

Email Functions in Zambia

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Abstract:

Zambia is a piece of Con Management Software. This document is a guide to building the Vendor System for the Zambia FFF-branch instance. This is still a work in progress.

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1 General Design

This is a working guide on how to use the Email portion of Zambia.

2 Components

There are several components to the emailing system in Zambia.

- To lists
- From/CC addresses
- Composing email
- "Mail Merge" style replacements
- Sending the email

3 "To" lists

The "To" lists are maintained in the database, as a query. Many queries have been pre-loaded, but you might want to customize or build your own. To do so, there is a good report, and a functional tool to help. The report is:

- `genreport.php?reportname=emailtolist`

That will either allow you to edit an existing list, or create a new list. That uses the:

- `StaffEmailToUpdate.php`

This page is used to appropriately create or change the query that produces the "To" line, and a few other little bits along the way. The query needs to produce the following fields:

- `badgeid`
- `firstname`
- `lastname`
- `email`
- `pubsname`
- `badgename`
- `interestedtypename` as `itn`

If you are not really concerned with the `interestedtypename` (which defaults to checking on "Yes") just use `concat("Yes")` as `itn` for it. Everything else should exist on all people in the database. It is suggested that at least one test email address is set up in there, to test the system, being that it depends on software outside Zambia to work, and ... that is not guaranteed to work.

4 From/CC

These are generated from those who have roles this year in the con.

5 Composing email

This is a two-step process. One is writing the email, with all the attendant information, and the other is checking it to make sure it does the right thing. The first is accomplished from: StaffSendEmail-Compose.php This should be available under the "Manage Participants & Schedule" tab. If it is not available to you, it might be that you have not (yet) been authorized to use the email program. Please check with your Zambia administrator for further information. Once on this page, you can set your To:, From:, CC:, Subject:, and Body of the email. If it is a long, or complex email, it is suggested that you compose it in another editor, and then paste it into here. Although, be careful, this is limited to the Latin-8 set of characters, so out of band characters (like special quotes, apostrophes, etc) will not translate well, if they are in there at all. (Yes, this is a bug, and needs to be tracked down and fixed.) Once the email is written, hit the "See it" button (not the "Reset" button) and it will take you to the next step. The next page will list all the recipients in the top box. If they do not match your expectations, you might have to go back and tweak the "To:" query some more. The first individual on the list will have their letter in the lower box. Check the letter to make sure it reads the way you wish. If it does, hit "Send". If it does not, or you need to go back to fix the "To:" field, use the "Go Back" button. NOTE: Using the "Go Back" button resets the "From:" and "CC:" fields, so make sure you set them appropriately, if you use the "Go Back" button.

6 "Mail Merge" style replacements

There are a number of things you can replace in your email so they are specific to the person. They currently are:

- *BADGEID*
- *FIRSTNAME*
- *LASTNAME*
- *EMAILADDR*
- *PUBNAME*
- *BADGENAME*
- *SCHEDULE*
- *FULLSCHEDULE*
- *BIOS*
- *LIAISON*
- *HOTELROOM*
- *ENTRANCES*
- *CONFIRMNUM*

They are pulled from a number of sources, so . . . they might not work as you fully expect them to, but . . . they basically pull what they describe from the database, to populate the letter. As an example, if you start your email with: "Hello *PUBSNAME*," it will cycle in each of the individual's publname where the *PUBSNAME* is. Same with all the other replace-tags.

7 Sending the email

The "Send it" button doesn't actually send the email. We've had a few problems with people thinking our email is spam, so there are two ways to get the email sent. Either via the bulk sender, which sends a chunk of them at a time automatically, or, you can use the: `HandSendQueuedMail.php` This will call up each email individually in your local email sending program, so you can check/modify each one, and make sure it is sent. This also allows you to "mark as sent" each email, so if you want to mark one as sent, but not actually send it, you can. It gives you finer control over what goes out. The bulk emailer currently is only available to the Zambia maintainer, at this time, due to errors and difficulties from the users.