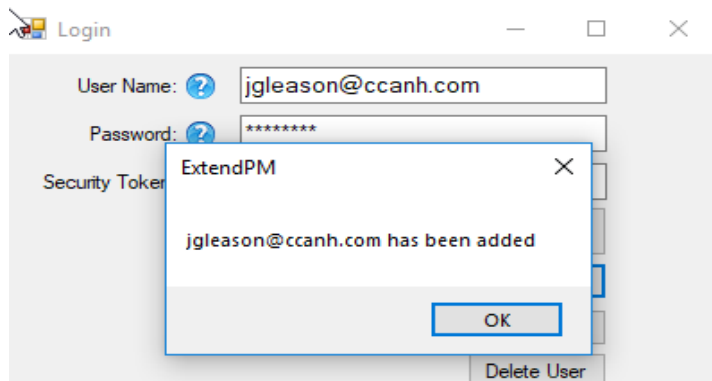
- 3 Run the newly installed program



- 4 The first time you use the app, enter your PatronManager account info  
You will need to have your Salesforce Security Token. Click Add User

A screenshot of the 'Login' window of the ExtendPM application. The window has a title bar with a minimize, maximize, and close button. It contains three input fields: 'User Name' with the value 'jgleason@ccanh.com', 'Password' with masked characters '\*\*\*\*\*', and 'Security Token' with masked characters '\*\*\*\*\*'. Below these fields are four buttons: 'Login', 'Config Settings', 'Add User', and 'Update User'. The 'Add User' button is highlighted with a blue border and a mouse cursor is pointing at it. There is also a 'Delete User' button at the bottom right.

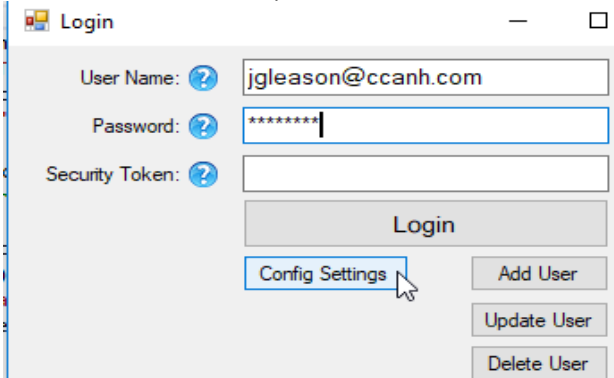
- 5 Congrats, you added a user.



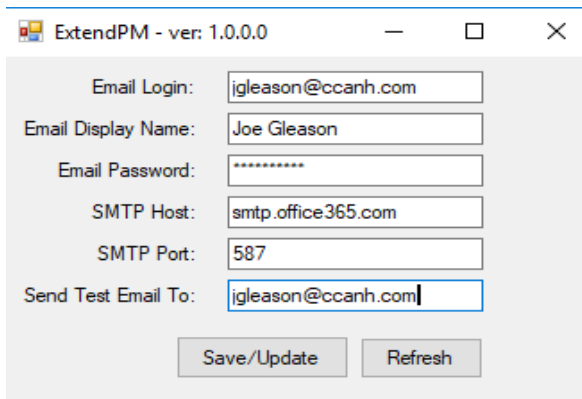
- 6 Now login. Future logins you only need to enter your username and password  
The security token is stored and retrieved whenever you login.  
If you change your PM password you will need to update it and your security token in this app.

A screenshot of the 'Login' window of the ExtendPM application. The window is the same as in the previous images, with the 'User Name' field containing 'jgleason@ccanh.com', the 'Password' field masked with '\*\*\*\*\*', and the 'Security Token' field masked with '\*\*\*\*\*'. The 'Login' button is now highlighted with a blue border and a mouse cursor is pointing at it. The 'Add User' button is still visible but no longer highlighted.

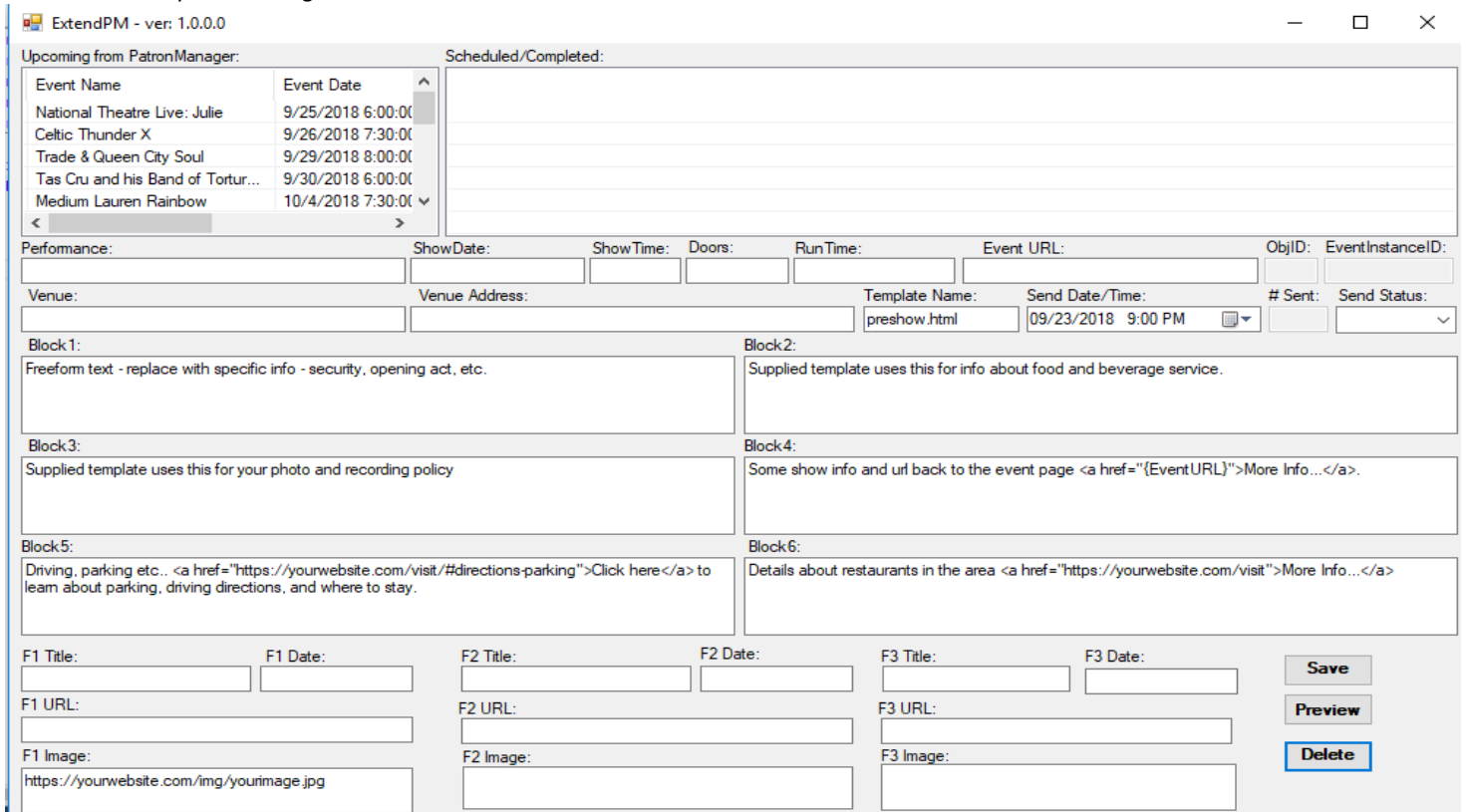
7 To send email you will need to enter valid account information. The email does not need to be your own. Credentials will be saved.



8 Enter your email info and click Save.



9 Once you login, you should see the main form. This is where you select event instances in PatronManager and customize your preshow email information. There is an option to preview and to delete any job previously scheduled/sent. The included template can be modified and you can create multiple templates if you need variety. :) Set a date/time for the email to be sent and set the send status to Ready. The app runs from the command line for sending email. The easiest way is to use Windows Task Scheduler and run the app on a schedule of your choosing.



10 The app takes one command line parameter - a valid username that you added to app. No password or token is required here.

When run like this from the command line the prgram will retrieve the config settings and will get the latest list of ticketholders for the event instance being sent. My scheduled task runs every hour 24/7. Any preshow jobs that are in Ready status and the send date/time is earlier than the current time will be processed.

