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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

Proceeding	91198102
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Date	03/15/2011
Attachments	Exhibit 5.pdf (8 pages)(4303491 bytes)

Exhibit 5

Guide Purpose

The purpose of this guide is to walk you step-by-step through pertinent functions of the Wildfire application.

Citizens Section

The Citizens Section is divided into two Groups – Supporter Groups and Voter Groups. From these Groups, you can perform all supporter and voter data management functions. These Groups also allow for batch imports of contacts from Microsoft Outlook or other contact management programs.

SUPPORTER GROUPS / VOTER GROUPS

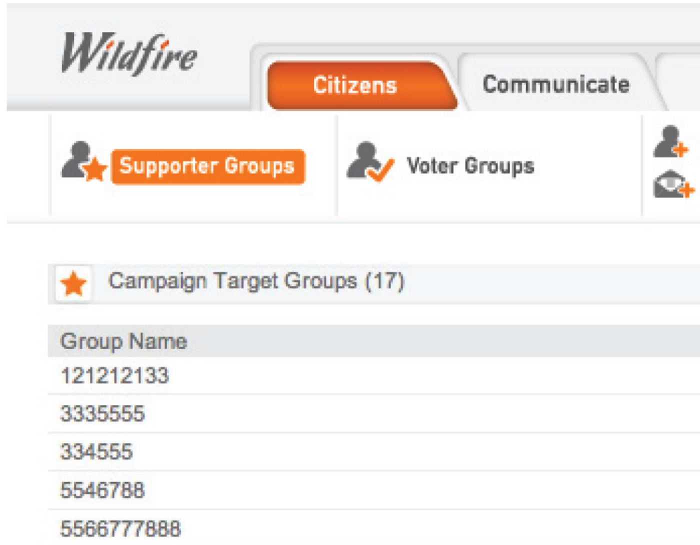
All Voter Group functionality is identical to that of Supporter Groups (viewing, creating, etc.)

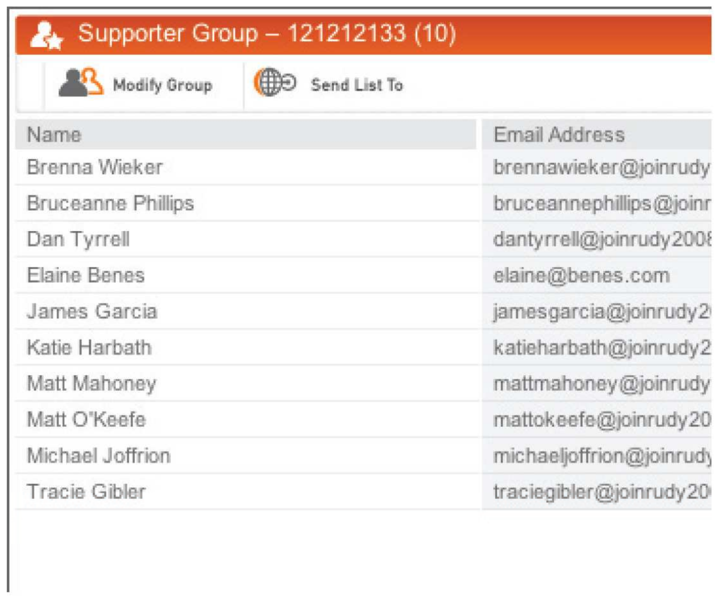
View a Saved Group

You can select from two types of Groups:

1. Campaign Target Groups: established by campaign management.
2. My Saved Groups: created by each individual.

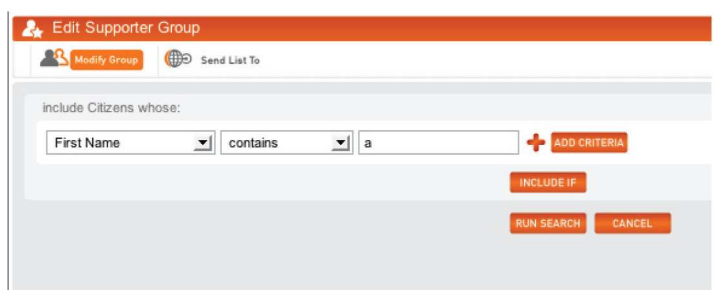
Click on either Group to display a listing of supporters in that Group.





Modify a Saved Group

1. From Group Listing, select "Modify Group".
2. From the drop-down tab to click "Add Criteria".
3. Modify criteria using the drop-down tab(s).
4. To add secondary criteria, Click "Include If".
5. Click "Run Search" to display new results.

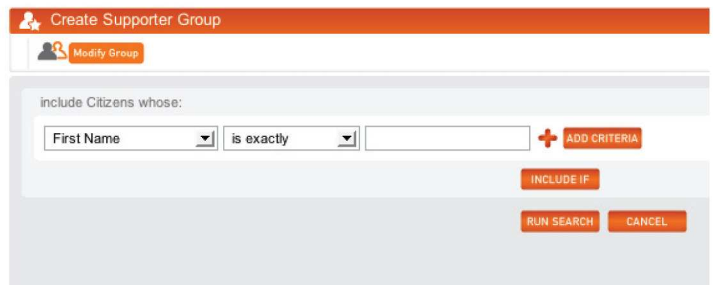


Group Exports

1. From Group Listing, select “Send List To”.
2. Click “Export to Excel”.
3. Select fields for export.
4. Click Save to create the Excel file.

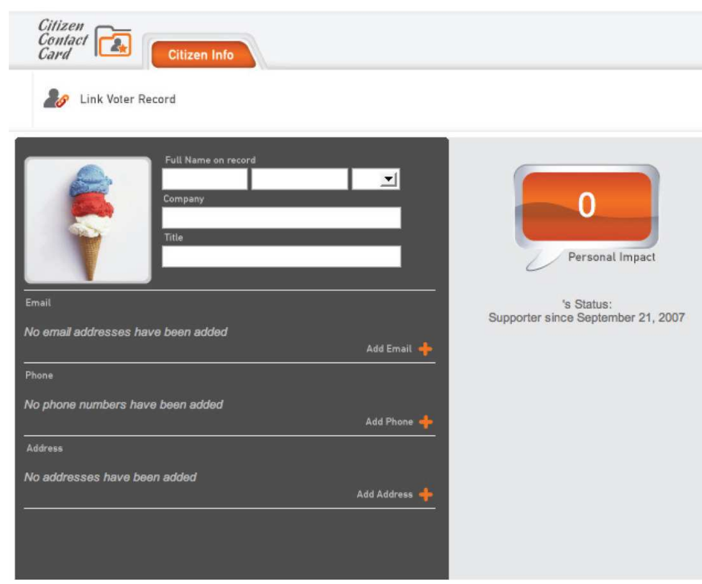
Create New Group

1. Click “Create New Group” (a Group is created for whichever Group is presently active --Supporter or Voter).
2. If Voter Group, select voter state from dropdown menu.
3. Choose criteria for Group creation.
4. Click “Run Search” to see results.



Create New Supporter

1. Click “Create New Supporter”.
2. The Citizen Contact Card is displayed.
3. Enter the Supporter’s profile information.
4. Save the Supporter’s information by clicking “Save” in the upper right navigation.

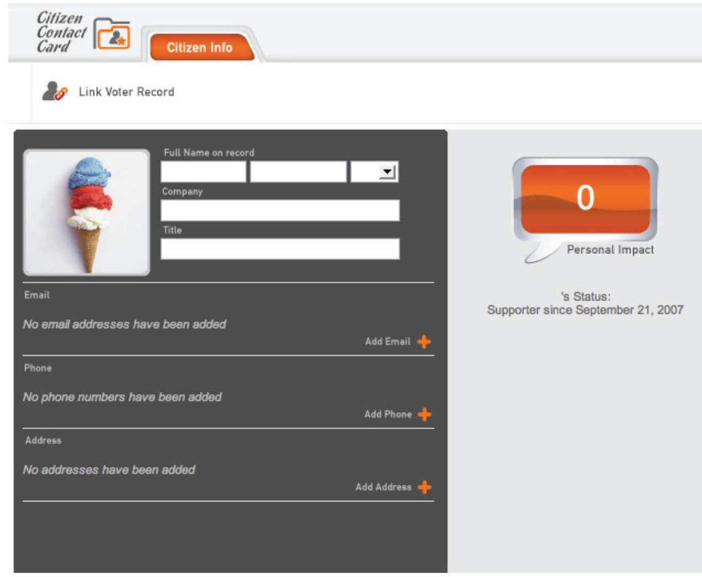


Import Supporters

1. Click “Import Supporters”; a wizard appears.
2. Step 1: Prepare the Import file (via wizard instructions) or to go directly to File Upload.
3. Step 2: Click “Browse” to locate and select a file for Import.
4. File contents are displayed, listing Contacts for Import and potential Duplicate Records.
5. Select Contacts to Import or Delete.
6. Click “Information Looks Correct”.
7. Add a message before sending, if desired.
8. Click “Send Invites” to complete the process.

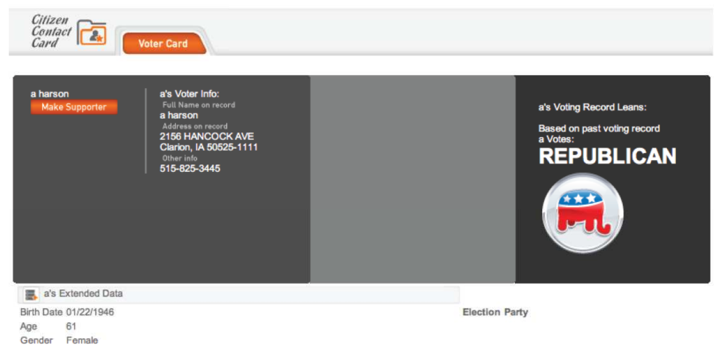
Viewing/Editing a Contact Card

1. From any Group Listing, click a name to open the Citizen Contact Card.
2. Supporter profile information is displayed (Interests, Coalitions, Positions, Personal Impact, Voter Issues).
3. Add staff notes and update profile information if desired.



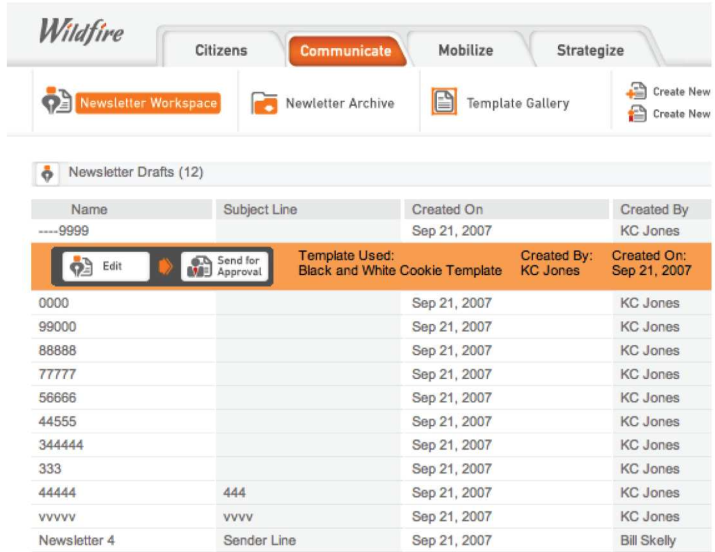
Viewing a Voter Card

1. From Voter Groups tab, click on a Group Name.
2. From Group List, click on a Voter's name.
3. Voter's available information is displayed.



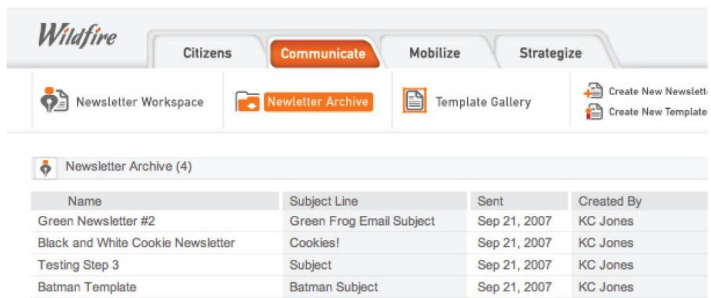
Communicate Section

This section allows for creation, editing, and sending of email newsletter communications.



View Existing Newsletter Status

1. Select Newsletter Workspace tab.
2. Single-click on Newsletter Name.
3. Dropdown appears with Newsletter information.
4. Newsletter options from Workspace: “Edit”, “Send for Approval”, or “Send to Queue”.

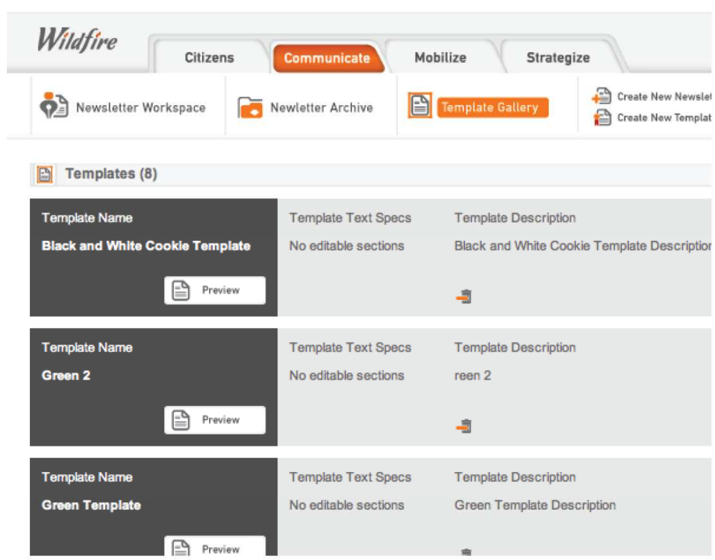


View Past Newsletters

1. Select Newsletter Archive tab.
2. Single-click on newsletter name for newsletter details.
3. Display gives the option to “Preview” or “Re-Send” this newsletter.

View Newsletter Templates

1. Select Template Gallery tab.
2. A display of all existing Templates is revealed.
3. Click “Preview” to view a given Template.
4. Click “Edit” to alter the name, description, or content of the Template.
5. Click “New Newsletter” to create a new Newsletter from a given template.

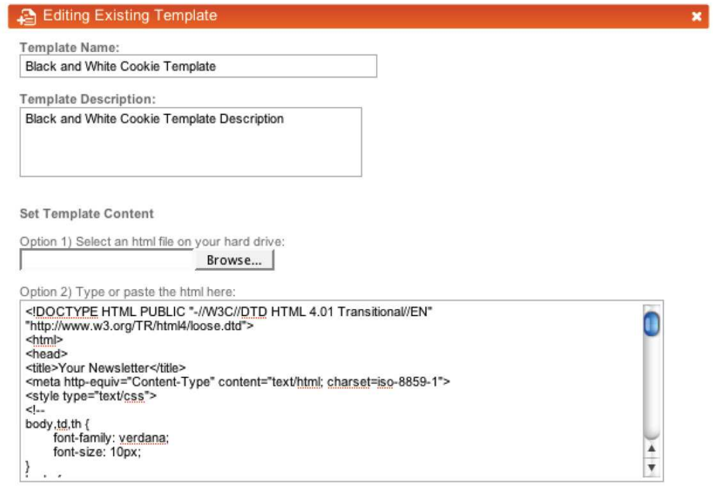


Edit Existing Newsletter Template

1. From the “Template Gallery” tab, select “Edit” for a given Newsletter template.
2. Display template name, description, and HTML code.
3. Click “Browse” to upload an external HTML file from the hard drive.
4. When complete, click “Update Template” to save changes.

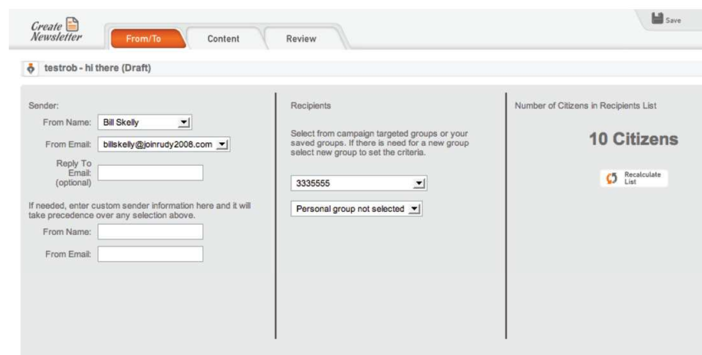
Create New Template

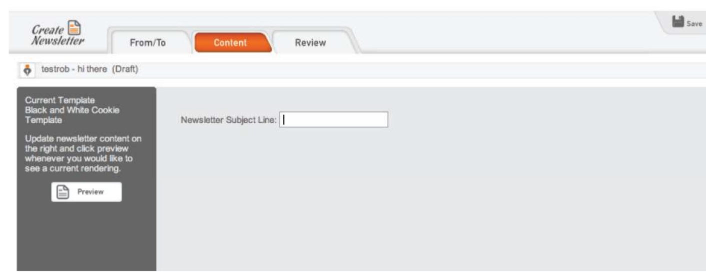
1. From main display, click “Create New Template”.
2. Enter template name and description.
3. Upload or paste Template Content.
4. Click “Create Template” to save New Template.



Edit/Send an Existing Newsletter

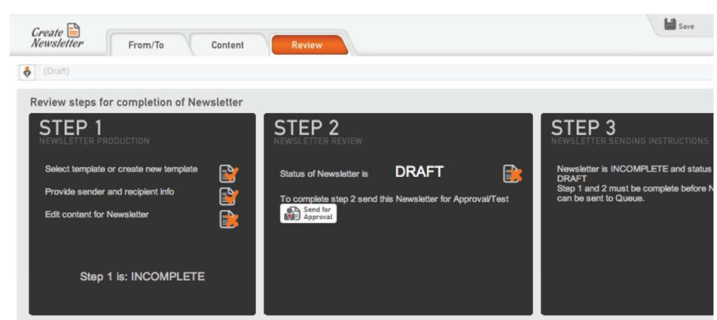
1. From Newsletter Workspace, single-click a Newsletter.
2. Select “Edit” from the dropdown menu; a three-part wizard appears.
3. Step 1: Enter information on the “From/To” tab.
4. Select sender from pre-populated groups or custom-enter sender-information for one-time use.
5. Select recipients from either campaign-targeted groups or saved groups.
6. Click the “Recalculate List” to display the number of recipients.
7. Step 2: Enter information on the “Content” tab.
8. Enter a subject line for the Newsletter.
9. Use sidebar menu to edit regions in the Newsletter template.
10. Click “Preview” button to preview changes.
11. Step 3: Verify completion of all steps on the “Review” tab.
12. Click “Approve” to send Newsletter to queue.





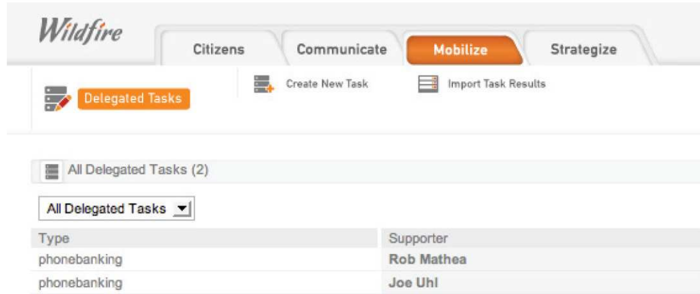
Create New Newsletter

1. From main display, click “Create New Newsletter”.
2. Enter Newsletter name.
3. Select from existing Newsletter Templates.
4. Click “Create New Newsletter”.



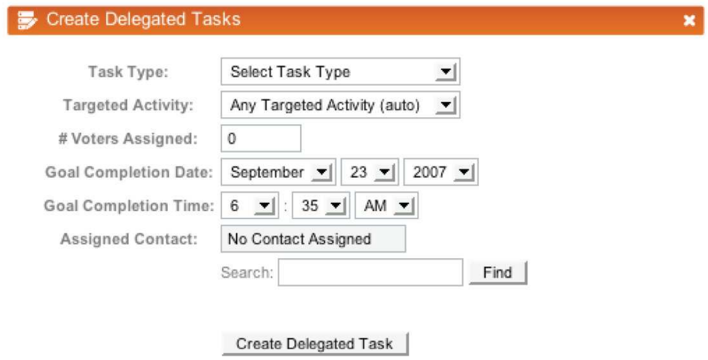
Mobilize Section

This section allows for creating and assigning delegated tasks such as phone banking to individual supporters or staff.



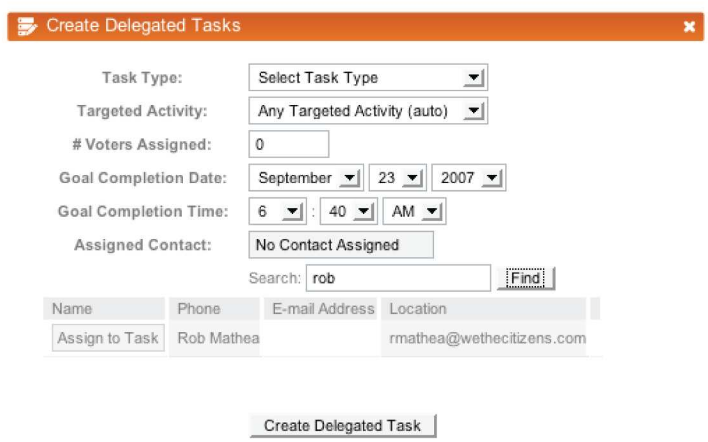
View Delegated Tasks

1. Click Delegated Tasks if you are not in the section. All tasks will be displayed
2. Sort tasks by type by selecting from the drop down menu.
3. Individual task can be viewed or edited by clicking on the list item.



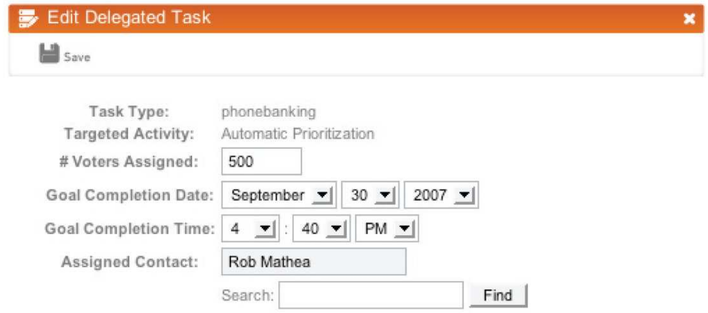
Create New Task

1. Click on Create New Task menu item.
2. From pop-up select type of task from dropdown menu.
3. Select targeted activity type or leave set to auto from dropdown menu.
4. Fill in number of voters that will be contacted from this task.
5. Set completion date from dropdown menus.
6. Set completion time from dropdown menus.
7. Assign a contact/supporter to delegate this task to. Use the search box to locate the supporter that you want to assign this task to. Enter a name and click search.
8. From results locate the supporter you want to assign and click assign task. This name will appear in the Assigned Contact field.
9. Click delegate task to complete the assignment.



Edit Delegated Task

1. Click on a task list item to open the task. Display will show task information.
2. Edit the task by changing items such as number of voters assigned, completion dates or times, or the person assigned to this task.
3. When done click the save icon in the upper tool bar.



Import Task Results

1. When task is complete click on Import Task Results from the menu.
2. In pop-up browse to the .csv file to be imported by clicking on the browse button.
3. Click Upload and follow instructions to upload and import your data.