Email Marketer Pro
User Manual

Advanced Internet Technologies, Inc.
April 2009

Document Overview

Revision History

This is version 2.0 of the Enterprise Mail User Manual. All updates to this document will be noted below.

Version 1.3	Original Documentation

Target Audience:

AIT Customers with the Email Marketer Pro

About This User’s Guide

How to Use This User’s Guide

This user’s guide describes the email software’s Graphical User Interface (GUI). It shows you how to use each screen in the GUI.

- Use the Introduction to get a basic overview of the email software.
- Use the Getting Started chapter to start sending emails right away.
- Use the Troubleshooting chapter to diagnose and solve specific problems.
- Use the rest of the user’s guide to see in-depth descriptions of the email software’s features. The chapters are roughly arranged in order of the frequency with which you are likely to use them when configuring the email software.

Written by Rick Carlile.

DISCLAIMER: The information in this user’s guide is accurate at the time of writing. This user’s guide is provided “as is” without express or implied warranty of any kind. Neither the manufacturer nor its agents assume any liability for inaccuracies in this user’s guide, or losses incurred by use or misuse of the information in this user’s guide.

I

INTRODUCTION

This section contains the following chapters:

Introduction

Getting Started

Logging In to the Email Software

The Email Software Interface

Introduction

Welcome to the Email Software

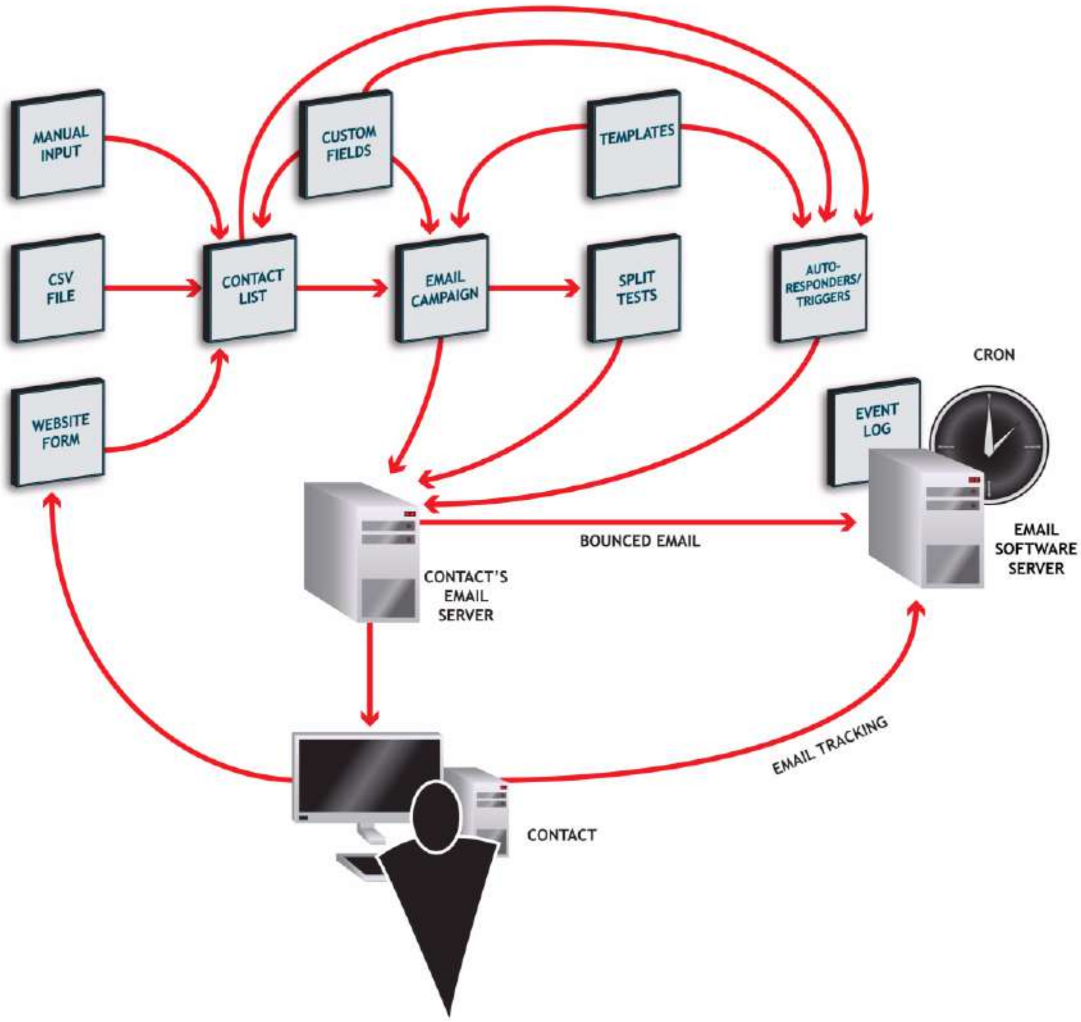
Congratulations on your purchase of the email software! The email software gives you an unprecedented ability to create, manage and automate large-scale email marketing campaigns, mailing lists, and automatic responses.

Note: If you want to start using the email software to send out emails right away, see Getting Started.

Email Software Overview

Here's an overview of how the email software works. The figure below shows how the email software's most important components interact. The rest of this chapter describes the components in this figure.

Figure 1 Email Software Overview



Contacts

Contacts are the people about whom you store information in the email software. These are the people to whom you send emails.

Contact lists

The email software stores all of your contacts in contact lists.

You can have multiple contacts lists, and you can configure each contact list to work in a different way. For example, you can configure one contact list to send out automatic

emails to its members every month, and configure another list to take no automatic action. You can also configure information differently for each contact list (such as the "from" address of the emails you send out, and your company name).

Manual Input, CSV Files and Website Forms

There are three ways to add contacts to a contact list: by inputting them manually one-by-one, by uploading a CSV (Comma-Separated Value) file with information on multiple contacts, or by having contacts fill out a form on your website.

Note: You can output a CSV file from many database and spreadsheet applications (Microsoft Excel, for example). When you upload a CSV file to the email software, you can specify how the email software should populate the contact list with the information in the file.

The email software helps you create forms you can put on your website to let your customers sign up for your newsletter or emails.

Note: You can design forms in the email software, and then paste the HTML directly into your web pages. You can also put some kinds of forms into the emails you send out.

There are three ways to add contacts to a contact list: by inputting them manually one-by-one, by uploading a CSV (Comma-Separated Value) file with multiple contacts' information, or by having contacts fill out a form on your website.

Note: You can output a CSV file from many database and spreadsheet applications (Microsoft Excel, for example). When you upload a CSV file to the email software, you can specify how it should populate the contact list with the information in the file.

Templates

Use HTML and plain-text templates to form the basis of your email campaigns. Templates make your emails attractive and promote your brand identity.

Either use the templates included with the email software, which are designed specifically to display correctly in all popular email clients, or design your own using the email software's fully-featured HTML development editor and plain-text editor.

Email Campaigns and Split Tests

Email campaigns are the emails that you send out from the email software to the people on a contact list.

Email campaigns are based on an HTML or plain-text template, and are sent to members of a contact list. You control when you send email campaigns; you can send them at the click of a button, or schedule them to be sent out at a specific point in the future.

Split tests allow you to discover which version of an email is most effective. You can create different variations on an email (three versions with different subject lines, for example) and send them out to your contact list at random, in equal numbers. The statistics that are returned let you see which version has the highest open or click-through rate.

The email software also supports automatic split testing, in which the "candidate" email versions are sent to only a small proportion of your contact list, and the "winner" version is then sent to the remaining contacts in the list.

Autoresponders and Triggers

Like email campaigns, autoresponders are emails based on HTML or plain-text templates. However, autoresponders are sent out automatically at pre-defined intervals after a contact is added to a contact list.

For example, you may want to send out one autoresponder as soon as contacts are added to the list ("Thanks for joining our mailing list!") and another a month or a year after they join ("You've been reading our daily newsletter for 30 days now; tell us what you think!").

Triggers are similar to autoresponders, but allow you even greater flexibility to automate email and administrative tasks to happen automatically when certain other events occur. You can set up date-related triggers (so that everyone in your contact list receives a "Happy Birthday" email on their birthday, for example) and event-related triggers (so that a contact is automatically added to a "warm leads" contact list when he or she opens your email).

Custom Fields

Custom fields are variables that are added to a contact list. You can add any kind of variable you want ("City", "Date of birth", "Zip code", "Hat size" - whatever you need).

When you add a custom field to a contact list, you can then add it in to an email campaign.

The email software already has a lot of built-in custom fields that you can use to personalize your emails. For example, if you required that a contact fills in a "First name" field in the website form, you can then send out an email that automatically addresses the contact as "Dear Joe". This function is similar to the "mail merge" feature found in some word processing and database applications

Note: If you are going to use custom fields in emails, it is strongly recommended that you make them mandatory (a contact must fill them in to sign up). This way, you can be sure that you will have no embarrassing gaps in your emails.

Email Tracking

The email software allows you to track and view a variety of information about the emails you send; how many are opened (and when), how many links are clicked in each one (and which link was clicked), and so on.

Bounce Tracking

Bounced emails are those that never reach their destination.

This can happen for numerous reasons. However, if you keep sending emails to an address that does not accept them, there is a danger that your email server could be blacklisted (making it much more difficult to send subsequent emails to anybody). To avoid this, the email software can track bounced emails, discover why they were bounced, and automatically act by deactivating contact's email addresses. The contact's details remain in the list, but emails are no longer sent.

The email software can tell the difference between emails that bounced for temporary reasons (a contact's inbox was full, for example) and those that bounced for permanent reasons (the account does not exist, for example). The email software can then take different action depending on the type of bounce that occurred.

Cron

Cron (an abbreviation of "chronograph") is a program that activates other programs, commands and processes at pre-determined times and intervals. It is a way of scheduling tasks to happen automatically. The email software server uses cron jobs to take care of sending out scheduled emails, handling autoresponders and bounced emails, and a variety of other tasks.

Event Log

The email software's event log is a CRM (Customer Relationship Management) feature that allows you to see all of your interactions with a contact at a glance. Information about email software-related events (for example, each time an email is sent to a contact) is logged automatically, and you can also manually log all sorts of other information (for example, each time you call or meet a contact in person).

Getting Started

Use this chapter if you want to start sending out emails right away. The steps in this chapter show you how to set up a list of your contacts, and send emails to them.

Note: The email software should already be set up and configured on your server. If you are in doubt, check with your system administrator or whoever is in charge of the server.

Steps marked with a red asterisk (*) are necessary. The other steps are not necessary, but allow you to perform additional, useful tasks.

Follow the links to other parts of this user's guide for information on how to complete each step.

1 **Log in to the email software**. *

Use your username and password to access the email software.

See Logging In to the Email Software.

2 **Set up a contact list**. *

Create a list to hold information about your contacts (the people to whom you send your emails). You can also configure the following:

- Your name, email address, and other personal details.
- Your company's name, address and phone number.
- Where bounced emails should be sent.
- Which custom fields you want to use (see step 3).
- Which fields you want to see when you view the list.

See Creating and Editing Contact Lists.

3 **Create custom fields**.

If you want to collect a specific type of information about your contacts, you can create a custom field to hold the information.

- You can specify the kind of field you want to make (text box, drop-down list, check box, and so on), and a variety of other settings.
- You can also specify whether or not the field should be mandatory (if a field is mandatory, it must be filled in before you can successfully add a contact to the list).

See Creating and Editing Custom Fields.

Note: Skip this step if you do not want to collect information that is not covered by the built-in fields.

4 **Add contacts to your contact list**. *

Manually add information about one or more people to whom you want to send emails. You can also upload a file containing contacts' information, if you have one.

See Adding or Editing a Contact.

5 **Create a signup form**.

Use the email software to create an HTML form you can add to your website that allows people to add their information to your contact list.

See Creating and Editing Forms.

Note: Skip this step if you do not want to allow people to sign up to join your contact list.

6 **Place the signup form on your website**.

Add the HTML form you created in step 5 to a page on your website.

See Adding a Form to Your Website.

Note: Skip this step if you did not create a form in step 5.

7 **Create an email campaign**. *

Email campaigns control the emails you sent to the contacts on your contact list.

- Specify whether you want to send an HTML email, a plain-text email, or both (known as "multipart").
- Design the HTML and/or text components of the campaign. Use the built-in templates, modify a template, or build your own from scratch.
- Write your email's text content.
- Use custom fields, if required.
- Activate the email: allow it to be sent to your contacts.
- Validate your email, if required: check how it looks in popular email clients.
- Preview your email, if required: send a test copy to your own email address.
- Save the campaign.

See Creating and Editing Email Campaigns.

8 **Send your campaign to your contacts**. *

Select the contact list to which you want to send the email campaign, and send it out to the contacts belonging to the list.

See Sending Email Campaigns.

9 **Check statistics about your campaign**.

Find out how many of your emails reached their targets successfully, how many were opened, and a variety of other statistics.

See Viewing Email Campaign Statistics.

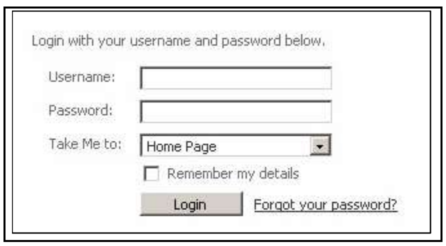
Note: Skip this step if you do not want to view statistics about your campaign.

Logging In to the Email Software

Take the following steps to log in to the email software.

1. Open your Internet browser and enter the email software's URL in the address bar. Hit **Enter** or click **Go**.

Figure 2 Login Screen



2. Enter your **Username** and **Password**.
3. Select the screen you want to see once you have logged in. See the following pages for more information on each screen:
   - **Home page**: see Using The Home Screen.
   - **My contacts**: see Viewing and Managing Contacts.
   - **My contact lists**: see Viewing and Managing Contact Lists.
   - **My segments**: see Creating, Editing and Viewing Segments.
   - **My email campaigns**: see Viewing and Managing Email Campaigns.
   - **My autoresponders**: see Viewing Autoresponders.
   - **My campaign statistics**: see Viewing Email Campaign Statistics.
4. If you want the email software to remember your **Username** and **Password**, click **Remember my details**. If you do not want the email software to remember your details, leave this box unchecked.

Note: Select **Remember my details** only when you are the only person with access to the computer you are using. NEVER select this on a public computer. Failure to adequately protect the details of your contacts may contravene your local data protection laws.

5. Click **Login**. If your **Username** and **Password** are correct, the screen you selected in step 3 displays.

Note: If you forgot your password, click the **Forgot your password?** link. A screen displays in which you can enter your **Username**. Click **Send email**. An email is sent to the email address you registered with the email software. You can click a link in the email to regain access to the email software.

The Email Software Interface

This chapter discusses the email software's Graphical User Interface (GUI). The GUI lets you control every aspect of the email software.

The Email Software Interface at a Glance

The GUI is divided up into three parts.

Figure 3 The Email Software Interface at a Glance

- See The Toolbar for more information on the toolbar.
- See The Navigation Bar for more information on the navigation bar.
- The fields that display in the workspace depend on the screen you are currently viewing. The Navigation Bar and The Toolbar sections of this user's guide deal with the workspace.

Recent Activity Log

When the recent activity log is enabled (see Configuring User Settings), a list of the screens you have recently visited displays at the top of your screen.

Figure 4 Recent Activity Log

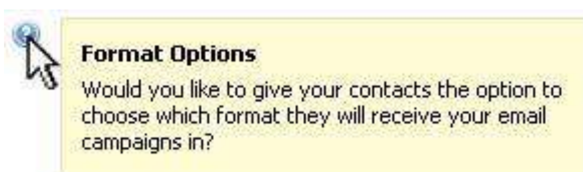
Click an item in the recent activity log to jump back to the relevant screen.

Note: The recent activity log is a user-specific setting; you can turn it on or off for one user without affecting how the interface displays to other users.

Tooltips and Knowledge Base Links

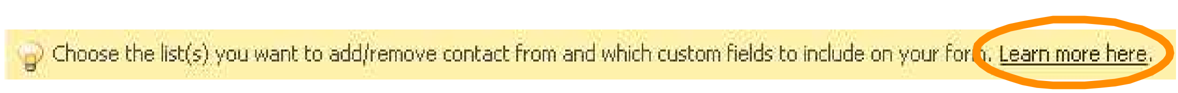
Many objects in the GUI have tooltip icons next to them ( ). Place your mouse pointer over the tooltip to see more information about the object.

Figure 5 Tooltips



Other objects have text links next to them. Click these links to see an article from the knowledge base on the subject.

Figure 6 Knowledge Base Links



To see more articles in the knowledge base, click **Help** in the toolbar.

Sorting Lists

When you see and arrow icons in a list heading, use them to sort the list.

Click to sort the list in ascending order, or click to sort the list in descending order.

Navigating Lists

In pages with numerous list entries, navigation tools display.

Figure 7 Navigating Lists

Table 1 Navigating Lists

Results per page	Select the number of list entries to display in each page.
<<	Click this to go to the first page in the list.
Back	Click this to move backward one page in the list.
1, 2, 3, …	Click this to go to the numbered page in the list.
Next	Click this to move forward one page in the list.
>>	Click this to go to the last page in the list.

The Toolbar

The toolbar displays in every screen.

Figure 8 The Toolbar

Use the toolbar to perform tasks related to the email software's system and management.

Table 2 The Toolbar

Home	Click this to return to the **Home** page, where you can see your contact activity for the last seven days and use the **Getting Started** tool. Note: The **Getting Started** tool walks you through the basic configuration steps you need to take to set up the email software and start sending email campaigns.

Templates	Click this to view the email software's built-in email templates, or to create or configure your own custom email templates. Note: Templates control the appearance of the emails you send.
Forms	Click this to see a menu that lets you create, view and edit website forms. Note: You can create forms for your website that let contacts subscribe, unsubscribe, modify their details, or send information to a friend.
User Accounts	Click this to go to the **User Accounts** screen, where you can create, delete and manage the email software's user accounts. Note: When you create new users, you can specify the features, templates, contact lists and so on to which each user has access.
Settings	Click this to go to the **Settings** screen, where you can view and change global system, email and scheduling, security and addon module settings.
Tools	Click this to see a menu that allows you to check information about your server's configuration, check for updates to the email software, view the PHP error log, and check the email software's components' file permissions.
Logout	Click this to log out of the email software. You will need your user name and password to log back in.
Help	Click this to go to the the email software online knowledge base, where you can read help articles on all of the email software's features.

The Navigation Bar

The navigation bar displays in every screen.

Figure 9 The Navigation Bar

Use the navigation bar to go to screens where you can create, configure and manage your email campaigns.

Table 3 The Navigation Bar

Contact Lists	Click this to see a menu that lets you manage contact lists, bounced emails, contact list segments and contact list groups. Note: Bounced emails are emails you sent that could not be delivered. Note: Segments are groups of contact list entries that share a particular feature; for example, entries with ".com" in the address.
Contacts	Click this to see a menu that lets you manage contacts manually, upload or download a file of contacts, and manage suppression lists. Note: The email software uses CSV (Comma-Separated Value) files to upload contacts. Many common applications such as Microsoft Outlook and Excel can export CSV files. Note: Suppression lists contain email addresses to which emails are not sent, even though the address remains on the contact list.
Email Campaigns	Click this to see a menu that allows you to view, create and send email campaigns, perform split tests and view scheduled emails. Note: Scheduled emails are emails you have configured the email software to send out at a particular point in the future.
Autoresponders	Click this to see a menu that allows you to create, view and edit autoresponders and triggers. Note: Autoresponders are emails that are sent out automatically after a certain event (for example, as soon as a contact joins your list). Triggers are similar to autoresponders, but allow you even greater flexibility to automate email and administrative tasks to happen automatically when certain other events occur.
Custom Fields	Click this to see a menu that lets you create, view and edit subscription form custom fields. Note: By default, subscription forms contain only **Email Address** and **Contact Format** (plain text or HTML) fields. Custom fields help you gather more information about your contacts when they join your list.
Statistics	Click this to see a menu that lets you view statistics about your email campaigns, split tests, triggers, autoresponders, contact lists and user accounts.


Email Marketing
Market to UNLIMITED Contacts
View Statistics, Customize Templates & Generate Reports.
Everything you need to get your message across.

II

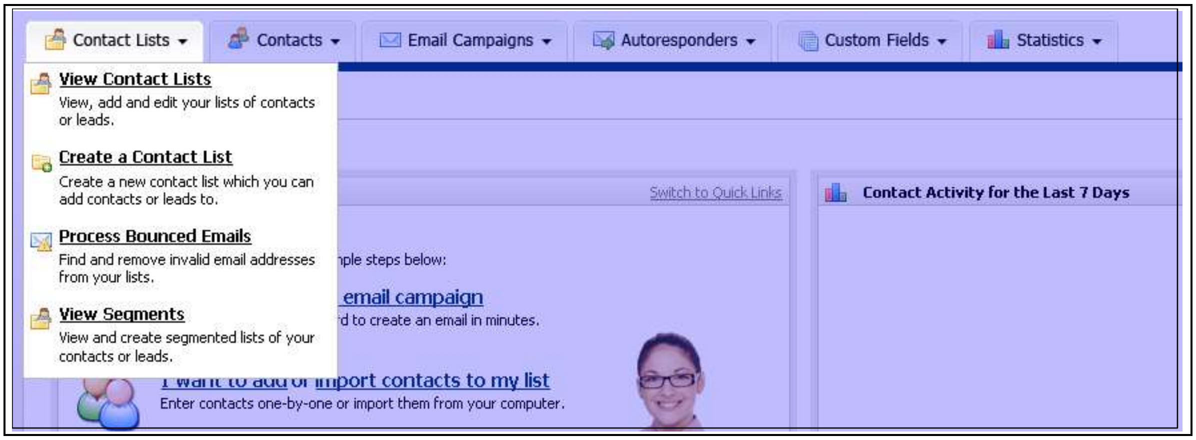
THE NAVIGATION BAR

This section contains the following chapters:

Using Contact Lists

This chapter discusses how to use the **Contact lists** menu in the navigation bar.

Figure 10 The Contact Lists Menu



Contact List Overview

Contact lists are the basic building block of your email campaigns. Each contact list contains information about a set of contacts: the people to whom you send your emails.

You can create separate contact lists for different types of contacts (for example, one list for leads from a trade show and another for people who sign up for your company email newsletter).

When you create an email campaign, you send it to one or more contact lists. You can also send an email campaign to a segment (see Contact List Segments).

Contact List Information

A contact list contains a variety of information about each contact. The type and extent of information you collect about each contact is configurable.

For example, a contact list for trade show leads might contain basic information, such as:

- First and last name.

- Email address.
- Company name.
- Job title.

However, another type of list might contain different types of information. For example, a contact list for customers of a men's clothing store might contain information such as:

- First and last name.
- Email address.
- Suit jacket size.
- Last product purchased.

The information a contact list contains depends solely upon the built-in and custom fields that you define and populate with information. When you create contacts yourself (by entering information from business cards after a trade show, for instance) you must enter the information yourself; when contacts add themselves to lists (by signing up for a newsletter, for instance) they must enter the information themselves.

These fields allow you to personalize your email campaigns. For example, the owner of the men's clothing store would be able to use the custom fields mentioned above to send out highly personalized emails such as:

> "Dear Mr. Smith,
>
> Thank you so much for purchasing your overcoat from our store recently. As a valued customer, I would like to let you know about our fall line of sport coats available in your size, 42 long."

Bounced Emails

"Bounced" emails are emails you send that cannot be delivered to the recipient. This can happen for a variety of reasons: the recipient's mailbox is full, the account has been closed, or does not exist, and so on. When an email bounces, an error message is returned to the email software.

The email software allows you to process bounced emails by deactivating the relevant contact in the contact list. Subsequent emails are not send to the contact. This is important, because an email server that repeatedly sends email that is subsequently rejected by other servers can become blacklisted for spamming.

Note: Contacts are not deleted from the list. This allows you to keep the contact's information, and also ensures that the invalid email address is not later added to the contact list by accident.

There are two types of bounced emails. A "soft bounce" occurs if the error message returned to the email software is temporary (such as "the recipient's email inbox is full"). A "hard bounce" occurs if the error message is permanent (such as "the email account does not exist"). When a soft bounce occurs, no action is taken - but the bounce is logged. If a contact receives five soft bounces, it is treated as a hard bounce. When a hard bounce occurs, the contact is deactivated immediately.

Contact List Segments

Segments are sets of contact list members who all fulfil certain criteria. For example, all members of a contact list whose e-mail addresses end in ".co.uk".

You can use multiple criteria to define segments. For example, all members of a contact list with two or more children and a household income of over $100,000.

The criteria that you can use to define segments depend on the built-in and custom fields you use for the contact list. This allows you to target the audience for each of your email campaigns with great precision, as long as you collect the right information about your contacts.

For instance, a record company promoter ensures that all the people who sign up for his label's email newsletter give their age and location. This means he can later target an email campaign inviting recipients to a label party in a Manhattan nightclub to the right segment of his contact list: those who are over 21 years old and live in New York.

Segments can belong to a single list, or span multiple lists.

Contact List Groups

You can arrange your contact lists into groups for ease of access. Each group of lists is contained in a folder (see Managing Contact List Group Folders).

You might want to arrange contact lists into groups if you have a variety of lists that derive from different sources (for example, contacts from your website and contacts from trade shows).

Contact list groups are a per-user feature. This means that you can arrange the email software's contact lists into groups as you like, without interfering with other users' group arrangements.

Viewing and Managing Contact Lists

To manage the contact lists you already created (see Creating and Editing Contact Lists), click **Contact lists** in the navigation bar. Select **View contact lists**.

You can:

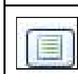
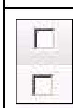
- **Delete selected list(s)**: remove the list (or lists) from the email software. The list cannot be retrieved.
- **Delete contacts in selected list(s)**: remove all the contacts in the list (or lists). The contacts cannot be retrieved. The list remains, but contains no contacts.
- **Update contacts to receive text campaigns**: change the status of all the contacts in the list (or lists) allowing them to receive emails in text format.
- **Update contacts to receive HTML campaigns**: change the status of all the contacts in the list (or lists) allowing them to receive emails in HTML format.
- **Update contacts status to confirmed**: confirmed contacts are those who have replied to a confirmation request email. Use this to change all the contacts in the selected list (or lists) to confirmed contacts.
- **Update contacts status to unconfirmed**: unconfirmed contacts are those who have not yet replied to a confirmation request email. Use this to change all the contacts in the selected list (or lists) to unconfirmed contacts.
- **Merge the selected lists together**: select two or more lists and use this to combine them. An **Edit contact list** screen displays (see Creating and Editing Contact Lists for information on the fields in this screen), allowing you to define the new, combined, list.
- Toggle between **List mode** and **Folder mode**: see Contact List Groups.

You can also **view**, **search** and **add contacts**, and **edit**, **copy** or **delete** a contact list.

Figure 11 Viewing Contact Lists

Note: The above figure shows your contact lists arranged in list mode; to see your contact lists arranged in folder mode, see Figure 12.

Table 4 Viewing Contact Lists

Create contact list	Use this to create a new contact list. See Creating and Editing Contact Lists for more information.
Choose an action	Select one or more contact lists, select an option from the list and click **Go** to perform the selected action.
	Click this to view your contact lists in folder mode. See Managing Contact List Group Folders for more information.
	Click this to view your contact lists in list mode. When you select this, all your contact lists display, regardless of the contact list group to which they belong (see Contact List Groups).
	When you are viewing your contact lists in folder mode, click this to create a new folder. Note: When you are viewing your contact lists in list mode, this icon does not display.
	Select a box belonging to a contact list before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all contact lists.

List name	This is the name you gave the contact list. Click **Edit** to change the name and other details.
Created	This displays the date on which you created the contact list.
Contacts	This displays the number of contacts currently associated with the contact list.
List owner	This is the default name used when sending email campaigns to this contact list.
Archive	Click this to go to the archived list of email campaigns sent to this list.
Action	• Click **View contacts** to see a list of the contacts belonging to the contact list. See Viewing Contact List Contacts. • Click **Search contacts** to search for contacts in the selected list. The **Contacts** > **Search contacts** > **Next** screen displays. • Click **Add contact** to add a new contact to the selected list. The screen that displays is the same as the **Contacts** > **Add a contact** > **Next** screen. • Click **Edit** to configure the contact list. The screen that displays is the same as the **Create a contact list** screen. See Creating and Editing Contact Lists • Click **Copy** to create a new copy of the contact list. The new list displays, with "Copy of" appended to the original name. • Click **Delete** to remove the contact list from the email software.

Managing Contact List Group Folders

To view your contact list groups, click **Contact lists** in the navigation bar, then click **View contact lists**. If the folders do not display immediately, click the **Switch to folder mode** icon ().

Figure 12 Contact List Group Folders

View Contact Lists

Contact lists are used to store details about subscribers or leads, which include their email address and other details such as name, company, age, etc.

Create a Contact List...

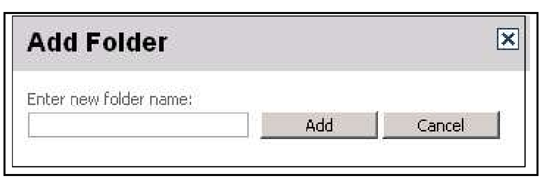
Choose an action | Go

List Name	Created	Contacts	List Owner	Archive	Action
Trade Show Leads					Rename Delete
Leads from Trade Show (Oct 2007)	20 Nov 2007	7	Demo User	RSS	View Contacts Add Contact Edit Copy Delete
Newsletter Subscribers (From Product Demo's)	19 Nov 2007	3,930	Demo User	RSS	View Contacts Add Contact Edit Copy Delete
Website Leads					Rename Delete
Newsletter Subscribers (From Website)	20 Nov 2007	0	Demo User	RSS	View Contacts Add Contact Edit Copy Delete
Webcast Attendees (Nov 2007)	20 Nov 2007	0	Demo User	RSS	View Contacts Add Contact Edit Copy Delete
(Uncategorized)					
Leads for Sales Team	20 Nov 2007	3	Demo User	RSS	View Contacts Add Contact Edit Copy Delete

By default, only one folder exists (**Uncategorized**). All your contact lists are in this folder.

- **To create a new contact list group folder**, click the **Add a new folder** icon ( ). Enter a name for the new folder and click **Add**. The new folder appears at the top of the list.

Figure 13 Create New Folder

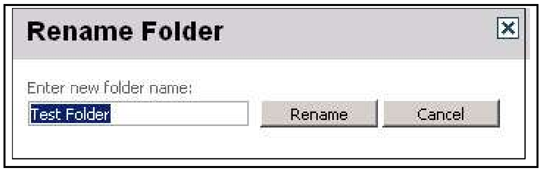


- **To delete a contact list group folder**, click its **Delete** link. When you delete a group folder, any contact lists contained in the folder are assigned to the **Uncategorized** folder.

Note: You cannot delete the **Uncategorized** folder.

- **To rename a contact list group folder**, click its **Rename** link. Enter the folder's new name and click **Rename**.

Figure 14 Rename Folder



Note: You cannot rename the **Uncategorized** folder.

- **To move a contact list into a group folder**, drag and drop the contact list into the required folder.
- **To remove a contact list from a group folder**, drag and drop the contact list into the **Uncategorized** folder.
- **To view a group folder's contact lists**, click its **Expand** icon ( ).

Note: When you drag a contact list onto a group folder, it expands automatically.

- **To hide a group folder's contact lists**, click its **Collapse** icon ( ).

Viewing Contact List Contacts

To view a list of the contacts belonging to a contact list, click **Contact lists** in the navigation bar, select **View contact lists**, and then click the **View contacts** link next to a contact list.

You can:

- **Add a new contact**: add a contact to the contact list.
- **Delete selected contact(s)**: remove the selected contacts from the email software.
- **Update contacts to receive text campaigns**: change the status of selected contacts, allowing them to receive emails in text format.
- **Update contacts to receive HTML campaigns**: change the status of selected contacts, allowing them to receive emails in HTML format.
- **Update contacts status to confirmed**: confirmed contacts are those who have replied to a confirmation request email. Use this to change the selected contact or contacts to confirmed status.
- **Update contacts status to unconfirmed**: unconfirmed contacts are those who have not yet replied to a confirmation request email. Use this to change the selected contact or contacts to unconfirmed status.

You can also **view**, **edit** and **delete** contacts.

Figure 15 Viewing Contact List Members

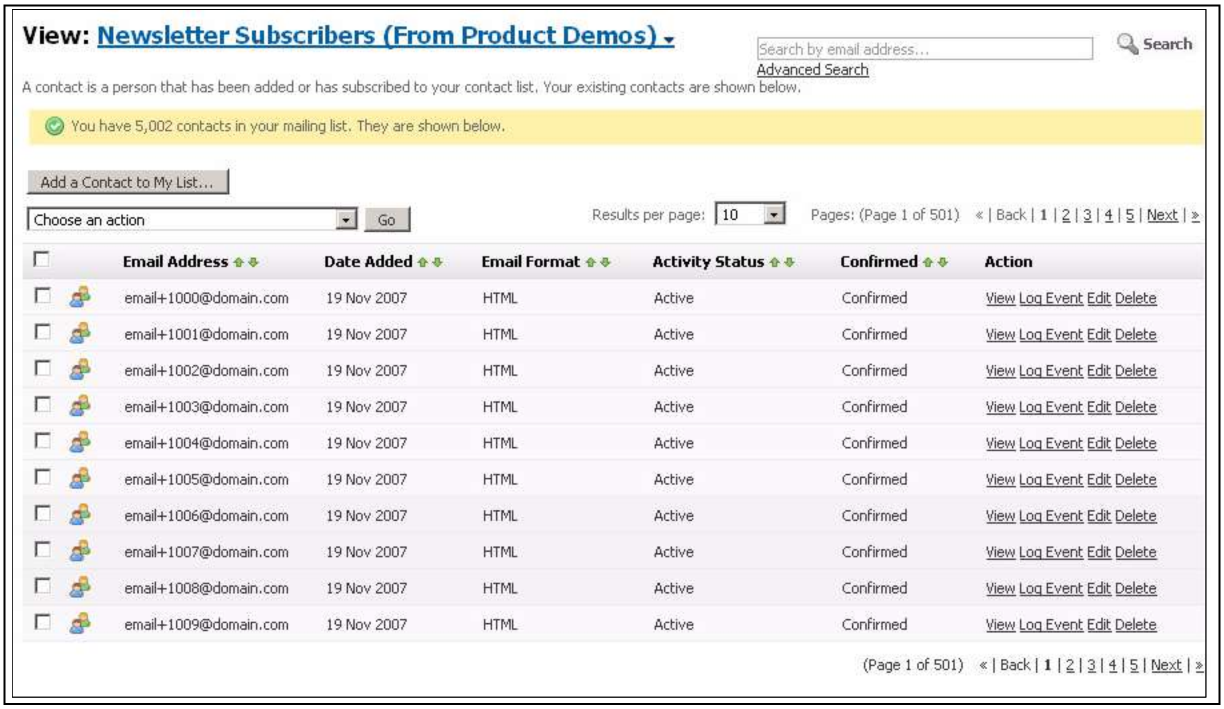
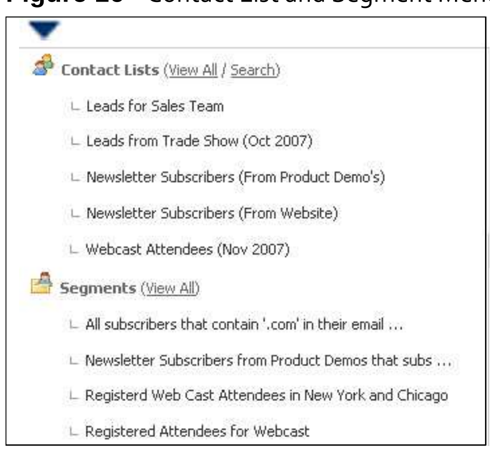
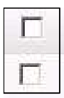


Table 5 Viewing Contact List Members

<table>
<tr><td>View</td><td>This displays the contact list name. Click the triangular icon to view Contact lists or Segments.

Figure 16 Contact List and Segment Menu

</td></tr>
</table>

Search	Use this to search for contacts in the list by their email address. Enter your search term in the text field and click the **Search** button. Click **Advanced search** to go to the **Contacts** > **Search contacts** screen.
Add a contact to my list	Click this to add a new contact to the contact list. The screen that displays is the same as the **Contacts** > **Add a contact** > **Next** screen.
Choose an action	Select one or more contacts, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to a contact before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all contacts.
Email address	This is the address to which emails for this contact are sent.
Date added	This is the date this contact was added to the contact list.
Email format	• This displays **HTML** if the contact is configured to receive HTML emails. • This displays **Text** if the contact is configured to receive plain text emails.
Activity status	• This displays **active** if emails are sent to the contact. • This displays **unsubscribed** if the contact was unsubscribed from the list. • This displays **bounced** if emails to this contact have not been delivered, and emails are no longer sent to the contact.
Confirmed	• This displays **Confirmed** if the contact has replied to a confirmation request email. • This displays **Unconfirmed** if the contact has not yet replied to a confirmation request email.
Action	• Click **View** to see information about the contact. The **Contacts** > **View contact** screen displays. • Click **Log event** to manually add an entry to this contact's event log. See Manual Event Logging for information on the screen that displays. • Click **Edit** to modify the contact's information. The **Contacts** > **Edit contact** screen displays. • Click **Delete** to remove the contact from the email software.

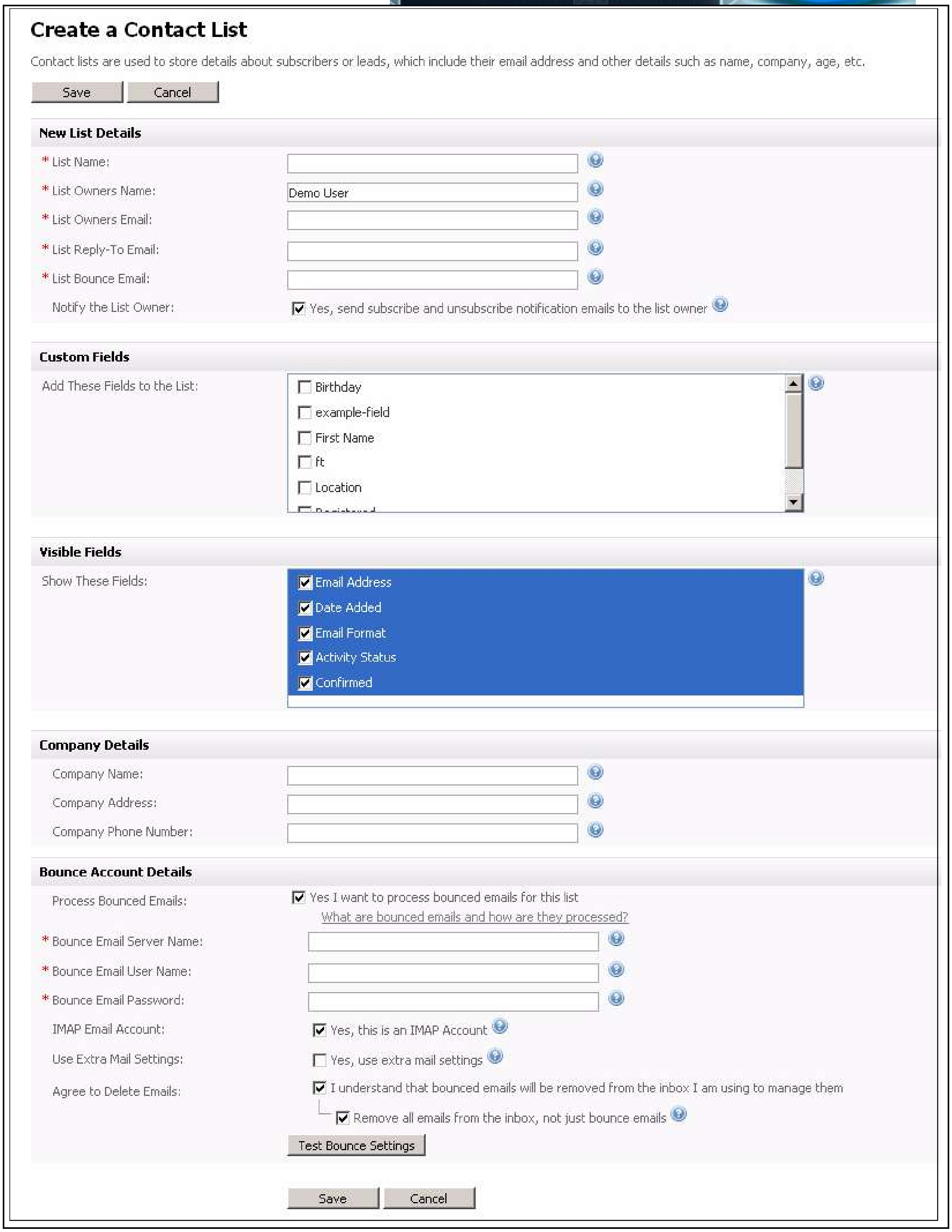
Creating and Editing Contact Lists

Take the following steps to create or edit a contact list:

1. To create a new contact list, click **Contact lists** in the navigation bar. Select **Create a contact list**.

   To edit an existing contact list, click **Contact lists** in the navigation bar, select **View contact lists**. Click the **Edit** link next to the contact list you want to modify.
2. Configure the fields in the screen that displays.

Figure 17 Create or Edit a Contact List



Create a Contact List

Contact lists are used to store details about subscribers or leads, which include their email address and other details such as name, company, age, etc.

Save | Cancel

New List Details

- * List Name:
- * List Owners Name: Demo User
- * List Owners Email:
- * List Reply-To Email:
- * List Bounce Email:
- Notify the List Owner: ☑ Yes, send subscribe and unsubscribe notification emails to the list owner

Custom Fields

Add These Fields to the List:

- ☐ Birthday
- ☐ example-field
- ☐ First Name
- ☐ ft
- ☐ Location

Visible Fields

Show These Fields:

- ☑ Email Address
- ☑ Date Added
- ☑ Email Format
- ☑ Activity Status
- ☑ Confirmed

Company Details

- Company Name:
- Company Address:
- Company Phone Number:

Bounce Account Details

- Process Bounced Emails: ☑ Yes I want to process bounced emails for this list
  What are bounced emails and how are they processed?
- * Bounce Email Server Name:
- * Bounce Email User Name:
- * Bounce Email Password:
- IMAP Email Account: ☑ Yes, this is an IMAP Account
- Use Extra Mail Settings: ☐ Yes, use extra mail settings
- Agree to Delete Emails: ☑ I understand that bounced emails will be removed from the inbox I am using to manage them
  ☑ Remove all emails from the inbox, not just bounce emails

Test Bounce Settings

Save | Cancel

Table 6 Create or Edit a Contact List

New list details	
List name	Enter the name for this contact list. This name appears in the control panel and subscription forms.
List owner's name	Enter the name of the list owner. This is the name that appears on emails to this contact list.
List owner's email	Enter the e-mail address of the list owner. This is the default "from" address that displays on email sent to this contact list.
List reply-to email	Enter the default reply email address for emails sent to this contact list.
List bounce email	Enter the address to which bounced emails from this contact list are sent.
Notify the list owner	Select the check box to have an email sent to the **List owner's email** every time a contact subscribes to, or unsubscribes from, the list.
Custom fields	
Add these fields to list	Select the custom fields you want to associate with this list.
Visible fields	
Show these fields	Select the fields you want to display in the list's **View contacts** page.
Company details	
Company name	Enter your company name. This is used when you add the `%%companyname%%` variable in your emails to this list. Note: Configure this field and use the `%%companyname%%` variable in your emails to adhere to the CAN-SPAM act.
Company address	Enter your company address. This is used when you add the `%%companyaddress%%` variable in your emails to this list. Note: Configure this field and use the `%%companyaddress%%` variable in your emails to adhere to the CAN-SPAM act.
Company phone number	Enter your company address. This is used when you add the `%%companyphone%%` variable in your emails to this list. Note: Configure this field and use the `%%companyphone%%` variable in your emails to adhere to the CAN-SPAM act.

Bounce account details	
Process bounced emails	Select the checkbox to process bounced emails (see Bounced Emails). Note: If you do not process bounced emails your server is in danger of becoming blacklisted due to repeated attempts to email unavailable accounts.
Bounce email server name	If you selected the **Process bounced emails** checkbox, enter the IP address or hostname of the server you want to use to process bounced emails.
Bounce email user name	Enter the username for your account on the email server you use for processing bounced emails.
Bounce email password	Enter the password for your account on the email server you use for processing bounced emails.
IMAP email account	Select the checkbox if the account on the bounce server is an IMAP (Internet Message Access Protocol) account. Deselect this if the account is a POP3 (Post Office Protocol version 3) account.
Use extra mail settings	Select this if you need to configure the bounce email server account further. The following fields display: **Do not validate certificate**: select this if you do not want to validate the server's SSL (Secure Sockets Layer) certificate. Use this if your server uses a self-signed certificate. If you are not sure whether your server uses a self-signed certificate, do not select this. **Do not use TLS**: select this if you do not want to use TLS (Transport Layer Security) to connect to the server. If you are not sure whether you want to use TLS, do not select this. **Do not use SSL**: select this if you do not want to use SSL (Secure Sockets Layer) to connect to the server. If you are not sure whether you want to use SSL, do not select this. **Others**: enter any other options required to connect to the server.
Agree to delete emails	Select this if you want to delete emails from the server once you have read them. If you did not save an email on your computer, you will not be able to re-read the email.
Test bounce settings	Click this to test the bounce email account by sending a test email.

3 Click **Save** to save your changes. Alternatively, click **Cancel** to return to the **View contact lists** screen without saving any changes.

Processing Bounced Emails

Bounced email processing clears your contact lists of invalid emails (see Bounced Emails).

If you use automatic bounced email processing, you do not need to perform manual bounced email processing.

- See Managing Email Settings for information on configuring default global automatic bounced email settings.
- See Creating and Editing Contact Lists for configuring automatic bounced email processing for individual contact lists.

Take the following steps to manually process bounced emails:

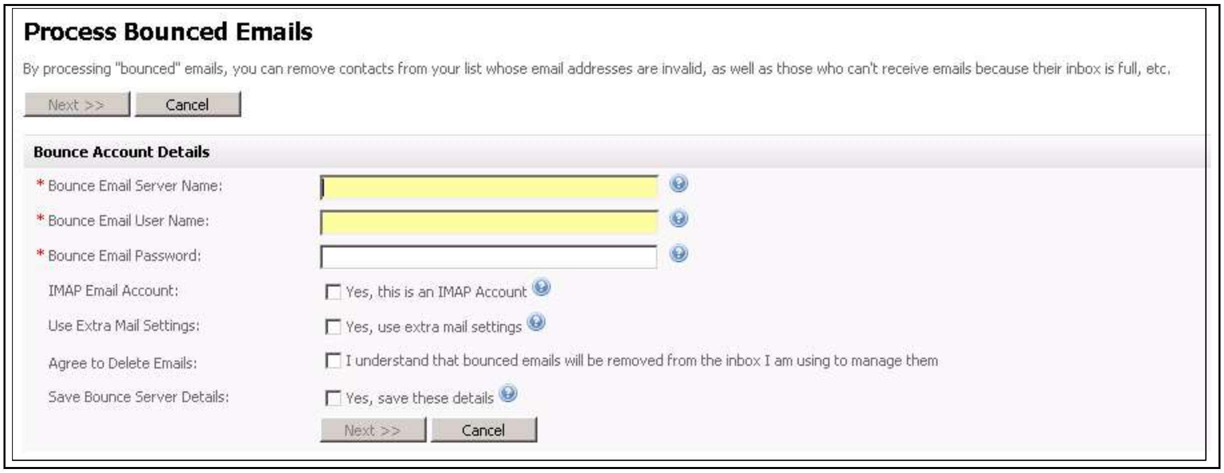
1 Click **Contact lists** in the navigation bar, then click **Process bounced emails**.

Figure 18 Processing Bounced Emails

2 Select the contact list for which you want to process bounced emails and click **Next**.

Alternatively, click **Cancel** to return the fields in this screen to their defaults without saving any changes.

Figure 19 Processing Bounced Emails: Enter Server Details



3 Enter the details of the email server you want to use to process bounced emails.

Table 7 Processing Bounced Emails: Enter Server Details

Bounce email server name	If you selected the **Process bounced emails** checkbox, enter the IP address or hostname of the server you want to use to process bounced emails.
Bounce email user name	Enter the username for your account on the email server you use for processing bounced emails.
Bounce email password	Enter the password for your account on the email server you use for processing bounced emails.
IMAP email account	Select the checkbox if the account on the bounce server is an IMAP (Internet Message Access Protocol) account. Deselect this if the account is a POP3 (Post Office Protocol version 3) account.

Use extra mail settings	Select this if you need to configure the bounce email server account further. The following fields display: **Do not validate certificate**: select this if you do not want to validate the server's SSL (Secure Sockets Layer) certificate. Use this if your server uses a self-signed certificate. If you are not sure whether your server uses a self-signed certificate, do not select this. **Do not use TLS**: select this if you do not want to use TLS (Transport Layer Security) to connect to the server. If you are not sure whether you want to use TLS, do not select this. **Do not use SSL**: select this if you do not want to use SSL (Secure Sockets Layer) to connect to the server. If you are not sure whether you want to use SSL, do not select this. **Others**: enter any other options required to connect to the server.
Agree to delete emails	Select this if you want to delete emails from the server once you have read them. If you did not save an email on your computer, you will not be able to re-read the email.

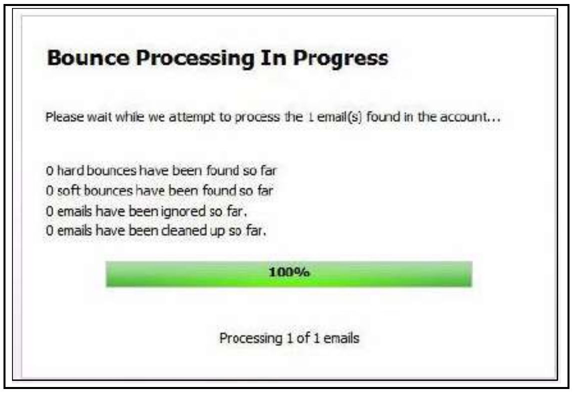
4 Click **Next** to begin processing bounced emails.

Alternatively, click **Cancel** to return the field in this screen to its default without saving any changes.

Figure 20 Processing Bounced Emails: Start Processing

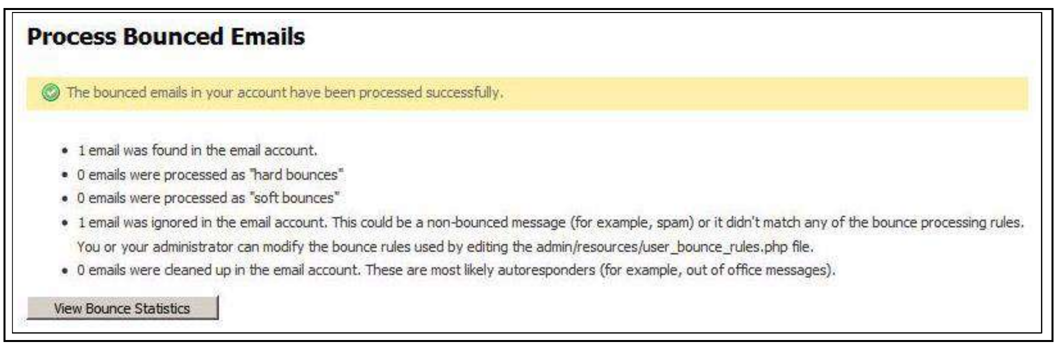
5 Click **Start Processing**. A screen displays indicating progress.

Figure 21 Processing Bounced Emails: Progress



6 A screen displays with a summary of the processing operation. Click **View bounce statistics** to see detailed information.

Figure 22 Processing Bounced Emails: Summary

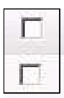


Creating, Editing and Viewing Segments

Click **Contact lists** in the navigation bar, then click **View segments**.

Figure 23 Viewing Segments

Table 8 Viewing Segments

Create a segment	Click this to define a new segment of one or more contact list contacts. See Creating a Segment.
	Select a box belonging to a segment before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all segments.
Choose an action	Use this to delete one or more segments. Select the segment (or segments) you want to delete and select **Delete the selected segment(s)**.
Segment Name	This displays the descriptive name of the segment.
Created	This displays the date on which the segment was defined.
Contacts	This displays the current number of contacts within the segment (those in the relevant contact list or lists, whose information matches the segment's rules).
Action	• Click **View contacts** to see a list of all the contacts in a segment. See Viewing a Segment's Contacts. • Click **Edit** to modify a segment's settings. The fields that display are the same as the **Create a segment** screen; see Creating a Segment. • Click **Copy** to create a new copy of the segment. The new segment displays, with "Copy of" appended to the original name. • Click **Delete** to remove the segment from the email software. Note: When you delete a segment, the contacts in the segment are not deleted.

Creating a Segment

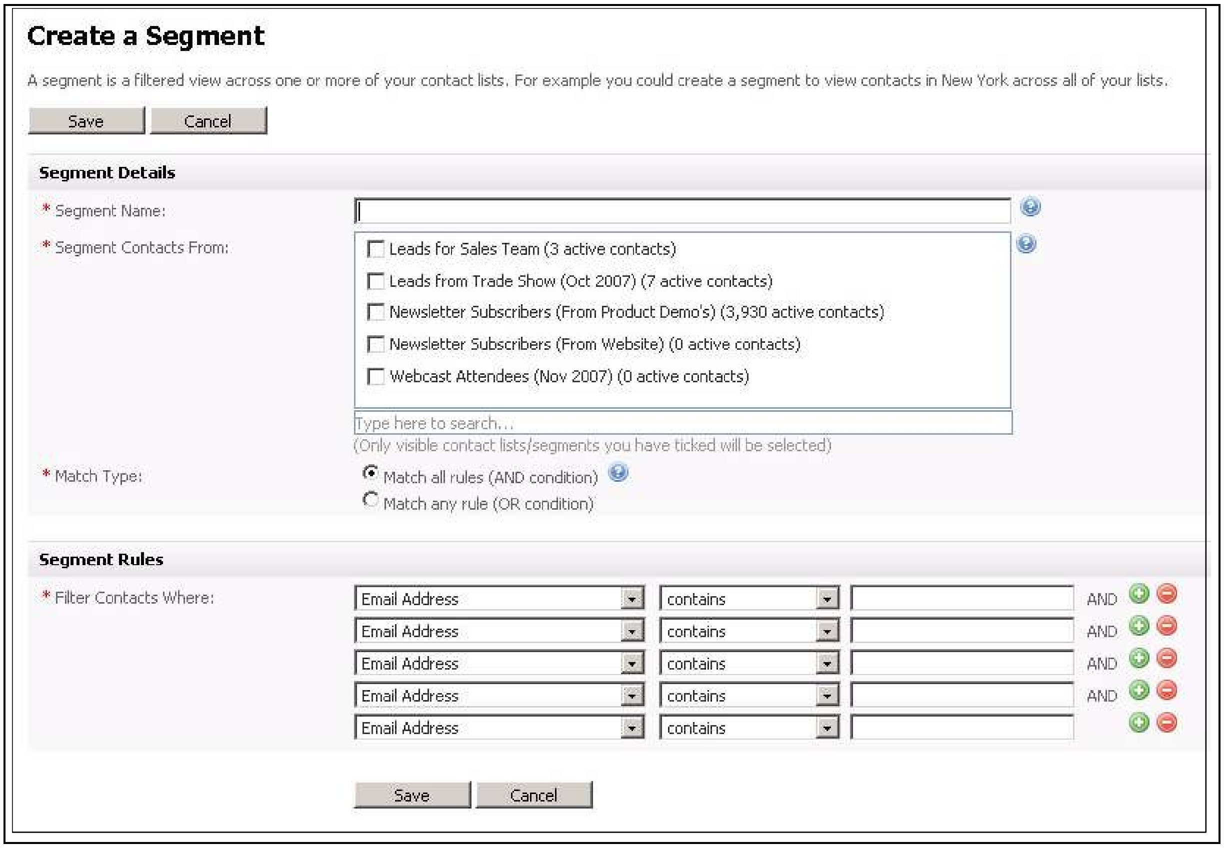
Take the following steps to create a segment:

1 Click **Contact lists** in the navigation bar, then **View Segments**.

Figure 24 Creating a Segment

2 Click **Create a Segment**.

Figure 25 Creating a Segment: Configure Segment



3. Enter a descriptive **Segment name**.
4. In the **Segment contacts from list**, select the contact lists you want to include in the segment. You can use the search box below the list to find contact lists.
5. Choose a **Match type**. This controls how the email software applies the rules you configure.
   - Select **Match all rules (AND condition)** to find only contacts who match every rule you define.
   - Select **Match any rule (OR condition)** to find contacts who match one or more of the rules you define.
6. Define your **Segment rules**. These are the conditions a contact must match to be included in the segment.

   Do the following for each rule:
   - The first drop-down list contains the fields available for the contact list (or lists) you selected. Select the basic or custom field you want to base the rule on.

- In the second drop-down list, select **contains** to search for contacts that match the information you add in the text field. Select **does not contain** to search for contacts that do not match the information you add in the text field.
- In the text field, enter the information you want to search for.

Note: Click the add icon ( ) to insert another rule to the list, or click a rule's delete icon ( ) to delete the rule from the list.

7 When you have finished configuring your rules, click **Save**. The **View segments** screen displays, with the new segment in the list.
Alternatively click **Cancel** to return to the **View segments** screen without saving your changes.

Viewing a Segment's Contacts

To view a list of the contacts belonging to a segment, click **Contact lists** in the navigation bar, select **View segments**, and then click the **View contacts** link next to a segment.

You can:

- **Add a new contact**: add a contact to the email software.
- **Delete selected contact(s)**: remove the selected contacts from the email software.
- **Update contacts to receive text campaigns**: change the status of selected contacts, allowing them to receive emails in text format.
- **Update contacts to receive HTML campaigns**: change the status of selected contacts, allowing them to receive emails in HTML format.
- **Update contacts status to confirmed**: confirmed contacts are those who have replied to a confirmation request email. Use this to change the selected contact or contacts to confirmed status.
- **Update contacts status to unconfirmed**: unconfirmed contacts are those who have not yet replied to a confirmation request email. Use this to change the selected contact or contacts to unconfirmed status.

You can also **view**, **edit** and **delete** contacts.

Figure 26 Viewing a Segment's Contacts

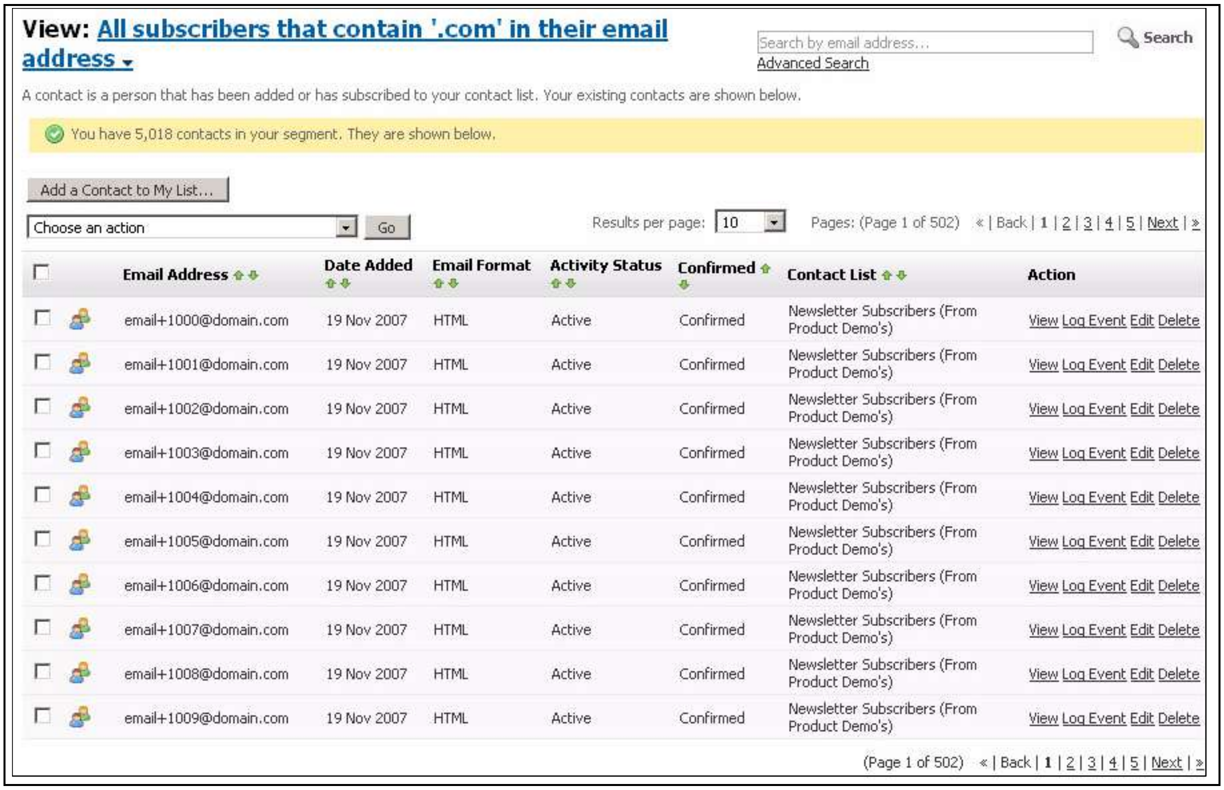
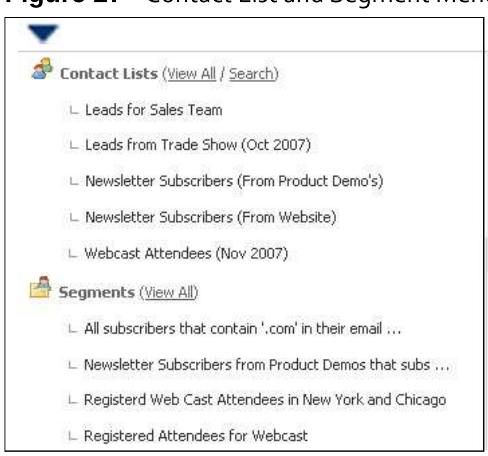
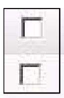


Table 9 Viewing Segment Contacts

<table>
<tr>
<td>View</td>
<td>This displays the segment name. Click the triangular icon to view Contact lists or Segments.

Figure 27 Contact List and Segment Menu


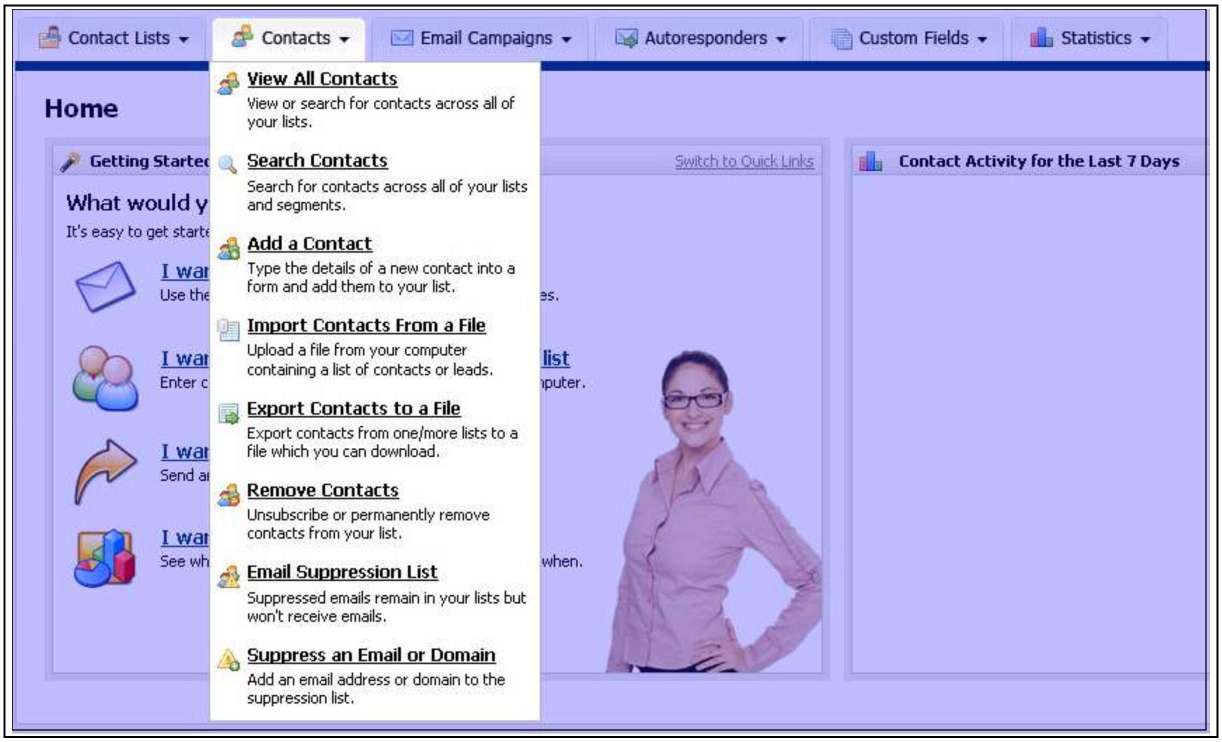
</td>
</tr>
</table>

Search	Use this to search for contacts in the segment by their email address. Enter your search term in the text field and click the **Search** button. Click **Advanced search** to go to the **Contacts** > **Search contacts** screen.
Add a contact to my list	Click this to add a new contact to the email software. The screen that displays is the same as the **Contacts** > **Add a contact** > **Next** screen. Note: When you use this option, the contact is not necessarily added to the segment. The contact is added to the segment only if it fulfils the segment's criteria.
Choose an action	Select one or more contacts, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to a contact before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all contacts.
Email address	This is the address to which emails for this contact are sent.
Date added	This is the date this contact was added to the contact list.
Email format	• This displays **HTML** if the contact is configured to receive HTML emails. • This displays **Text** if the contact is configured to receive plain text emails.
Activity status	• This displays **active** if emails are sent to the contact. • This displays **unsubscribed** if the contact was unsubscribed from the list. • This displays **bounced** if emails to this contact have not been delivered, and emails are no longer sent to the contact.
Confirmed	• This displays **Confirmed** if the contact has replied to a confirmation request email. • This displays **Unconfirmed** if the contact has not yet replied to a confirmation request email.
Contact list	This displays the name of the contact list to which this contact belongs.
Action	• Click **View** to see information about the contact. The **Contacts** > **View contact** screen displays. • Click **Edit** to modify the contact's information. The **Contacts** > **Edit contact** screen displays. • Click **Delete** to remove the contact from the email software.

Using Contacts

This chapter discusses how to use the **Contacts** menu in the navigation bar.

Figure 28 The Contact Lists Menu



Contacts Overview

A contact is a person to whom you send email campaigns. Contacts can be added to the email software in one of three ways.

- You manually create a contact record and input the information yourself.
- You import contacts from a CSV (Comma-Separated Value) file. The email software creates contact records for each entry.
- A contact signs up at your website. The email software creates the contact record.

Contacts are arranged into contact lists. Each contact must belong to one contact list. See Contact List Overview for more information.

You can also arrange contacts using segments; lists of contacts in one or more contact lists that share certain criteria. See Creating, Editing and Viewing Segments for more information.

Each contact has a contact record that contains information about the person it represents. When you create a contact list, you specify the types of information you want to hold by selecting the fields for the list. All contact records in a list have the same fields.

There are two types of field: built-in and custom. You can define custom fields yourself, using the **Custom fields** > **Create a custom field** screens.

The minimum required information for a contact is:

- **Email address**: required to send emails.
- **Email format** (HTML or text): required so that users with text-only email clients are not sent HTML emails.
- **Confirmation status** (confirmed or unconfirmed): required so that you can use double-opt-in confirmation. When you use double-opt-in confirmation, users who sign up to your contact list receive an email to confirm that they want to join.

Note: Double-opt-in confirmation is not mandatory. However, it is strongly recommended that you use it in order to avoid sending potentially unwanted emails.

Event Logging Overview

Every contact in the email software has a personal event log. This is a CRM (Customer Relationship Management) feature that allows any user of the email software to instantly see information about interaction with the contact.

Events can be logged either automatically or manually.

When the email software performs an action that relates to a contact (such as sending an email to the contact) an event is logged automatically.

When you want to log an event that the email software cannot log automatically, such as a phone call or a meeting, you can add an event log entry manually (see Manual Event Logging).

To see a contact's event log, either:

- Click the contact's icon in the **Contacts** > **View contacts** screen.
- In a contact's **View contacts** screen, scroll down to the **Event log** section.

Viewing and Managing Contacts

To view the contacts stored in the email software, click **Contacts** in the navigation bar, then click **View all contacts**.

You can:

- **Add a new contact**: add a contact to the email software.
- **Delete selected contact(s)**: remove the selected contacts from the email software.
- **Update contacts to receive text campaigns**: change the status of selected contacts, allowing them to receive emails in text format.
- **Update contacts to receive HTML campaigns**: change the status of selected contacts, allowing them to receive emails in HTML format.
- **Update contacts status to confirmed**: confirmed contacts are those who have replied to a confirmation request email. Use this to change the selected contact or contacts to confirmed status.
- **Update contacts status to unconfirmed**: unconfirmed contacts are those who have not yet replied to a confirmation request email. Use this to change the selected contact or contacts to unconfirmed status.

You can also **view**, **edit** and **delete** contacts.

Figure 29 Viewing Contacts

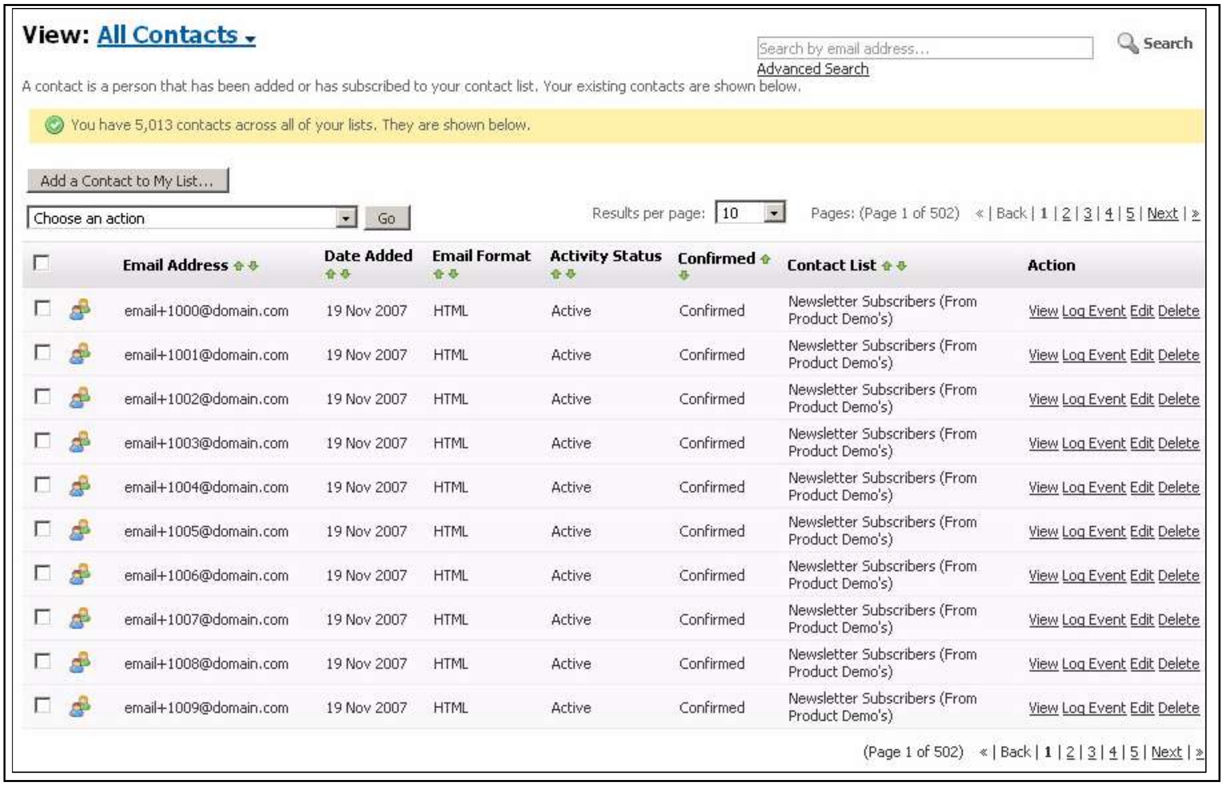
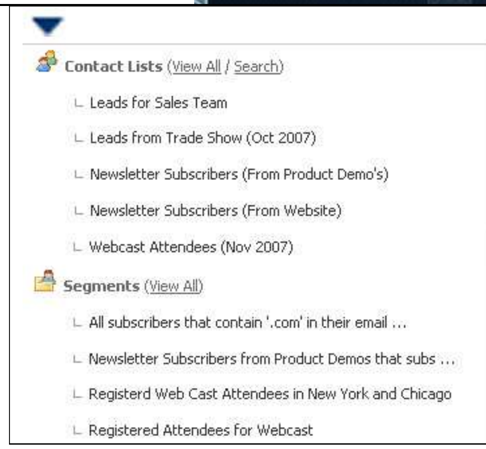
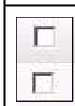


Table 10 Viewing Contacts

View	By default, this displays **All contacts**. Click the triangular icon to view **Contact lists** or **Segments**. **Figure 30** Contact List and Segment Menu

	
Search	Use this to search for contacts in the segment by their email address. Enter your search term in the text field and click the **Search** button. Click **Advanced search** to go to the **Contacts** > **Search contacts** screen.
Add a contact to my list	Click this to add a new contact to the email software. The screen that displays is the same as the **Contacts** > **Add a contact** > **Next** screen. Note: When you use this option, the contact is not necessarily added to the segment. The contact is added to the segment only if it fulfils the segment's criteria.
Choose an action	Select one or more contacts, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to a contact before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all contacts.

	Click this icon to see the contact's personal event log. Note: This icon displays only when a contact has personal event log entries. **Figure 31** Contact Event Log  For information on manual event logging, see Manual Event Logging. For information on automatic event logging, and event logging in general, see Event Logging Overview.
Email address	This is the address to which emails for this contact are sent.
Date added	This is the date this contact was added to the contact list.
Email format	• This displays **HTML** if the contact is configured to receive HTML emails. • This displays **Text** if the contact is configured to receive plain text emails.
Activity status	• This displays **Active** if emails are sent to the contact. • This displays **Unsubscribed** if the contact was unsubscribed from the list. • This displays **Bounced** if emails to this contact have not been delivered, and emails are no longer sent to the contact.
Confirmed	• This displays **Confirmed** if the contact has replied to a confirmation request email. • This displays **Unconfirmed** if the contact has not yet replied to a confirmation request email.
Contact list	This displays the name of the contact list to which this contact belongs.

Action	• Click **View** to see information about the contact. The **Contacts** > **View contact** screen displays (see Viewing A Contact). • Click **Log event** to manually add an entry to this contact's event log. See Manual Event Logging for information on the screen that displays. • Click **Edit** to modify the contact's information. The **Contacts** > **Edit contact** screen displays. • Click **Delete** to remove the contact from the email software.

Viewing A Contact

To view information about a contact stored in the email software, click **Contacts** in the navigation bar, then click **View all contacts**. Click the relevant contact's **View** link.

Figure 32 View Contact

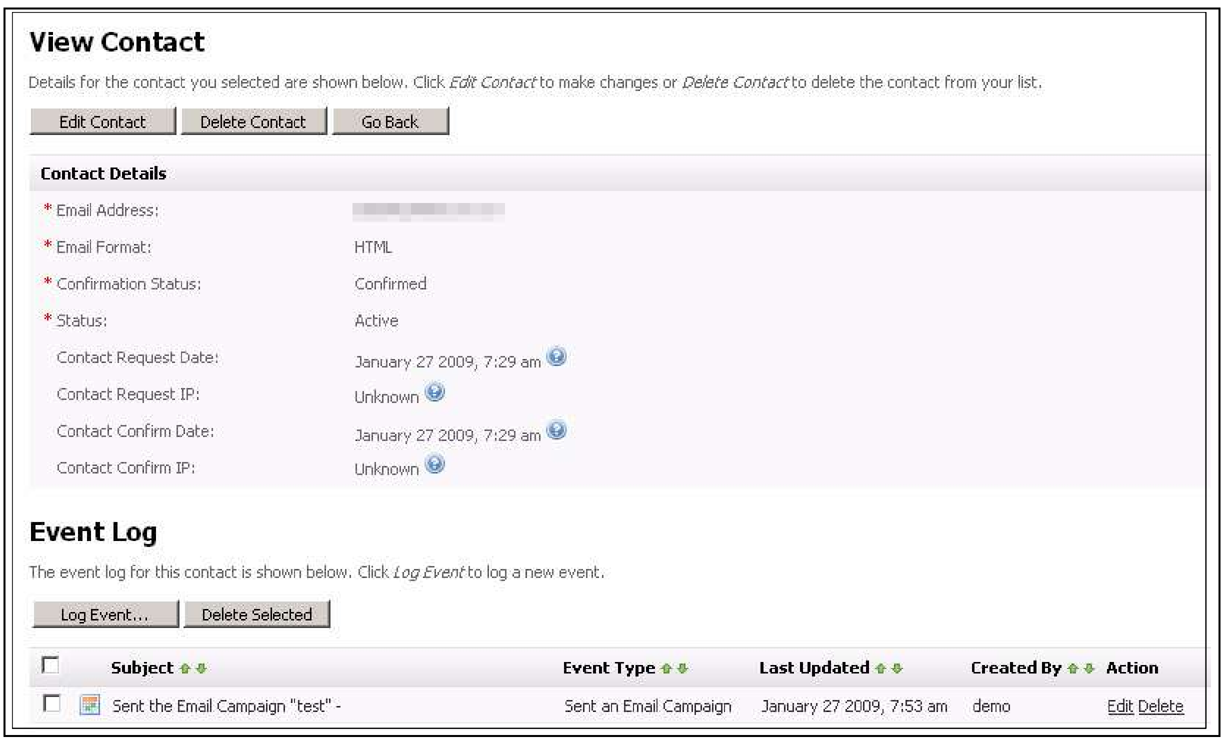


Table 11 View Contact

Edit contact	Click this to make changes to the contact's information. See Adding or

	Editing a Contact for information on the screen that displays.
Delete contact	Click this to remove the contact from the email software. A deleted contact's information cannot be retrieved.
Go back	Click this to return to the previous screen.
Contact details	This section displays information about the contact.
Email address	This displays the email address to which emails for this contact are sent.
Email format	• This displays **HTML** if the contact is configured to receive HTML emails. • This displays **Text** if the contact is configured to receive plain text emails.
Confirmation status	• This displays **Confirmed** if the user has confirmed that he or she wants to be in your contact list. • This displays **Unconfirmed** if the user has not yet confirmed that he or she wants to be in your contact list.
Status	• This displays **Active** if emails are sent to the contact. • This displays **Unsubscribed** if the contact was unsubscribed from the list. • This displays **Bounced** if emails to this contact have not been delivered, and emails are no longer sent to the contact.
Contact request date	This displays the date and time at which the contact asked to be added to your contact list.
Contact request IP	This displays the IP address from which the contact requested to be added to your contact list, if known. This displays **Unknown** if the IP address is not known, or if the contact was added by an administrator.
Contact confirm date	If the contact has confirmed that he or she wants to be added to your contact list, this displays the date and time that this confirmation was made.
Contact confirm IP	This displays the IP address from which the contact confirmed that he or she wanted to be added to your contact list, if known. This displays **Unknown** if the IP address is not known, or if the confirmation was made by an administrator.
Event log	This section displays information about the email software events that relate to this contact, or events that you have added to the log manually. See Event Logging Overview for more information.

Subject	This displays the subject of the event log entry.
Event type	This displays the type of event that the log entry describes.
Last updated	This displays the date and time that the log entry was created, or last edited.
Created by	This displays the username of the email software user who created the entry (for manual entries) or performed the action in the email software that created the entry (for automatic entries).
Action	• Select **Edit** to make changes to the event log entry. See Manual Event Logging for information on the fields that display. • Select **Delete** to remove the entry from the event log. Deleted event log entries cannot be retrieved.

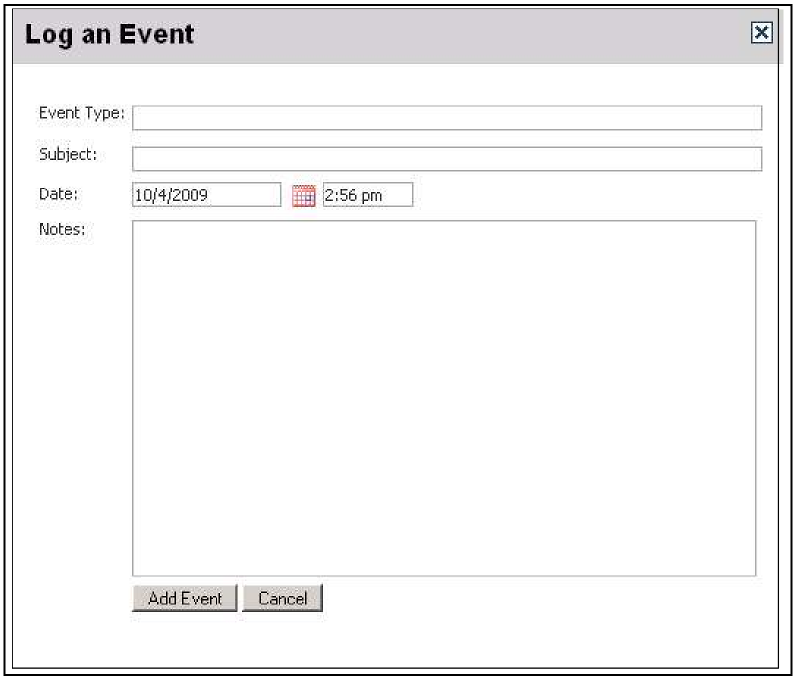
Manual Event Logging

This section describes how to manually add an entry to a contact's event log.

Note: For information on automatic event logging, see Event Logging Overview.

1. To manually add an entry to a contact's event log, either:
   - Click the contact's **Log event** link in the **Contacts** > **View contacts** screen.
   - Click the **Log event** button while editing or viewing a contact.

Figure 33 Manual Event Logging: Step 1



2 Enter an **Event type**. This allows you to easily categorize event log entries. If you enter a common event type ("Phone call", "Meeting", and so on), the email software automatically adds an appropriate icon (if the email software does not recognize the event type, it uses a generic calendar icon).

3 Enter a **Subject** that describes this event log entry.

4 Select a date and time for this log entry. Entries are ordered in the log by date and time.

Figure 34 Manual Event Logging: Select Date and Time

Note: By default, the current date and time displays. If you want to log the event as taking place at the current date and time, you do not need to select a date and time.

5. If you want to include additional information in the log, enter it in the **Notes** section.
6. Click **OK**. The new entry displays in the event log.

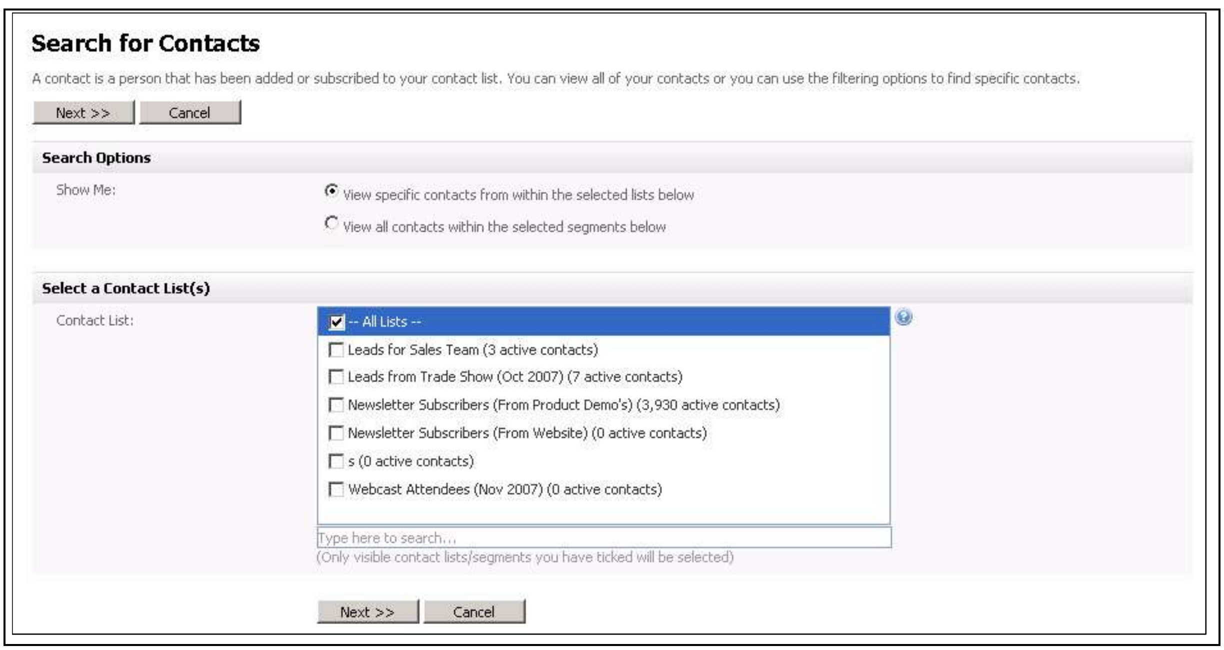
Searching Your Contacts

Take the following steps to conduct an advanced search of your contacts.

Note: To conduct a simple search, use the **Search** box in the **Contacts** > **View all contacts** screen (and other screens).

1. Click **Contacts** in the navigation bar, then click **Search contacts**.

Figure 35 Searching Contacts: Choose List or Segment



2. Choose one of the **Search options**.
   - Select **View specific contacts from within the selected lists below** to search contact lists. A list of contact lists displays below.

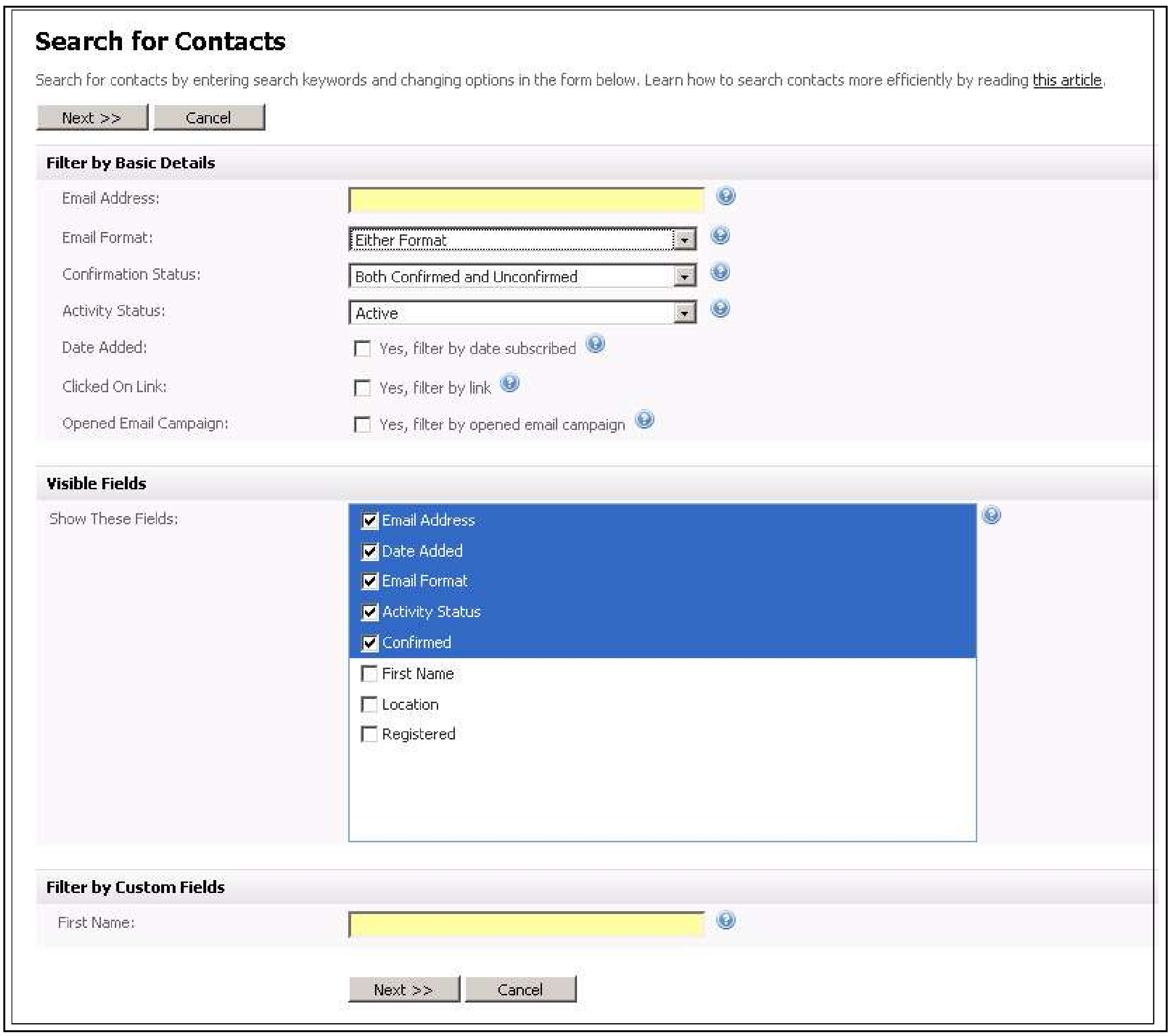
- Select **View all contacts within the selected segments below** to search segments. A list of segments displays below.

3 Select the **Contact list(s)** or **Segment(s)** you want to search below.

4 If you want to search for a contact list or segment, enter the list or segment's name in the **Type here to search** field.

5 Click **Next**.

Figure 36 Searching Contacts: Filter and Show Fields



6 Configure the **Filter by basic details** fields:

- If you want to search for all or part of an email address, enter it in the **Email address** field.

- If you want to search for contacts configured to receive **HTML** or **Text** emails only, select the relevant option from the **Email format** list.
- If you want to search for contacts who are **Confirmed** or **Unconfirmed** only, select the relevant option from the **Confirmation status** list. If you want to search for both, leave **Both confirmed and unconfirmed** selected (default).
- If you want to search for contacts who are **Active**, **Bounced**, or **Unsubscribed**, select the relevant option from the **Activity status** list.
- If you want to search for contacts who subscribed **Before** or **After** a certain date, **Between** two dates, or **Exactly** on a particular date, select **Yes, filter by date subscribed** and make the relevant selection in the fields that display.

Figure 37 Searching Contacts: Filter By Date Subscribed

Select the day and month in the drop-down list boxes. Enter the year in the field to the right. If you selected **Between**, configure the end date in the fields beneath.

- If you want to search for contacts who have, or have not, clicked a specific link in your email campaigns, select **Yes, filter by link**.

Figure 38 Searching Contacts: Filter By Link

If you want to find contacts who have clicked a link, select **Has clicked** in the first list, and select the relevant link in the second list.

If you want to find contacts who have not yet clicked a link, select **Has not clicked**, and select the relevant link in the second list.

- If you want to search for contacts who have, or have not, opened a specific email, select **Yes, filter by opened email campaign**.

Figure 39 Searching Contacts: Filter By Opened Email

If you want to search for contacts who have opened an email, select **Has opened** in the first list, and select the email campaign in the second list.

If you want to find contacts who have not yet opened an email, select **Has not opened**, and select the email campaign in the second list.

7. In the **Visible fields** section, select the fields that you want to see in the search results list.
8. If the contact list contains custom fields, you can search each field in the **Filter by custom fields** section.
9. Click **Next**.
10. The **Search results** screen displays, showing the contacts the fulfill the criteria you specified. The fields in this screen are the same as those in the **View contacts** screen; see Viewing and Managing Contacts.

Adding or Editing a Contact

Take the following steps to add a contact to one of your contact lists:

Note: If you want to add contacts from a file, see Importing Contacts From a File.

1. Click **Contacts** in the navigation bar, then click **Add a contact**.

Figure 40 Add a Contact: Select Contact List

2. Select the **Contact list** to which you want to add the contact. Click **Next**.

Figure 41 Add a Contact: Add Contact Details

3 Enter the contact's details:

- Enter the contact's **Email address**.
- Select an option from the **Email format** list. If you want the contact to receive HTML emails, select **HTML**. If you want the contact to receive plain text emails, select **Text**.

Note: Contacts set to receive HTML emails can also receive text emails.

- Select a **Confirmation status**. If you want to send a confirmation email to the contact later, select **Unconfirmed**. Otherwise, select **Confirmed**.

4 If the contact list to which you are adding this contact has additional custom fields, enter the required information in the **Custom field details** section of this screen.

Note: If there are date-based custom fields, you can add a follow-up reminder to your Google Calendar. See Creating Google Calendar Follow-Up Reminders for information on adding a follow-up reminder, and see Configuring Google Calendar Settings for information on configuring Google Calendar.

5 Click **Save** to add the contact to the list and enter another contact's details.

Click **Save and Exit** to add the contact to the list and return to the first **Add a contact** screen.

Alternatively, click **Cancel** if you want to return to the previous screen without saving any contact details.

Creating Google Calendar Follow-Up Reminders

If the contact list to which a contact belongs contains date-based custom fields, you can use them to add follow-ups to Google calendar.

Note: for information on how to create a date-based custom field for a contact list, see Creating and Editing Custom Fields.

In order to do this, you must first set up the email software's Google Calendar integration; see Configuring Google Calendar Settings.

To add a Google Calendar follow-up:

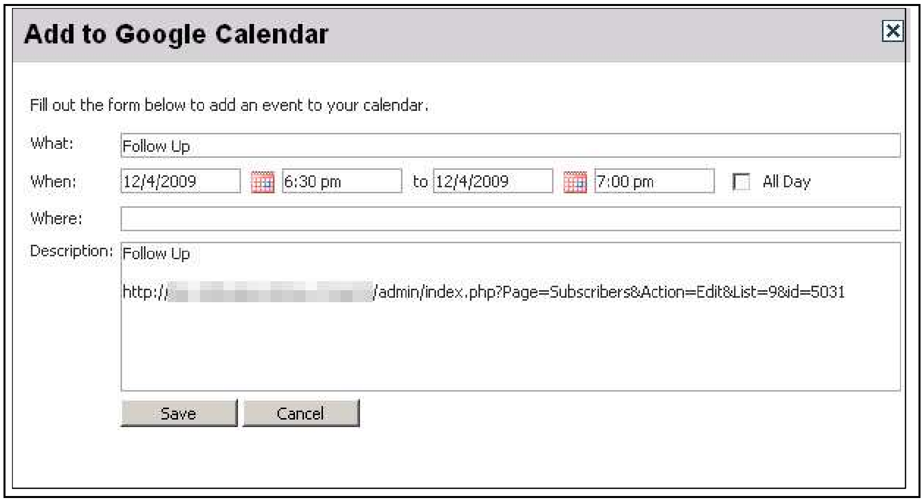
1. Click **Contacts** in the navigation bar, then **View all contacts**. Click the contact's **Edit** link.
2. Locate the custom date field for which you want to create a follow-up reminder. Click the field's icon.

Note: This icon displays next to all custom date fields. If the icon does not display next to a field for which you want to create a follow-up reminder, ensure that it is a proper date-related custom field (see Creating and Editing Custom Fields).

Configure the screen that displays with the information you want to display in Google calendar. The **When** fields are pre-populated with the data from the contact's custom field. However, you can change them if you want.

Note: The URL that displays in the **Description** field allows you to navigate back to the contact's page from Google Calendar; do not delete it.

Figure 42 Google Calendar: Configure Reminder



Add to Google Calendar

Fill out the form below to add an event to your calendar.

What: Follow Up

When: 12/4/2009 6:30 pm to 12/4/2009 7:00 pm ☐ All Day

Where:

Description: Follow Up

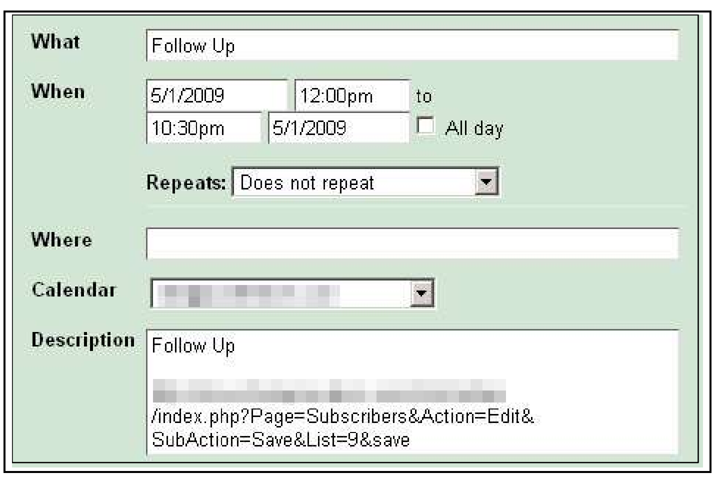
http:// /admin/index.php?Page=Subscribers&Action=Edit&List=9&id=5031

Save Cancel

3 Log into your Google calendar account (at **www.google.com/calendar**, at the time of writing) and navigate to the date. The follow-up reminder displays. Click the reminder to see its details.

Note: If the follow-up reminder does not immediately display, click the calendar's **Refresh** link.

Figure 43 Google Calendar: View Reminder



What Follow Up

When 5/1/2009 12:00pm to 10:30pm 5/1/2009 ☐ All day

Repeats: Does not repeat

Where

Calendar

Description Follow Up

/index.php?Page=Subscribers&Action=Edit&SubAction=Save&List=9&save

4 To navigate back from Google Calendar to the contact's page in the email software, copy the link that displays in the **Description** field, paste it into your browser's URL bar and hit **ENTER** (or click **Go**).

Importing Contacts From a File

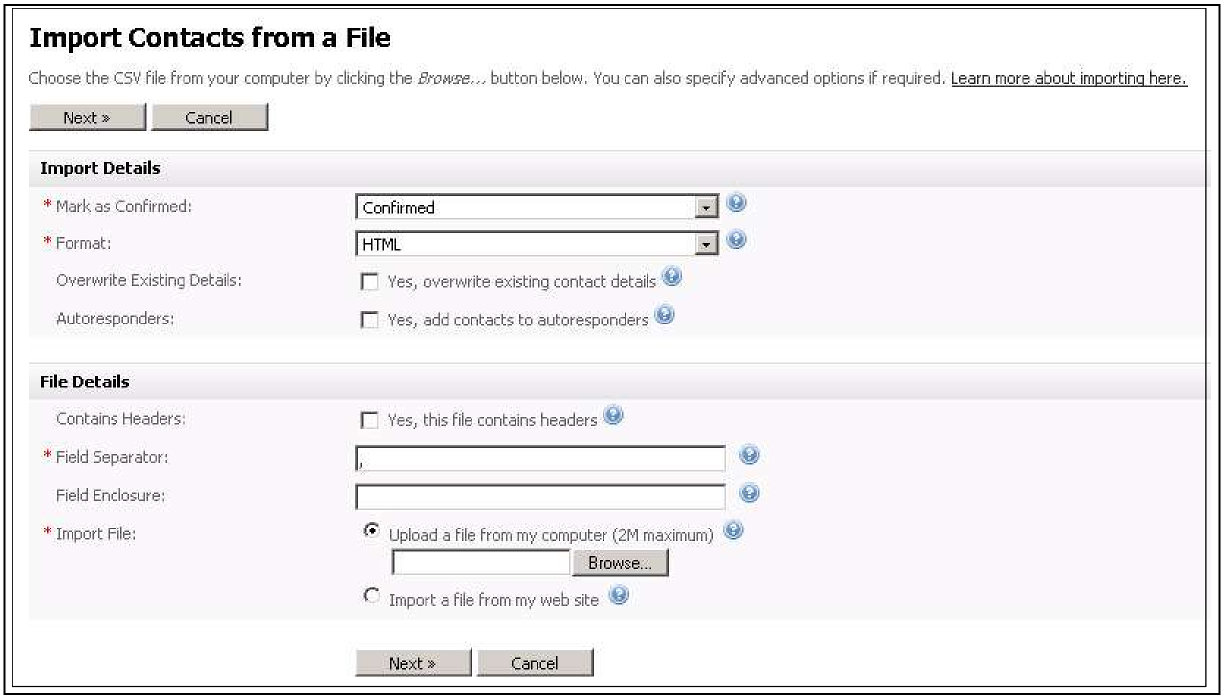
Take the following steps to import contact information from a CSV file to the email software.

1 Click **Contacts** in the navigation bar, then click **Import contacts from a file**.

Figure 44 Import Contacts From a File

2 Select the contact list (or lists) to which you want to import contacts in the **Contact list** field.

Figure 45 Define File Parameters



3 In the **Import details** section, define how you want to import the contacts:

- If you intend to send confirmation emails to the contacts in the future (as part of a double-opt-in procedure), select **Unconfirmed** in the **Mark as confirmed** list. Otherwise, select **Confirmed**.
- If you want to configure imported contacts to receive plain text emails only, select **Text** in the **Format** list. Otherwise, select **HTML**.

Note: HTML contacts can receive both HTML and text emails.

- When you select **Yes, overwrite existing contact details**, an email address that is already stored in the contact list is overwritten if the same address appears in the imported contact list.
- When you select **Yes, add contacts to autoresponders**, any autoresponders created for this list are sent out to the imported contacts. If you deselect this option, the imported contacts do not receive autoresponders.

  If you are not sure, deselect this option.

4 In the **File details** section, specify how the file you want to import is configured:

- If the file you want to import contains headers (a line of information at the start of the file that defines field names), select **Yes, this file contains headers**.

Note: The names of field headers should be separated by the character you specify in the **Field separator** field.

- Specify the **Field separator** your file uses to identify where fields begin and end.

Note: In a CSV file, the field separator is usually a comma.

- If your file uses a character to enclose fields information, enter it here. If you are not sure, leave this field blank.

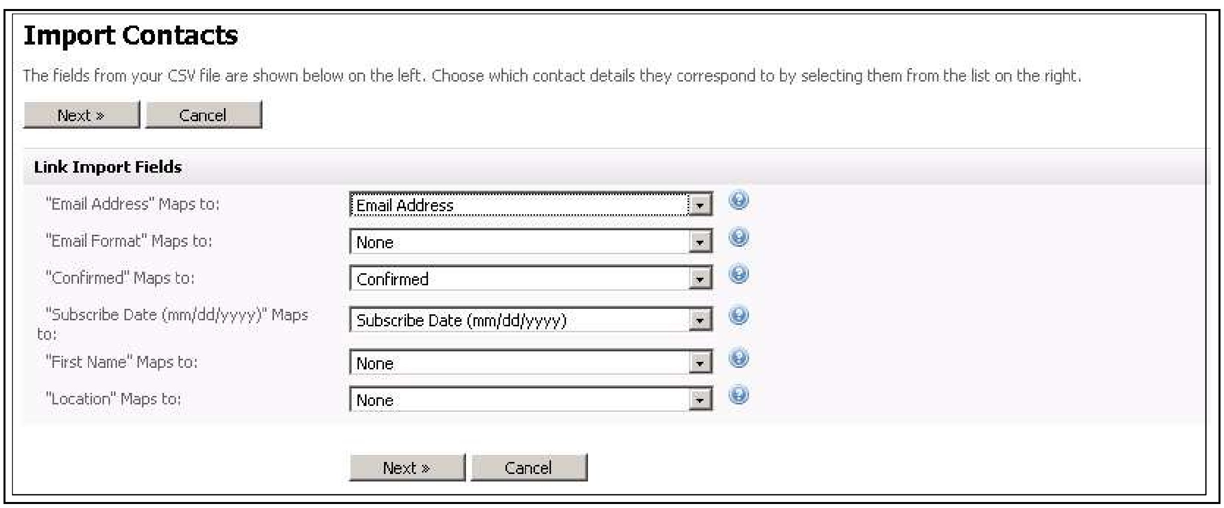
5 If you want to import a file from your computer, select **Upload a file from my computer** and click **Browse** to locate the file.

6 If you want to import a file that is already on the the email software server, select **Import a file from my web site** and select the file.

Note: Upload the file to the server's **Admin/Import** folder first.

7 Click **Next**.

Figure 46 Define Field Mapping



8 This screen allows you to map the fields in the imported file with fields in the email software's contact list.

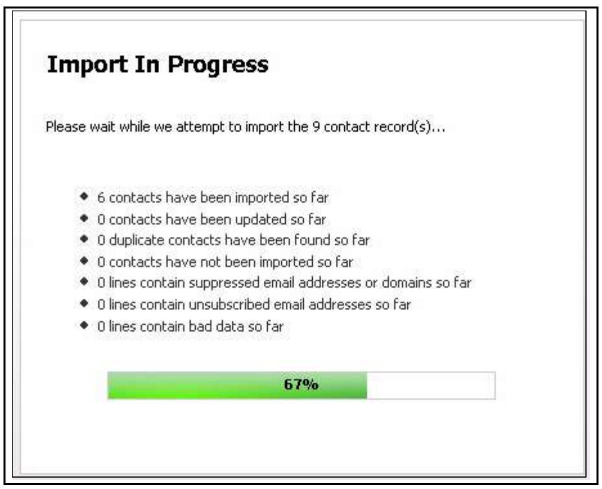
The text on the left of the screen displays the fields in the imported file. Select the contact list field to which each field should map.

9 Click **Next**.

Figure 47 Start Importing Contacts

10 Click **Start importing**.

Figure 48 Import In Progress



When the process is complete, a screen displays with a report of the results.

Figure 49 Contact Import Report

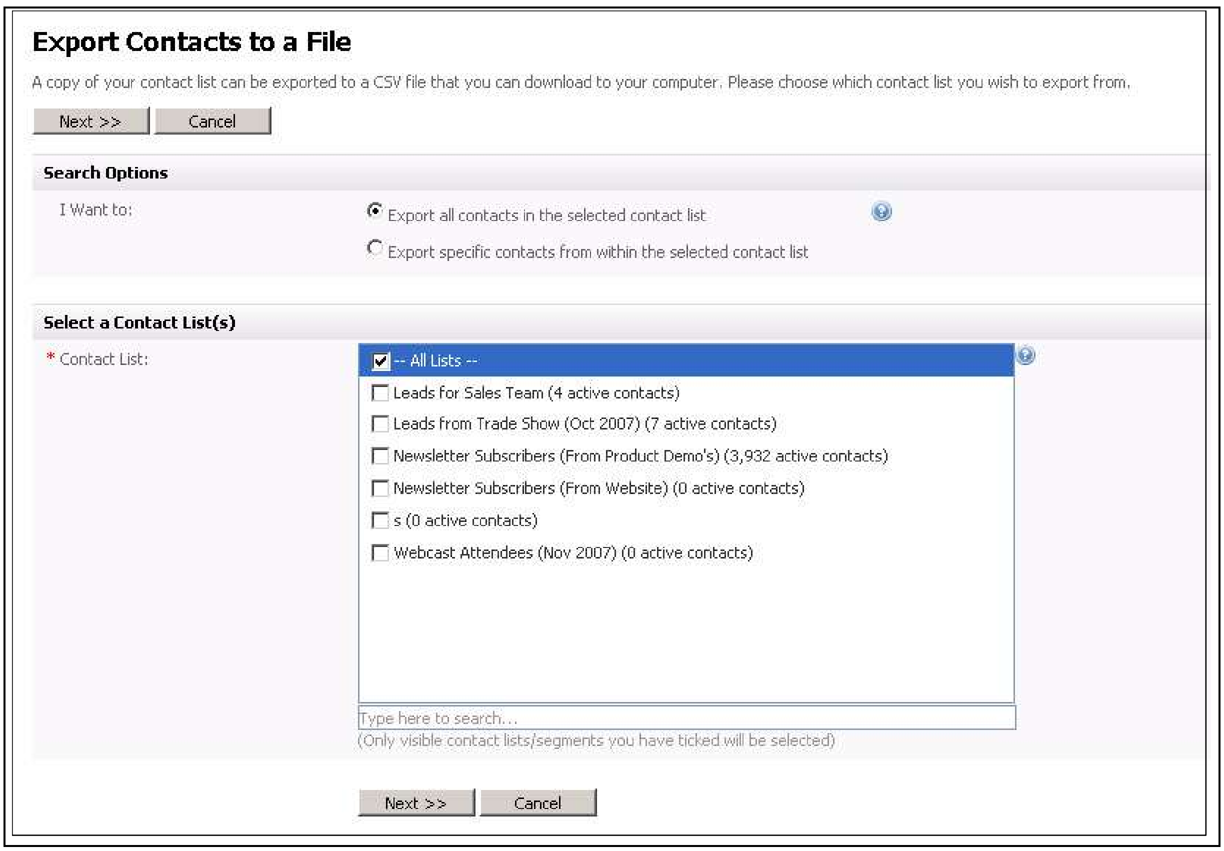
Exporting Contacts To a File

Take the following steps to export contacts to a CSV (Comma-Separated Value) or XML (Extensible Markup Language) file:

Note: You can export all contacts from a list (or multiple lists), or export only contacts who match certain criteria.

1 Click **Contacts** in the navigation bar, then click **Export contacts to a file**.

Figure 50 Export Contacts To a File



2 Select a **Search option**:

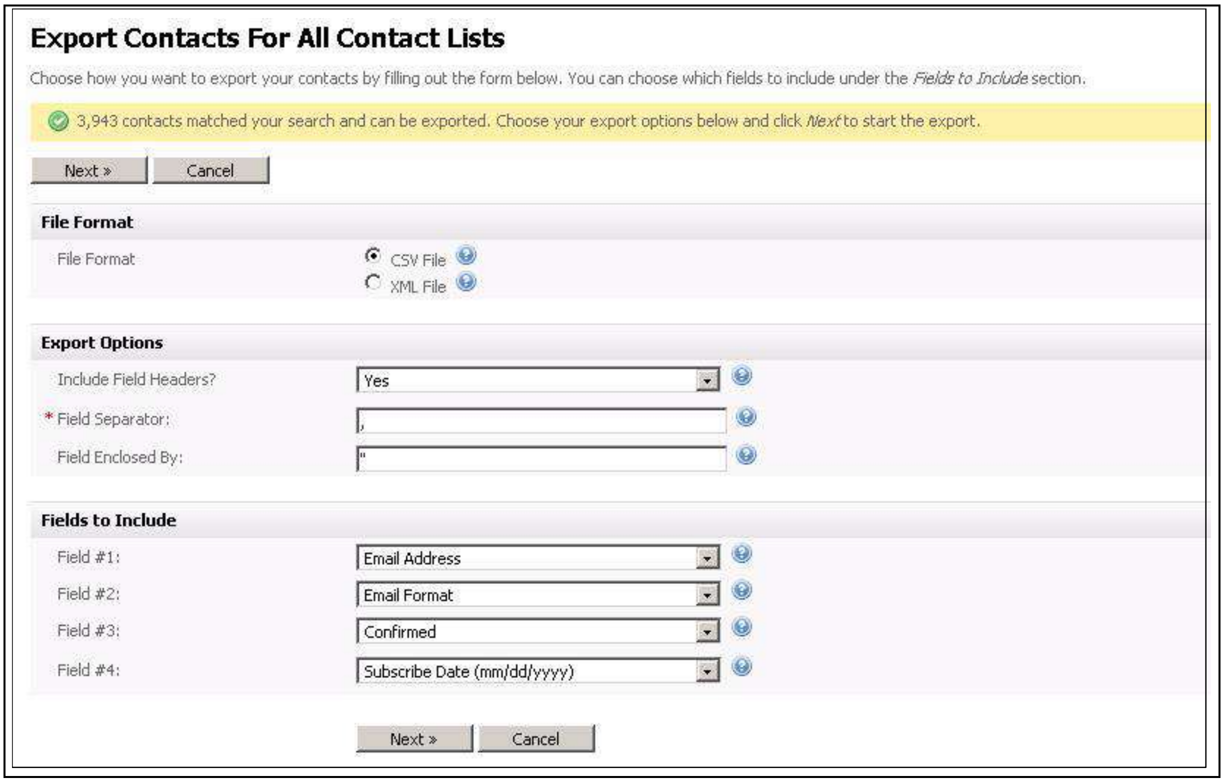
- To create a CSV file containing all the contacts in a list, select **Export all contacts in the selected contact list**.
- To create a CSV file containing only contacts who match certain criteria, select **Export specific contacts from within the selected contact list**. You can select criteria in the next screen (see step 4).

3 Select the contact list (or lists) you want to export in the **Contact list** field. To search for a list, enter your search term in the field below.

4 If you selected **Export specific contacts from within the selected contact list**, a screen displays allowing you to refine your criteria.

Click **Next** when you have finished.

Figure 51 Specify Contact File Details



5 Specify a **File format**:

- Choose whether to export a **CSV file** or an **XML file**.

6 If you chose **CSV file**, choose your **Export options**:

Note: This section does not display if you selected XML file in the File format section.

Note: If you are unsure what to select in this section, leave these fields at their defaults.

- Choose whether or not to **Include field headers**. If you include field headers, the first line of your file specifies field headers (for example, “Email, Format, Status”).

- Specify a **Field separator** character. This is the character that separates pieces of information in the file.
- Specify a **Field enclosed by** character. If you enter a character in this field, the character appears to either side of each piece of information in the file.

7 Select the information fields you want to include in the exported CSV or XML file in the **Fields to include** section.

8 Click **Next**.

Figure 52 Start Exporting

9 Click **Start exporting**. The email software prepares the file.

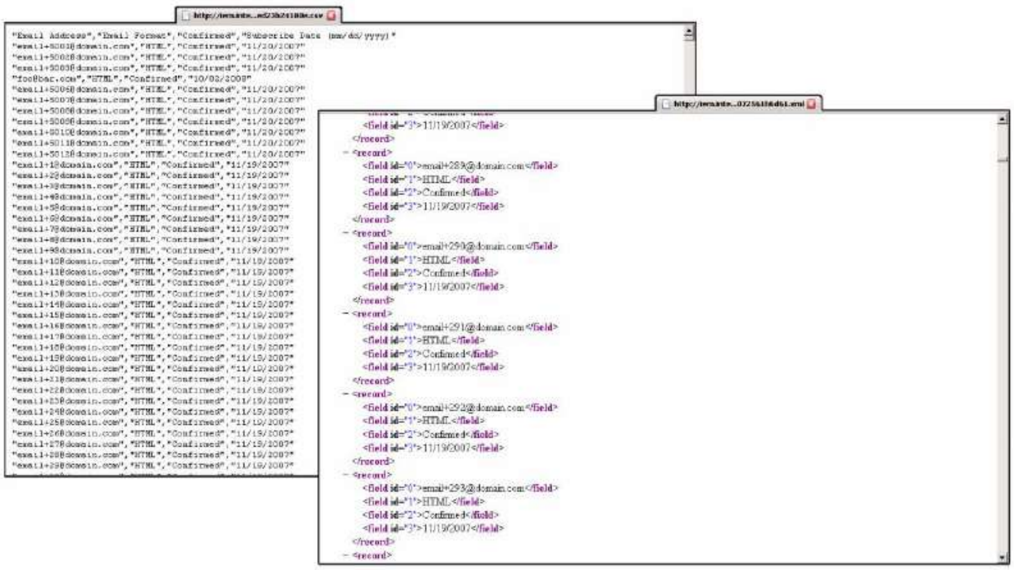
Figure 53 Exporting Contacts

When the file is ready, the following screen displays.

Figure 54 Download Contacts File

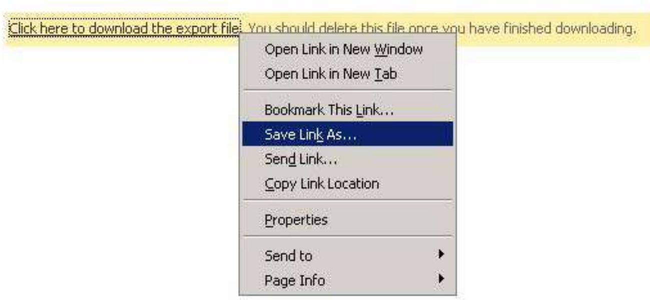
10 Click **Click here to download the export file**. The CSV or XML file displays in a new browser window.

Figure 55 View Exported Contacts File



Alternatively, right-click **Click here to download the export file** and select **Save link as**.

Figure 56 Save Exported Contacts File



Removing Contacts

Take the following steps to permanently remove a contact from the email software:

Note: You can remove contacts by entering their address manually, or by uploading a file containing the addresses of each contact you want to remove. Alternatively, use the **Contacts** > **View all contacts** screen to delete single contacts.

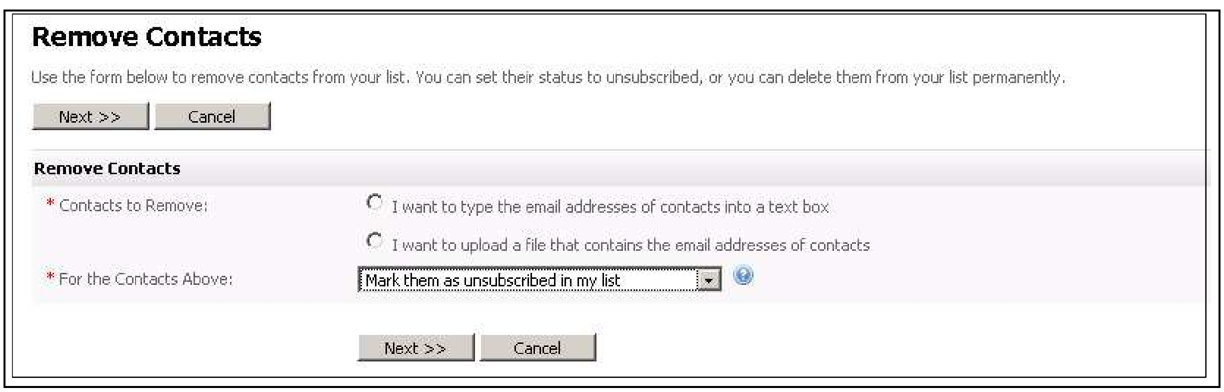
Note: You can also use this procedure to mark contacts as unsubscribed; see step 4.

1 Click **Contacts** in the navigation bar, then click **Remove contacts**.

Figure 57 Remove a Contact: Choose Contact List

2 Select the contact list from which you want to remove contacts. Click **Next**.

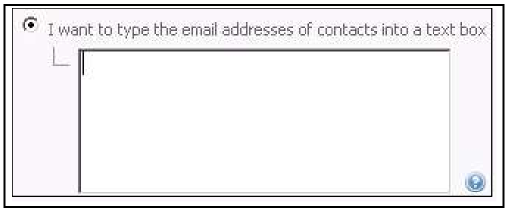
Figure 58 Remove a Contact: Define Contacts



3 Define the contacts that you want to remove from the list:

- To enter the contact's email addresses manually, select **I want to type the email addresses of contacts into a text box**. Enter the addresses in the field that displays.

Figure 59 Enter Contact Addresses Manually



- To upload a list of email addresses, select **I want to upload a file that contains the email addresses of contacts**.

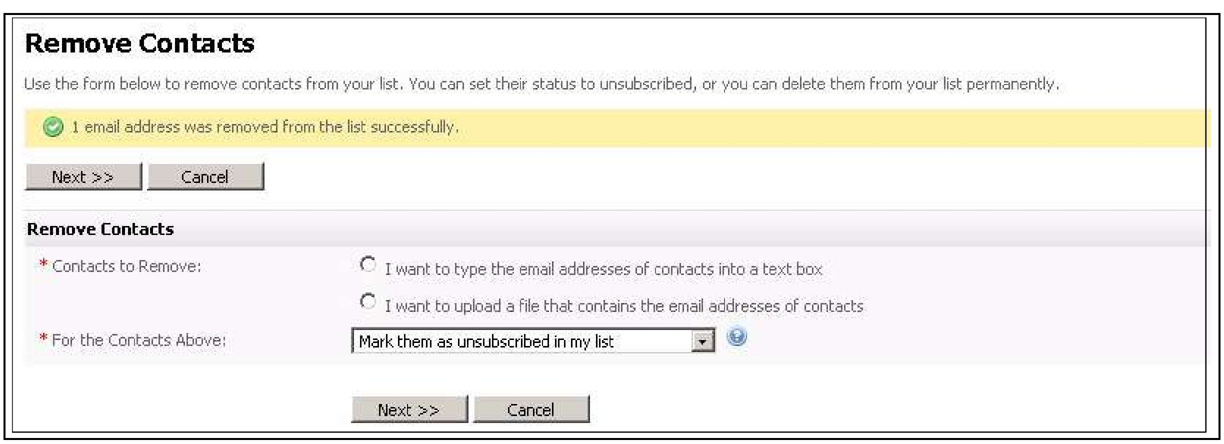
Note: The file that you use should contain email addresses only, one address to a line.

Figure 60 Upload List of Contacts to Remove

Enter the filepath of the file you want to use, or click **Browse** and locate the file.

4. Use the **For the contacts above** field to specify whether you want to delete the contacts permanently, or just mark them as unsubscribed:
   - If you want to delete the contacts permanently, select **Remove them from my list permanently**.
   - If you want to mark the contacts as unsubscribed, but keep the contact's details, select **Mark them as unsubscribed in my list**.
5. Click **Next**.
6. A screen displays with a report of the results. You can use this screen to delete more contacts from the list.

Figure 61 Removed Contact Report



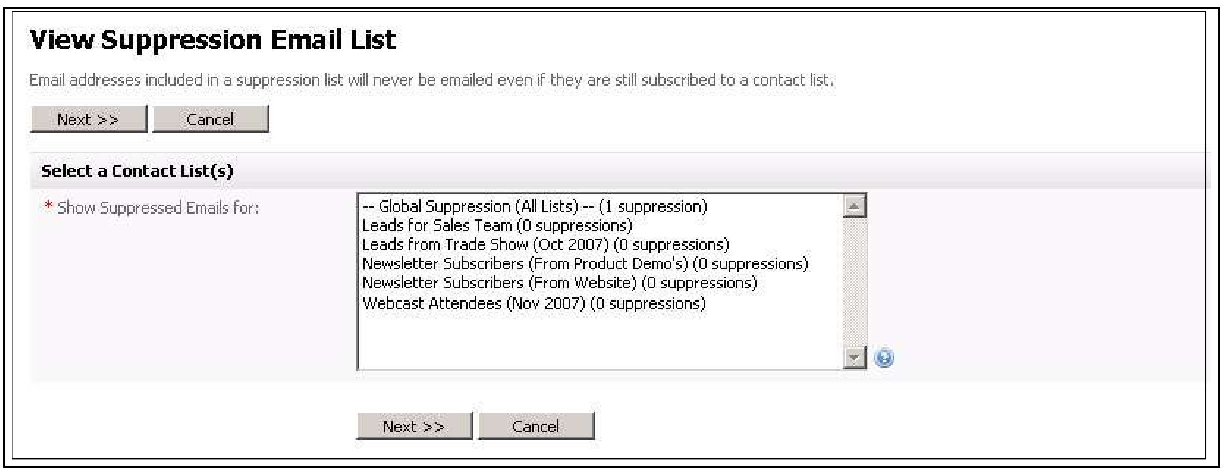
Viewing Suppressed Email Addresses

Suppressed email addresses are those to which email addresses are never sent, even if the address is subscribed to a list. You can view suppressed email addresses for all contact lists, or for a specific list.

Take the following steps to see the suppressed email addresses for a contact list:

1 Click **Contacts** in the navigation bar, then click **Email Suppression List**.

Figure 62 Email Suppression List: Choose Contact List



2 Choose the contact list for which you want to see suppressed email addresses. To see suppressed email addresses for all lists, select **Global Suppression**.

Figure 63 Email Suppression List: View Suppressed Email Addresses

3 This screen displays the list of suppressed email addresses for the list or lists you specified, as well as the date on which each address was suppressed. You can take the following actions:

- Click **Suppress an email or domain** to add an entry to the email suppression list. See Suppressing an Email Address or Domain.

- Select the checkbox next to an **Email address** (select the checkbox at the head of the column to select all entries in the list) and click **Delete selected** to remove the address from the list. The address is no longer suppressed. You can also delete an address by clicking its **Delete** link.
- Click an address's **Edit** link to edit the suppressed address's details.

Figure 64 Edit Suppressed Email Address

Edit the address in the **Email to suppress** field, if required.

You can also change the list that this email should be barred from. To bar the email address from all lists in the email software, select **Global suppression**.

- Click **Save** when you have finished, or click **Cancel** to return to the **View suppressed emails** list without saving any changes.

Suppressing an Email Address or Domain

You can bar an email address or a domain (like "exampledomain.com", for instance) from having emails sent to it. This is known as suppressing the email address or domain.

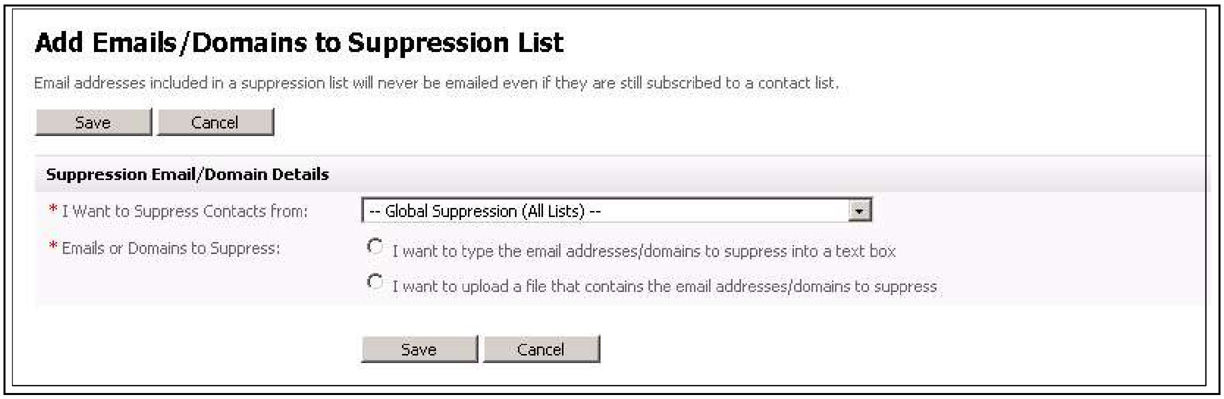
This takes precedence over other settings; for instance, an email address may be an active member of a contact list, but it will never have emails or autoresponders sent to it if it is suppressed.

Note: You can suppress email addresses and domains by entering the information manually, or by uploading a file containing the information. Alternatively, use the **Contacts** > **Email suppression list** screen to suppress single email addresses or domains.

Take the following steps to suppress an email address or a domain:

1. Click **Contacts** in the navigation bar, then click **Suppress an email or domain**.

Figure 65 Suppress an Email or Domain: Select Contact List

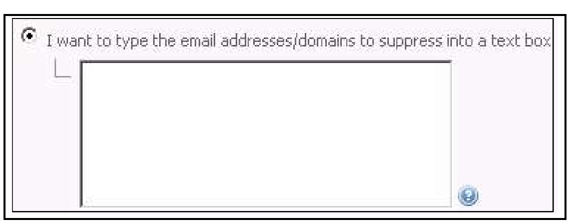


2. Select the contact list from which you want this address or domain to be barred in the **I want to suppress contacts from list**. To bar an address or domain from all contact lists, select **Global suppression**.
3. Define the addresses or domains you want to suppress:

Note: To suppress a domain, enter it in the following format: "@domain.tld", where "domain" is the domain you want to suppress, and ".tld" is the top-level domain (".com", for example).
So, to suppress all email addresses belonging to **www.yahoo.co.uk** (for example), enter "@yahoo.co.uk".

- To enter the email addresses or domains manually, select **I want to type the email addresses/domains to suppress into a text box**. Enter the addresses or domains in the field that displays.

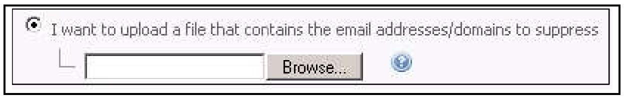
Figure 66 Enter Addresses or Domains for Suppression Manually



- To upload a list of email addresses or domains, select **I want to upload a file that contains the email addresses/domains to suppress**.

Note: The file that you use should contain email addresses or domain names only, one address or domain name to a line.

Figure 67 Upload List of Addresses or Domains for Suppression



Enter the filepath of the file you want to use, or click **Browse** and locate the file.

4 A screen displays with a report of the results. You can use this screen to add more email addresses or domains to the list.

Figure 68 Suppressed Email Address or Domain Report

Using Email Campaigns

This chapter describes the **Email campaigns** menu in the navigation bar.

Figure 69 The Email Campaigns Menu

Email Campaigns Overview

Email campaigns are the emails you send out to your contacts.

Each email campaign you plan, create, and send out transmits an email, based on an HTML or plain-text template (or both), to each of the addresses stored in the contact list you select (see Using Contact Lists).

Archiving Email Campaigns

When you archive email campaigns, all emails sent to a contact list are available on the Internet, and can be viewed by campaign recipients in the contact list. In order to set this up, you must archive the email campaigns (click the **Archive** field in the **View email campaigns** screen, or use the **Create an email campaign** screen; see Creating and Editing Email Campaigns). You must also include a link to the archive (using the `%%mailinglistarchive%%` variable) in the email campaigns you send to the contact list.

Activating Email Campaigns

Only email campaigns that are activated may be sent. This means that an administrator can assign specific permissions to different users that allow one user to design a campaign, and another to authorize it.

Split Testing Email Campaigns

Split testing, also known as "A/B testing", is a scientific method of testing your email campaigns' effectiveness using statistical analysis.

When you perform a normal campaign send, you send one email to your whole contact list. You can then see how well it performed using the email software's statistical analysis tools. However, when you perform a split test you "split" your contact list into different parts and send a different email campaign to each part. Then, you can see how well each email performed and select the most effective.

Split testing is essentially a competition between email campaigns, in which the losers are discarded and the winner is used in future campaigns. You can select the criteria on which to judge the winner (open rate or click-through rate) and the email software tracks each email's performance and decides the winner.

Split tests are usually performed on variations of the same basic email campaign, not on vastly different emails. For example, you might split test two emails that are identical except for their slightly different subject lines, in order to see which variation is opened most often. However, you would not split test one email advertising a seasonal discount on store merchandise and another offering a free holiday; this would not produce meaningful results.

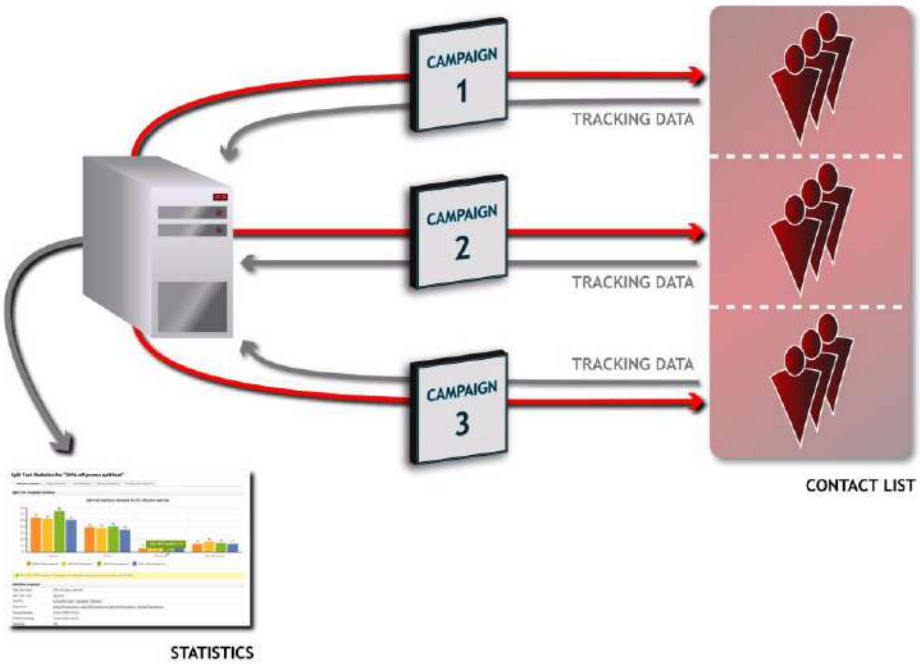
The term "A/B testing" suggests a split test must be a competition between two emails. However, this is not the case with the email software, which allows you to create tests using any number of emails. This means that you can perform highly detailed and efficient split tests that compare multiple email variations simultaneously.

Manual and Automatic Split Testing

The email software supports both manual and automatic split testing.

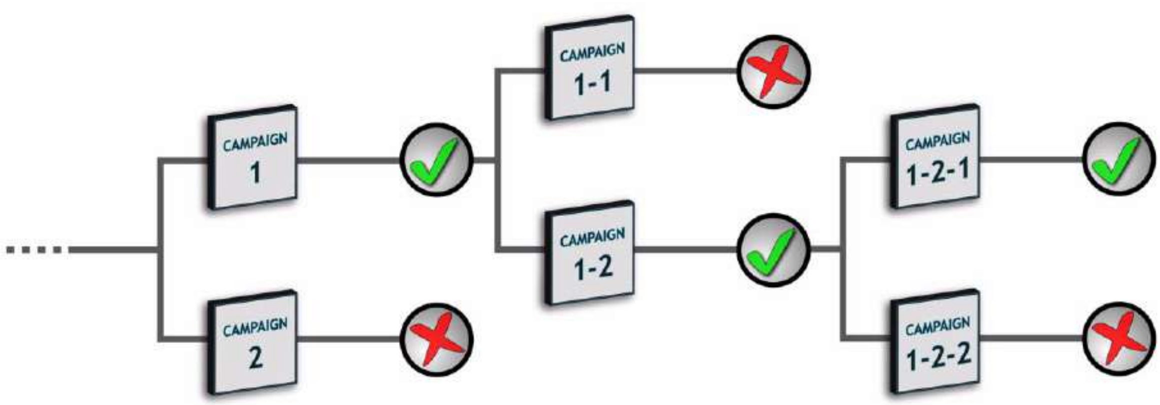
- When you use manual split testing, the email software sends the email campaigns you have included in the test, tracks each email, and lets you view their effectiveness in the **Statistics** > **Split test statistics** screen. Manual split tests have no cut-off time.

Figure 70 Manual Split Testing



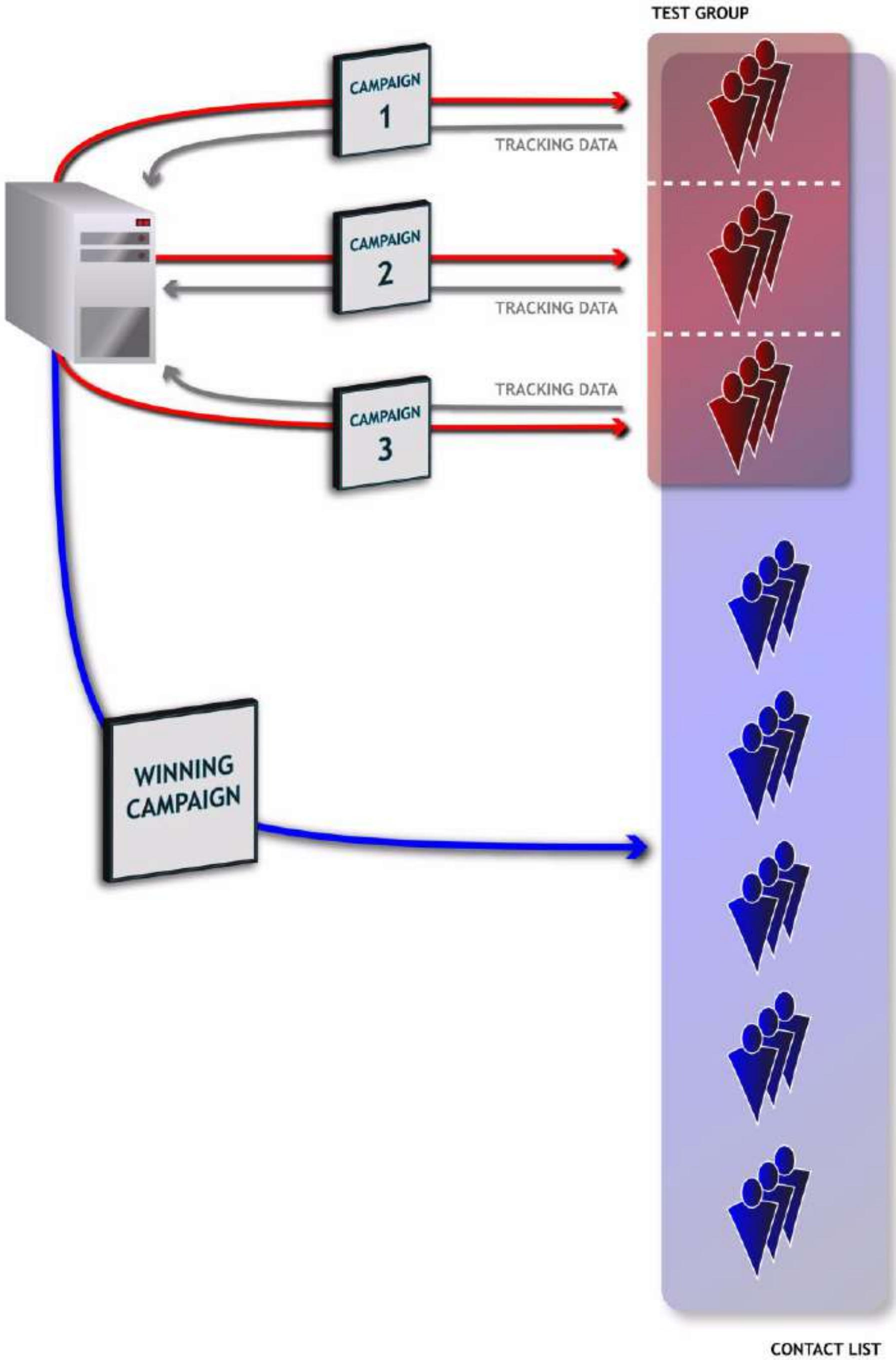
Once you have discovered the most effective email campaign, it's up to you what you do next. You could use the winning email for your next campaign, send the winning email to another contact list, or perform further split tests on variations of the winning email (an example of which is shown in the following figure) in order to further refine its effectiveness.

Figure 71 Multi-Level Split Testing Example



- When you use automatic split testing, the test emails are sent to only a percentage of your contact list's contacts (you define the percentage). You also define the test's duration. The email software sends the test emails and tracks their performance. Once the test duration has elapsed, the email software declares a winner based on the criterion you selected, and automatically sends the winning email to the rest of your contact list.

Figure 72 Automatic Split Testing



Split Testing Tips

If you have not used split testing before, here are some tips that might be helpful:

- **Don't "compare apples and oranges"**. Make sure that the emails you are testing are variations of one email, not completely different emails. Split testing is designed to help fine-tune your email marketing, not make broad decisions on marketing direction.
- **Keep it simple**. As with any scientific test, results are only meaningful if they compare two things that differ only in a single feature. For example, test two emails that differ only in their font colors, or two emails that differ only in their subject lines. Don't test one email against another that has a different subject line, graphic design and body text; the results would not let you know which element is affecting performance.

  The email software lets you test an unlimited number of emails simultaneously. For the most informative results when testing multiple variations, create an email campaign for each variation or combination of variations.
- **Include a "control"**. In scientific testing, a "control" is an element of the test that provides a base result against which other results can be compared. For instance, in a pharmaceutical test a section of the test group is given a placebo instead of the real drug. This allows the scientist conducting the test to exclude the influence of other variables on the results. In email split testing this means that you should always include the original version of the email, which has had no changes or variations applied to it.

  This is particularly important if you are split testing variations of an email campaign that you have used in the past. In order to accurately gauge the effectiveness of each new variation, you must compare it against the control email (which is sent at the same time as the variations) and NOT the email you sent in the past. If you compared the new variations' performance against that of the email you sent in the past, your results could be affected by a multitude of variables (time of day the email was sent, the day of the week, the season, economic conditions, and many more) that would severely impair the comparison.
- **Use a large test group**. Like any statistical analysis (political polls, for example) the larger the test group you use, the more accurate and reliable your results will be.
- **Use the correct metric**. The email software lets you base your split test on open rates or click-through rates (links clicked). Make sure you select the metric that makes sense based on the type of variation you're testing. If you are testing variations in your subject line, it makes sense to use the open rate (since recipients open - or don't open - emails based largely on the subject line). If you are testing

variations in your email's graphic design, it makes sense to use the click-through rate; it would be useless to base the test on the emails' open rate, since recipients do not see an email's design until after they have opened it.

Viewing and Managing Email Campaigns

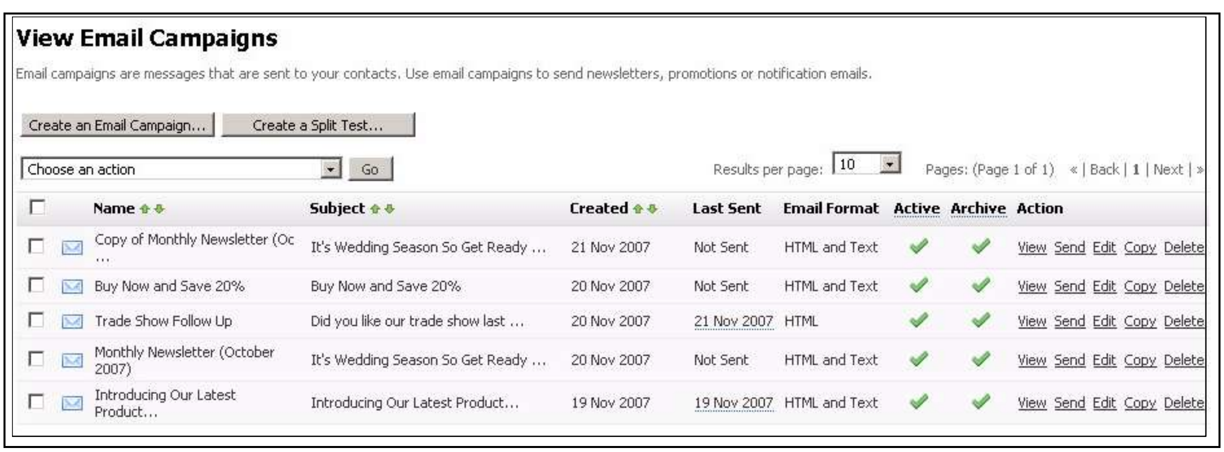
To view an existing email campaign you already created, click **Email campaigns** in the navigation bar, then click **View email campaigns**. This screen allows you to view and manage all email campaigns you have created in the past (whether you already sent them or not).

You can:

- **Create an email campaign**: build a new email campaign. See Creating and Editing Email Campaigns.
- **Delete**: remove the campaign (or campaigns) from the email software. The campaign cannot be retrieved.
- **Archive**: turn on automatic archiving of the campaign on the email software's server.
- **Unarchive**: turn off automatic archiving of the campaign on the email software's server.
- **Activate**: allow the campaign to be sent (give your permission).
- **Deactivate**: forbid the campaign from being sent (deny your permission).

You can also **view, send**, **edit**, **copy** and **delete** email campaigns.

Figure 73 Viewing Email Campaigns



Name	Subject	Created	Last Sent	Email Format	Active	Archive	Action
Copy of Monthly Newsletter (Oc ...	It's Wedding Season So Get Ready ...	21 Nov 2007	Not Sent	HTML and Text	✔	✔	View Send Edit Copy Delete
Buy Now and Save 20%	Buy Now and Save 20%	20 Nov 2007	Not Sent	HTML and Text	✔	✔	View Send Edit Copy Delete
Trade Show Follow Up	Did you like our trade show last ...	20 Nov 2007	21 Nov 2007	HTML	✔	✔	View Send Edit Copy Delete
Monthly Newsletter (October 2007)	It's Wedding Season So Get Ready ...	20 Nov 2007	Not Sent	HTML and Text	✔	✔	View Send Edit Copy Delete
Introducing Our Latest Product...	Introducing Our Latest Product...	19 Nov 2007	19 Nov 2007	HTML and Text	✔	✔	View Send Edit Copy Delete

Table 12 Viewing Email Campaigns

Create an email campaign	Click this to begin building a new email campaign. See Creating and Editing Email Campaigns for more information.
Create a split test	Click this to begin configuring a new split test. See Creating and Editing Split Tests for more information.
Choose an action	Select one or more email campaigns, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to an email campaign before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all campaigns.
Name	This displays the name of the email campaign.
Subject	This displays the subject of the email campaign. This is the text that displays in the email's subject line.
Created	This displays the date on which you created the email campaign.
Last sent	This displays the date on which you last sent the email campaign. If you have not yet sent the email campaign, **Not sent** displays.
Email format	This displays the format of the email campaign. • If the campaign is configured to send HTML emails only, **HTML** displays. • If the campaign is configured to send plain text emails only, **Text** displays. • If the campaign is configured to send both HTML emails and plain text emails, **HTML and text** displays.
Active	A icon displays if the email campaign may be sent. A icon displays if the email campaign may not be sent.
Archive	A icon displays if the email campaign is automatically archived on the email software server. A icon displays if the email campaign is not automatically archived on the email software server.

Action	• Click **View** to see a full-screen preview of the email campaign. • Click **Send** to select a contact list and send the campaign to the contacts in the list. The screens that display are similar to the **Send an email campaign** screens (see Sending Email Campaigns). • Click **Resend** to try sending an email campaign again. This option displays only when an email campaign that you sent previously failed to send completely. • Click **Edit** to update the campaign. The screens that display are similar to the **Create an email campaign** screens (see Creating and Editing Email Campaigns). • Click **Copy** to create a new copy of the campaign. The new campaign displays, with "Copy of" appended to the original name. • Click **Delete** to remove the campaign from the email software.

Creating and Editing Email Campaigns

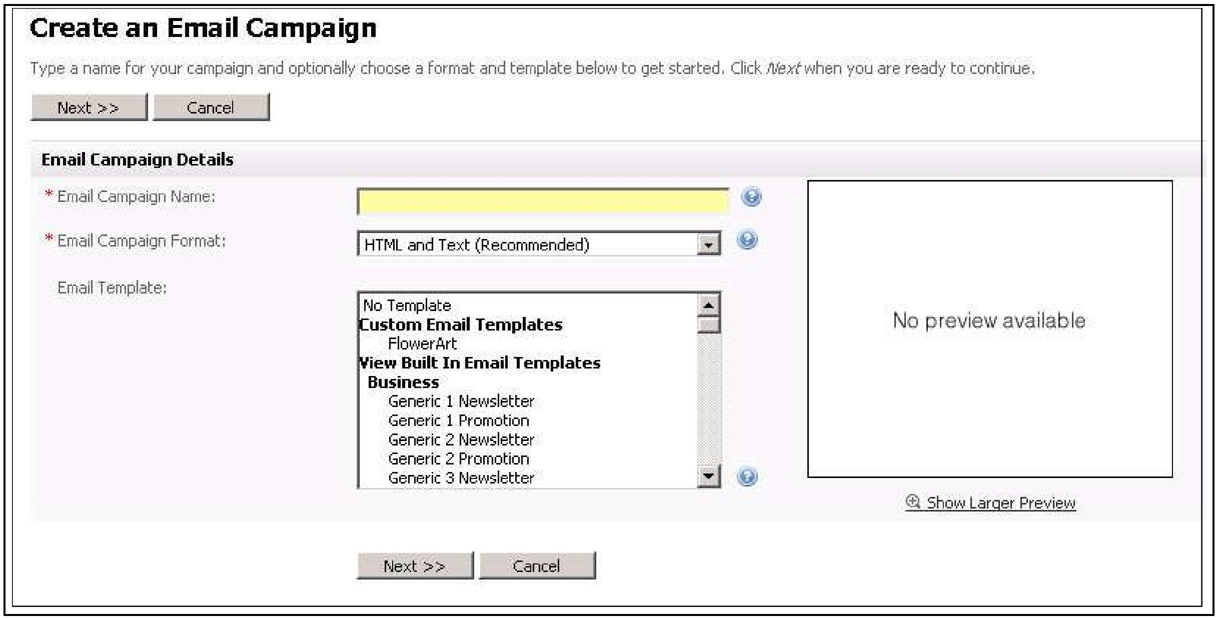
The email software's email campaigns are usually based on templates (see Using Templates). You can take a template and customize it for use in your campaign; replacing its text with your own, adding or removing sections and images, and modifying its formatting if required.

Alternatively, you can create a new email campaign without using a template. If you choose to do this, you can build the campaign yourself using the text or HTML editor, or import an HTML file from your computer or a web page.

Take the following steps to create a custom email campaign:

1 Click **Email campaigns** in the navigation bar and select **Create an email campaign**.

Figure 74 Create an Email Campaign



2 Enter a new **Email Campaign Name**.

3 Select the type of campaign you want to create.

- Select **HTML and Text** if you want emails to be sent with both HTML and plain text elements (multipart). Email clients that can display HTML messages use the HTML element, and clients that cannot display HTML use the plain text element.
- Select **Text** if you want emails you send to be sent in plain text only.
- Select **HTML** if you want emails you send to be sent in HTML only. If you select this option, your emails will not display in email clients that cannot display HTML messages.

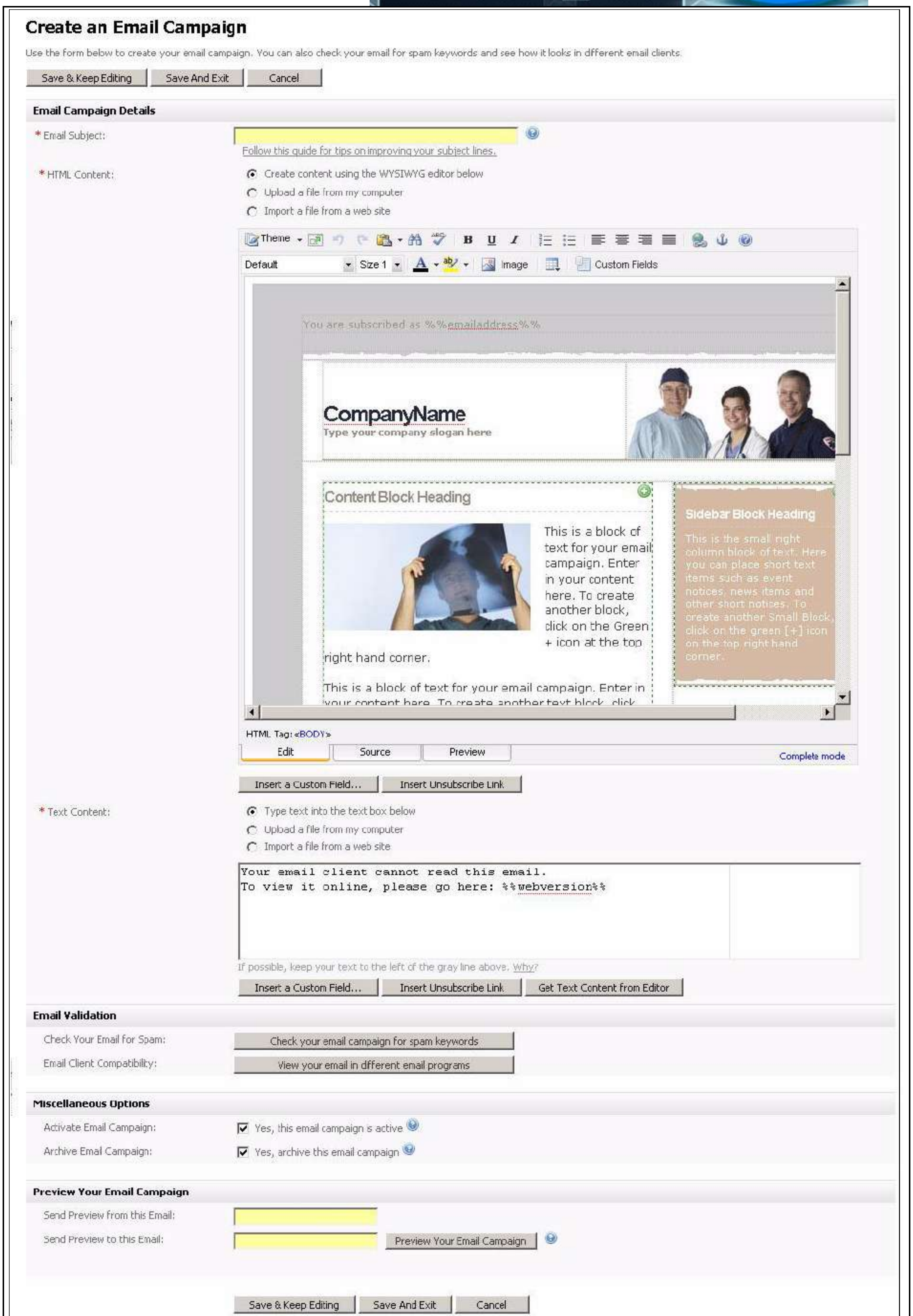
4 If you want to base this email campaign on an existing template, select the template in the **Email template** list. A preview of the template displays.

If you do not want to base this campaign on an existing template, select **No template** in the **Email template** list.

5 Click **Next**.

Figure 75 The Email Campaign Editor


Email Marketing
Market to UNLIMITED Contacts
View Statistics, Customize Templates & Generate Reports.
Everything you need to get your message across.


Create an Email Campaign
Use the form below to create your email campaign. You can also check your email for spam keywords and see how it looks in different email clients.
Save & Keep Editing
Save And Exit
Cancel
Email Campaign Details
* Email Subject:
Follow this guide for tips on improving your subject lines.
* HTML Content:
Create content using the WYSIWYG editor below
Upload a file from my computer
Import a file from a web site
Theme
Default
Size 1
Image
Custom Fields
You are subscribed as %%emailaddress%%
CompanyName
Type your company slogan here
Content Block Heading
This is a block of text for your email campaign. Enter in your content here. To create another block, click on the Green + icon at the top right hand corner.
This is a block of text for your email campaign. Enter in
Sidebar Block Heading
This is the small right column block of text. Here you can place short text items such as event notices, news items and other short notices. To create another Small Block, click on the green [+] icon on the top right hand corner.
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
* Text Content:
Type text into the text box below
Upload a file from my computer
Import a file from a web site
Your email client cannot read this email.
To view it online, please go here: %%webversion%%
If possible, keep your text to the left of the gray line above. Why?
Insert a Custom Field...
Insert Unsubscribe Link
Get Text Content From Editor
Email Validation
Check Your Email for Spam:
Check your email campaign for spam keywords
Email Client Compatibility:
View your email in different email programs
Miscellaneous Options
Activate Email Campaign:
Yes, this email campaign is active
Archive Email Campaign:
Yes, archive this email campaign
Preview Your Email Campaign
Send Preview from this Email:
Send Preview to this Email:
Preview Your Email Campaign
Save & Keep Editing
Save And Exit
Cancel

Note: If you selected **Text only** in the previous page, the **HTML Content** section in this page does not display. Likewise, if you selected **HTML only**, the **Text Content** section in this page does not display.

6. Specify how you want to build the HTML email.
   - If you want to use the built-in WYSIWYG (What You See Is What You Get) editor in this page, select **Create content using the WYSIWYG editor below**.
   - If you want to use an HTML file on your computer, select **Upload a file from my computer**. Click the **Browse** button that displays. A file upload window displays; locate and select the file you want to use and click **OK**. Click **Upload**. The HTML editor screen updates to show the new file.
   - If you want to use a file from a page on the Internet, select **Import a file from a web site** and enter the full URL (for example, "http://www.examplesite.com/examplepage.html") in the field that displays. Click **Import**. The HTML editor screen updates to show the new file.
7. Customize the HTML email using the editor. See Using the HTML Editor for more information.
8. Customize the text email using the editor. See Using the Text Editor for more information.
9. Check that your email campaign will not be marked as spam by a recipient's email client. Click **Check your email for spam**.

Note: This checks the text in your email campaign against a list of known spam keywords. However, it cannot guarantee that your campaign will be delivered to all recipients.

Figure 76 Check Your Email for Spam

If either the HTML or text versions of your email break any rules, take note of the offending text and edit the email campaign to not include the term.

Click the icon to close the **Check your email for spam** window.

10 Check that your campaign displays correctly in a variety of common email clients. Click **View your email in different email programs**. The **Email Validation** screen displays in a new window (see Validating an Email). When you have finished, close the window.

11 Configure the **Miscellaneous options**.

- Select **Yes, this email campaign is active** if you want the template to be available for use once you have saved it. Otherwise, deselect this option. You can activate the template later.
- Select **Yes, archive this email campaign** if you want to place the campaign in the archive for the selected contact list. Contacts in the list can see all emails sent to the list in the past (if you provide them with a link to do so).

12 If you want to test the campaign by sending it to your own email address:

- Enter the email address from which you want to send the test email in the **Send preview from this email** field.
- Enter the email address to which you want to send the test email in the **Send preview to this email** field.

- To send the test email, click **Preview your email campaign**. Check the inbox of the account you entered in the **Send Preview to this Email** field.

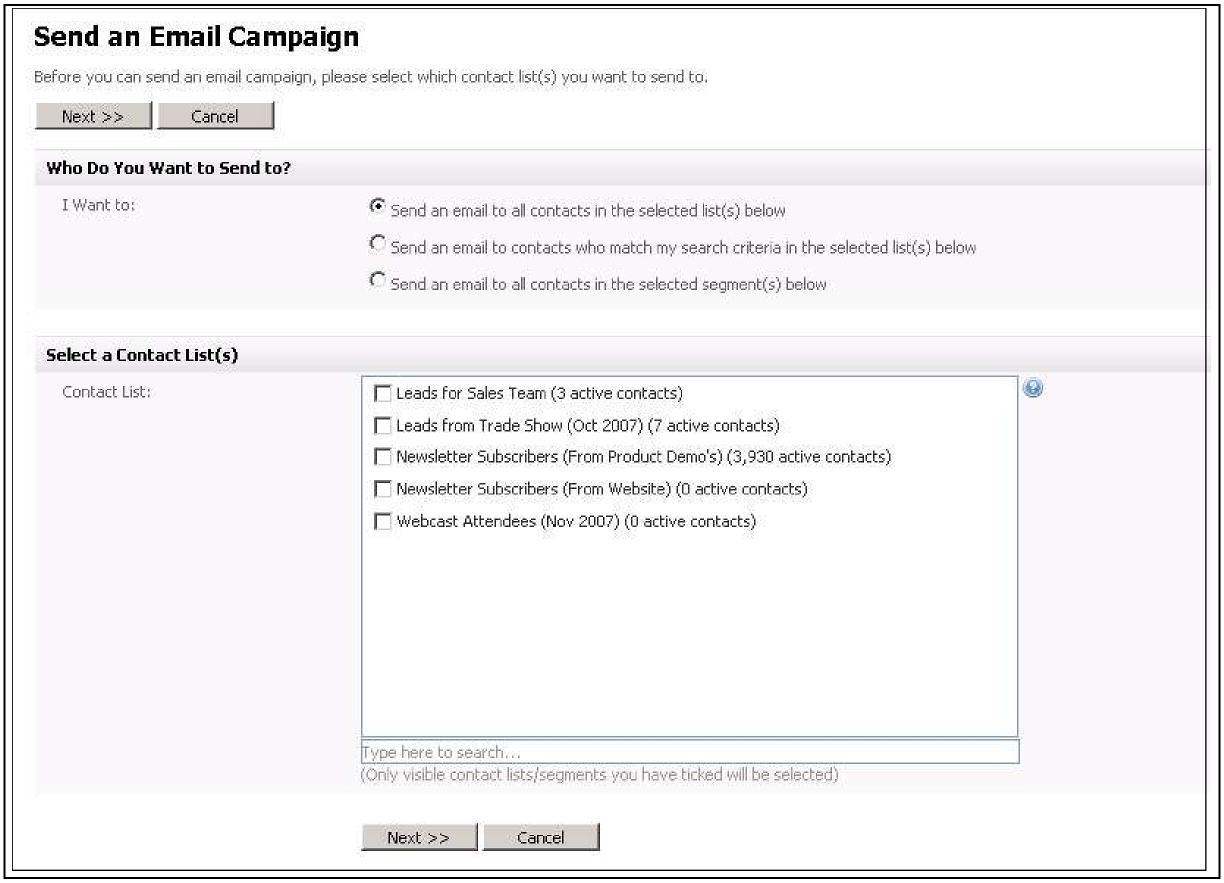
13. Finish the campaign.
    - Click **Save & keep editing** to save the new campaign and remain in this screen to make further changes.
    - Click **Save and exit** to save the new campaign and go to the **View Custom Templates** screen (see Managing Custom Email Templates).
    - Click **Cancel** to return to the **View Custom Templates** screen without saving the template. Any changes you made are lost.

Sending Email Campaigns

Take the following steps to send an existing email campaign:

1. Click **Email campaigns** in the navigation bar, then select **Send email campaign**.

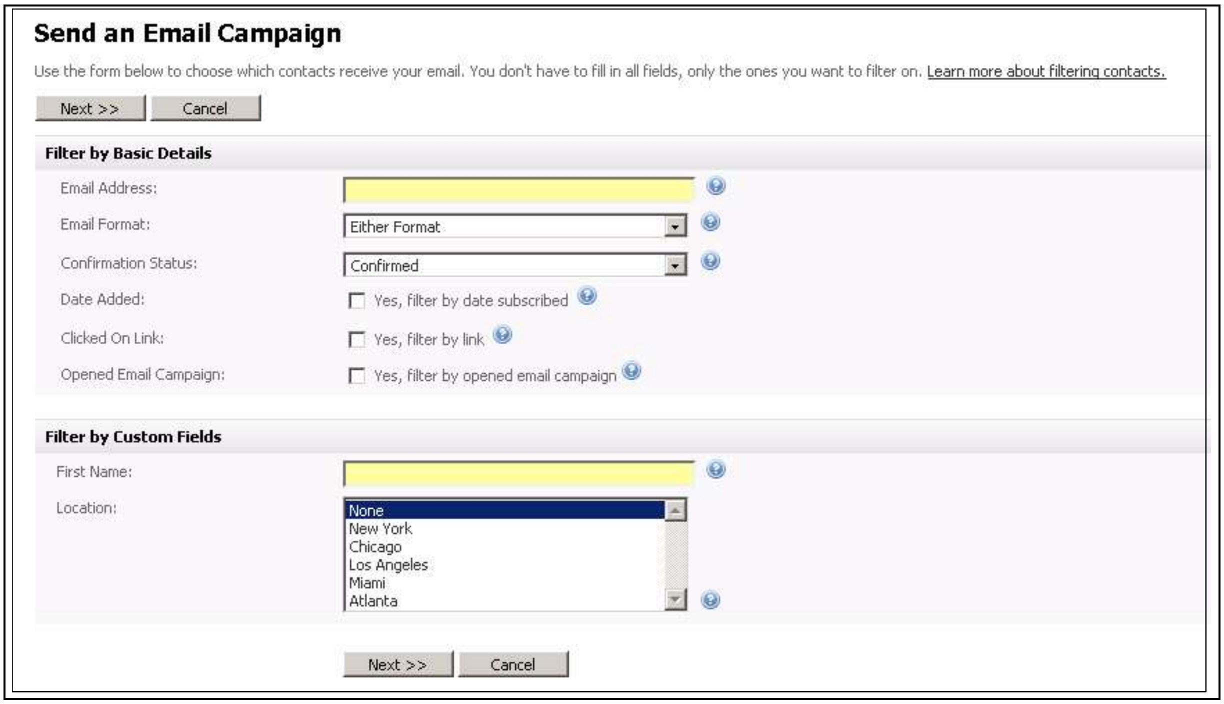
Figure 77 Send an Email Campaign



2. Select the contacts to whom you want to send the campaign in the **I want to** section:
   - To send the campaign to the entire list you select in the **Contact list** field, select **Send an email to all contacts in the selected list(s) below**.
   - To perform a search (see step 5), and send the campaign to only the contacts matching the search, select **Send an email to contacts who match my search criteria in the selected list(s) below**.
   - To send the campaign to the entire list you select in the **Segments** field, select **Send an email to all contacts in the selected segment(s) below**.
3. Select the contact list(s) or segment(s) to which you want to send the email campaign. Use the search box below the list to search for contact lists or segments.
4. Click **Next**.

5 If you opted to perform a search for the contacts to whom you want to send the campaign, the following screen displays. If you did not opt to perform a search, skip to step 6.

Figure 78 Send an Email Campaign: Search Contacts



The fields that display in this screen are the same as those in the **Contacts** > **Search contacts** screen. See Searching Your Contacts for more information. Click **Next**.

6 Use this screen to configure your campaign settings.

Figure 79 Send an Email Campaign: Campaign Settings

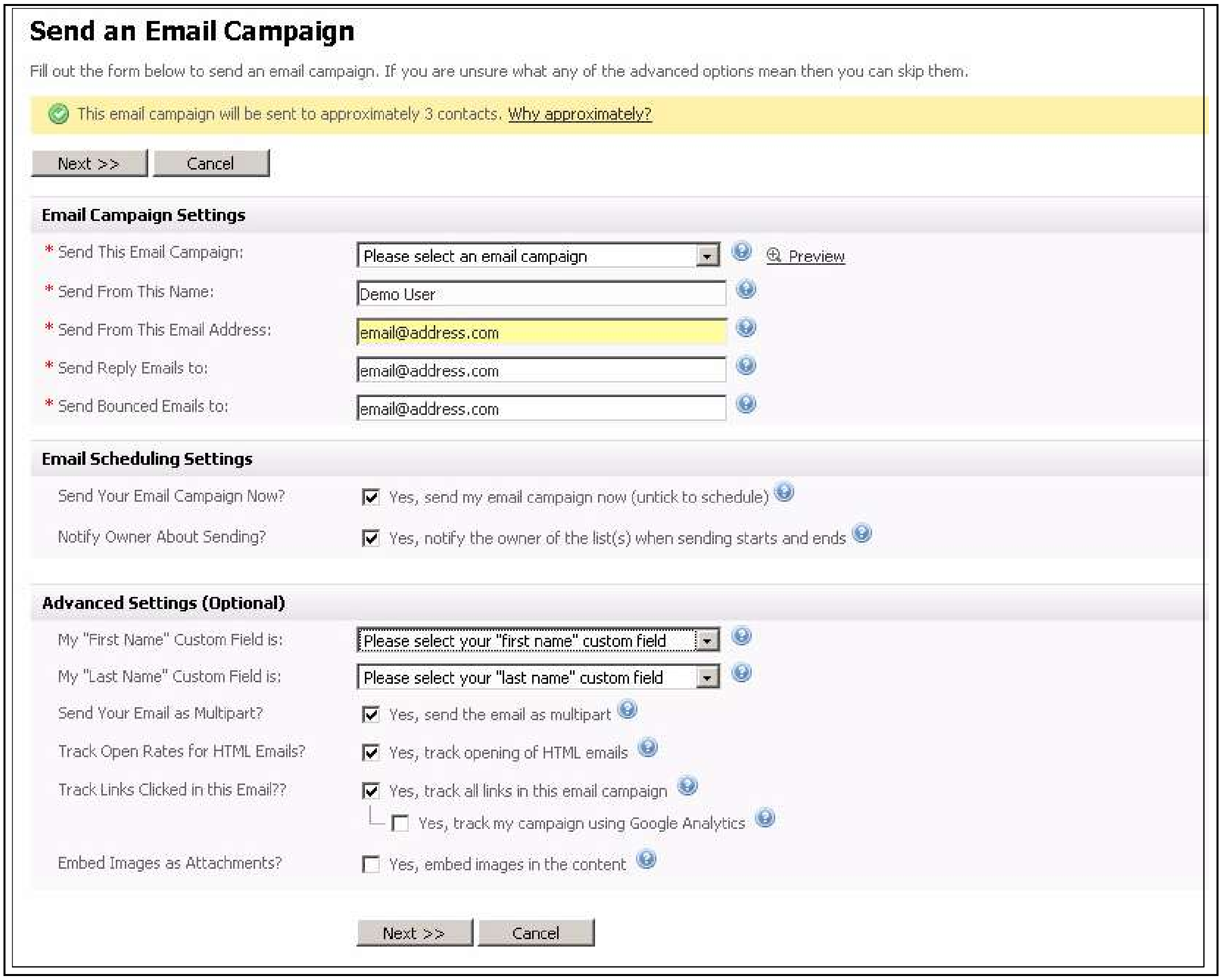
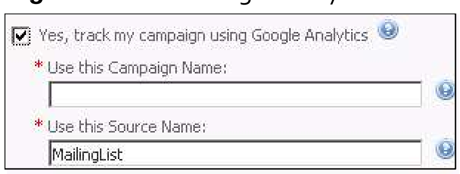


Table 13 Send an Email Campaign: Campaign Settings

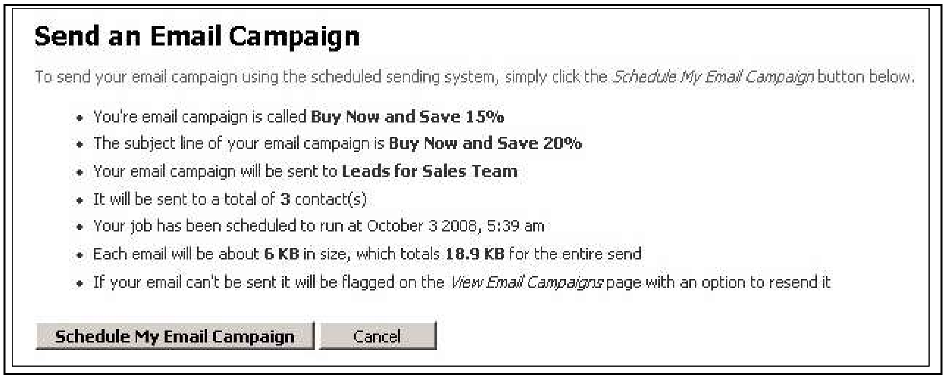
Email campaign settings	
Send this email campaign	Select the email campaign that you want to send from the list. Click **Preview** to see the campaign in a new browser window.
Send from this name	This displays the default “from” name for the contact list you selected. If you want to use a different name, enter the new name in this field.
Send from this email address	This displays the default “from” email account for the contact list you selected. If you want to use a different email account, enter the new address in this field.

Send reply emails to	This displays the default reply email address for this contact list. When a contact replies to your email campaign, this is the address to which the reply is sent. If you want to use a different address, enter the new address in this field.
Send bounced emails to	This displays the default bounced email address for this contact list. This is the address to which undeliverable emails are sent. If you want to use a different address for handling bounced emails, enter the new address in this field.
Email scheduling settings Note: This section displays only when you have configured scheduling settings in the **Settings** > **Cron settings** screen.	
Send your campaign now?	Select this if you want to send the email campaign immediately. Deselect this to schedule a date and time to send the email. **Figure 80** Schedule Email Campaign  Select the **date**, **month** and **year** in the first three lists, and select the **hour**, **minute** and **AM/PM** in the last three lists.
Notify owner about sending?	Select this if you want to send an email to the list owner when a scheduled campaign starts sending, and another when it finishes sending.
Advanced settings (optional)	
My "first name" custom field is	If your email campaign uses a custom field to define a recipient's first name, select it here. If your email campaign uses a single field to define a recipient's name, select it in this field. Note: This field displays only when the selected contact list contains custom fields.
My "last name" custom field is	If your email campaign uses a custom field to define a recipient's last name, select it here. If your email campaign uses a single field to define a recipient's name, leave this field blank. Note: This field displays only when the selected contact list contains custom fields.

Send your email as multipart?	Select this to send both HTML and text elements of a multipart email campaign to recipients. This allows a recipient's email client to choose the correct display method. Note: Use this option if you are unsure. Also, use this option if you don't provide your recipients with the ability to choose HTML or text emails.
Track open rates for HTML emails?	Select this to have the email software track the proportion of HTML emails opened by their recipients.
Track links clicked in this email	Select this to have the email software track the proportion of links in this email campaign that are clicked by the recipient (click-through rate). You can view the results of clicked links in the **Statistics** > **Email campaign statistics**.
Yes, track my campaign using Google Analytics	Select this to have the email software use Google Analytics to track your campaign's links. **Figure 81** Use Google Analytics  • Enter the name you want Google Analytics to use for this campaign in the **Use this campaign name** field. • Enter the name you want to use as the source of traffic for this campaign in the **Use this source name** field.
Embed images as attachments	Select this to embed the images you send in HTML emails, rather than linking to them. This allows recipients to view the email campaign offline, but can increase the email size significantly.

7 Click **Next** when you have finished configuring this screen. Alternatively, click **Cancel** to return to the **View email campaigns** screen without saving your changes.

Figure 82 Send an Email Campaign: Report



8 A screen displays, showing a report of the email campaign you are about to send. Review the information and click **Schedule my Email Campaign** to continue.

Alternatively, click **Cancel** to return to the **View email campaigns** screen without saving your changes.

9 The screen that displays next depends on whether or not you have enabled scheduled sending (in the **Settings** > **Cron settings** screen).

- If scheduled sending is enabled, the **View scheduled email queue** screen displays (see Viewing Scheduled Email Campaigns). The email campaign will be sent the next time Cron runs scheduled sending.

Note: This happens even if you selected **Send your campaign now**. For this reason, it is important that you configure scheduled sending to run frequently (in the **Settings** > **Cron settings** screen) even if you do not want to schedule email sending. Alternatively, you can avoid this issue by turning scheduled sending off if you do not require it.

- If scheduled sending is disabled, a warning displays. Click **OK**.

Figure 83 Sending an Email Campaign: Warning

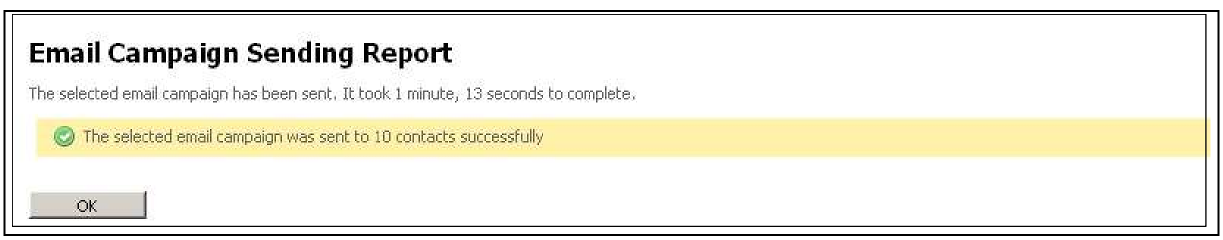
The email software begins to send your campaign. A new browser window displays, showing how much time is remaining.

Figure 84 Sending an Email Campaign: Sending in Progress

Note: As stated in the warning that displayed previously, do NOT close this window, otherwise your campaign will not be sent correctly.

The browser window closes automatically when the email campaign has been completely sent.

Figure 85 Sending an Email Campaign: Completed



Viewing and Managing Split Tests

To view details about the email campaign split tests configured in the email software, click **Email campaigns** in the navigation bar, then click **View split tests**.

Figure 86 Viewing Split Tests

Table 14 Viewing Split Tests

Create a split test	Click this to begin configuring a new split test. See Viewing Scheduled Email Campaigns.
Delete selected	Select one or more split test's checkboxes and click this to remove the split test from the email software. Deleted split tests cannot be retrieved.
	Select a box belonging to an email campaign before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all campaigns.
Name	This displays the name of the split test.
Campaigns	This displays the name of each email campaign in the test. Note: This is the name that displays in the email software control panel, not the email subject line.
Type	This displays the type of test: • **Split test** displays if you selected **Find a winning email and show me the results** when you created the test. The campaigns are sent to the whole contact list in equal proportion, and the winner is displayed to you. • **Best performing** displays if you selected **Find a winning email then send it to my list automatically** when you created the test. The campaigns are sent to a small part of your contact list, and the winner is automatically sent to the rest of the list.
Created	This displays the date on which the test was created.
Last sent	This displays the date on which the test was last performed. If the test has never been performed, **Not sent** displays.

Action	• Click **Waiting to send** to see when a scheduled test will be sent. The **View scheduled email queue** screen displays (see Viewing Scheduled Email Campaigns). Note: This option displays only when a test is scheduled and has yet to be sent. • Click a test's **Pause** link to stop sending the test. Click its **Resume** link to begin sending the test again. Note: These options display only when a test is currently being sent. • Click a test's **Send** link to perform the test. Note: Before you send **Best performing** tests, you need to enable **Split test campaigns** in the **Settings** > **Cron settings** screen. • Click a test's **Edit** link to make changes to the test. See Creating and Editing Split Tests for information on the screen that displays. • Click a test's **Copy** link to create a new test with the same properties as the original. The new test displays in the list with **Copy of** prepended to its name. • Click a test's **Delete** link to remove the test from the email software. Deleted tests cannot be retrieved. Note: When you delete a test, its associated email campaigns are not deleted.

Creating and Editing Split Tests

To create a new split test, click **Email campaigns** in the navigation bar, then **View split tests**. Click the **Create a split test** button.

To edit an existing split test, click **Email campaigns** in the navigation bar, then **View split tests**. Then click the relevant test's **Edit** link.

Note: This screen allows you to set up your test; you can choose the people to whom you want to send it later on (see Performing a Split Test).

Figure 87 Creating a Split Test

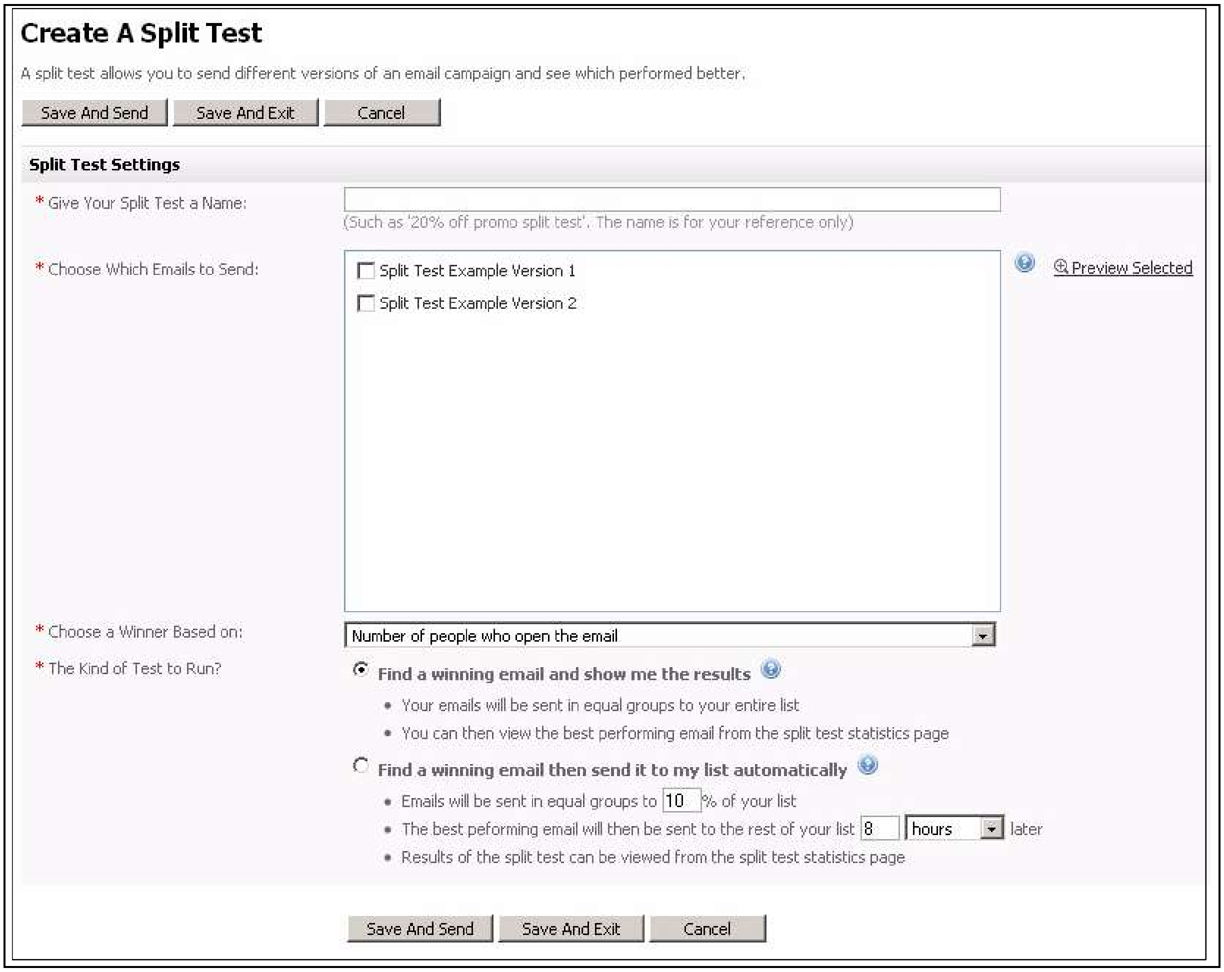


Table 15 Creating a Split Test

Give your split test a name	Enter a name for this split test. The name only displays in the configuration interface, and not to your contacts.
Choose which emails to send	Select the email campaigns that you want to include in this test. Note: You can select as many email campaigns as you want.
Preview selected	Click this to see all the email campaigns you selected in the **Choose which emails to send** list. Each email campaign opens in a new browser window.

Choose a winner based on	Use this field to specify how the winning email campaign is chosen: • Select **Number of people who open the email** to choose the email campaign that is opened most often. • Select **Number of people who click a link in the email** to choose the email in which a link is clicked most often (the one with the highest click-through rate). Note: When you select this option, the email software counts the total number clicks on all links in each email campaign, not any one link in particular.
The kind of test to run	Use this section to define whether to perform a manual test or an automatic test, and to configure how the test should proceed: • Select **Find a winning email and show me the results** if you want to perform a manual test. When you select this option, the email software splits the contact list (or lists) into equal parts and sends each email campaign to one part. You can then view each email campaigns performance in the **Statistics** > **Split test statistics** screens. For example, if you select two email campaigns and have 1000 people in your contact list, each email campaign is sent to 500 people. Note: If you choose this option, you may want to first set up a new contact list for test subjects, rather than sending it to your complete contact list. If so, see Creating and Editing Contact Lists. • Select **Find a winning email then send it to my list automatically** if you want to perform an automatic test. When you select this option, you can specify the percentage of your contact list's contacts that are test subjects. The email software performs the test, then waits the amount of time you specify before declaring a winning email campaign (based on the criteria you select). The email software then sends the winning email campaign to the remainder of your contact list's contacts (those not in the test group). In the **Emails will be sent in equal groups to (...) % of your list** field, enter the percentage of your contact list's contacts that should be in the test group. The default is 10%. In the **The best performing email will then be sent to the rest of your list (...) later** field, select the number of **Hours** or **Days** after which the email software decides the winning email. Note: The minimum test time is two hours, and the maximum is thirty days.

	For example, if you have a contact list of 5000 people, select five email campaigns, specify a test group of ten percent and a test time of one day, each email is sent to 100 people, and the winning email is sent to the remaining 4,500 people the next day.
Save and send	Click this to save your changes to the test, and send it immediately. See Performing a Split Test for information on the screen that displays.
Save and exit	Click this to save your changes to the test and return to the **View split tests** screen.
Cancel	Click this to return to the **View split tests** screen without saving your changes.

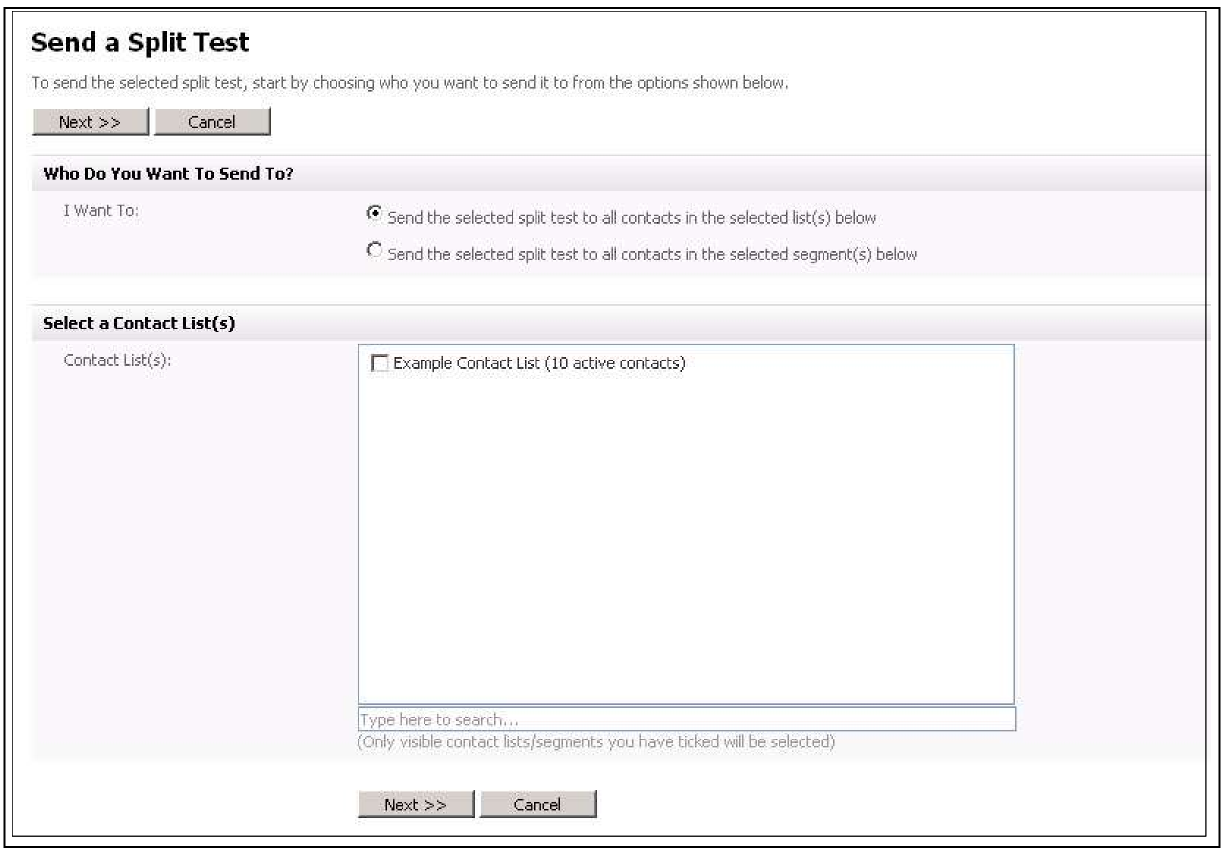
Performing a Split Test

To send a split test to members of your contact lists:

1. Click **Email campaigns** in the navigation bar, then click **View split tests**. Click the relevant split test's **Send** link.

   Alternatively, while creating or editing a split test, click its **Save and send** button (see Creating and Editing Split Tests).
2. The first screen that displays allows you to specify to whom you want to send the test.

Figure 88 Sending a Split Test



3. Select the contacts to whom you want to send the test in the **I want to** section:
   - To send the campaign to the entire list you select in the **Contact list** field, select **Send the selected split test to all contacts in the selected list(s) below**.
   - To send the campaign to the segment you select in the **Segments** field, select **Send an email to all contacts in the selected segment(s) below**.

Note: Segments define a sub-section of a contact list. In order to select a segment here, you must first create segments; see Creating, Editing and Viewing Segments.

4 Select the contact list(s) or segment(s) to which you want to send the email campaign. Use the search box below the list to search for contact lists or segments.
5 Click **Next**.
6 The screen that displays allows you to configure your campaigns' settings.

Figure 89 Sending a Split Test: Test Settings

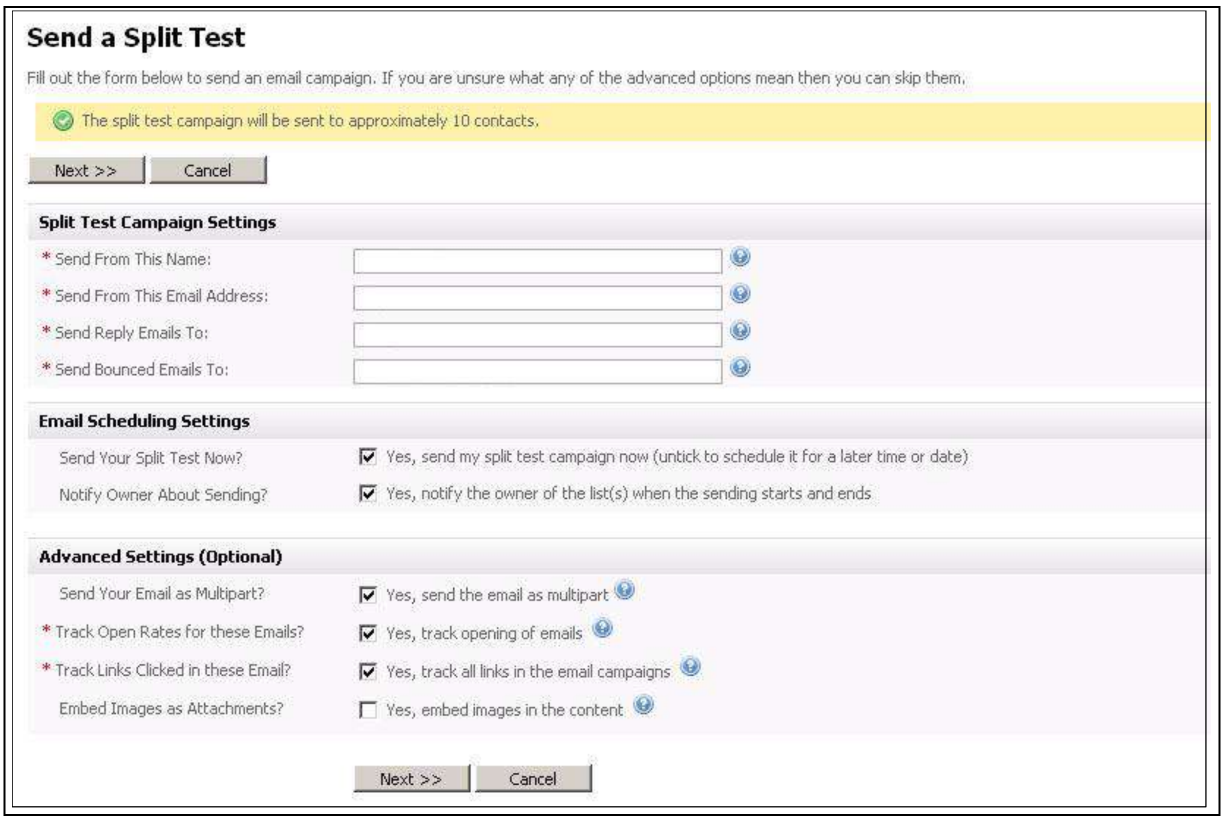


Table 16 Sending a Split Test: Test Settings

Split test campaign settings	
Send from this name	This displays the default "from" name for the contact list you selected. If you want to use a different name, enter the new name in this field.

Send from this email address	This displays the default "from" email account for the contact list you selected. If you want to use a different email account, enter the new address in this field.
Send reply emails to	This displays the default reply email address for this contact list. When a contact replies to your email campaign, this is the address to which the reply is sent. If you want to use a different address, enter the new address in this field.
Send bounced emails to	This displays the default bounced email address for this contact list. This is the address to which undeliverable emails are sent. If you want to use a different address for handling bounced emails, enter the new address in this field.
Email scheduling settings Note: This section displays only when split test scheduling is enabled. To enable or disable split test scheduling, click **Settings** > **Cron settings** and configure the **Split test campaigns** item.	
Send your split test now?	Select this if you want to send the split test campaign immediately. Deselect this to schedule a date and time to send the email. **Figure 90** Schedule Split Test  Select the **date**, **month** and **year** in the first three lists, and select the **hour**, **minute** and **AM/PM** in the last three lists.
Notify owner about sending?	Select this if you want to send an email to the list owner when a scheduled campaign starts sending, and another when it finishes sending.
Advanced settings (optional)	
My "first name" custom field is	If your email campaigns use a custom field to define a recipient's first name, select it here. If your email campaigns use a single field to define a recipient's name, select it in this field. Note: This field displays only when the selected contact list contains custom fields.

My "last name" custom field is	If your email campaigns use a custom field to define a recipient's last name, select it here. If your email campaigns use a single field to define a recipient's name, leave this field blank. Note: This field displays only when the selected contact list contains custom fields.
Send your email as multipart?	Select this to send both HTML and text elements of a multipart email campaign to recipients. This allows a recipient's email client to choose the correct display method. Note: Use this option if you are unsure. Also, use this option if you don't provide your recipients with the ability to choose HTML or text emails.
Track open rates for HTML emails?	Select this to have the email software track the proportion of HTML emails opened by their recipients. Note: This option cannot be deselected, as it is necessary for split testing campaigns to work.
Track links clicked in this email	Select this to have the email software track the proportion of links in this split test that are clicked by the recipient. Note: This option cannot be deselected, as it is necessary for split testing campaigns to work.
Embed images as attachments	Select this to embed the images you send in HTML emails, rather than linking to them. This allows recipients to view the email campaign offline, but can increase the email size significantly.

7 Click **Next**. In the screen that displays, review your split test.

Figure 91 Sending a Split Test: Review Test

8 Click **Schedule my split test campaign** when you are ready to send your test.

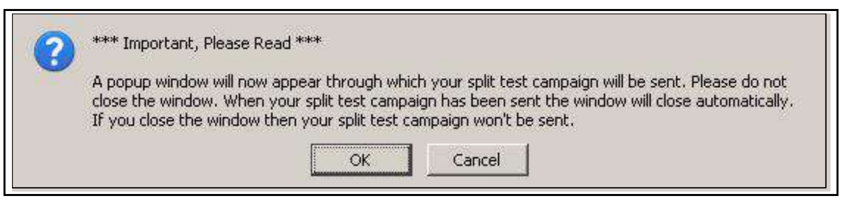
9 The screen that displays next depends on whether or not you have enabled split test scheduling (in the **Settings** > **Cron settings** screen).

- If split test scheduling is enabled, the **View split tests** screen displays (see Viewing and Managing Split Tests). **Waiting to send** displays in the split test's **Action** field. The split test will be sent the next time Cron runs split test sending.

Note: This happens even if you selected **Send your split test now**. For this reason, it is important that you configure split test scheduling to run frequently (in the **Settings** > **Cron settings** screen) even if you do not want to schedule split test sending. Alternatively, you can avoid this issue by turning split test scheduling off if you do not require it.

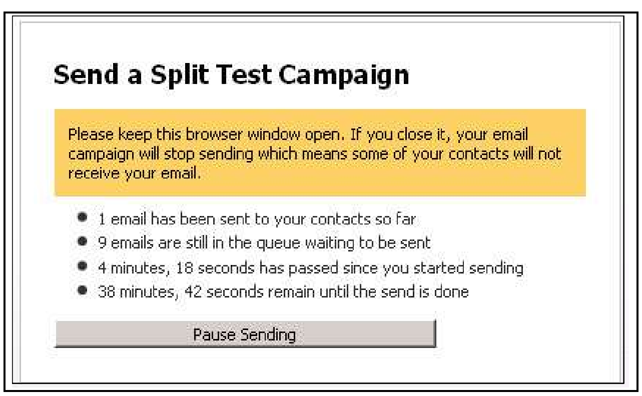
- If split test scheduling is disabled, a warning displays. Click **OK**.

Figure 92 Sending a Split Test: Warning



The email software begins to send your split test. A new browser window displays, showing how much time is remaining.

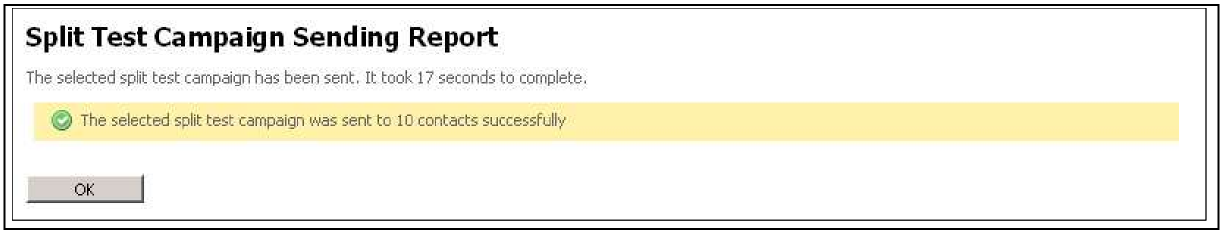
Figure 93 Sending a Split Test: Sending in Progress



Note: As stated in the warning that displayed previously, do NOT close this window, otherwise your test will not be sent correctly.

The browser window closes automatically when the split test has been completely sent.

Figure 94 Sending a Split Test: Completed



Viewing Scheduled Email Campaigns

To view details about the email campaigns that are scheduled to be sent, click **Email campaigns**, then click **View scheduled email queue**.

You can:

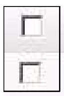
- **Send an email campaign**: build a new email campaign. See Sending Email Campaigns.
- **Delete**: remove the campaign (or campaigns) from the email software. The campaign cannot be retrieved.

You can also **View**, **Pause** or **Edit** a campaign.

Figure 95 View Scheduled Email Campaigns

Table 17 View Scheduled Email Campaigns

Send an email	Click this to send a new email campaign. See Sending Email Campaigns

campaign	for more information.
Delete selected	Select one or more email campaigns and click this to delete the selected campaign (or campaigns).
	Select a box belonging to an email campaign before clicking the **Delete selected** button. Select the box at the top of the column to select all campaigns.
Email campaign name - email subject	This displays the name of the email campaign scheduled for sending, and the subject line of the email campaign.
Campaign type	This displays the type of email campaign.
Contact list	This displays the contact list to which the email campaign is scheduled to be sent.
Date scheduled	This displays the date and time at which the email campaign is scheduled to be sent.
Activity status	• For email campaigns scheduled to be sent at a specific time in the future, a timer displays that counts down to the time at which the campaign will be sent. • **Waiting to send** displays if the email campaign is scheduled for immediate sending, but is yet to be sent. The campaign will be sent when the cron job runs. • **Paused** displays when the email campaign has been temporarily stopped. • **Complete** displays when the email campaign has finished sending.
Action	• Click **View** to see a preview of the email campaign in a new browser window. • Click **Pause** to temporarily stop a campaign that is running. • Click **Resume** to start a campaign that has been temporarily stopped. • Click **Edit** to change the settings of an email campaign. See Creating and Editing Email Campaigns for more information. • Click **Delete** to remove the campaign (or campaigns) from the email software. The campaign cannot be retrieved.

Using Autoresponders and Triggers

This chapter discusses how to use the **Autoresponders** menu in the navigation bar.

Figure 96 The Autoresponders Menu

Autoresponders Overview

Autoresponders are emails sent out automatically by the email software in response to actions taken by a contact (signing up for a newsletter, for example).

You can set up autoresponders to be sent out at specific times after the contact has been added to the contact list.

You can also configure an autoresponder to be sent to only the contacts in the list that match the search criteria you specify.

Triggers Overview

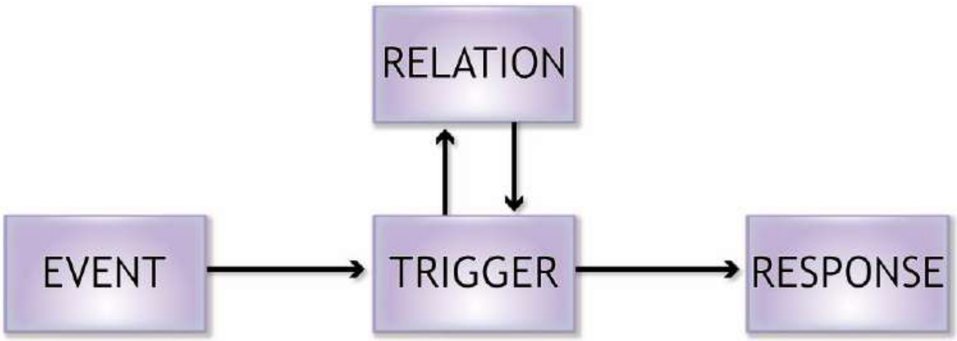
When you set up triggers, you can configure certain things to happen automatically when certain other events occur.

For example, you can set up a trigger so that everyone in your contact list receives a "Happy Birthday" email on their birthday, or a "Xmas special offer" email a week before Christmas.

You can also set up triggers that automate certain email processes. For example, you could automatically add a contact to a "warm leads" contact list when the contact opens your email, or you could include a "Tell me more" link in an email, and automatically send a personalized email response to all contacts who click the link.

The following figure shows how triggers work.

Figure 97 Triggers Overview



- **Event**: this is what sets off the trigger. It can be either date-related, or email-related.

  Date-related events can be based on a custom field you have set up for your contact list (for example, each contact's birthday) or based on a single date that you specify when you set up the trigger (for example, Christmas).

Note: If you want to base your trigger on a variable, custom field-related date, you need to set up the custom field in your contact list (or lists) before you set up the trigger.

  Email-related events can be based on a contact either opening an email, or clicking a specific link in an email.

- **Trigger**: the trigger configuration defines the event that sets off the trigger, the resulting response, and the time relation between the event and the response.
- **Relation**: when you create a date-related trigger, you can configure it to be set off on, before or after the event. You can also set it to be set off on, before or after the next anniversary of the event, or on all future anniversaries.

  When you create an email-based trigger, you can configure it to be set off on or after the event.
- **Response**: this is the action that is taken when the trigger is set off. These actions can be external (sending an email to the contact) or internal (adding the contact to a new contact list, or removing the contact from the current contact list).

  You can perform multiple actions; for example, if a contact in your "Raw leads" list clicks a "Tell me more" link in an email, you can automatically send a subsequent

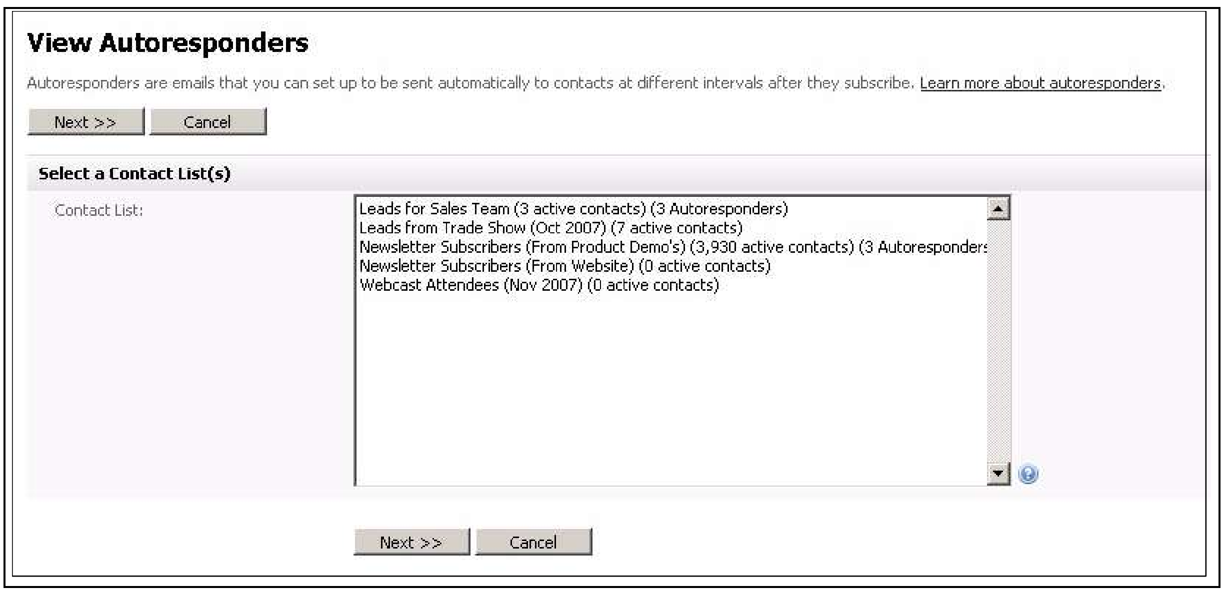
email with more information, add the contact to a "Warm leads" contact list, and remove the contact from the "Raw leads" list, all at the same time.

Viewing Autoresponders

Take the following steps to view details about an autoresponder you already created.

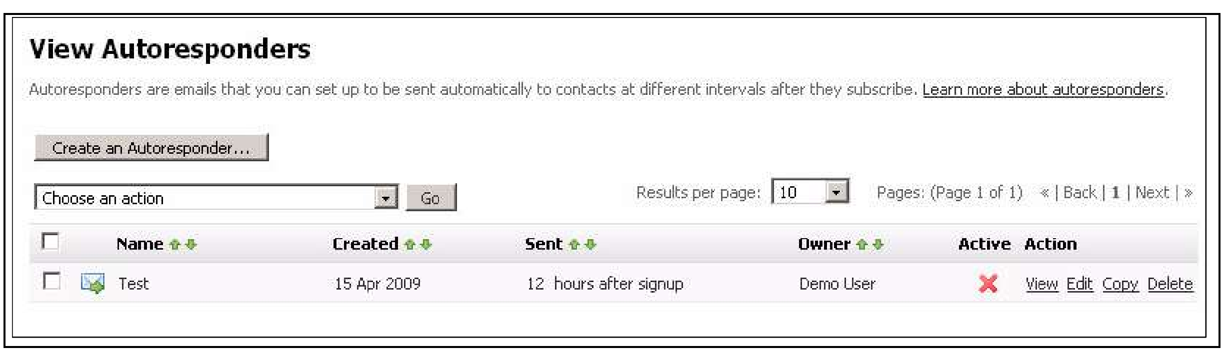
1 Click **Autoresponders** in the navigation bar, then click **View autoresponders**.

Figure 98 View Autoresponders: Choose Contact List



2 This screen displays a list of contact lists, the number of contacts belonging to the list, and the number of autoresponders associated with each list. Select a contact list and click **Next**.

Figure 99 View Autoresponders: Manage Autoresponders

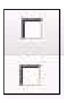


3 This screen allows you to:

- **Create an autoresponder**: click this to begin defining a new autoresponder for this contact list (see Creating and Editing Autoresponders).
- **Delete the selected autoresponder(s)**: remove the autoresponder (or autoresponders) from the email software. The autoresponder cannot be retrieved.
- **Activate the selected autoresponder(s)**: when activated, an autoresponder will be sent to contacts at the specified time.
- **Deactivate the selected autoresponder(s)**: when deactivated, an autoresponder will not be sent to contacts.

You can also **View**, **Edit** and **Copy** autoresponders.

Table 18 View Autoresponders

Create an autoresponder	Click this to go to the **Create an autoresponder** screen. See Creating and Editing Autoresponders for more information.
Choose an action	Select one or more autoresponders, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to an autoresponder before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all autoresponders.
Name	This displays the name of the autoresponder.
Created	This displays the date on which the autoresponder was created.
Sent	This displays the time that the autoresponder is sent after a contact signs up.
Owner	This displays the name of the email software user who created the autoresponder.
Active	• A tick ( ) displays if the autoresponder is enabled. The autoresponder is sent when at the relevant time. • A cross ( ) displays if the autoresponder is disabled. The autoresponder is not taken at the relevant time.

Action	• Click **View** to see a full-screen version of the autoresponder. • Click **Edit** to update the autoresponder. The screens that display are similar to the **Create an Autoresponder** screens (see Creating and Editing Autoresponders). • Click **Copy** to create a new copy of the autoresponder. The new autoresponder displays, with "Copy of" appended to the original name. • Click **Delete** to remove the autoresponder from the email software. The autoresponder cannot be retrieved.

Creating and Editing Autoresponders

The email software allows you to create autoresponders using the built-in editor.

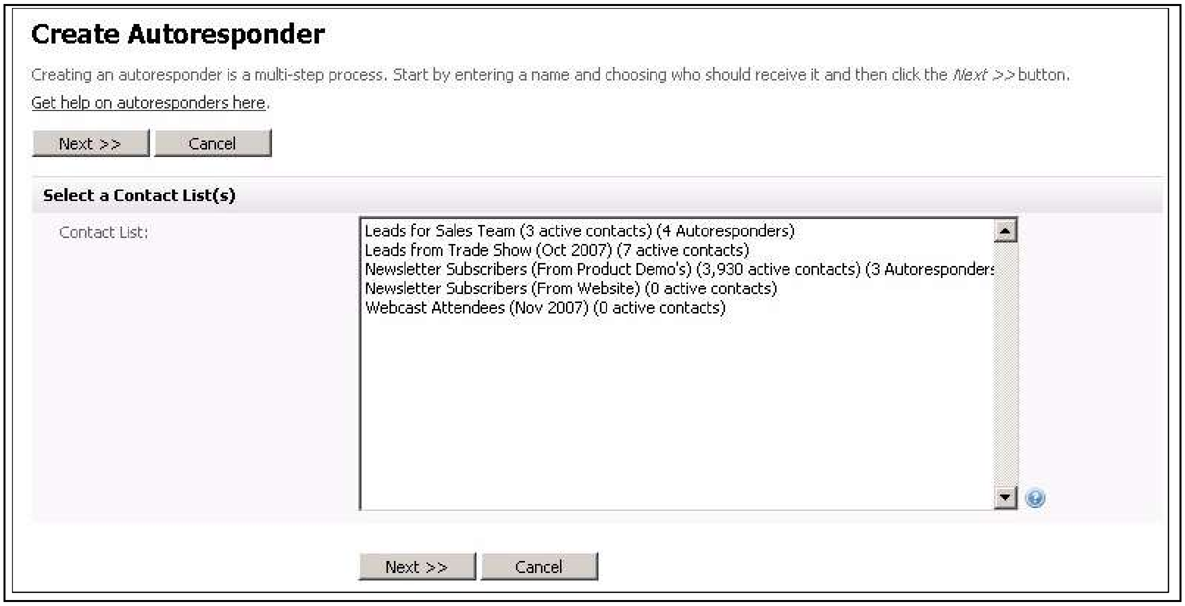
Note: If you want to create a new autoresponder based on an autoresponder you created previously, use the **Autoresponders > View autoresponders** screen to copy the template, then edit the new template. See Viewing Autoresponders.

To edit an autoresponder, click its **Edit** link in the **Autoresponders** > **View autoresponders** screen.

Take the following steps to create an autoresponder:

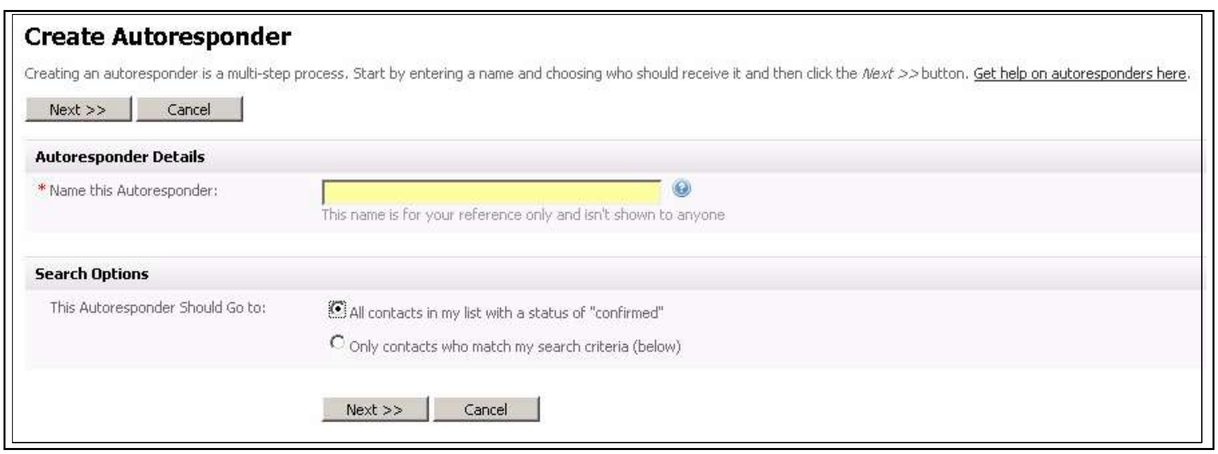
1 Click **Autoresponders** in the navigation bar and select **Create an autoresponder**.

Figure 100 Create an Autoresponder: Select a Contact List



2 Select the contact list for this autoresponder and click **Next**.

Figure 101 Create an Autoresponder: Name and Search

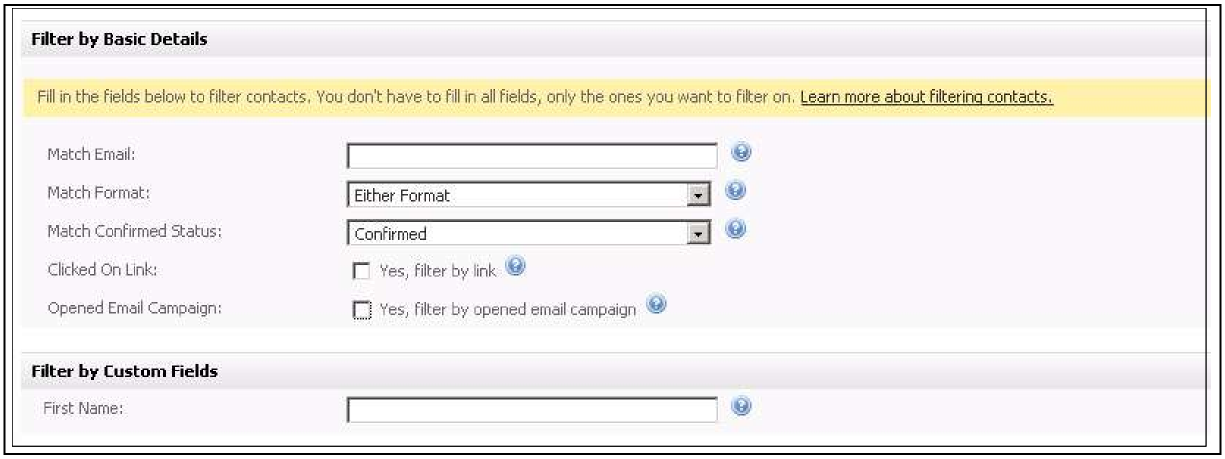


3 Enter a name for the autoresponder in the **Name this autoresponder** field.

4 If you want to send this autoresponder to all contacts who sign up and subsequently confirm that they want to receive emails, select **All contacts in my list with a status of "confirmed"**.

Alternatively, you can send this autoresponder to certain contacts only. Select **Only contacts who match my search criteria (below)**. The following fields display.

Figure 102 Autoresponder Filter Options



Configure the **Filter by basic details** fields:

- If you want to send this autoresponder only to contacts with a certain type of email address (for example, all contacts at hotmail.com), enter all or part of the email address in the **Email address** field.
- If you want to send this autoresponder only to contacts configured to receive **HTML** or **Text** emails only, select the relevant option from the **Match format** list.
- If you want to send this autoresponder only to contacts who are **Confirmed** or **Unconfirmed** only, select the relevant option from the **Match confirmed status** list. If you want to search for both, leave **Both confirmed and unconfirmed** selected (default).
- If you want to send this autoresponder only to contacts who have, or have not, clicked a specific link in your autoresponder, select **Yes, filter by link**.

Figure 103 Autoresponder: Filter By Link

If you want to send this autoresponder only to contacts who have clicked a link, select **Has clicked** in the first list, and select the relevant link in the second list.

If you want to send this autoresponder only to contacts who have not yet clicked a link, select **Has not clicked**, and select the relevant link in the second list.

- If you want to send this autoresponder only to contacts who have, or have not, opened a specific email, select **Yes, filter by opened email campaign**.

Figure 104 Autoresponder: Filter By Opened Email

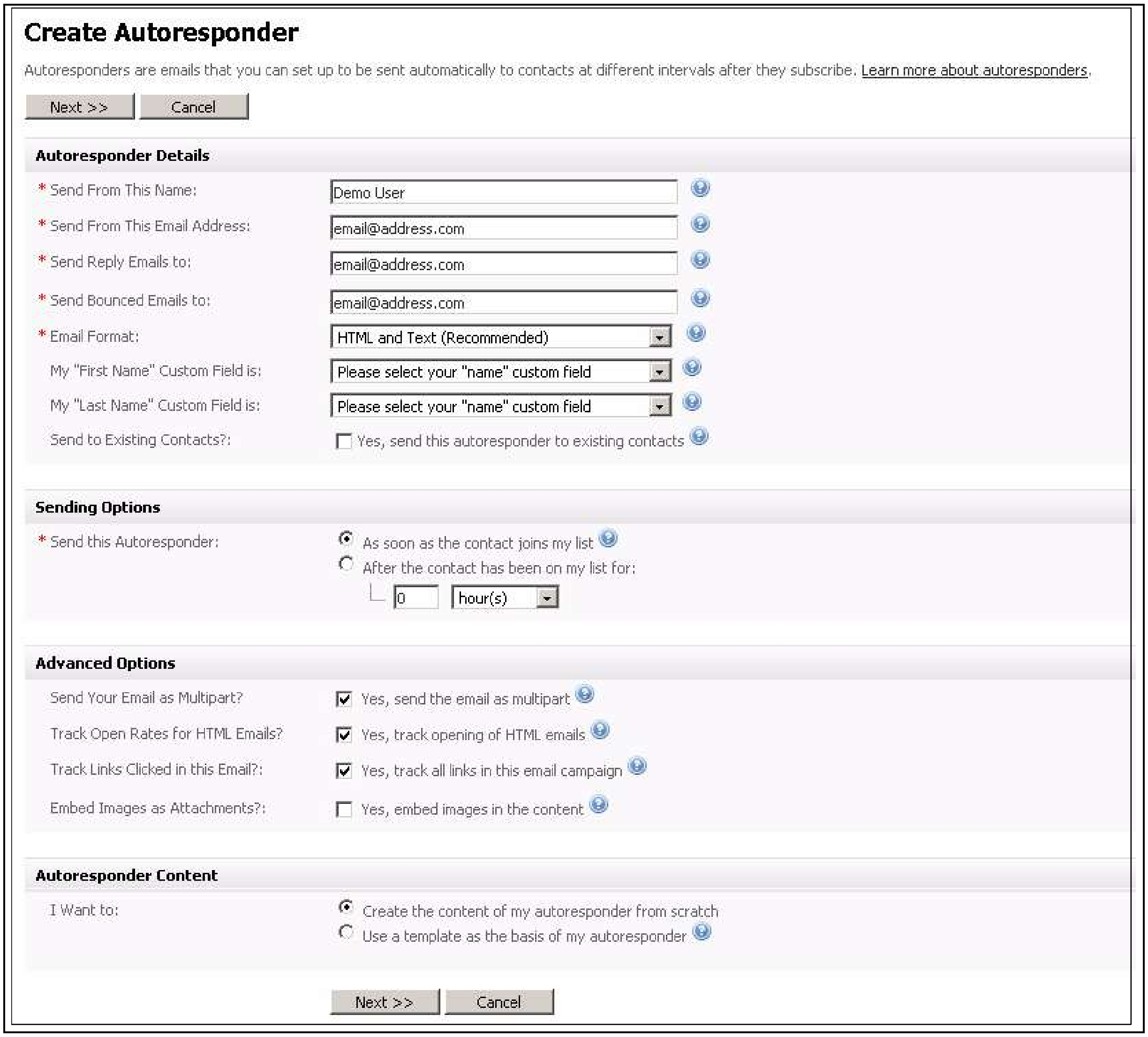
If you want to search for contacts who have opened an email, select **Has opened** in the first list, and select the email campaign in the second list.

If you want to find contacts who have not yet opened an email, select **Has not opened**, and select the email campaign in the second list.

5 If the contact list contains custom fields, you can search each field in the **Filter by custom fields** section.

6 Click **Next**.

Figure 105 Autoresponder: Sending Options



Create Autoresponder

Autoresponders are emails that you can set up to be sent automatically to contacts at different intervals after they subscribe. Learn more about autoresponders.

Next >> | Cancel

Autoresponder Details

* Send From This Name:	Demo User
* Send From This Email Address:	email@address.com
* Send Reply Emails to:	email@address.com
* Send Bounced Emails to:	email@address.com
* Email Format:	HTML and Text (Recommended)
My "First Name" Custom Field is:	Please select your "name" custom field
My "Last Name" Custom Field is:	Please select your "name" custom field
Send to Existing Contacts?:	☐ Yes, send this autoresponder to existing contacts

Sending Options

* Send this Autoresponder:	◉ As soon as the contact joins my list ○ After the contact has been on my list for: 0 hour(s)

Advanced Options

Send Your Email as Multipart?	☑ Yes, send the email as multipart
Track Open Rates for HTML Emails?	☑ Yes, track opening of HTML emails
Track Links Clicked in this Email?:	☑ Yes, track all links in this email campaign
Embed Images as Attachments?:	☐ Yes, embed images in the content

Autoresponder Content

I Want to:	◉ Create the content of my autoresponder from scratch ○ Use a template as the basis of my autoresponder

Next >> | Cancel

Table 19 Autoresponder: Sending Options

Autoresponder details	
Send from this name	This displays the default "from" name for the contact list you selected. If you want to change this name, enter the new name in this field.
Send from this email address	This displays the default "from" email account for the contact list you selected. If you want to use a different email account, enter the new address in this field.

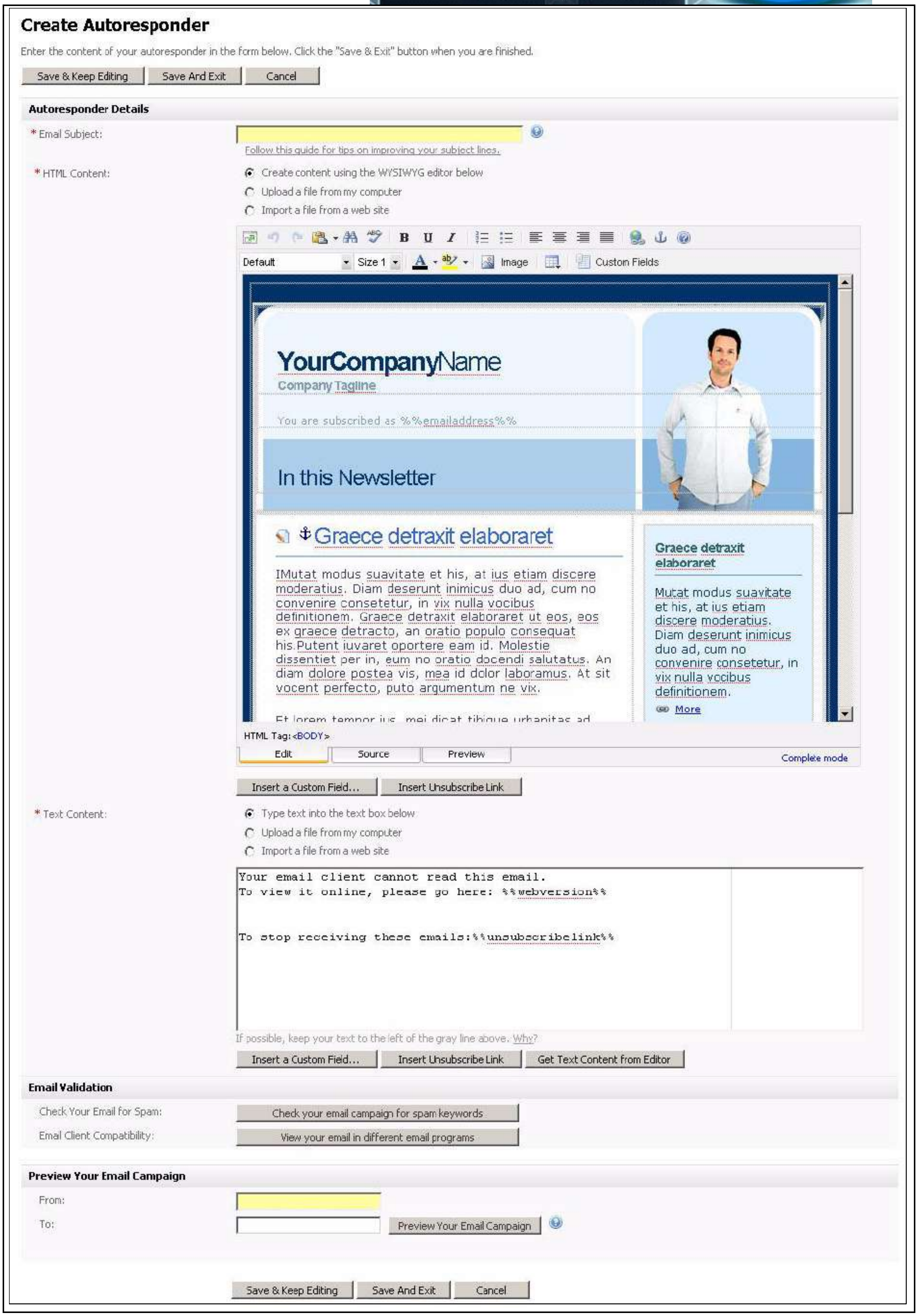
Send reply emails to	This displays the default reply email address for this contact list. When a contact replies to your autoresponder, this is the address to which the reply is sent. If you want to use a different address, enter the new address in this field.
Send bounced emails to	This displays the default bounced email address for this contact list. This is the address to which undeliverable emails are sent. If you want to use a different address for handling bounced emails, enter the new address in this field.
Email format	• Select **HTML and Text** if you want this autoresponder to be sent with both HTML and plain text elements (multipart). Email clients that can display HTML messages use the HTML element, and clients that cannot display HTML use the plain text element. • Select **Text** if you want this autoresponder to be sent in plain text only. • Select **HTML** if you want this autoresponder to be sent in HTML only. If you select this option, your emails will not display in email clients that cannot display HTML messages.
My “first name” custom field is	If your autoresponder uses a custom field to define a recipient’s first name, select it here. If your autoresponder uses a single field to define a recipient’s name, select it in this field.
My “last name” custom field is	If your autoresponder uses a custom field to define a recipient’s last name, select it here. If your autoresponder uses a single field to define a recipient’s name, leave this field blank.
Send to existing contacts	Select this to send the autoresponder to contacts who already belong to the contact list. For example, if you set up an autoresponder to send ninety days after a contact was added to the list, contacts who were added to the list fewer than ninety days ago will receive the autoresponder on the relevant date.
Sending options	
Send this autoresponder	Select **As soon as the contact joins my list** to send the autoresponder to contacts immediately when they join the list. Select **After the contact has been on my list for** to send the autoresponder a specific number of hours, days, weeks, months or years after the contact has joined the list. Enter the time in the fields that display.
Advanced options	

Send your email as multipart?	Select this to send both HTML and text elements of a multipart autoresponder to recipients. This allows a recipient's email client to choose the correct display method. Note: Use this option if you are unsure. Also, use this option if you don't provide your recipients with the ability to choose HTML or text emails.
Track open rates for html emails?	Select this to have the email software track the proportion of HTML autoresponders opened by their recipients.
Track links clicked in this email?	Select this to have the email software track the proportion of links in this autoresponder that are clicked by the recipient. You can view the results of clicked links in the **Statistics** > **Autoresponder statistics**.
Embed images as attachments?	Select this to embed the images you send in HTML emails, rather than linking to them. This allows recipients to view the autoresponder offline, but can increase the email size significantly.
Autoresponder content	
I want to	• Select **Create the content of my autoresponder from scratch** if you do not want to base this autoresponder on an existing template. • Select **Use a template as the basis of my autoresponder** if you want to base this autoresponder on an existing template. **Figure 106** Autoresponder: Select a Template  Select the template upon which you want to base this autoresponder.

7 Click **Next**. The autoresponder editor displays.

Figure 107 The Autoresponder Editor


Email Marketing
Market to UNLIMITED Contacts
View Statistics, Customize Templates & Generate Reports.
Everything you need to get your message across.


Create Autoresponder
Enter the content of your autoresponder in the form below. Click the "Save & Exit" button when you are finished.
Save & Keep Editing
Save And Exit
Cancel
Autoresponder Details
* Email Subject:
Follow this guide for tips on improving your subject lines.
* HTML Content:
Create content using the WYSIWYG editor below
Upload a file from my computer
Import a file from a web site
Default
Size 1
Image
Custom Fields
YourCompanyName
Company Tagline
You are subscribed as %%emailaddress%%
In this Newsletter
Graece detraxit elaboraret
IMutat modus suavitate et his, at ius etiam discere moderatius. Diam deserunt inimicus duo ad, cum no convenire consetetur, in vix nulla vocibus definitionem. Graece detraxit elaboraret ut eos, eos ex graece detracto, an oratio populo consequat his.Putent iuvaret oportere eam id. Molestie dissentiet per in, eum no oratio docendi salutatus. An diam dolore postea vis, mea id dolor laboramus. At sit vocent perfecto, puto argumentum ne vix.
Graece detraxit elaboraret
Mutat modus suavitate et his, at ius etiam discere moderatius. Diam deserunt inimicus duo ad, cum no convenire consetetur, in vix nulla vocibus definitionem.
More
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
* Text Content:
Type text into the text box below
Upload a file from my computer
Import a file from a web site
Your email client cannot read this email.
To view it online, please go here: %%webversion%%
To stop receiving these emails:%%unsubscribelink%%
If possible, keep your text to the left of the gray line above. Why?
Insert a Custom Field...
Insert Unsubscribe Link
Get Text Content from Editor
Email Validation
Check Your Email for Spam:
Check your email campaign for spam keywords
Email Client Compatibility:
View your email in different email programs
Preview Your Email Campaign
From:
To:
Preview Your Email Campaign
Save & Keep Editing
Save And Exit
Cancel

Note: If you selected **Text only** in the previous page, the **HTML Content** section in this page does not display. Likewise, if you selected **HTML only**, the **Text Content** section in this page does not display.

8 Specify how you want to build the HTML autoresponder.

- If you want to use the built-in WYSIWYG (What You See Is What You Get) editor in this page, select **Create content using the WYSIWYG editor below**.
- If you want to use an HTML file on your computer, select **Upload a file from my computer**. Click the **Browse** button that displays. A file upload window displays; locate and select the file you want to use and click **OK**. Click **Upload**. The HTML editor screen updates to show the new file.
- If you want to use a file from a page on the Internet, select **Import a file from a web site** and enter the full URL (for example, "http://www.examplesite.com/examplepage.html") in the field that displays. Click **Import**. The HTML editor screen updates to show the new file.

9 Customize the HTML email using the editor. See Using the HTML Editor for more information.

10 Customize the text email using the editor. See Using the Text Editor for more information.

11 Check that your autoresponder will not be marked as spam by a recipient's email client. Click **Check your email for spam**.

Note: This checks the text in your autoresponder against a list of known spam keywords. However, it cannot guarantee that your autoresponder will be delivered to all recipients.

Figure 108 Check Your Email for Spam

If either the HTML or text versions of your email break any rules, take note of the offending text and edit the autoresponder to not include the term.

Click the icon to close the **Check your email for spam** window.

12 Check that your autoresponder displays correctly in a variety of common email clients. Click **View your email in different email programs**. The **Email Validation** screen displays in a new window (see Validating an Email). When you have finished, close the window.

13 If you want to test the autoresponder by sending it to your own email address:

- Enter the email address from which you want to send the test email in the **Send preview from this email** field.
- Enter the email address to which you want to send the test email in the **Send preview to this email** field.
- To send the test email, click **Preview your email campaign**. Check the inbox of the account you entered in the **Send Preview to this Email** field.

14 Finish the autoresponder:

- Click **Save & keep editing** to save the new autoresponder and remain in this screen to make further changes.
- Click **Save and exit** to save the new autoresponder and go to the **View Custom Templates** screen (see Managing Custom Email Templates).

- Click **Cancel** to return to the **View Custom Templates** screen without saving the template. Any changes you made are lost.

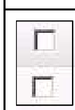
Viewing and Managing Triggers

To view the event triggers already set up in the email software, click **Autoresponders** in the navigation bar, then **View triggers**.

Note: Before you set up triggers, you need to enable scheduling (cron jobs). See Managing Cron Jobs for more information.

Figure 109 Viewing Triggers

Table 20 Viewing Triggers

Create a trigger	Click this to set up a new trigger event. See Creating and Editing Triggers for information on the screen that displays.
Choose an action	Select one or more triggers' checkboxes, choose an item from the list, and click **Go** to perform the action on the selected trigger (or triggers). • Select **Delete selected trigger(s)** to remove the selected trigger (or triggers) from the email software. Deleted triggers cannot be retrieved. • Select **Mark selected trigger(s) as active** to enable the trigger (or triggers). • Select **Mark selected trigger(s) as inactive** to disable the trigger (or triggers).
	Select a box belonging to a trigger before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all triggers.

Name	This displays the name that you assigned to this event trigger. This name does not display to the public.
Created	This displays the date on which you created the event trigger.
Triggered by	This displays information about the type of event that sets off the trigger. • **Predefined date** displays if you selected **Based on a specific date** when you created the event trigger. • **Custom field** displays if you selected **Based on a contact's date field** when you created the event trigger. • **Link clicked** displays if you selected **Based on a link being clicked** when you created the event trigger. • **Email campaign opened** displays if you selected **Based on a email campaign being opened** when you created the event trigger.
When	This displays information about when the relevant action occurs. • **Immediately after** displays if you selected **On** or **On the date** when you created the event trigger. • **[X] hours before** displays if you selected **Before [X] hours** when you created the event trigger. Note: Even if you selected **[X] days** or **[X] weeks** when you created the event trigger, the relevant number of hours displays. • **N/A** displays if you selected an option other than those above when you created the event trigger.
Active	• A tick ( ) displays if the trigger is enabled. The relevant action is taken if the trigger event occurs. • A cross ( ) displays if the trigger is disabled. The relevant action is not taken if the trigger event occurs.
Action	• Click **Edit** to modify the trigger. The **Edit trigger** screen's **General settings** tab displays (see Creating and Editing Triggers). • Click **Copy** to create a new trigger with the same properties as the original. The new trigger displays with **Copy of** prepended to its name. • Click **Delete** to remove the trigger from the email software. Deleted triggers cannot be retrieved.

Creating and Editing Triggers

- To create a new event trigger, click **Autoresponders** in the navigation bar, then click **View triggers**. In the screen that displays, click the **Create new trigger** button.
- To edit an existing event trigger, click **Autoresponders** in the navigation bar, then click **View triggers**. In the screen that displays, click the existing trigger's **Edit** link.

The **General settings** tab displays.

Note: If you are editing an existing event trigger, additional tabs may also display.

The General Settings Tab

The **General Settings** tab displays when you create or edit an event trigger.

Figure 110 Create a New Trigger: General Settings

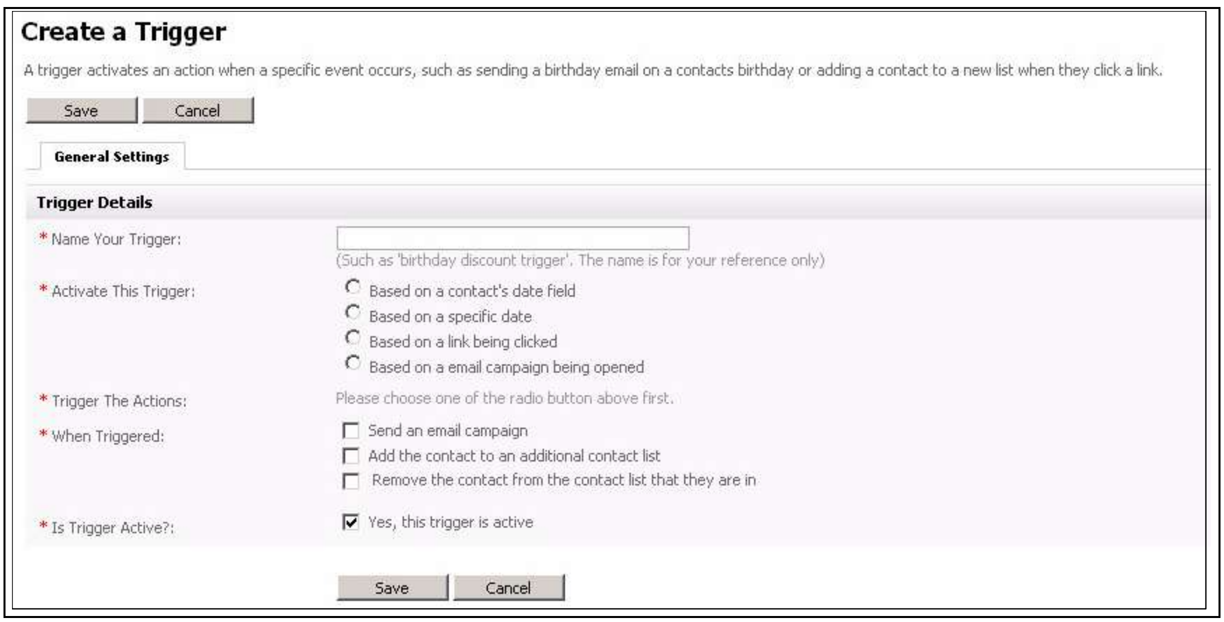
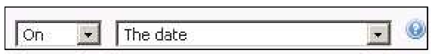


Table 21 Create a New Trigger: General Settings

Name your trigger	Enter a descriptive name for this event trigger. This name displays only in the configuration interface, and not to your contacts.
Activate this trigger	Select the type of event that should set off this trigger, and configure the additional fields that display. See Configuring Trigger Activation Options for information on configuring this field.

Trigger the actions	Once you have selected an option in the **Activate this trigger** field, use this field to configure when the action should take place, in relation to the trigger event. The fields that display depend on the option you selected in the **Activate this trigger** field. • If you selected **Based on a contact's date** or **Based on a specific date**, the following fields display: **Figure 111** Date-Based Trigger Options  In the first field: Select **On** to perform the action at the relevant time. Select **Before** to perform the action before the relevant time. In the additional fields that display, enter the required number of **Hours**, **Days** or **Weeks** before the time. Select **After** to perform the action after the relevant time. In the additional fields that display, enter the required number of **Hours**, **Days** or **Weeks** after the time. In the second field: Select **The date** to perform the action at the relevant time, and at no other time. Select **The next anniversary of the date** to perform the action at the next month and day (ignoring the year), and at no other time. Select **Every anniversary of the date** at the specified month and day, every year. • If you selected **Based on a link being clicked** or **Based on a email campaign being opened**, one of the following fields display: **Figure 112** Email-Based Trigger Options  Select **When** to perform the action at the moment the contact clicks the link or opens the email. Select **After** to perform the action at the moment the contact clicks the link or opens the email. In the additional fields that display, enter the required number of **Hours**, **Days** or **Weeks** after the event.

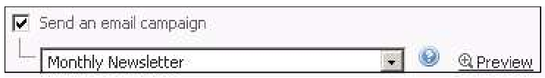
<table>
<tr>
<td>When triggered</td>
<td>

Use this field to specify what should happen when the trigger is set off:

Note: You can select multiple options in this field

- If you want to send an email to the contact when the trigger is set off, select **Send an email campaign**.

Figure 113 When Triggered: Send Email Campaign



The list that displays contains all the email campaigns currently configured in the email software. Select the required campaign from the list.

Click **Preview** to open the selected email campaign in a new browser window.

Note: When you select this option, the **Sending options** tab appears. Remember to configure this tab before you save the trigger (see The Sending Options Tab).

- If you want to add contacts to another contact list when the trigger is set off, select **Add the contact to an additional contact list**.

Figure 114 When Triggered: Send Email Campaign

Select the contact list (or lists) from the field that displays.

- If you want to delete the contact from the original contact list, select **Remove the contact from the contact list that they are in**.

Note: If you do not additionally select **Add the contact to an additional contact list**, the contact's details cannot be retrieved.

</td>
</tr>
<tr>
<td>Is trigger active?</td>
<td>Select this option to enable the trigger. When the event occurs, the trigger is set off.
Deselect this option to disable the trigger. When the event occurs, the trigger is not set off.</td>
</tr>
<tr>
<td>Save</td>
<td>Click this to save your changes in this screen and return to the View triggers screen.</td>
</tr>
</table>

Cancel	Click this to return to the **View triggers** screen without saving your changes.

Configuring Trigger Activation Options

This section describes the options available in the **Create a new Trigger** screen's **Activate this trigger** field.

- If you want to base a trigger on a custom date field (for example, "Date of Birth"), select **Based on a contact's date field**. See Based on a Contact's Date Field.

Note: To use this option, the contact list that you select must have at least one custom date field defined (for example "Date of Birth"). For more information on setting up custom date fields and associating them with contact lists, see Creating and Editing Custom Fields and Configuring a Date Field.

Note: When you select this option, you may apply the trigger to only a single contact list.

- If you want to base a trigger on a date that you specify, select **Based on a specific date**. See Based on a Specific Date.

Note: When you select this option, you may apply the trigger to multiple contact lists.

- If you want to base a trigger on when a contact clicks a link in an email, select **Based on a link being clicked**. See Based on a Link Being Clicked.

Note: When you select this option, the trigger applies to all contact lists.

- If you want to base a trigger on when a contact opens an email, select **Based on an email campaign being opened**. See Based on an Email Campaign Being Opened.

Note: When you select this option, the trigger applies to all contact lists.

Based on a Contact's Date Field

Select **Based on a contacts date field** to set off the trigger based on a custom date field (for example, "Date of Birth").

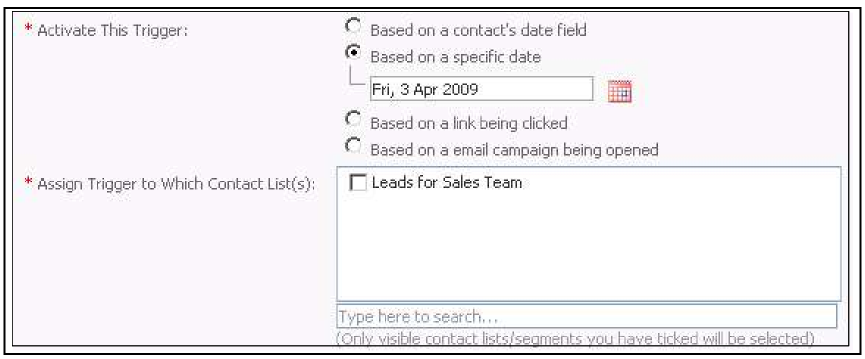
Figure 115 Activate Trigger Based on Custom Date

In the first list that displays, select the contact list to which you want to associate this trigger. In the second list, select the custom date field on which you want to base this trigger.

Based on a Specific Date

Select **Based on a specific date** to set off the trigger based on the date that you specify.

Figure 116 Activate Trigger Based on Specific Date



First, click the calendar icon that displays ( ) and select the date on which you want to base this trigger. Next, select the contact list (or lists) to which this trigger should apply from the **Assign trigger** list.

Based on a Link Being Clicked

Select **Based on a link being clicked** to set off the trigger based on when a contact clicks a link in an email. In the first list that displays, select the campaign that contains the link. The second list contains the target URLs of all the links in the campaign you select. Select the required target URL.

Note: When you use this option, the email campaign that you select must contain at least one link.

Figure 117 Activate Trigger Based on Link Being Clicked

Based on an Email Campaign Being Opened

Select **Based on an email campaign being opened** to set off the trigger based on when a contact opens an email.

Figure 118 Activate Trigger Based on Email Being Opened

The list that displays contains all the email campaigns currently configured in the email software. Select the required campaign.

The Sending Options Tab

This tab displays only when you select the **Send an email campaign** option in the **General settings** tab.

Figure 119 Create a New Trigger: Sending Options

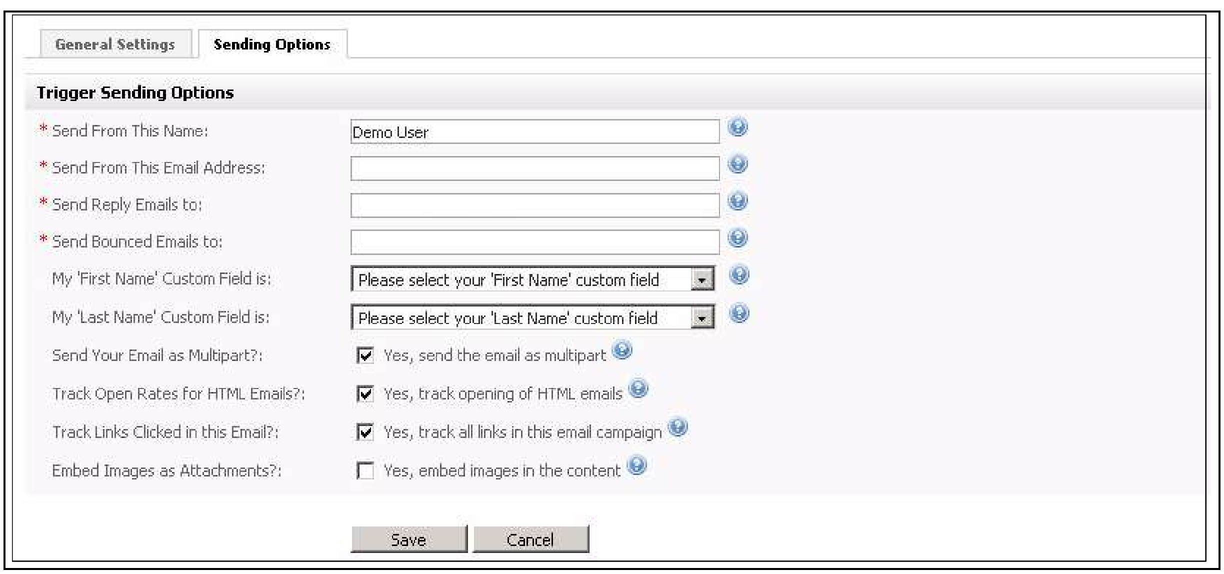


Table 22 Create a New Trigger: Sending Options

Send from this name	This is the name of the person from which the triggered email will be sent. This displays your user's full name (specified in your user account settings; see Creating and Editing User Accounts). If you want to use a different name, enter the new name in this field.
Send from this email address	This is the email address from which the triggered email will be sent. This displays your email address (specified in your user account settings). If you want to use a different name, enter the new name in this field.
Send reply emails to	This is the email address to which a contact's reply email will be sent. This displays your email address (specified in your user account settings). If you want to use a different name, enter the new name in this field.
Send bounced emails to	Enter the address to which undeliverable emails are sent.
My "first name" custom field is	If you use a custom field to define a recipient's first name, select it here. If you use a single field to define a recipient's name, select it in this field.
My "last name" custom field is	If you use a custom field to define a recipient's last name, select it here. If you use a single field to define a recipient's name, leave this field blank.
Send your email as multipart	Select this to send both HTML and text elements of a multipart email campaign to recipients. This allows a recipient's email client to choose the correct display method. Note: Use this option if you are unsure. Also, use this option if you don't provide your recipients with the ability to choose HTML or text emails.
Track open rates for html emails	Select this to have the email software track the proportion of HTML emails opened by their recipients.
Track links clicked in this email	Select this to have the email software track the proportion of links in this email campaign that are clicked by the recipient. You can view the results of clicked links in the **Statistics** > **Email campaign statistics**.
Embed images as attachments	Select this to embed the images you send in HTML emails, rather than linking to them. This allows recipients to view the email campaign offline, but can increase the email size significantly.
Save	Click this to save your changes in this screen and return to the **View triggers** screen.

Cancel	Click this to return to the **View triggers** screen without saving your changes.

Using Custom Fields

This chapter discusses how to use the **Custom Fields** menu in the navigation bar.

Figure 120 The Custom Fields Menu

Custom Fields Overview

Custom fields are placeholder variables that you can use to include contact-specific (or contact-list-specific) information in your emails.

These variables can be used to represent three types of information:

- Information stored in the email software about you and your company, and those of other users. This type of information is specific to each contact list. See Using Contact Lists for more information on the fields, and Inserting Custom Fields for information on inserting the fields into your emails.
- Links to functions of the email software. These include links that allow users to confirm that they want to receive emails, to stop receiving emails, to see a version of the email stored on the Internet, or to see an archive of all emails sent to the relevant list. See Inserting Custom Fields for information on inserting the fields into your emails.
- Information stored in the email software about a contact (name, email address, country, and so on). Before you can use contact-specific information, you must first include it in your contact list. This means defining the custom fields (if they do not already exist in the email software) and then associating them with a contact list. If you want to populate your contact list using a website form (which your contacts fill in), you also need to include the field in your form.

Note: If you intend to use a custom field in your emails, and populate your contact list using a website form, it is strongly recommended that you make the custom field

mandatory in the form. This will avoid leaving gaps in the text of emails you subsequently send out.

Use the **Custom fields** menu in the navigation bar to view and define custom fields for contact-specific information.

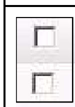
Viewing and Managing Custom Fields

To view an existing custom fields you already created, click **Custom fields** in the navigation bar, then click **View custom fields**. This screen allows you to view and manage all the custom fields configured in the email software.

You can create, edit and delete custom fields in this screen.

Figure 121 Viewing Custom Fields

Table 23 Viewing Custom Fields

Create a custom field	Click this to define a new custom field. See Creating and Editing Custom Fields for information on the screens that display.
Delete selected	Select a box belonging to one or more fields, then click this button to delete the selected fields.
	Select a box belonging to a field before clicking the **Delete selected** button. Select the box at the top of the column to select all fields.
Custom field	This displays the name of the custom field.
Created	This displays the date on which you created the custom field.
Type	This displays the type of custom field. See Creating and Editing Custom Fields for information on the types of custom fields available.

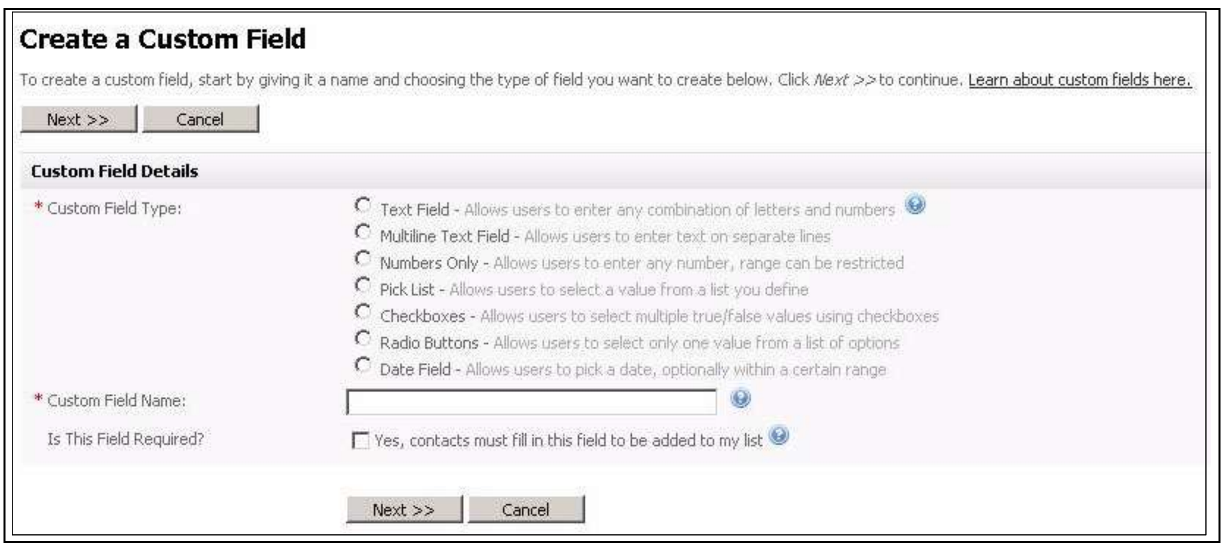
Mandatory	This displays **Yes** if a contact must complete this field to be added to the contact list.
Action	• Click **Edit** to modify a custom field. See Creating and Editing Custom Fields for information on the screens that display. • Click **Delete** to remove a custom field from the email software. The field cannot be retrieved.

Creating and Editing Custom Fields

Take the following steps to create a custom field:

1 Click **Custom fields** in the navigation bar, then click **Create custom field**.

Figure 122 Create a Custom Field: Type and Name



2 Select the **Custom field type**:

- Select **Text field** to create a field into which the user may enter a single line of text.
- Select **Multiline text field** to create a field into which the user may enter multiple lines of text.
- Select **Numbers only** to create a field into which the user may enter numerals only.
- Select **Pick list** to create a drop-down list box from which the user may select an option.

- Select **Checkboxes** to create one or more check boxes from which the user may select multiple options.
- Select **Radio buttons** to create one or more radio buttons from which the user may select a single option.
- Select **Date field** to create a field from which the user may select a date. You can limit the years available for selection.

3 Enter the name for the field in the **Custom field name** field.

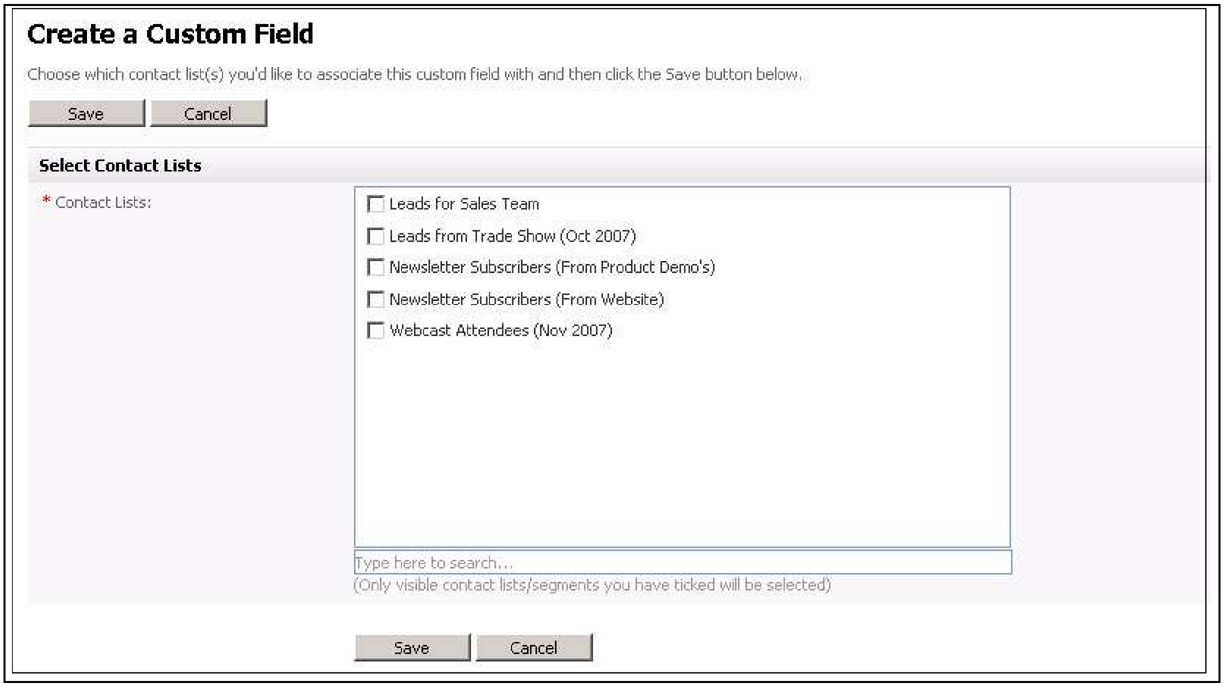
4 If you want the email software to allow users to join a contact list only once they have completed this field, select the **Is this field required?** check box.

5 Click **Next**. The fields that display in the next screen depend upon the **Custom field type** you selected:

- If you selected **Text field**, see Configuring a Text Field.
- If you selected **Multiline text field**, see Configuring a Multiline Text Field.
- If you selected **Numbers only**, see Configuring a Numbers Only Field.
- If you selected **Pick list**, see Configuring a Pick List.
- If you selected **Checkboxes**, see Configuring Checkboxes.
- If you selected **Radio buttons**, see Configuring Radio Buttons.
- If you selected **Date field**, see Configuring a Date Field.

6 When you have completed the fields in this screen, click **Next**.

Figure 123 Create a Custom Field: Select Contact List



7. Select the contact list (or lists) in which you want to use this custom field.
8. Click **Save** to finish configuring your custom field. The **View custom fields** screen displays (see Viewing and Managing Custom Fields).

Configuring a Text Field

This section describes how to configure the screen that displays when you select **Text field** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 124 Configuring a Text Field

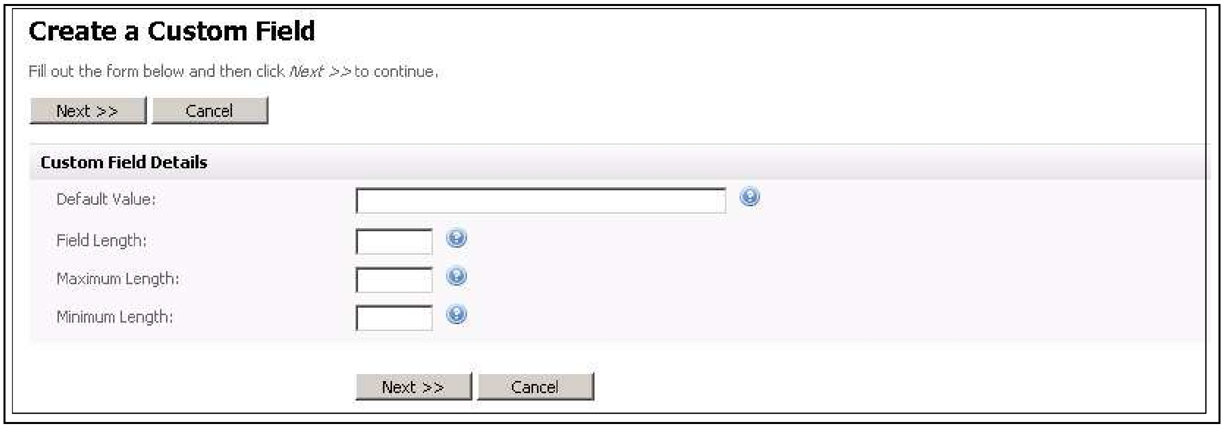


Table 24 Configuring a Text Field

Default value	Enter the value that displays by default in the field you are configuring. Note: If a contact fails to enter information in this field, this value displays in the contact's contact list entry.
Field length	Enter the length of the field as you want it to display on your website.
Maximum length	Enter the maximum number of characters a contact may enter in this field.
Minimum length	Enter the minimum number of characters a contact may enter in this field.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Configuring a Multiline Text Field

This section describes how to configure the screen that displays when you select **Multiline text field** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 125 Configuring a Multiline Text Field

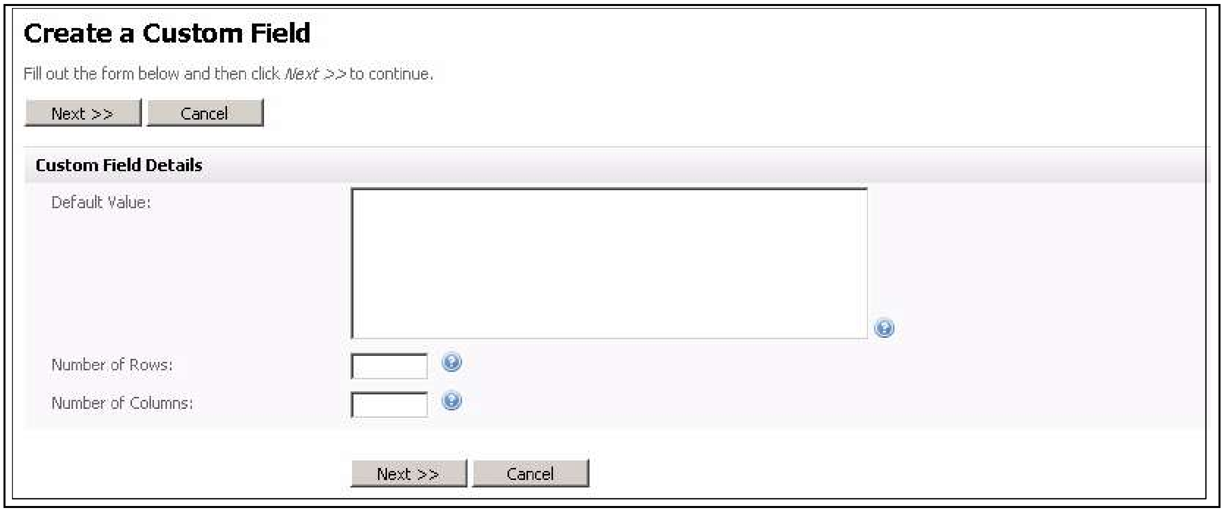


Table 25 Configuring a Multiline Text Field

Default value	Enter the value that displays by default in the field you are configuring. Note: If a contact fails to enter information in this field, this value displays in the contact's contact list entry.
Number of rows	Enter the number of rows you want the text field to have.
Number of columns	Enter the number of columns you want the text field to have.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Configuring a Numbers Only Field

This section describes how to configure the screen that displays when you select **Numbers only field** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 126 Configuring a Numbers Only Field

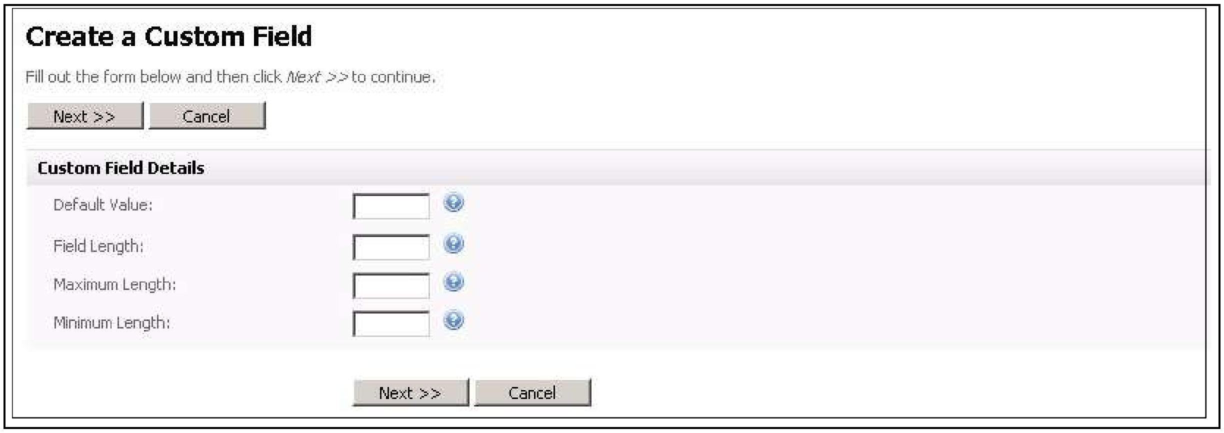


Table 26 Configuring a Numbers Only Field

Default value	Enter the value that displays by default in the field you are configuring. Note: If a contact fails to enter information in this field, this value displays in the contact's contact list entry.
Field length	Enter the length of the field as you want it to display on your website.
Maximum length	Enter the maximum number of characters a contact may enter in this field.
Minimum length	Enter the minimum number of characters a contact may enter in this field.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Configuring a Pick List

This section describes how to configure the screen that displays when you select **Pick List** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 127 Configuring a Pick List

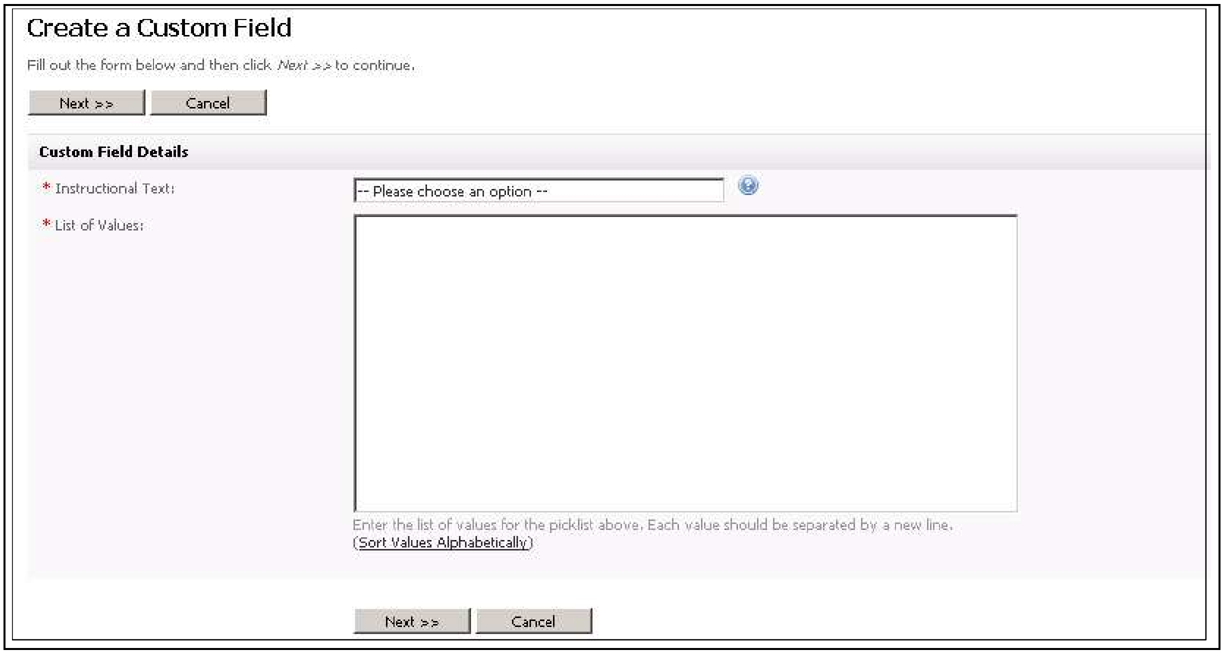


Table 27 Configuring a Pick List

Instructional text	Enter the text that displays to tell the user how to configure the field.
List of values	Enter all the options the user may pick from the list.
Sort values alphabetically	Click this to arrange the options from A to Z.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Configuring Checkboxes

This section describes how to configure the screen that displays when you select **Checkboxes** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 128 Configuring Checkboxes

Table 28 Configuring Checkboxes

List of values	Enter all the options the user may select. Each option has a checkbox.
Sort values alphabetically	Click this to arrange the options from A to Z.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Configuring Radio Buttons

This section describes how to configure the screen that displays when you select **Radio Buttons** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 129 Configuring Radio Buttons

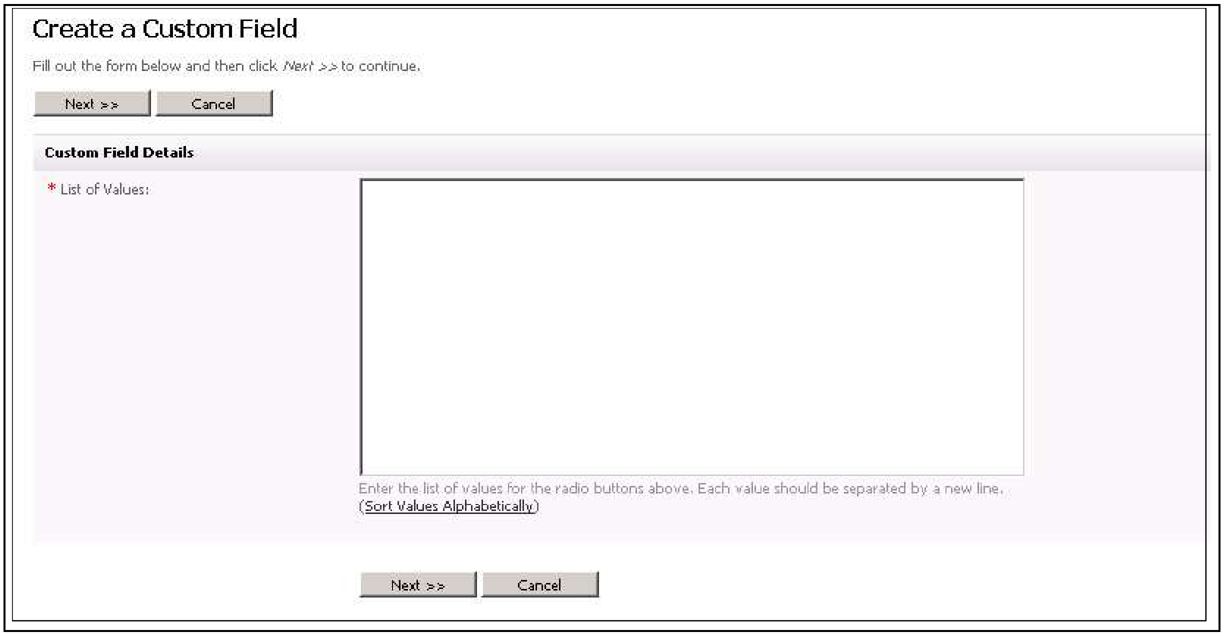


Table 29 Configuring Radio Buttons

List of values	Enter all the options the user may select (the user may select only one option). Each option has a radio button.
Sort values alphabetically	Click this to arrange the options from A to Z.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Configuring a Date Field

This section describes how to configure the screen that displays when you select **Date Field** in the **Create a Custom Field: Type and Name** screen (see Creating and Editing Custom Fields).

Figure 130 Configuring a Date Field

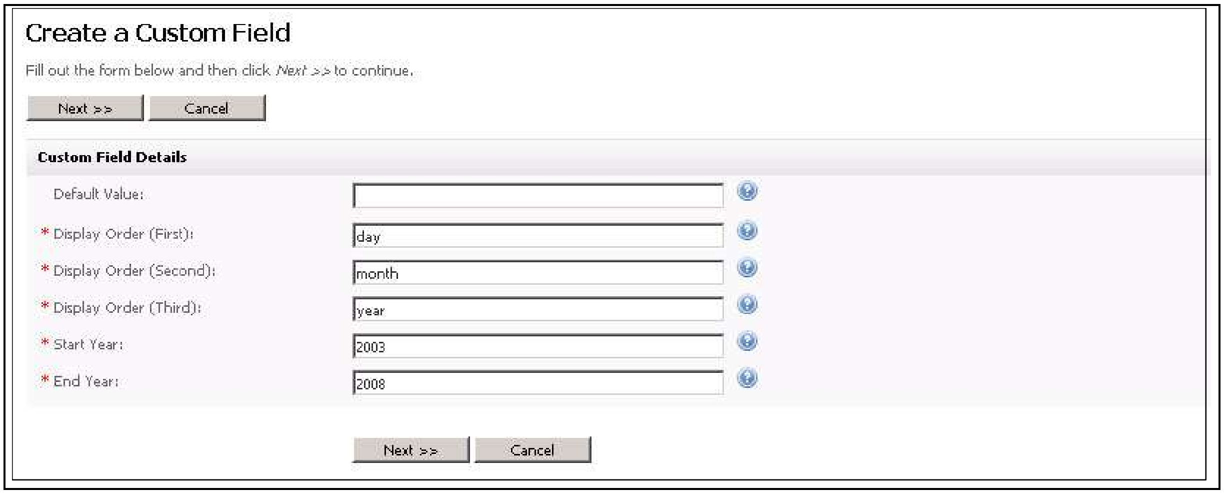


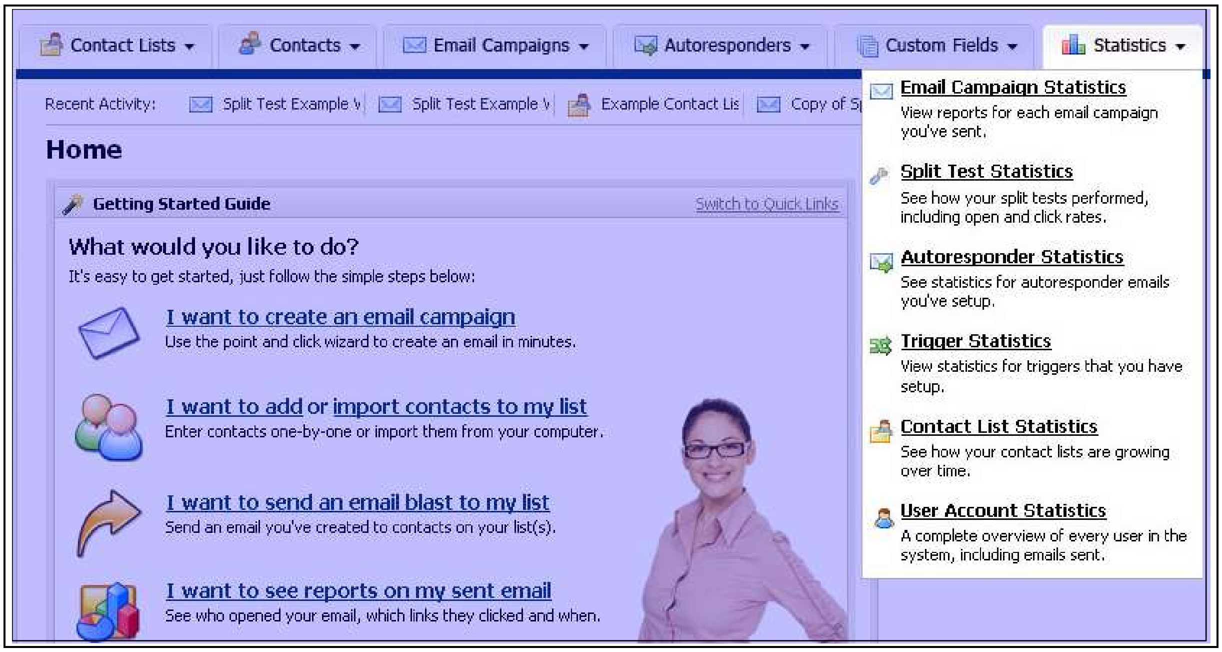
Table 30 Configuring a Date Field

Default value	Enter the date (or other text) that displays before the user selects anything. You may leave this blank if you do not want anything to display.
Display order (first/second/third)	Select the order in which you want the day, month and year to display.
Start year	Enter the earliest year the user may select.
End year	Enter the latest year the user may select.
Next	Click this to save your changes in this screen and proceed with configuring your custom field.
Cancel	Click this to return to the **View custom fields** screen. See Viewing and Managing Custom Fields.

Using Statistics

This chapter discusses how to use the **Statistics** menu in the navigation bar.

Figure 131 The Statistics Menu



Statistics Overview

Use the statistics screens to view general and detailed information about the email software's various subjects, such as email campaigns, split tests, autoresponders, triggers, contact lists and user accounts. Each screen provides you with a variety of statistical information.

- See Viewing Email Campaign Statistics for information on viewing statistics about the email campaigns you have sent out to your contacts.
- See Viewing Split Test Statistics for information on viewing statistics about the split tests you have performed.
- See Viewing Autoresponder Statistics for information on viewing statistics about the autoresponder you send out to contacts at predefined intervals.

- See Viewing Trigger Statistics for information on viewing statistics about the emails that the email software has sent to contacts in response to trigger events.
- See Viewing Contact List Statistics for information on viewing statistics about the behavior of the contacts in your contact lists.
- See Viewing User Account Statistics for information on viewing statistics about the users of the email software (including yourself).
- See Managing Statistics for information on performing a variety of tasks in the **Statistics** screens, such as exporting statistics, printing statistics, and using the detailed statistics screens.

Viewing Email Campaign Statistics

To view statistics about email campaigns, click **Statistics** in the navigation bar, then click **Email campaign statistics**.

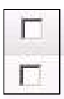
Note: This screen displays information about only the campaigns you have already sent out.

This screen shows an overview of your email campaigns, and some basic statistics about each. You can:

- **View** a campaign's detailed statistics. These include statistics about the number of opened emails, links, bounced emails, unsubscribed contacts, and forwarded emails.
- **Export** a campaign's statistics to a CSV (Comma-Separated Value) file.
- **Print** a campaign's statistics.
- **Delete** a campaign's statistics from the email software. The statistics cannot be retrieved.

Figure 132 Viewing Email Campaign Statistics

Table 31 Viewing Email Campaign Statistics

Choose an action	Select one or more email campaigns, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to an email campaign before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all campaigns.
Email campaign name	This displays the name of the email campaign.
List name	This displays the name of the list with which this email campaign is associated.
Date started	This displays the date and time at which the campaign started sending.
Date finished	This displays the date and time at which the campaign completed sending.
Recipients	This displays the number of contacts to whom the email campaign was sent.
Unsubscribes	This displays the number of contacts who subsequently unsubscribed from the contact list using the link in the email.
Bounces	This displays the number of emails sent in this campaign which could not be delivered.

Action	• Click **View** to see detailed statistics about the campaign. See Viewing Detailed Email Campaign Statistics. • Click **Export** to save a campaign's statistics as a CSV (Comma-Separated Value) file. See Exporting Statistics. • Click **Print** to select the campaign's statistics you want to print, view a preview of the printed document, and send the print job to your printer. See Printing Statistics. • Click **Delete** to remove a campaign's statistics from the email software. The statistics cannot be retrieved.

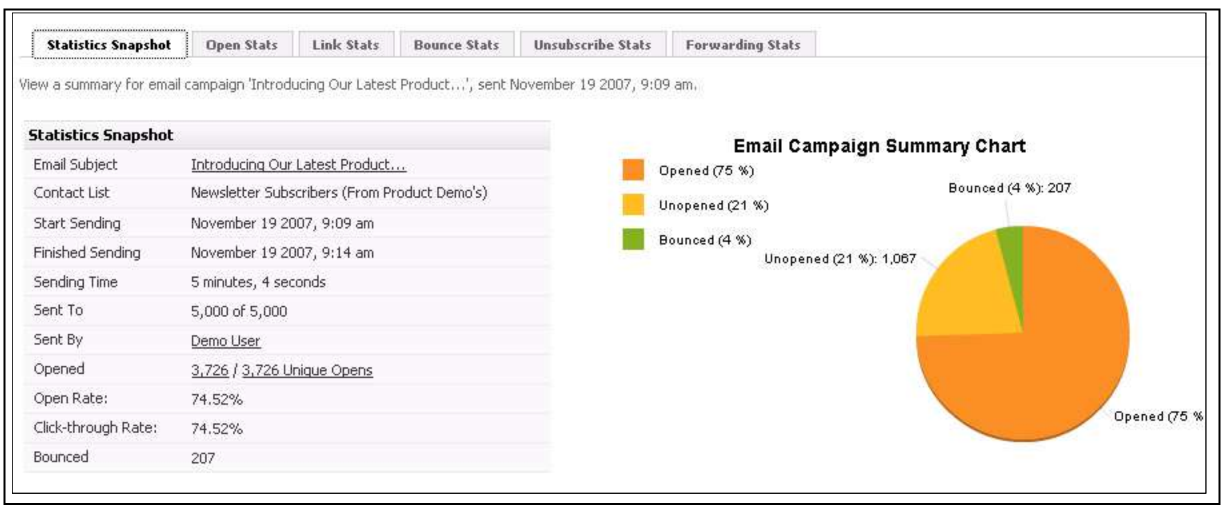
Viewing Detailed Email Campaign Statistics

To view detailed statistics about an email campaign, click **Statistics** in the navigation bar, then click **Email campaign statistics**. Click a campaign's **View** link.

Note: See Using the Detailed Statistics Screens for further information on these screens.

The **Detailed email campaign statistics** screen displays at the **Statistics snapshot** tab.

Figure 133 Detailed Email Campaign Statistics



The following table describes the tabs in this screen.

Table 32 Detailed Email Campaign Statistics

Statistics snapshot	Use this tab to see general information about the email campaign, as well as the number of opened, unopened and bounced emails. You can also see the percentage of emails that were opened, and the click-through percentage.
Open statistics	Use this tab to see information about the number and percentage of emails in this campaign that were opened by their recipients. You can also see the date on which an email was opened by an individual recipient, and whether it was opened as HTML or plain text.
Link statistics	Use this tab to see information about the number and percentage of links in this email campaign that were clicked by their recipients, as well as the average number of clicks per email, and the most popular link in this campaign. You can also see which individual recipients clicked a link, and at what date and time.
Bounce statistics	Use this tab to see information about the number and percentage of undeliverable emails in this campaign, as well as the number of hard bounces and soft bounces. You can also see the type of bounce (hard or soft) for each bounced email, the exact reason that the email was not delivered, and the date and time at which the bounce occurred. Note: Hard bounces are emails that were not delivered because of a permanent reason (for instance, the email account does not exist), whereas soft bounces are emails that were not delivered for a temporary reason (for instance, the recipient's inbox was full).
Unsubscribe statistics	Use this tab to see information about the number of contacts who have unsubscribed using a link in this email campaign. You can also see the email address of each contact, the date and time at which the contact unsubscribed, and the month with the greatest number of contacts unsubscribing.
Forwarding statistics	Use this tab to see information about the number of contacts who have forwarded this email campaign to their friends.

Viewing Split Test Statistics

To view statistics about the split tests you have performed, including the winner of each test, click **Statistics** in the navigation bar, then click **Split test statistics**.

Note: This screen displays information about both manual and automatic split tests.

This screen shows an overview of your split tests, and the winner of each (if the test has finished sending, and tracking information has been returned). You can:

- **View** a split test's detailed statistics. These include information about the winning email campaign (based on the criteria you selected), the number of opened emails, links clicked, bounced emails, and unsubscribed contacts.
- **Export** a split test's statistics to a CSV (Comma-Separated Value) file.
- **Print** a split test's statistics.
- **Delete** a split test's statistics from the email software. The statistics cannot be retrieved.

Figure 134 Viewing Split Test Statistics

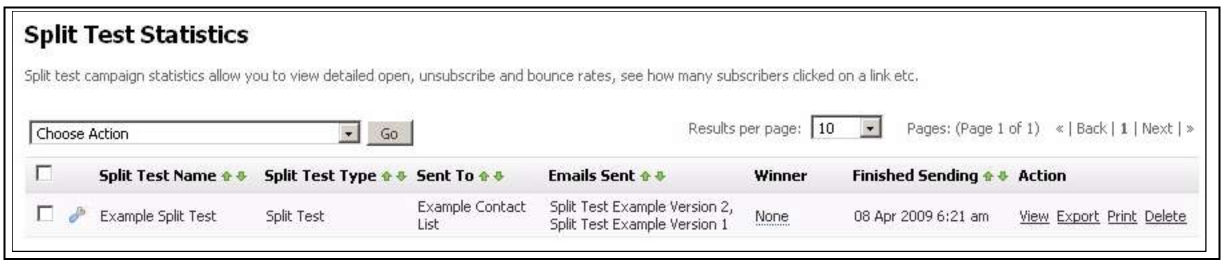
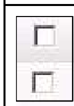


Table 33 Viewing Split Test Statistics

Choose an action	Select one or more split tests' checkboxes, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to a split test before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all split tests.
Split test name	This displays the name of the split test.
Split test type	This displays the type of test: • **Split test** displays if you selected **Find a winning email and show me the results** when you created the test. The campaigns are sent to the whole contact list in equal proportion, and the winner is displayed to you. • **Best performing** displays if you selected **Find a winning email then send it to my list automatically** when you created the test. The campaigns are sent to a small part of your contact list, and the winner is automatically sent to the rest of the list.
Sent to	This displays the name of the contact list, contact lists, or contact list segments to which this test was sent.

Emails sent	This displays the name of each email campaign that is part of this split test.
Winner	This displays the name of the winning email campaign (based on the criterion you selected when you set up the test). If no tracking information has been received, or all campaigns are performing equally, **None** displays. If the test has not yet finished sending, **Still sending** displays. Note: Place the mouse pointer over the winner's name to see more information.
Finished sending	This displays the date and time at which the split test completed sending the test emails.
Action	• Click **View** to see detailed statistics about the split test. See Viewing Detailed Split Test Statistics. • Click **Export** to save a split test's statistics as a CSV (Comma-Separated Value) file. See Exporting Statistics. • Click **Print** to select the split test's statistics you want to print, view a preview of the printed document, and send the print job to your printer. See Printing Statistics. • Click **Delete** to remove a split test's statistics from the email software. The statistics cannot be retrieved.

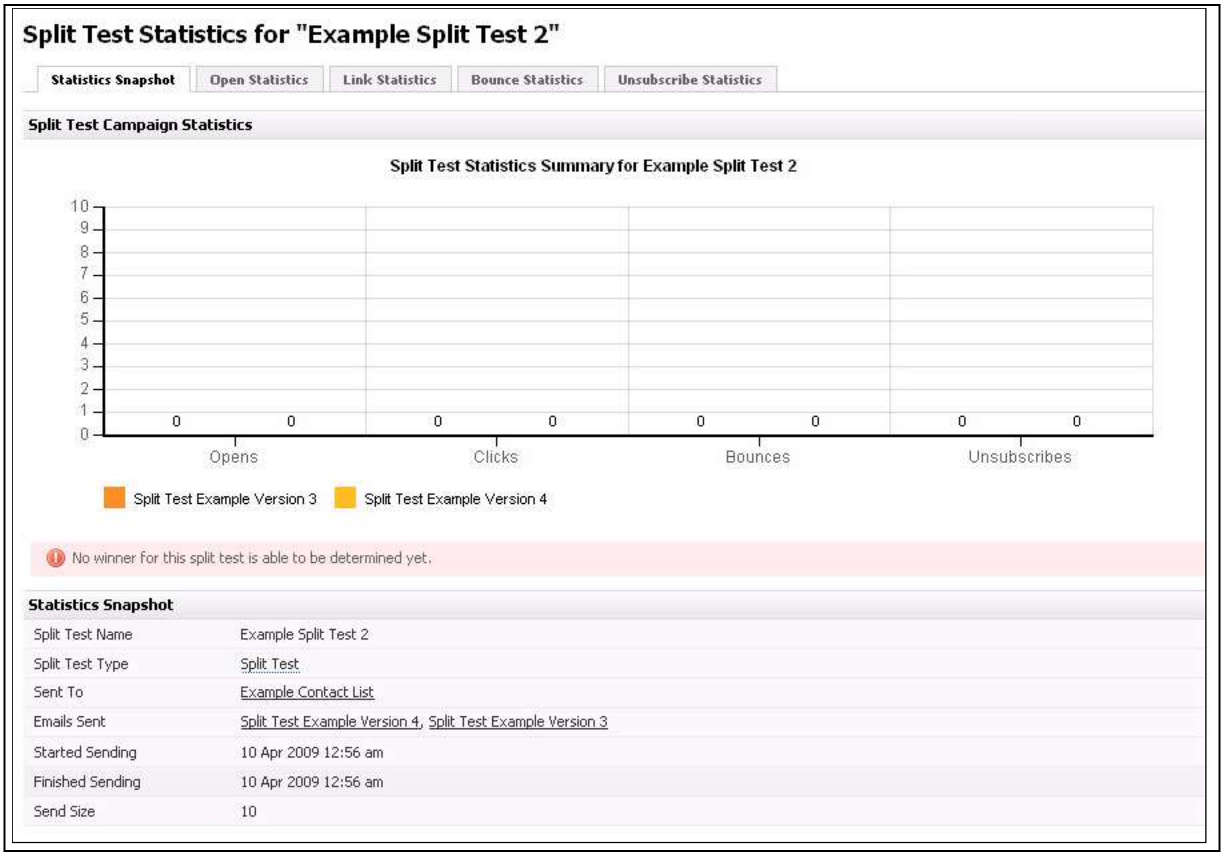
Viewing Detailed Split Test Statistics

To view detailed statistics about a split test, click **Statistics** in the navigation bar, then click **Split test statistics**. Click a test's **View** link.

Note: See Using the Detailed Statistics Screens for further information on these screens.

The **Detailed split test statistics** screen displays at the **Statistics snapshot** tab.

Figure 135 Detailed Split Test Statistics



The following table describes the tabs in this screen.

Table 34 Detailed Split Test Statistics

Statistics snapshot	Use this tab to see general information about the split test, including the best-performing email campaign, as well as: • The number of opened emails of each type. • The number of clicks in each email (the click-through rate). • The number of bounced emails of each type. • The number of contacts unsubscribing from each email.
Open statistics	Use this tab to see information about the number and percentage of unique email opens for each email campaign in this test.
Link statistics	Use this tab to see information about the number and percentage of links in emails of each type in this test that were clicked by their recipients.
Bounce statistics	Use this tab to see information about the number and percentage of undeliverable emails of each type in this test.

Unsubscribe statistics	Use this tab to see information about the number of contacts who have unsubscribed using a link in emails of each type in this test.

Viewing Autoresponder Statistics

To view statistics about autoresponders, click **Statistics** in the navigation bar, then click **Autoresponder statistics**.

This screen shows an overview of your autoresponders, and some basic statistics about each. You can:

- **View** an autoresponder's detailed statistics. These include statistics about the number of autoresponders sent out and opened, links, bounced autoresponders, unsubscribed contacts, and forwarded autoresponders.
- **Print** an autoresponder's statistics.
- **Delete** an autoresponder's statistics from the email software. The statistics cannot be retrieved.

Figure 136 Viewing Autoresponder Statistics

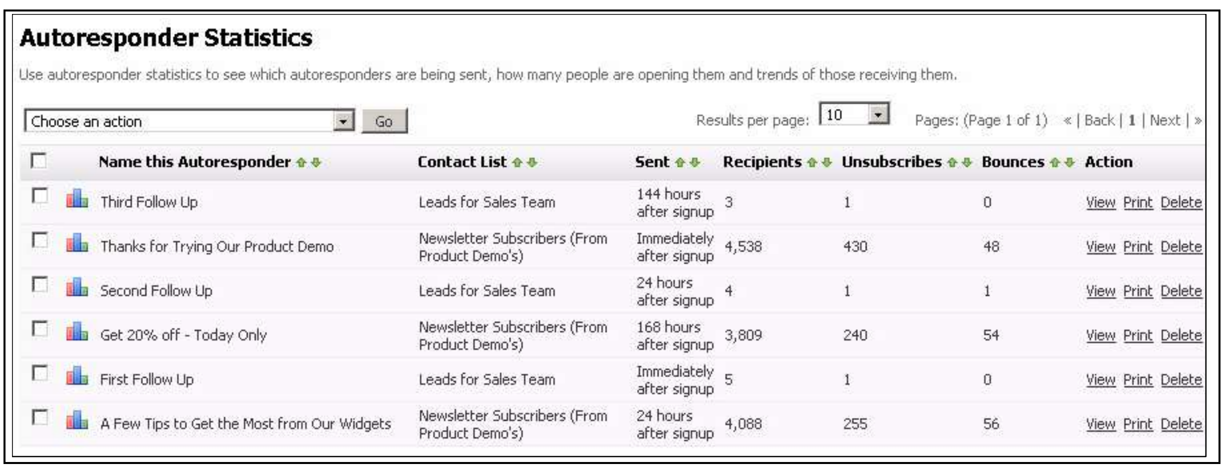


Table 35 Viewing Autoresponder Statistics

Choose an action	Select one or more autoresponders, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to an autoresponder before choosing an option from the **Choose an action** list.

	Select the box at the top of the column to select all autoresponders.
Name this autoresponder	This displays the name of the autoresponder.
Contact list	This displays the name of the list with which this autoresponder is associated.
Sent	This displays the time after signup that this autoresponder is sent.
Recipients	This displays the number of contacts to whom the autoresponder has been sent.
Unsubscribes	This displays the number of contacts who subsequently unsubscribed from the contact list using the link in the autoresponder.
Bounces	This displays the number of autoresponders of this type that could not be delivered.
Action	• Click **View** to see detailed statistics about the autoresponder. See Viewing Detailed Autoresponder Statistics. • Click **Print** to select the autoresponder's statistics you want to print, view a preview of the printed document, and send the print job to your printer. See Printing Statistics. • Click **Delete** to remove an autoresponder's statistics from the email software. The statistics cannot be retrieved.

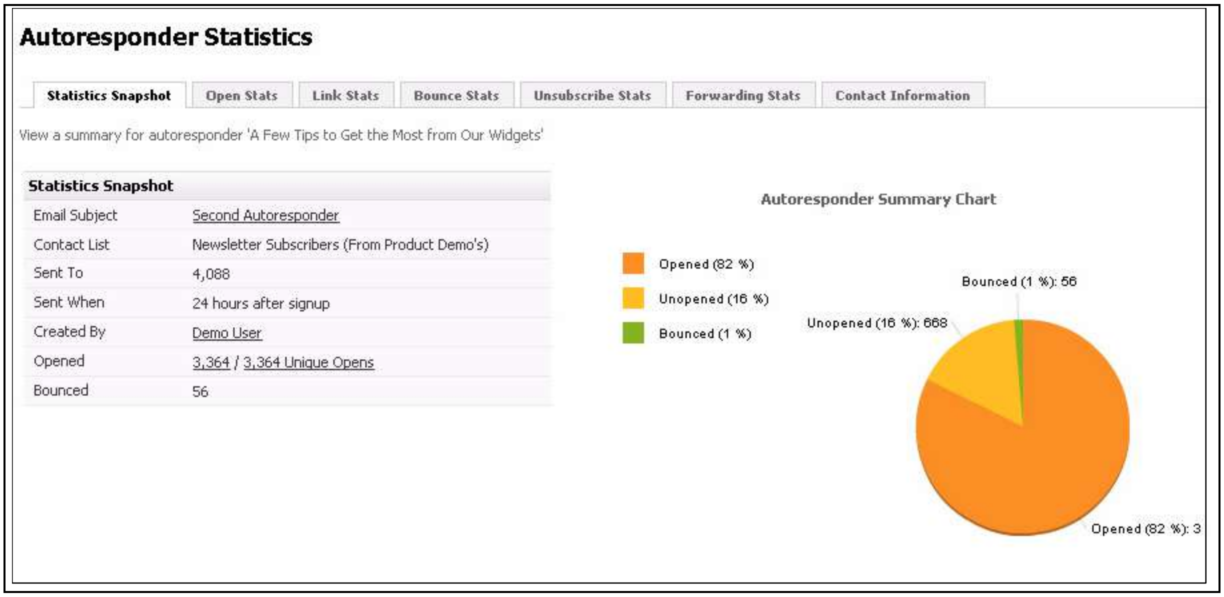
Viewing Detailed Autoresponder Statistics

To view detailed statistics about an autoresponder, click **Statistics** in the navigation bar, then click **Autoresponder statistics**. Click an autoresponder's **View** link.

Note: See Using the Detailed Statistics Screens for further information on these screens.

The **Detailed autoresponder statistics** screen displays at the **Statistics snapshot** tab.

Figure 137 Detailed Autoresponder Statistics



The following table describes the tabs in this screen.

Table 36 Detailed Autoresponder Statistics

Statistics snapshot	Use this tab to see general information about the autoresponder, as well as the number of opened, unopened and bounced autoresponders. You can also see the percentage of autoresponders that were opened.
Open statistics	Use this tab to see information about the number and percentage of autoresponders that were opened by their recipients. You can also see the date on which an autoresponder was opened by an individual recipient, and whether it was opened as HTML or plain text.
Link statistics	Use this tab to see information about the number and percentage of links in this autoresponder that were clicked by their recipients, as well as the average number of clicks per autoresponder, and the most popular link in this autoresponder. You can also see which individual recipients clicked a link, and at what date and time.

Bounce statistics	Use this tab to see information about the number and percentage of undeliverable autoresponders, as well as the number of hard bounces and soft bounces. You can also see the type of bounce (hard or soft) for each bounced autoresponder, the exact reason that the autoresponder was not delivered, and the date and time at which the bounce occurred. Note: Hard bounces are autoresponders that were not delivered because of a permanent reason (for instance, the email account does not exist), whereas soft bounces are autoresponders that were not delivered for a temporary reason (for instance, the recipient's inbox was full).
Unsubscribe statistics	Use this tab to see information about the number of contacts who have unsubscribed using a link in this autoresponder. You can also see the email address of each contact, the date and time at which the contact unsubscribed, and the month with the greatest number of contacts unsubscribing.
Forwarding statistics	Use this tab to see information about the number of contacts who have forwarded this autoresponder to their friends.
Contact information	Use this tab to see information about the contacts to whom this autoresponder has been sent.

Viewing Trigger Statistics

To view statistics about triggers, click **Statistics** in the navigation bar, then click **Trigger statistics**.

This screen shows an overview of triggers you have set up, and some basic statistics about each one. You can:

- **View** a trigger's detailed statistics. These include statistics about the number of contacts that have set off the trigger, the number of times a triggered email has been opened, or bounced, and the number of triggered emails that remain unopened.
- **Print** a trigger's statistics.
- **Delete** a trigger's statistics from the email software. The statistics cannot be retrieved.

Figure 138 Viewing Trigger Statistics

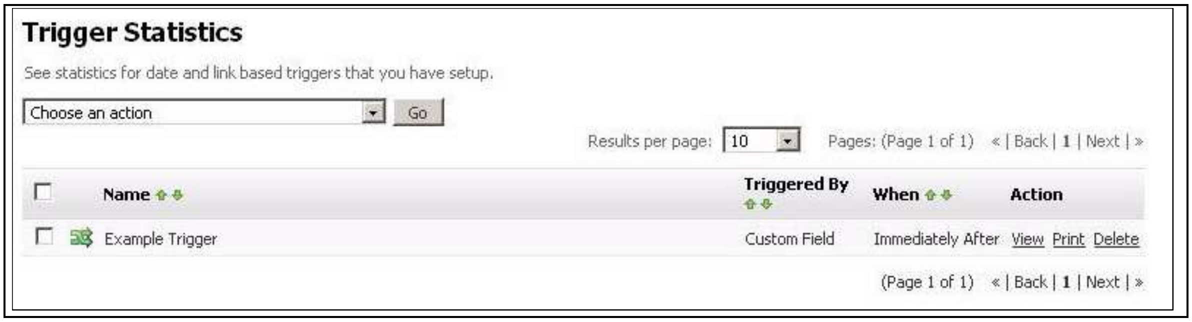
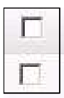


Table 37 Viewing Trigger Statistics

Choose an action	Select one or more triggers, select an option from the list and click **Go** to perform the selected action.
	Select a box belonging to a trigger before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all triggers.
Name	This displays the name of the trigger.
Triggered by	This displays information about the type of event that sets off the trigger. • **Predefined date** displays if you selected **Based on a specific date** when you created the event trigger. • **Custom field** displays if you selected **Based on a contact's date field** when you created the event trigger. • **Link clicked** displays if you selected **Based on a link being clicked** when you created the event trigger. • **Email campaign opened** displays if you selected **Based on a email campaign being opened** when you created the event trigger.
When	This displays information about when the relevant action occurs. • **Immediately after** displays if you selected **On** or **On the date** when you created the event trigger. • **[X] hours before** displays if you selected **Before [X] hours** when you created the event trigger. Note: Even if you selected **[X] days** or **[X] weeks** when you created the event trigger, the relevant number of hours displays. • **N/A** displays if you selected an option other than those above when you created the event trigger.

Action	• Click **View** to see detailed statistics about the trigger. See Viewing Detailed Trigger Statistics. • Click **Print** to select the trigger statistics you want to print, view a preview of the printed document, and send the print job to your printer. See Printing Statistics. • Click **Delete** to remove a trigger's statistics from the email software. The statistics cannot be retrieved.

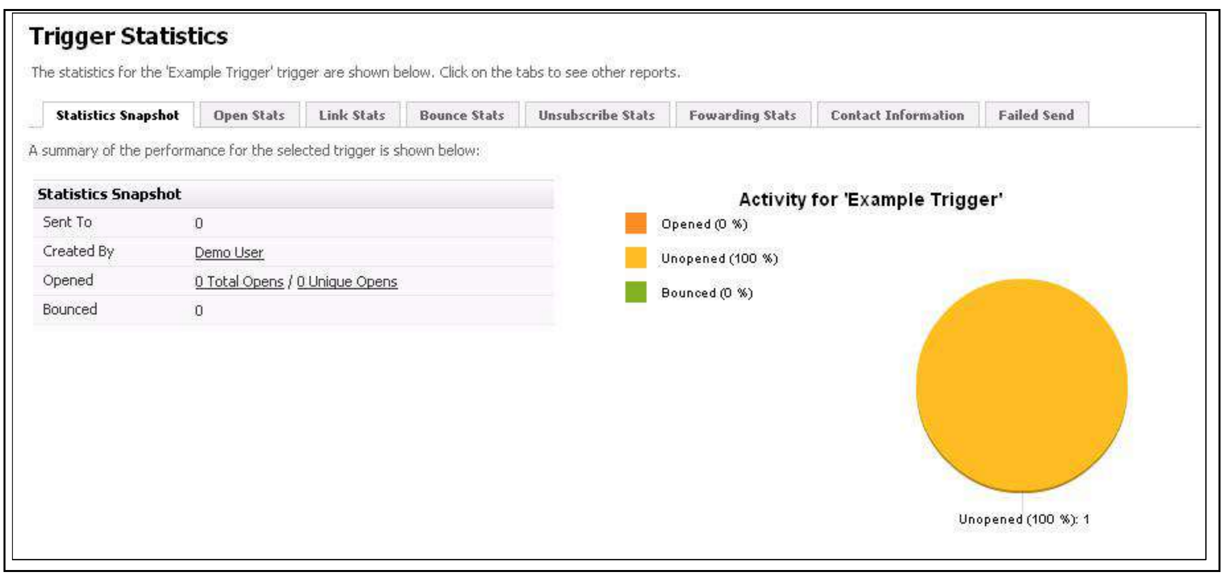
Viewing Detailed Trigger Statistics

To view detailed statistics about a trigger, click **Statistics** in the navigation bar, then click **Trigger statistics**. Click a trigger's **View** link.

Note: See Using the Detailed Statistics Screens for further information on these screens.

The **Detailed trigger statistics** screen displays at the **Statistics snapshot** tab.

Figure 139 Detailed Trigger Statistics



The following table describes the tabs in this screen.

Table 38 Detailed Trigger Statistics

Statistics snapshot	Use this tab to see general information about the trigger, as well as the number of opened, unopened and bounced trigger emails.

Open statistics	Use this tab to see information about the number and percentage of opens for trigger emails.
Link statistics	Use this tab to see information about the number and percentage of links in trigger emails that were clicked by their recipients.
Bounce statistics	Use this tab to see information about the number and percentage of triggered emails that were sent but could not be delivered.
Unsubscribe statistics	Use this tab to see information about the number of contacts who have unsubscribed using a link trigger emails.
Forwarding statistics	Use this tab to see information about the number of contacts who have forwarded triggered emails to their friends.
Contact information	Use this tab to see information about the contacts to whom this triggered email has been sent.
Failed send	Use this tab to see information about the number and percentage of triggered emails that could not be sent.

Viewing Contact List Statistics

To view statistics about contact lists, click **Statistics** in the navigation bar, then click **Contact list statistics**.

This screen shows an overview of your contact lists, and some basic statistics about each. You can:

- **View** an contact list’s detailed statistics. These include statistics about the domains to which your contacts in this list belong, the number of emails sent to this list that are opened, the number of links in emails to this list that are clicked, the number of emails to this list that have bounced, the number of contacts who have unsubscribed from the list, and the number of emails forwarded by this list’s contacts.
- **Print** an contact list’s statistics.

Figure 140 Viewing Contact List Statistics

Table 39 Viewing Contact List Statistics

Contact list	This displays the name of the contact list.
Created	This displays the date on which this contact list was set up.
Contacts	This displays the number of contacts in this list.
Unsubscribes	This displays the number of contacts who have unsubscribed from this contact list.
Action	• Click **View** to see detailed statistics about the contact list. See Viewing Detailed Contact List Statistics. • Click **Print** to select the contact list's statistics you want to print, view a preview of the printed document, and send the print job to your printer. See Printing Statistics.

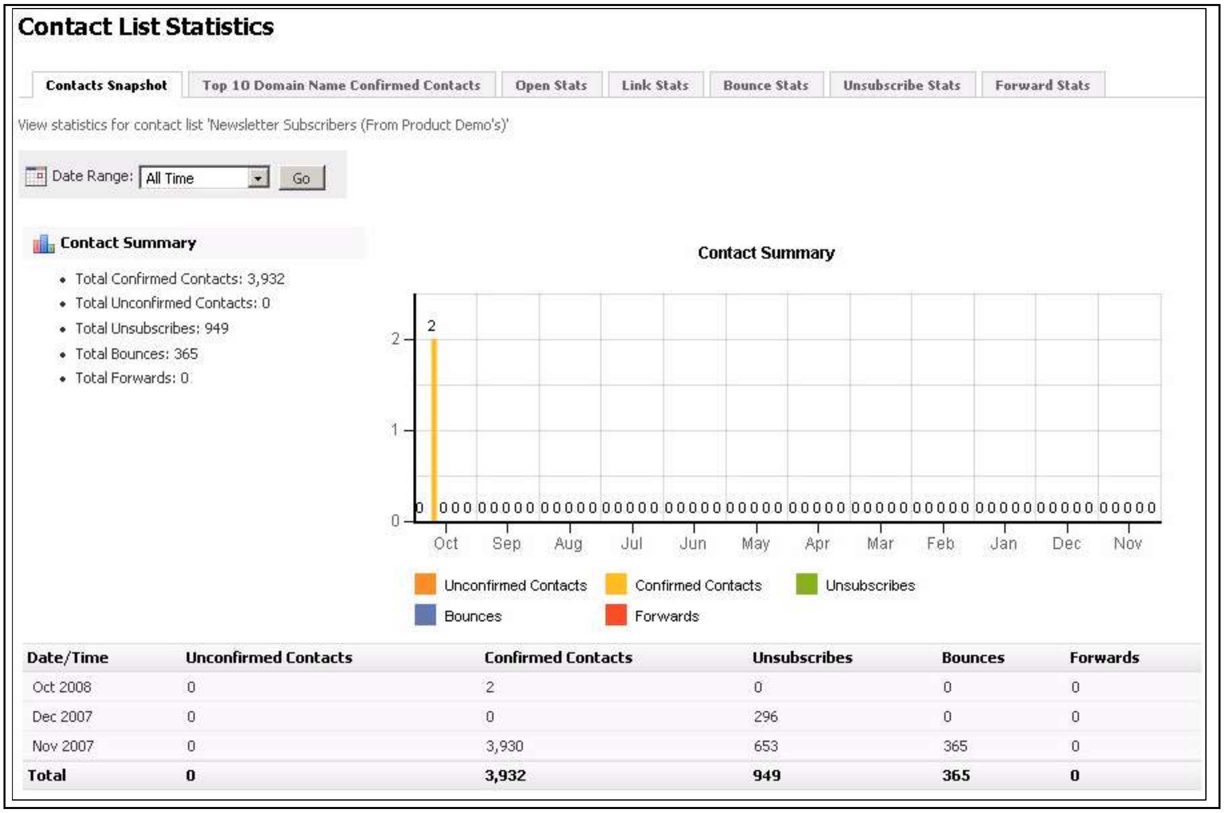
Viewing Detailed Contact List Statistics

To view detailed statistics about a contact list, click **Statistics** in the navigation bar, then click **Contact list statistics**. Click a contact list's **View** link.

Note: See Using the Detailed Statistics Screens for further information on these screens.

The **Detailed contact list statistics** screen displays at the **Contacts snapshot** tab.

Figure 141 Detailed Contact List Statistics



The following table describes the tabs in this screen.

Table 40 Detailed Contact List Statistics

Contacts snapshot	Use this tab to see general information about the contacts belonging to this contact list. This includes a summary of the contacts in the list who are unconfirmed, confirmed, have unsubscribed, have had emails bounced, and have forwarded emails. The information is arranged by month.
Top 10 domain name confirmed contacts	Use this tab to see information about the domains to which your confirmed contacts' email addresses belong. This information is ranked according to the number of email addresses belonging to a domain. You can also see information about the number of contacts who are confirmed, unconfirmed, have unsubscribed, have had emails bounced, and have forwarded emails, ranked by domain.

Open statistics	Use this tab to see information about the number and percentage of emails that were opened by members of this contact list. You can also see the date on which an email was opened by an individual recipient, and whether it was opened as HTML or plain text.
Link statistics	Use this tab to see information about the number and percentage of links in emails that were clicked by their members of this contact list, as well as the average number of clicks per email, and the most popular link overall. You can also see which individual recipients clicked a link, and at what date and time.
Bounce statistics	Use this tab to see information about the number and percentage of undeliverable emails sent to this contact list, as well as the number of hard bounces and soft bounces. You can also see the type of bounce (hard or soft) for each bounced email, the exact reason that the email was not delivered, and the date and time at which the bounce occurred. Note: Hard bounces are emails that were not delivered because of a permanent reason (for instance, the email account does not exist), whereas soft bounces are emails that were not delivered for a temporary reason (for instance, the recipient's inbox was full).
Unsubscribe statistics	Use this tab to see information about the number of contacts who have unsubscribed from this list. You can also see the email address of each contact, the date and time at which the contact unsubscribed, and the month with the greatest number of contacts unsubscribing.
Forwarding statistics	Use this tab to see information about the number of contacts in this list who have forwarded emails to their friends.

Viewing User Account Statistics

To view statistics about the email software's user accounts, click **Statistics** in the navigation bar, then click **User account statistics**.

Note: Configure user accounts in the **User account** screens; see Configuring User Accounts.

This screen shows an overview of your contact lists, and some basic statistics about each. You can **View** an user account's detailed statistics.

Figure 142 Viewing User Account Statistics

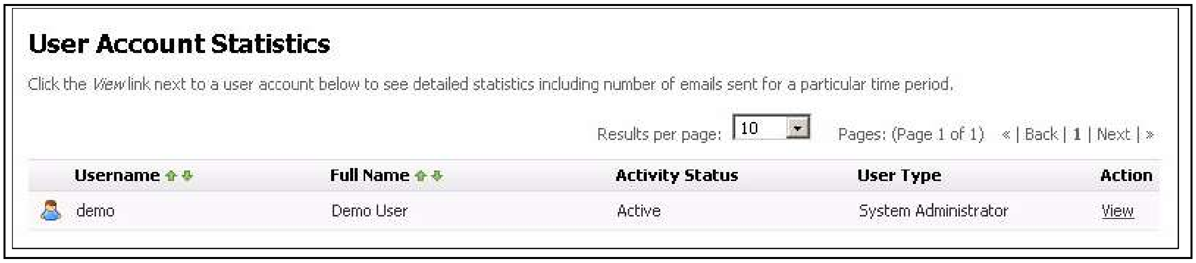


Table 41 Viewing User Account Statistics

Username	This displays the user's the email software username.
Full name	This displays the user's full name.
Activity status	This displays **Active** if the user may log into the email software and send emails. This displays **Inactive** if the user exists in the system, but may not log in or send emails.
User type	This displays the user's privilege level. See Configuring User Permissions for more information.
Action	Click **View** to see detailed statistics about the user. See Viewing Detailed User Account Statistics.

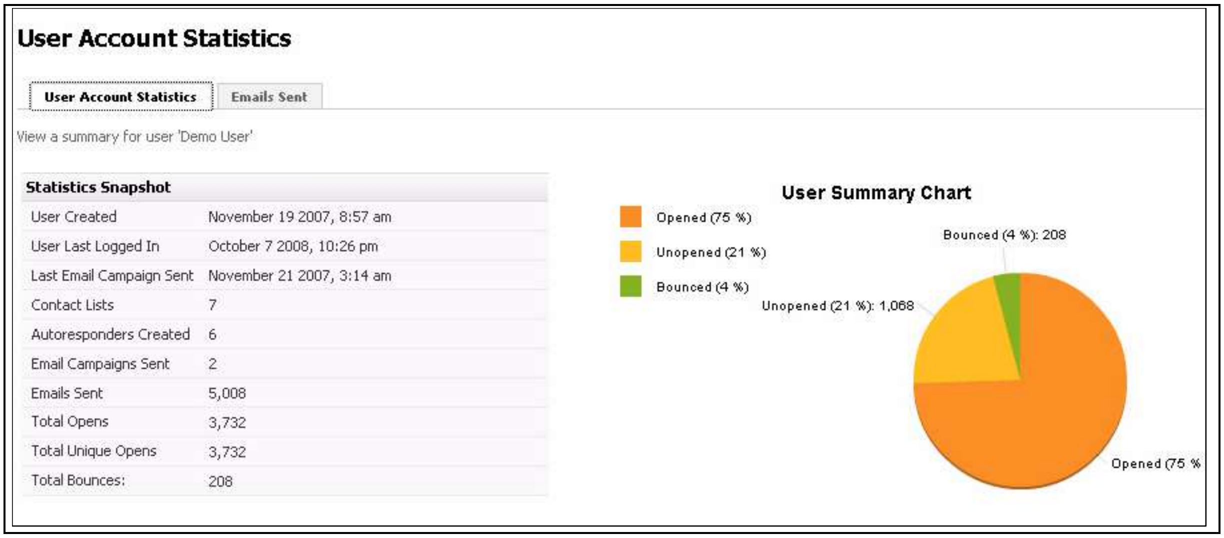
Viewing Detailed User Account Statistics

To view detailed statistics about a user account, click **Statistics** in the navigation bar, then click **Contact list statistics**. Click a contact list's **View** link.

Note: See Using the Detailed Statistics Screens for further information on these screens.

The **Detailed contact list statistics** screen displays at the **Contacts snapshot** tab.

Figure 143 Detailed User Account Statistics



The following table describes the tabs in this screen.

Table 42 Detailed User Account Statistics

User account statistics (snapshot)	Use this tab to see statistics about the user's creation date and last login date, the number of email campaigns, autoresponders and contact lists the user has created, and the number of opened and bounced emails the user has sent out.
Emails sent	Use this tab to view the number of emails the user has sent in a given period.

Managing Statistics

This section describes how to export statistical information to a CSV (Comma-Separated Values) file, print statistics, and use the **Detailed statistics** screens.

Exporting Statistics

Take the following steps to export statistics to a CSV file:

1. Click **Statistics** in the navigation bar, then click the option you want to export. In the screen that displays, click an entry's **Export** link. Alternatively, select multiple entry's checkboxes and select **Export** from the **Choose an action menu**.
2. The page reloads. An information bar displays.

Note: This example shows the information bar for **Email campaign statistics**.

Figure 144 Exporting Statistics

3 If you want to see the CSV file in your browser, click the **Click here** link.

If you want to save the file to your computer, right-click the link and select **Save link as...**. A dialog box displays. Use the dialog box to save the exported CSV file.

Printing Statistics

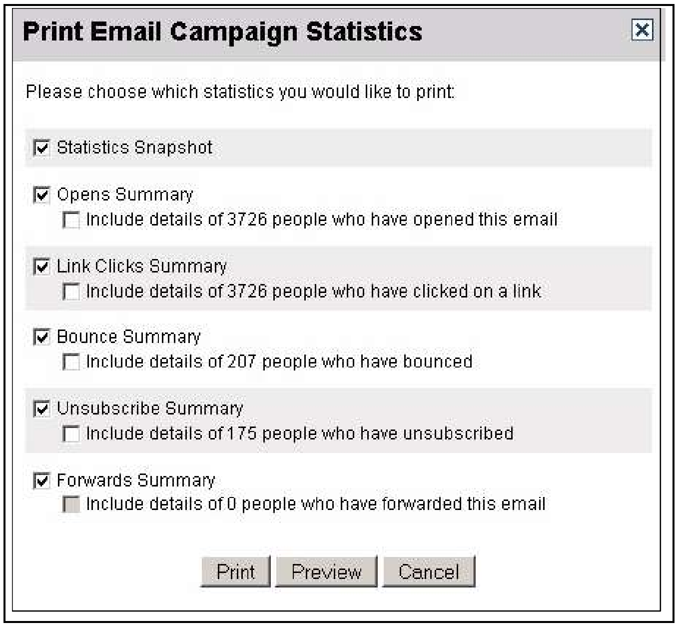
Take the following steps to print out statistics:

Note: If you have a PDF generation application (such as Adobe Acrobat) you can also create a PDF file.

1 Click **Statistics** in the navigation bar, then click the option you want to print. In the screen that displays, click an entry's **Print** link. Alternatively, select multiple entry's checkboxes and select **Print** from the **Choose an action menu**. The **Print Statistics** screen displays.

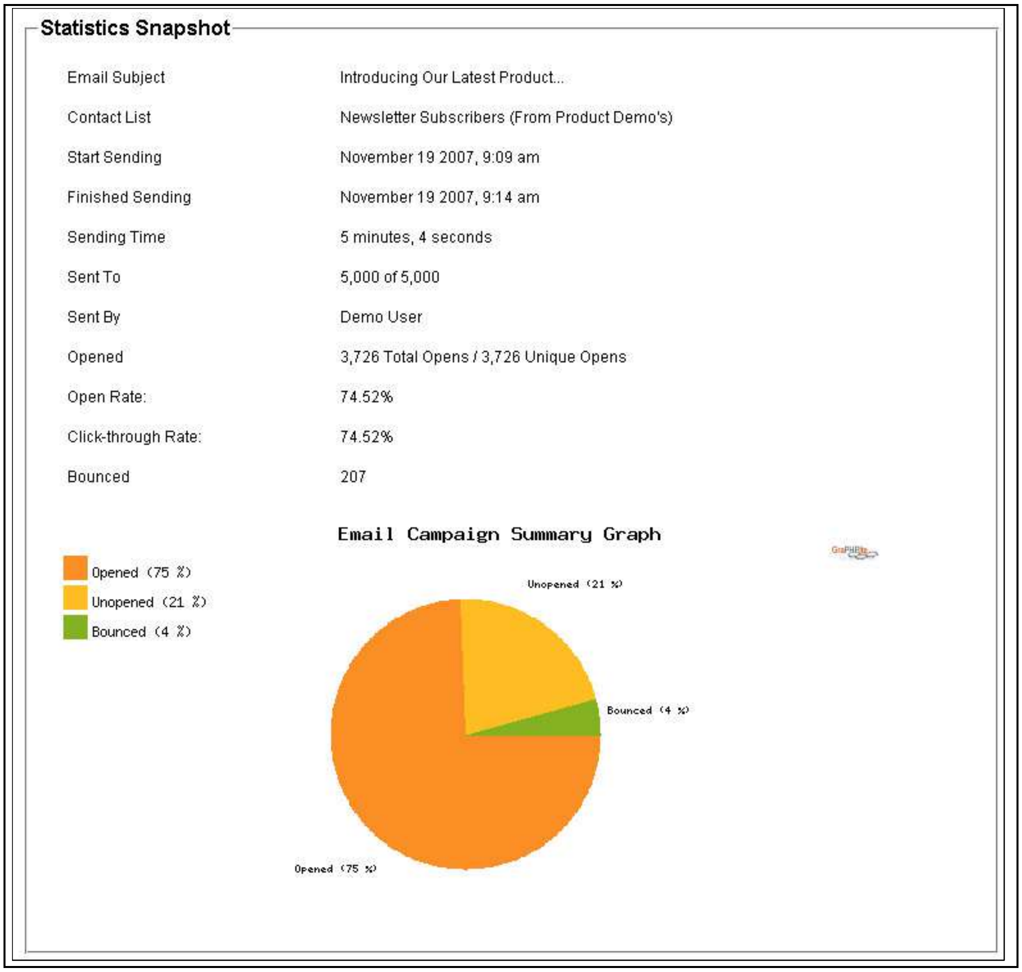
Note: This example uses the screens for **Email campaign statistics**. The screens for other types of statistics are similar.

Figure 145 Printing Statistics



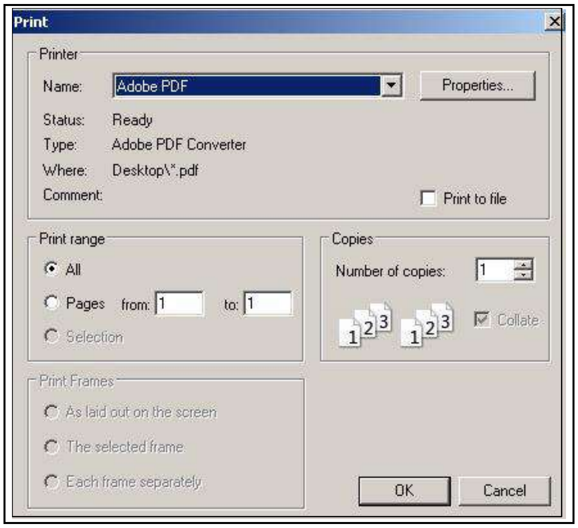
2. Select the types of statistics you want to include in the printed output.
3. Click **Preview** to see how the printed output will look. The preview opens in a new browser window.

Figure 146 Printing Statistics: Preview



4 Close the preview window. In the **Print Statistics** screen, click **Print**. A print dialog box opens.

Figure 147 Printing Statistics: Print Dialog



Select the printer you want to use. Click **Properties** to configure the print job further.

Note: If you want to make a PDF file and have a PDF generation application (such as Adobe Distiller), select the application from the **Name** menu.

5 Click **OK** to send the print job to the printer.

Using the Detailed Statistics Screens

When you click a **View** link in one of the statistics screens, a **Detailed statistics screen** displays. This screen contains multiple tabs, each of which displays a different subset of information about the subject (see the section on each screen for information on each tab).

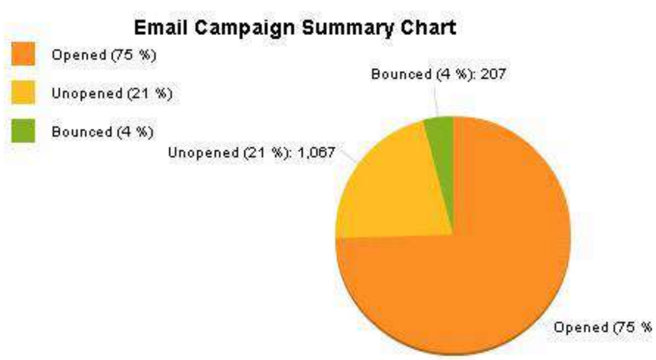
Each detailed statistics screen shares many features:

- Use the list at the left of each screen to see detailed statistical information about the relevant subject.

Figure 148 Detailed Statistics: Detailed List

- Each **Detailed statistics screen** opens at the **Snapshot** tab. In most instances, this screen contains a circular pie chart (those that do not contain a pie chart contain a timeline).

Figure 149 Detailed Statistics: Pie Chart

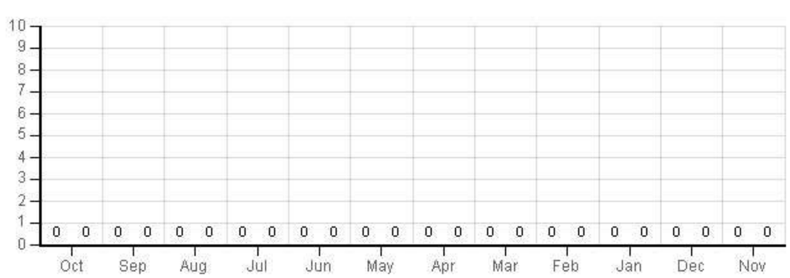


To display information about a segment of the chart, place the mouse pointer over the segment, or an item in the key on the left.

To make a segment more visible by detaching it from the rest of the chart, click the segment or the corresponding item in the key.

- Screens that do not contain a pie chart contain a timeline.

Figure 150 Detailed Statistics: Timeline



This displays the number of instances on the **y** (up) axis, and the time on the **x** (across) axis.

Note that the timeline runs from right to left; the most recent information is on the left, next to the **y** axis.

- Control the timeline by defining its **Date range**.

Figure 151 Detailed Statistics: Date Range

Select the time period you want to view from the drop-down list. If you select **Custom**, select the start and end dates in the fields that display.

Figure 152 Detailed Statistics: Custom Date Range

- Beneath the graphical representation of the information in the screen is a list of all the relevant records represented in the pie chart or timeline. Use this list to see each individual record.

Figure 153 Detailed Statistics: Individual Records

Email Address	Date Opened	Opened Email As
email+2268@domain.com	December 12 2007, 3:08 pm	HTML Email
email+735@domain.com	December 12 2007, 3:06 pm	HTML Email
email+1454@domain.com	December 12 2007, 3:04 pm	HTML Email

- Some screens contain a list box that allows you to refine the statistics in the screen. For example, you can see information on all links clicked by recipients, or select a specific link to see statistics. Select the option from the list, then click **Go**.

Figure 154 Detailed Statistics: Refine Lists

Editing HTML and Text

The email software provides a full-featured WYSIWYG (What You See Is What You Get) HTML editor, including an HTML code editor and preview function, as well as a plain-text editor.

Use these editors to create and modify templates, emails, autoresponders, and other HTML and plain-text features.

Note: See the relevant section of this user's guide for information on how to reach the editing screen for each type of HTML or plain-text feature.

You can also validate your email, ensuring that it displays correctly in a variety of popular email clients.

- See Using the HTML Editor for information on the WYSIWYG editor.
- See Using the Text Editor for information on the plain-text editor.
- See Validating an Emailfor information on checking how you email displays in popular email clients.

Using the HTML Editor

The email software's built-in HTML editor is an HTML design tool that allows you to easily create and modify your emails. You can use the WYSIWYG editing tool, work directly with HTML code, and preview your email.

HTML Source Options

In some instances of the HTML editor, you have a choice of how to build the HTML document.

- If you want to use the built-in WYSIWYG (What You See Is What You Get) editor in this page, select **Create content using the WYSIWYG editor below**.
- If you want to use an HTML file on your computer, select **Upload a file from my computer**. Click the **Browse** button that displays. A file upload window displays; locate and select the file you want to use and click **OK**. Click **Upload**. The HTML editor screen updates to show the new file.
- If you want to use a file from a page on the Internet, select **Import a file from a web site** and enter the full URL (for example,

"http://www.examplesite.com/examplepage.html") in the field that displays. Click **Import**. The HTML editor screen updates to show the new file.

HTML Editor Overview

The HTML editor is divided into three sections.

Figure 155 HTML Editor Overview

- Use **Design Tools** to control how text and images display, import material, create hyperlinks and a variety of other tasks. See Using Design Tools for more information.

- Use the **Editing Window** to control text blocks and image placement, and write your email's text content. See Using the Editing Window for more information.
- Use **Tags and Tabs** to switch between the **Editing Window**, the **Source Window** and the **Preview Window**, and to show or hide the advanced **Design Tools**. You can also see and select the HTML tags that relate to a selection in the WYSIWYG editor. See Using Tags and Tabs for more information.

Using Design Tools

The **Design Tools** allow you to edit every aspect of your HTML document.

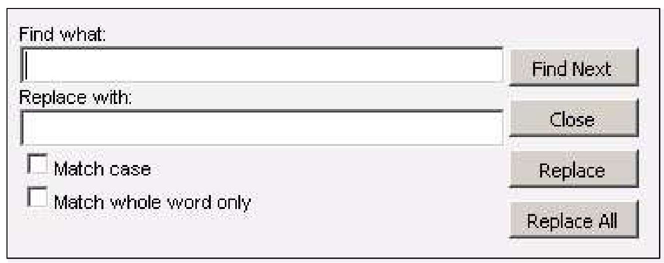
Note: Not all fields are available for all documents.

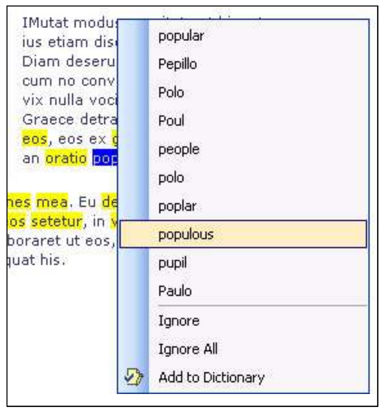
Note: Not all elements shown here display in **Simple mode**. To view all elements, click **Complete mode** at the bottom of the screen. See Using Tags and Tabs.

Figure 156 HTML Design Tools

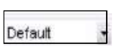
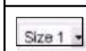
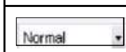
Table 43 HTML Design Tools

	Theme	Click this to choose the text color scheme for your document. Select a color to change all heading text to a matching color. If you choose **No color**, the document's default text color scheme is used. If you want to use a color that does not display in the list, click **More Colors**. An advanced color picker displays. Select the color you want to use, or enter its RGB (Red, Green, Blue) values, and click **OK**.
	Fullscreen mode	Click this to expand the HTML editor to occupy the full browser window. When in fullscreen mode, click this icon again to return to windowed mode.
	Undo	Click this to undo the last change you made to the document.
	Redo	Click this to repeat the last change you made to the document.

	Paste	Click this to place the contents of the clipboard into the document at the insertion point. • If you want to paste an image or formatted text, select **Paste**. • If you want to paste text, while removing text formatting, select **Paste as Plain Text**. • If the contents of the clipboard were taken from Microsoft Word, select the **Paste from MS Word** option. This removes formatting tags.
	Find and replace	Click this to find and replace specific text. The **Find/Replace** window displays. **Figure 157** The Find/Replace Window  • Enter the term you want to find in the **Find what** field. If you want to replace the text with another term, enter it in the **Replace with** field. • If you want your search to be case-sensitive (for example, “Search Term” is not the same as “search term”), select **Match case**. • If you want to search for complete words only (so a search for “sea” does not return a match for “search”), select **Match whole word only**. • Click **Find Next** to search for the term you entered in the **Find what** field. • Click **Replace** to replace the highlighted text with the term you entered in the **Replace with** field. • Click **Replace All** to find every instance of the search term you entered in the **Find what** field, and replace them with the term you entered in the **Replace with** field. • Click **Close** to close the Find/Replace window.

	Check spelling	Click this to check the spelling of the text in your document. • If you select text before clicking this icon, only the selected text is checked. • If you do not select any text before clicking this icon, all the text in the document is checked. The email software checks the text. Any words that appear to be spelled incorrectly are highlighted. Click a highlighted word to see some suggestions. **Figure 158** Check Spelling  • Click a suggestion to replace the misspelled word with the suggested word. • Click **Ignore** to move on to the next word, or click **Ignore All** to finish the spell check. • If you want to allow a highlighted word in future spell checks, click **Add to Dictionary**.
	Bold	Click this to bold the selected text or, if the text is already bolded, to remove bolding.
	Underline	Click this to underline the selected text or, if the text is already underlined, to remove the line.
	Italic	Click this to italicise the selected text or, if the text is already italic, to remove the italics.
	Insert ordered list	Click this to insert a numbered list. If you select paragraphs already in the document and click this, the text is converted to a numbered list.
	Insert unordered list	Click this to insert a bulleted list. If you select paragraphs already in the document and click this, the text is converted to a bulleted list.

	Align left	Select text in the document and then click this to align the text to the left side of its text box.
	Align center	Select text in the document and then click this to align the text to the center of its text box.
	Align right	Select text in the document and then click this to align the text to the right side of its text box.
	Justify	Select text in the document and then click this to align the text to both the left and right sides of its text box.
	Help	Click this to see online help for the HTML editor from the email software knowledge base.
	Remove text formatting	Select text and click this to return the text to its default state.
	Increase indent	Select text and click this to increase the space between the text and the left side of its text box.
	Decrease indent	Select text and click this to decrease the space between the text and the left side of its text box.
	Subscript	Select text and click this to reduce the text in size and drop it below the regular level.
	Superscript	Select text and click this to reduce the text in size and raise it above the regular level.
	Insert link	Select text, then click this to turn the text into a hyperlink. The **Link** screen displays. See Creating and Editing Hyperlinks for more information.
	Create email link	Select text, then click this to turn the text into a link that a recipient can click to send an email to the address that you specify. See Creating and Editing Email Links for more information.
	Insert / modify anchor	Click this to insert an anchor at the insertion point. Select an existing anchor and click this to edit the anchor's name. A window displays. Enter the new **Anchor Name** and click **OK**.

	Insert or modify an image	Click this to upload an image to the email software server and insert it at the insertion point. Select an existing image to edit its properties. See Inserting and Editing Images for more information.
	Table functions	Click this to see a menu that allows you to create and modify HTML tables. See Creating and Editing Tables for more information.
	Form functions	Click this to see a menu that allows you to create and modify HTML forms. See Inserting and Editing Forms for more information.
	Modify page properties	Click this to see and edit basic information about the HTML page. See Modifying Page Properties for more information.
	Insert a custom field	Click this to insert a custom field. Custom fields use variables to include information defined elsewhere. Most of these variables are different for each subscriber ("contact's email address", for example). You can also define variables that are specific to each contact list. See Inserting Custom Fields for more information.
	Font name	Select the font family that you want to use for the selected text. If no text is selected, the change affects the entire paragraph.
	Font size	Select the font size that you want to use for the selected text. If no text is selected, the change affects the entire paragraph.
	Format	Select the heading style that you want to use for the selected text. If no text is selected, the change affects the entire paragraph.
	Font color	Select text and click this to assign the color that displays to the text. To view a color picker, click the triangular icon next to the button. Click a color to assign the color to the text. If you want to use a color that does not display in the list, click **More Colors**. An advanced color picker displays. Select the color you want to use, enter its RGB (Red, Green, Blue) values, or enter its hex value, and click **OK**.

	Highlight	Select this and click this to highlight the text. Highlighting text adds a colored background to the text. To view a color picker, click the triangular icon next to the button. Click a color to assign the color to the text background. If you want to use a color that does not display in the list, click **More Colors**. An advanced color picker displays. Select the color you want to use, enter its RGB (Red, Green, Blue) values, or enter its hex value, and click **OK**.
	Insert horizontal line	Click this to add a horizontal line at the insertion point. If the insertion point is in a paragraph, the paragraph is split into two.
	Insert character	Click this to insert a non-standard character. Select the character that you want to insert in the window that displays.
	Show borders	Click this to see element borders. Click it again to hide element borders.

Creating and Editing Hyperlinks

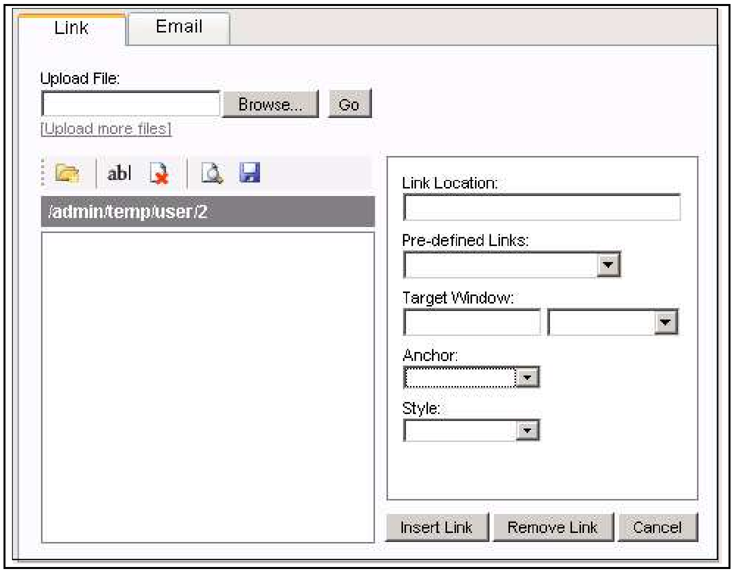
Use the **Link** screen to create and edit hyperlinks that allow recipients of your email to click through to web pages on the Internet or files stored on the email software server.

Note: The file to which you are linking must be available on the Internet. If you are linking to a file that is not already available on the Internet, you can make it available by uploading it to the email software server. See Uploading Files and Images to the Email Software Server.

Note: For information on links that allow a recipient to send an email, see Creating and Editing Email Links.

To access the **Link** screen, click the **Insert Link** ( ) icon in the HTML editor (see Using the HTML Editor).

Figure 159 The Link Screen



- If you want to link to an existing web page on the Internet, enter the full URL in the **Link Location** field.
- See Creating Pre-defined Links for information on creating links related to common email software features (unsubscribing from the contact list, for instance).
- See Specifying Window Type for information on specifying the type of window in which the link opens.
- See Uploading Files and Images to the Email Software Server for information on hosting linked files on the email software server so they can be accessed by your email's recipients.

The following table describes the labels not discussed in the above-mentioned sections.

Table 44 The Link Screen: Common Fields

Anchor	If the document contains named anchors, select the destination anchor from the list. When a recipient clicks the link, the email displays with the anchor's location at the top of the screen.
Style	If your document has styles defined, you can select a **Style** to have the link display using the selected style.
Insert link	Once you have set up your hyperlink, click this to place the link in your email document.
Remove link	If you are editing a hyperlink, click this to remove the link. The plain text remains in your email document.

Cancel	Click this to close the **Link** screen without saving any changes.

Creating Pre-defined Links

Alternatively, use one of the **Pre-defined Links** to allow the recipient to take action related to the email software.

Table 45 The Link Screen: Pre-defined Links

Link to Contact List Archives	Use this link to allow a user to see all the emails that have been sent to this contact list in the past. This option uses the **%%mailinglistarchive%%** variable.
Web Version of Email	Use this link to allow a user to view the HTML version of this email, stored on the email software server, in their default web browser. This option uses the **%%webversion%%** variable.
Unsubscribe Link	Use this link to allow users to remove their email addresses from the contact list. This option uses the **%%unsubscribelink%%** variable.

Specifying Window Type

If you want to specify the type of window in which the link opens, select an option in the **Target Window** field. The HTML code displays in the field to the left.

Table 46 The Link Screen: Target Window Options

None	No HTML	Select this if you do not want to specify the type of window in which the link opens.
Same frame	_self	Select this to have the link open in the same window as the original email. If the original email uses frames, the new file opens in the same frame as the link.
Whole page	_top	Select this to have the link open in the whole page of the original email. If the original email uses frames, the new file removes the frames.
New window	_blank	Select this to have the link open in a new browser window.
Parent frame	_parent	Select this to have the link open in the parent frameset. Use this option when the original email uses multiple framesets.

Uploading Files and Images to the Email Software Server

If you want to link to or embed a file that is not already available on the Internet (such as an image or another HTML file on your computer), use the file list on the left of the **Links** or **Images** screen. When you upload a file from your computer to this list it is automatically hosted on the email software server, and can be accessed over the Internet.

- Use the **Links** screen to upload files you want a recipient to access via a hyperlink. See Creating and Editing Hyperlinks.
- Use the **Images** screen to upload images you want to embed in your email document. See Inserting and Editing Images.

Table 47 Link and Images Screens: Uploading Files and Images

	Upload File	Enter the filepath of the file on your computer that you want to upload to the email software server. Alternatively, use the **Browse** button to locate the file.
	Browse	Click this to locate a file you want to upload to the email software server. A **File Upload** window displays. Locate the file and click **Open**. Then, click **Go** to upload the file.
	Go	Once you have selected a file to upload (the filepath displays in the **Upload File** field) click this to upload the file.
	Upload more files Upload more images	Click this to see two more fields where you can upload more files. Click each field's **Browse** button to select the file you want to upload. Note: The **Upload more files** button displays in the **Links** screen, and the **Upload more images** button displays in the **Images** screen.
	New folder	Click this to create a new folder for uploaded files on the email software server. The current directory path displays above the list. A window displays in which you can name the new folder. Enter the new name and click **OK**.

	Rename selected file/folder	Select a file or folder and click this to rename the file or folder. Note: Click a folder's icon to select it. A window displays in which you can rename the folder. Enter the new name and click **OK**.
	Delete selected file/folder	Select a file or folder and click this to remove the file or folder. Note: If you delete a folder, all files and subfolders within the folder are also deleted.
	Preview selected file	Select a file and click this to see a preview of the file. A new window opens, displaying the file. Close the window to return to the **Link** screen. Note: This icon displays only in the **Link** screen.
	Download selected file	Select a file and click this to download the file to your computer. Note: This icon displays only in the **Link** screen.
	Toggle thumbnails	Click this to show or hide image thumbnails. Note: This icon displays only in the **Images** screen.
	Set image as background	Select an image and click this to use the image as the background for your document. If the image is not the same size as the document, it is repeated (tiled). Note: This icon displays only in the **Images** screen.

Creating and Editing Email Links

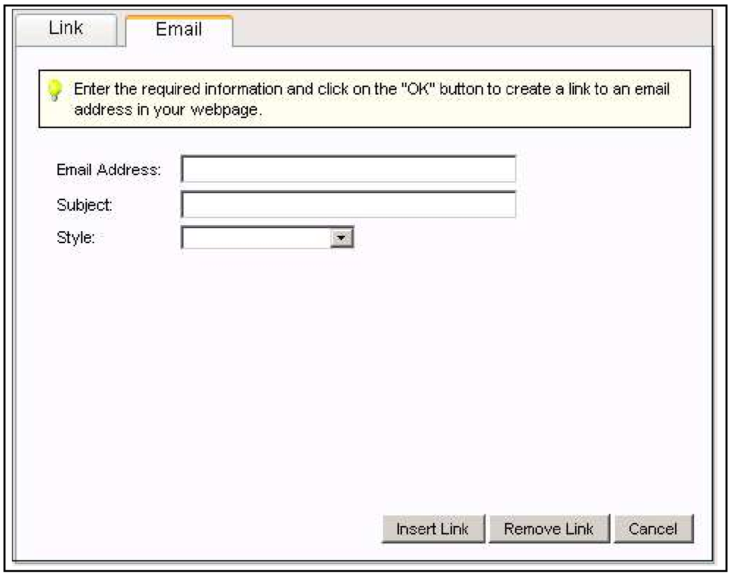
Use the **Email Link** screen to create and edit links that recipients can click to send an email to the address that you specify. Email links use the HTML **mailto** command. Take the following steps to create or edit an email link:

1 To create a new email link in your document, select text in the HTML editor (see Using the HTML Editor) and click the **Create email link** button ( ).

To edit an existing email link, select the link in the document and click the **Create email link** button.

The **Email Link** screen displays.

Figure 160 The Email Link Screen



2 Enter the **Email Address** to which you want the email to be sent.

3 If you want to specify the email subject (for example, “Response to Newsletter #15”), enter the subject line in the **Subject** field.

4 If your document has styles defined, you can select a **Style** to have the link display using the selected style.

5 Click **Insert Link** to place the email link in your document.

   Alternatively, click **Remove Link** to return the selected text in your document to its default state.

   Click **Cancel** to close the **Email Link** screen without saving any changes.

The email link displays in the HTML editor.

Inserting and Editing Images

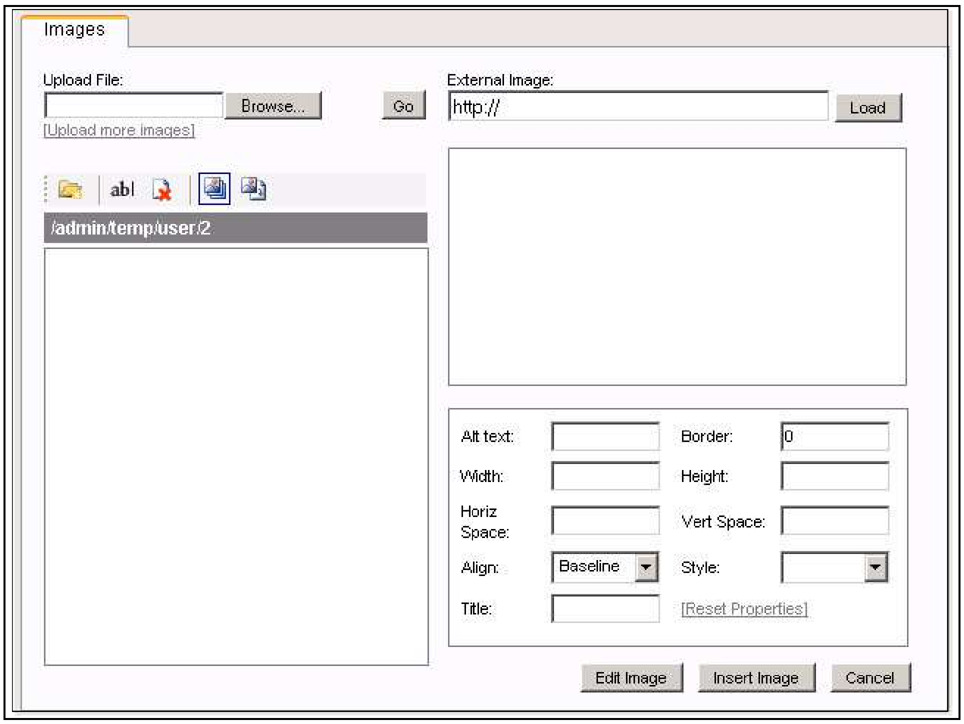
Use the **Images** screen to insert or edit an image in your document.

- To insert an image, access the HTML editor (see Using the HTML Editor). Place the insertion point where you want the image to appear, then click the **Insert or modify an image** button ( ).
- To edit an image, access the HTML editor. Select the image you want to edit, then click the **Insert or modify an image** button.

You can also resize, drag and drop images in the editing window. See Using the Editing Window.

Note: The email software allows you to use the following image types in your document: bitmap (.bmp), graphics interchange format (.gif), JPEG (.jpg), portable network graphics (.png), tagged image file format (.tif or .tiff).

Figure 161 The Images Screen



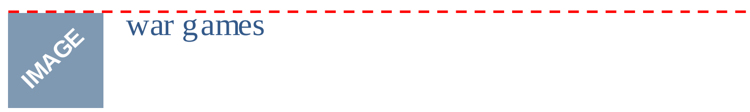
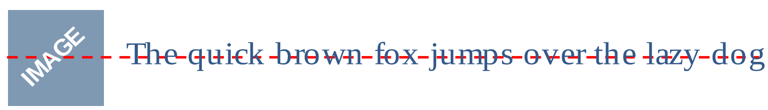
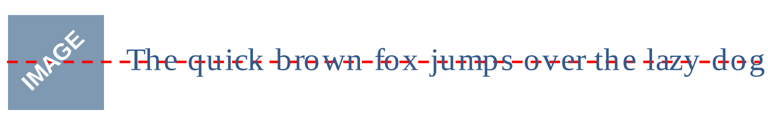
Images in your documents must be uploaded to the email software server, or available elsewhere on the Internet. Use the fields on the left side of this screen to upload images to the email software server, and configure the server's file structure. See Uploading Files and Images to the Email Software Server for information on these fields.

The following table discusses the fields on the right side of this screen.

Table 48 The Images Screen

External image	If the image you want to insert is available on the Internet, but not on the email software server, enter the full URL here ("http://www.examplesite.com/exampleimage.jpg", for instance).

Load	Enter an image's URL in the **External image** field and click this to display the image in the image field below.
View preview in new window ( )	This icon displays once you have selected an image from the email software server, or entered a URL in the **External image** field and clicked **Load**. Click this icon to open a new browser window, displaying the selected image at full size.
Alt text	Enter the text that displays if the image is unavailable (for example, if the server is offline or the recipient's email client blocks images). Note: Not all email clients support Alt text.
Border	Specify the width of the border around the image. Enter **0** if you do not want a border around the image. Note: To change the border color, insert the image and then use the **Font color** tool ( ) to select the new border color.
Width	Specify the width of the image in pixels. Note: This field is configured automatically when you select or load an image; you do not need to change it if you do not want to resize the image.
Height	Specify the height of the image in pixels. Note: This field is configured automatically when you select or load an image; you do not need to change it if you do not want to resize the image.
Horiz space	Enter the amount of empty space to left and right of the image in pixels.
Vert space	Enter the amount of empty space above and below the image in pixels.

Align	Select where the image should display in relation to the paragraph of text in which it is placed. Bear in mind that not all HTML viewers display aligned images in exactly the same way. **Baseline**: this aligns the image with the baseline of the text.  **Top**: aligns the image with the top of the tallest possible letters in the line of text (even if there are no tall letters).  **Middle**: in most browsers, this aligns the baseline of the line of text with the middle of the image.  However, in some browsers this aligns the middle of the text with the middle of the image (like **ABSmiddle**).  **Bottom**: this behaves the same as **Baseline**.  In some older browsers, “bottom” referred to the absolute bottom of the text (including letters with “tails,” such as **g** and **y**). **TextTop**: this is very similar to **Top**. This aligns the image with the tallest actual letters in the line of text.  **ABSmiddle**: this aligns the middle of the text with the middle of the image.  **ABSbottom**: this aligns the bottom of the image with the absolute

bottom of the text, including letters with “tails,” such as **g** and **y**.

The quick brown fox jumps over the lazy dog.

Left: this places the image at the left margin. Text flows around the image.

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.

Right: this places the image at the right margin. Text flows around the image.

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.


Style	If your document has styles defined, you can select a **Style** to have the image display using the selected style.
Title	Enter a title for the image. In most HTML viewers, this displays when the recipient places the mouse pointer over the image. However, not all email clients support this. Note: If you want nothing to display when the recipient places the mouse pointer over the image, leave this blank.
Reset properties	Click this to return the image properties to their default values. The image's **Width** and **Height** return to their full size values. Any information in the following fields is deleted: **Alt text**, **Border**, **Horiz space**, **Vert space**, **Align**, **Style** and **Title**.
Edit image	Click this to open the image in a new window and edit it using the Snipshot online image editing tool. At the time of writing, this tool allows you to: • Resize the image. • Crop the image. • Enhance the image. • Adjust the image's aspect ratio, tilt (horizontal angle), exposure, contrast, saturation, hue and sharpness. • Rotate the image. • Turn a color image to greyscale. See **www.snipshot.com** for more information. Note: This field displays only when you are inserting a new image.
Insert image	Click this to place the image into your document at the insertion point. Note: This field displays only when you are inserting a new image.
Modify image	Click this to save your changes to the image and return to the HTML editor. Note: This field displays only when you are editing an existing image in your document.
Cancel	Click this to close this window and return to the HTML editor without saving your changes.

Creating and Editing Tables

In HTML, tables allow you to arrange information in horizontal rows and vertical columns.

- To insert a table, access the HTML editor (see Using the HTML Editor). Place the insertion point where you want the table to appear, then click the **Table functions** button ( ) and select **Insert table**. The **Insert table** screen displays (see Inserting a Table).
- To edit a table, access the HTML editor. Select the table you want to edit, then click the **Table Functions** button.

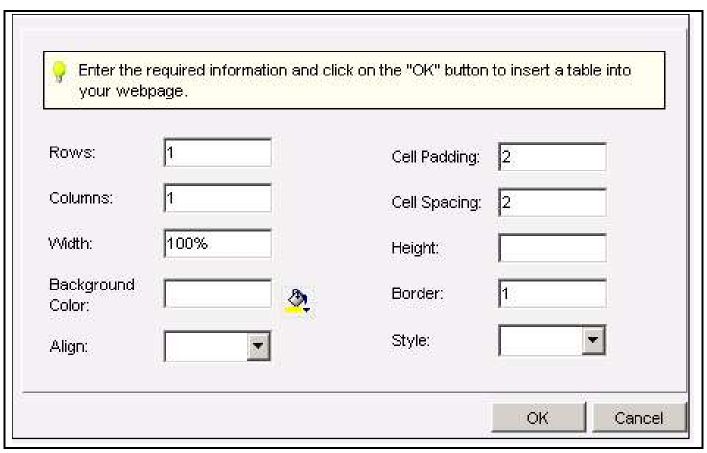
  You can also resize tables, and add rows and columns, in the editing window. See Using the Editing Window.

Inserting a Table

Take the following steps to insert a table in a document:

1 In the HTML editor, click the **Table functions** button ( ) and select **Insert table**. The **Insert table** window displays.

Figure 162 Insert Table



2 Enter the number of horizontal **Rows** and vertical **Columns** you want your table to have.

3 Enter the number of **Cell Padding** pixels you want to give your table. Cell padding inserts space between the edges of each table cell and the text inside the cell.

4 Enter the number of **Cell Spacing** pixels you want to give your table. Cell spacing inserts space between the cells in your table.

5 Define the **Width** of your table. You can define the table width in pixels by entering an integer (for example, "**150**"), or as a percentage of the recipient's browser window by entering a percentage (for example, "**75%**").

6 Define the **Height** of your table, if required. As with the **Width**, enter an integer to define the table height in pixels, or enter a percentage value to define the table height as a percentage of the recipient's browser window. If you leave this value blank, the table's default height is equal to the text height, plus cell padding and spacing for each row, multiplied by the number of rows.

7 If you want to define a **Background color** for the table, click the color picker icon ( ). Alternatively, enter a color's hex value ("**#ffffff**", for instance).

8 If you want your table to have a **Border**, specify its width. If you want a table with no borders, enter "**0**" in this field.

Note: The border does not display in the **Edit** screen; click the **Preview** tab (see Using Tags and Tabs) to see the table as it will display in the recipient's email client.

9 In the **Align** list, select how you want the table to be displayed in its container.

- Select **Left** to have the table display at the left-hand margin.
- Select **Right** to have the table display at the right-hand margin.
- Select **Center** to have the table display in the middle of the container.

10 If your document has styles defined, you can select a **Style** to have the table display using the selected style.

11 Click **OK**. Your table displays in the HTML editor.

Alternatively, click **Cancel** to close the **Insert table** screen without making any changes.

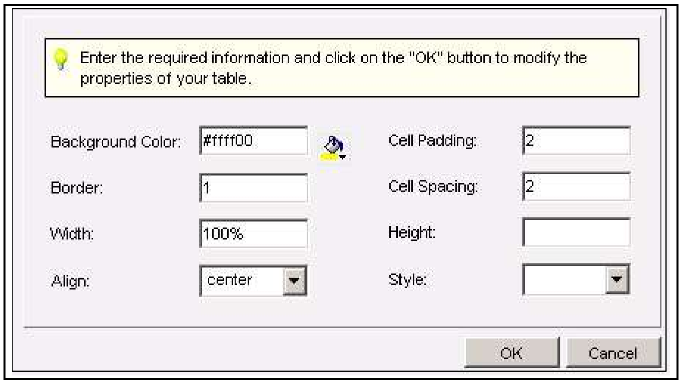
Modifying Table Properties

Take the following steps to change the properties of an existing table in a document:

1 In the HTML editor, click inside the table you want to modify.

2 Click the **Table functions** button ( ) and select **Modify table properties**.The **Modify table properties screen** displays.

Figure 163 Modifying Table Properties



3 Make the changes to the table's properties. The fields that display are the same as those in the **Insert table** scree. See Inserting a Table for information on how to modify the fields.

4 Click **OK**. The changes to your table display in the HTML editor.

Alternatively, click **Cancel** to close the **Modify table properties** screen without making any changes.

Modifying Cell Properties

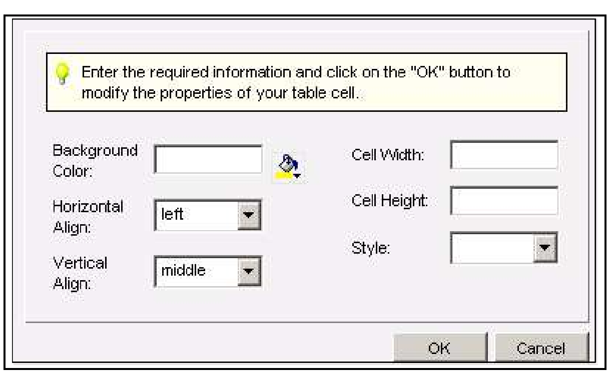
Take the following steps to change the properties of a cell in an existing table in a document:

1 In the HTML editor, click inside the cell you want to modify.

Note: The email software supports the modification of one cell at a time.

2 Click the **Table functions** button ( ) and select **Modify cell properties**.The **Modify cell properties screen** displays.

Figure 164 Modifying Cell Properties



3 If you want to define a **Background color** for the cell, click the color picker icon ( ). Alternatively, enter a color's hex value ("**#ffffff**", for instance).

4 Enter the **Cell width** and **Cell height**, if required. The **Cell width** field affects all cells in the same column as the selected cell, and the **Cell height** field affects all cells in the same row as the selected cell.

5 In the **Horizontal Align** list, select how you want text or images to display in the selected cell.

- Select **Left** to have the text or image display at the left-hand cell margin.
- Select **Right** to have the text or image display at the cell's right-hand margin.
- Select **Center** to have the text or image display in the horizontal middle of the cell.

6 In the **Vertical Align** list, select how you want text or images to display in the selected cell.

- Select **None** to have the text or image display in its default vertical location.
- Select **Top** to have the text or image display at the upper cell margin.
- Select **Middle** to have the text or image display at the vertical middle of the cell.
- Select **Bottom** to have the text or image display at the bottom cell margin.

7 Click **OK**. The changes to your cell display in the HTML editor.

Alternatively, click **Cancel** to close the **Modify cell properties** screen without making any changes.

Inserting and Deleting Columns

Take the following steps to add a column to a table in a document:

1 In the HTML editor, select a table cell next to which you want to add a column.

2 Click the **Table functions** button ( ). Select **Insert column to the right** or **Insert column to the left**.

The new column displays in the HTML editor.

Take the following steps to delete a column from a table in the HTML editor:

1 In the HTML editor, select a table cell in the column you want to delete.

2 Click the **Table functions** button ( ). Select **Delete column**.

The column is deleted from the table.

Inserting and Deleting Rows

Take the following steps to add a row to a table in a document:

1. In the HTML editor, select a table cell above or below which you want to add a row.
2. Click the **Table functions** button ( ). Select **Insert row above** or **Insert row below**.

   The new row displays in the HTML editor.

Take the following steps to delete a row from a table in a document:

1. In the HTML editor, select a table cell in the row you want to delete.
2. Click the **Table functions** button ( ). Select **Delete row**.

   The row is deleted from the table.

Increasing and Decreasing Column Span

Take the following steps to merge a table cell into the column to its immediate right (increase column span) or split a table cell from a cell with which it was previously combined (decrease column span):

Note: A cell can be split down to a single column width, and no further.

1. In the HTML editor, select a table cell in the column you want to modify.
2. Click the **Table functions** button ( ).
3. Select **Increase column span** to merge the cell with the cell to its right, or select **Decrease column span** to split a multi-column cell from its rightmost section.

   The cell displays in the HTML editor at its modified width.

Increasing and Decreasing Row Span

Take the following steps to merge a table cell into the row beneath it (increase row span) or split a table cell from a cell with which it was previously combined (decrease column span):

Note: A cell can be split down to a single row height, and no further.

1. In the HTML editor, select a table cell in the column you want to modify.
2. Click the **Table functions** button ( ).
3. Select **Increase row span** to merge the cell with the cell beneath it, or select **Decrease row span** to split a multi-row cell from its lowest section.

   The cell displays in the HTML editor at its modified width.

Inserting and Editing Forms

HTML forms allow recipients of your email to perform a variety of tasks. They can enter information in form fields, select options using radio buttons, check boxes and list boxes, and click buttons to send or reset the form. Furthermore, hidden form fields in your emails do not display in the recipient's email client, but convey information back to you when a form is sent.

Forms reference scripts in order to perform the required action. These scripts may be located on the email software server, or on another server on the Internet. Alternatively, forms can use an HTML **mailto** command to email the form contents to a specified address.

When you want to add a form to your document, first insert a new form and then add the required fields to the form.

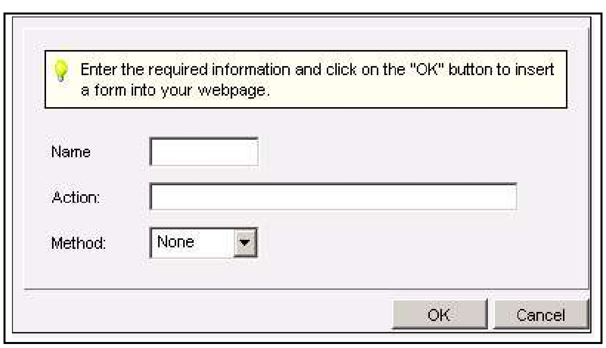
Note: Bear in mind that popular email clients handle forms differently. Some clients do not display forms, whereas others do not permit full form functionality. An alternative to using forms in your email is to link to a page on your website where a recipient can perform the required task.

Inserting a Form

Take the following steps to add a form to a document:

1 In the HTML editor, place the insertion point where you want the form to appear. Click the **Form functions** button ( ) and select **Insert form**. The **Insert form** screen displays.

Figure 165 Insert Form



2 Enter the **Name** you want to give this form.

Note: If this form references a script that specifies the form by name, the **Name** must be identical to the name in the script.

3 In the **Action** field, specify the location of the script you want this form to reference, for example:

```
http://www.somesite.com/somefolder/examplescript.php
```

Note: If you do not enter the full URI, the email software automatically appends its server information to the location you specify.

Alternatively, you can specify an email address to which to send the form's content; use the following format:

```
mailto:someaccount@somesite.com
```

4 Select the **Method** this form uses.

- Select **None** if you do not want to specify the form submission method.
- Select **Get** if you want the form content to be transmitted as a URI. The form content is added to the URI specified in the **Action** field, using a question mark ("**?**") as a separator. For example:

```
http://www.somesite.com/somefolder/examplescript.php?name=val
ue
```

- Select **Post** if you want the form content to be transmitted as a message (using an HTTP POST operation) to the URI specified in the **Action** field. The message contains the form content in the following format:

```
name1=value1&name2=value2&name3=value3
```

5 Click **OK** to insert the form, or click **Cancel** to close the **Insert form** window without saving any changes. See Inserting and Modifying Form Fields for information on adding the form fields you require.

Modifying Form Properties

Take the following steps to change the properties of an existing form in a document:

1 In the HTML editor, select the form you want to modify. Click the **Form functions** button ( ) and select **Modify form properties**. The **Modify form properties** screen displays.

2 Make your changes to the form. The fields that display in this screen are the same as those in the **Insert form** screen; see Inserting a Form.

3 Click **OK** to modify the form, or click **Cancel** to close the **Modify form properties** window without saving any changes.

Inserting and Modifying Form Fields

Once you have created a form in your HTML document (see Inserting a Form) you can insert the form fields you require.

Click the **Form functions** button ( ). Select one of the options from the list that displays:

- Inserting a Text Field
- Inserting a Text Area
- Inserting a Hidden Field
- Inserting a Button
- Inserting a Checkbox
- Inserting a Radio Button
- Inserting a List Box

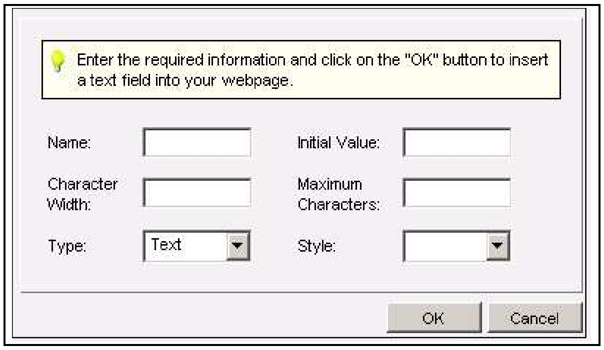
Note: To modify an existing form field, select the field in the HTML editor. Click the **Form functions** button ( ). The options that display are the same as before, except "**Insert**" is replaced with "**Modify**" in each option. The screens that display when you click the options are also the same.

Inserting a Text Field

A text field is a simple, one-line field in which a user may enter data.

1 Click the **Form functions** button and select **Insert Text Field**.

Figure 166 Insert Text Field



2 Enter the field's **Name**. This is displayed next to the user-entered value when the form content is sent.

3 If you want text to display in the field before the user enters anything, enter the text in the **Initial value** field.

4 Specify the **Character width**, if required, and enter the maximum number of text characters the user may enter in the **Maximum characters** field.

5 If you want the text in this field to display as asterisks ("*") select **Password** in the **Type** field. Otherwise, select **Text**.

6 If your document has styles defined, you can select a **Style** to have the field display using the selected style.

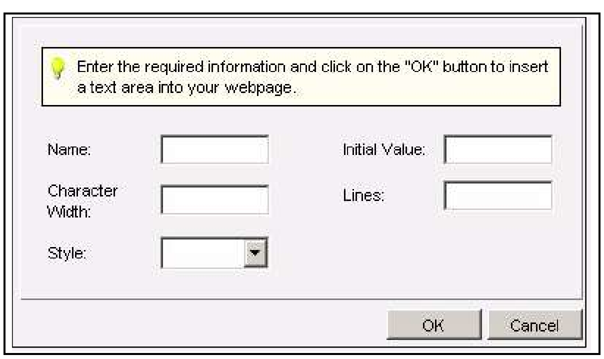
7 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

Inserting a Text Area

A text area is a text field with multiple lines, in which a user may enter data.

1 Click the **Form functions** button and select **Insert Text Area**.

Figure 167 Insert Text Area



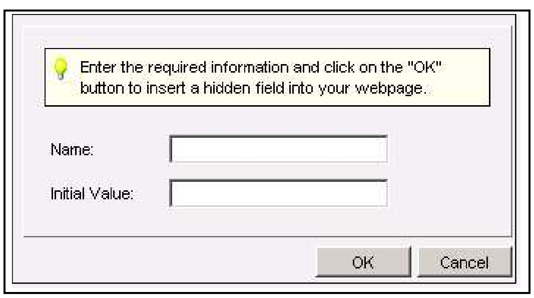
2 Enter the field's **Name**. This is displayed next to the user-entered value when the form content is returned.
3 If you want text to display in the field before the user enters anything, enter the text in the **Initial value** field.
4 Specify the **Character width**, if required.
5 Enter the number of lines of text to display (the text area's height) in the **Lines** field.
6 If your document has styles defined, you can select a **Style** to have the field display using the selected style.
7 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

Inserting a Hidden Field

A hidden field is a form field that does not display on the screen, but contains data to be sent as part of the form content when the form is returned.

1 Click the **Form functions** button and select **Insert Hidden Field**.

Figure 168 Insert Hidden Field



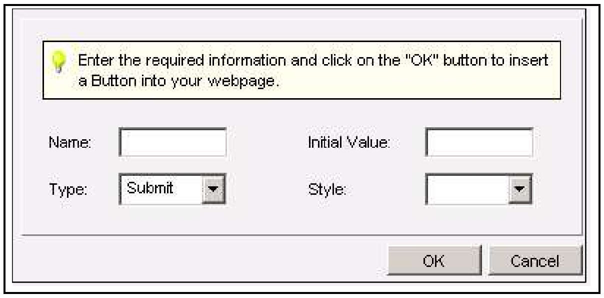
2 Enter the field's **Name**. This is displayed next to the initial value when the form content is sent.
3 Enter the field value in the **Initial value** field. Since this is a hidden field, there is no opportunity for the user to change this value.
4 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

Inserting a Button

Use buttons to allow the user to submit (send) or reset (clear) the form in which they appear, or to include the button's value in the form content.

1 Click the **Form functions** button and select **Insert Button**.

Figure 169 Insert Button



2 Enter the button's **Name**.
3 Enter the text that displays on the button in the **Initial value** field.
4 Select the **Type** of button you want to create:
   - Select **Button** to create a default button.
   - Select **Submit** to create a button that sends the form in the manner you specified in the **Insert form** screen (see Inserting a Form).
   - Select **Reset** to create a button that returns the fields in the form to their default values (blank or displaying their **Initial values**).
5 If your document has styles defined, you can select a **Style** to have the button display using the selected style.
6 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

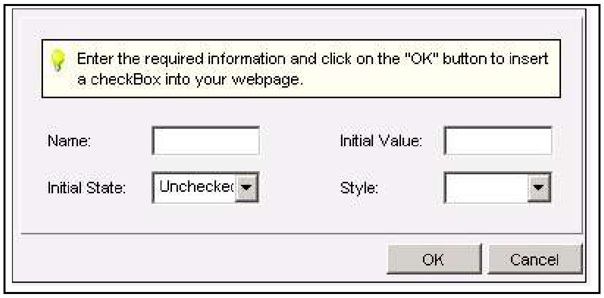
Inserting a Checkbox

Checkboxes () allow users to select options in a form. Use checkboxes when a user may enter multiple choices from a range of options.

Note: Unlike radio buttons, when multiple checkboxes in the same form have the same **Name**, a user may select multiple checkboxes, or none. For this reason it is advised to use checkboxes when a user may select all, none, or a variety of options.

1 Click the **Form functions** button and select **Insert Checkbox**.

Figure 170 Insert Checkbox



2 Enter the checkbox's **Name**.

3 Enter an **Initial value** field. This value will be returned along with the **Name** when the form is sent.

4 Select the **Initial State** of the checkbox:

- Select **Unchecked** to have the button empty (off) by default.
- Select **Checked** to have the button selected (on) by default.

5 If your document has styles defined, you can select a **Style** to have the checkbox display using the selected style.

6 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

Inserting a Radio Button

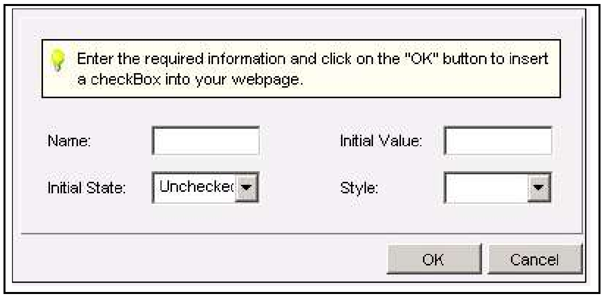
Radio buttons ( ) allow users to select options in a form. Use radio buttons when a user may select only one of a range of options.

When multiple radio buttons in a form have the same **Name**, only one may be checked at a time.

Note: Unlike checkboxes, radio buttons cannot be "unchecked" (deselected) by clicking on them a second time. The only way to deselect a radio button is to select another radio button in the form with the same **Name**. For this reason, it is advised to use radio buttons when the user must select one option or another (for example, "Yes, I want to receive updates" or "No, I don't want to receive updates") and to specify one of the radio buttons as selected by default (use the **Initial state** list).

1 Click the **Form functions** button and select **Insert Radio Button**.

Figure 171 Insert Radio Button



2 Enter the radio button's **Name**. Give all radio buttons in the same options list the same **Name**.

3 Enter an **Initial value** field. This value will be returned along with the **Name** when the form is returned.

4 Select the **Initial State** of the radio button:

- Select **Unchecked** to have the radio button empty (off) by default.
- Select **Checked** to have the radio button selected (on) by default.

5 If your document has styles defined, you can select a **Style** to have the radio button display using the selected style.

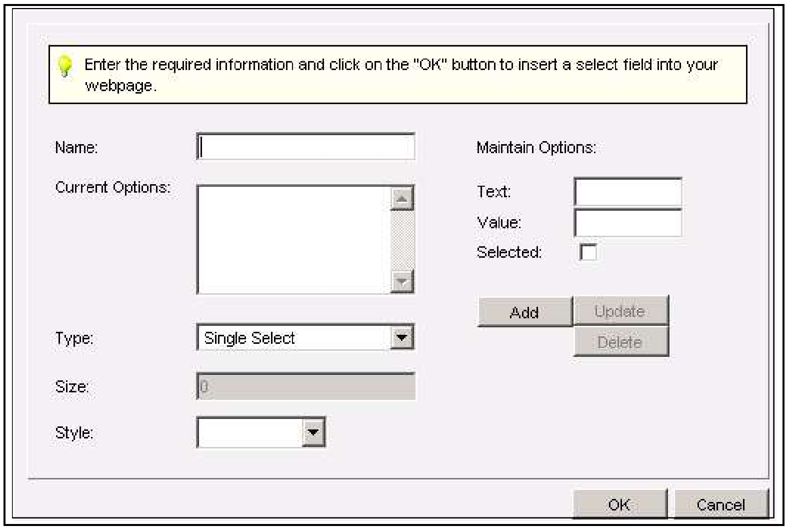
6 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

Inserting a List Box

List boxes, also known as select fields, allow users to select an option from a drop-down or static list.

1 Click the **Form functions** button and select **Insert Select Field**.

Figure 172 Insert List Box



2 Enter the radio button's **Name**.

3 Configure the **Maintain options** fields. These fields allow you to populate the **Current options** list and specify the **Values** that are returned in the form.

- Enter the **Text** that you want to display in the list.
- Enter the **Value** for the list option. Note that the **Value** returned and the **Text** displayed may be completely different, if required.
- Select **Selected** if you want the list option to be selected by default.
- Click **Add** to include the option in the list.
- Select an option in the list, edit it, and click **Update** to save the changes. Alternatively, click **Add** to keep the option with its old values and create a new option with the new values.
- Select an option in the list and click **Delete** to remove it from the list.

4 Select the **Type** of list:

- Select **Single select** to allow the user to select only one option.
- Select **Multiple select** to allow the user to select multiple options.

5 Enter the height of the list box (in text rows) in the **Size** field:

- Enter **0** (default) to have the list display in a single row with a drop-down icon (**Single select**) or in the same number of rows as list options (**Multiple select**).
- Enter **1** (**Multiple select** only) to have the list display in a single row with no drop-down icon. This is not recommended.
- Enter **2** or higher (**Multiple select** only) to display the specified number of rows. The user may navigate the list using the scroll bar on the right of the list box.

6 If your document has styles defined, you can select a **Style** to have the list display using the selected style.

7 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

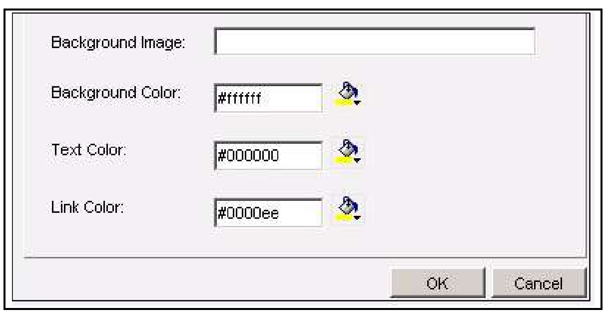
Modifying Page Properties

Take the following steps to modify your document's basic settings, including background and color setup:

Note: You do note need to modify the **Page Title**, **Description**, or **Keywords** in the **Page properties** window. These properties are standard HTML, but are designed for web pages and are not relevant when creating HTML emails.

1 In the HTML editor, click **Modify page properties** ( ).

Figure 173 Page Properties



2 Specify a **Background image** by pasting the image's URL into the field. If the image is larger than the HTML browser window, it is repeated (tiled).

Alternatively, specify a **Background color** by clicking the color picker icon ( ) or entering the color's hex value ("**#ffffff**", for instance).

3 If you want to change the default **Text color** or **Link color** (the color of text associated with a hyperlink) click the appropriate color picker, or enter a color's hex value in the appropriate field.

4 Click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving any changes.

Inserting Custom Fields

Custom fields allow you to include recipient-specific variables in your email campaigns, without manually configuring each email. This is similar to the mail merge feature available in some word processing, spreadsheet and database applications.

Custom fields use variables that refer to information configured and listed elsewhere. The information contained in most variables is different for each subscriber ("contact's email address", for instance).

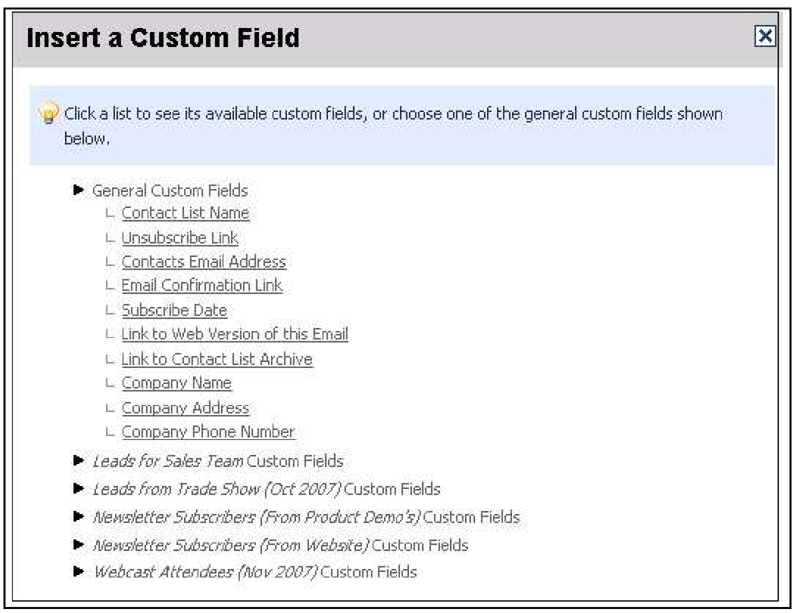
You can also define variables that are specific to each contact list.

Custom field variables are identified in the editor by the pair of percentage symbols to right and left of the variable name. For instance, if you define a "**city**" custom field, the variable appears in your document as "**%%city%%**".

Take the following steps to insert a custom field into your document:

1 In the HTML editor, place the insertion point where you want the custom field to display. Click **Insert a custom field** ( ).

Figure 174 Custom Fields



The **General custom fields** that display are standard fields built into the email software.

General custom fields relating to your company are specific to each contact list. For example, you can specify different contact phone numbers for different contact lists. Define these fields in the **Contact lists** > **Create a contact list** screen, or the **Contact lists** > **View contact lists** > **Edit** screen, for each contact list.

The other custom fields that display are those you created yourself, and are arranged by the contact list with which they are associated. Click a contact list name to see the

fields with which it is associated. If a custom field is associated with more than one contact list, it appears in both lists.

The following table describes the built-in **General custom fields**:

Table 49 General Custom Fields

Contact list name	%%listname%%	The name of the contact list to which the contact belongs.
Unsubscribe link	%%unsubscribelink%%	A hyperlink recipients can click to remove themselves from the contact list.
Contact's email address	%%emailaddress%%	The email address to which the email is sent.
Email confirmation link	%%confirmlink%%	A hyperlink recipients can click to confirm that they want to receive your emails.
Subscribe date	%%subscribedate%%	The date on which the contact was added to the contact list.
Link to web version of this email	%%webversion%%	A hyperlink recipients can click to see the HTML version of the email, stored on the email software server.
Link to contact list archive	%%mailinglistarchive%%	A hyperlink recipients can click to see the HTML versions of all emails sent to the contact list to which they belong, stored on the email software server.
Company name	%%companyname%%	Your company's name.
Company address	%%companyaddress%%	Your company's address.
Company phone number	%%companyphone%%	Your company's telephone number.

Using the Editing Window

Use the editing window in the HTML editor to:

- Add and delete text blocks (see Adding and Deleting Text Blocks).
- Compose and edit text (see Composing and Editing Text).
- Manipulate images (see Manipulating Images).

- Manipulate text and image containers (see Manipulating Text and Image Containers).
- Compose and edit HTML (see Composing and Editing HTML).
- Preview your email (see Previewing Your Email).

Adding and Deleting Text Blocks

When you are using a document containing text blocks, you can easily add and delete blocks using the and icons that display.

Note: This option is not available in all documents.

Figure 175 Text Block Icons

- Click the **add block** icon ( ) to insert a duplicate of the selected block directly after the selected block.
- Click the **delete block** icon ( ) to remove the selected block from the document.

Note: When there is only one block remaining in an HTML section (a table cell), the **delete block** icon does not display.

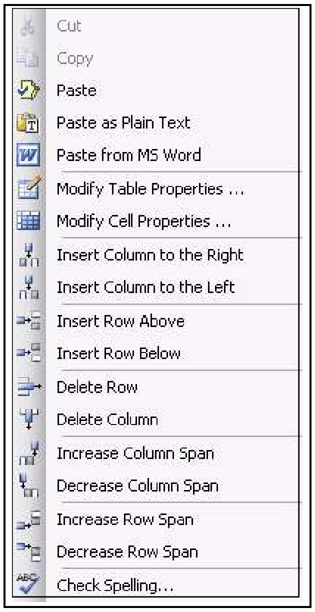
Composing and Editing Text

You can use the HTML editor's **Edit** tab to compose and edit text directly, in the same way as you would with a standard word processor or standalone web authoring tool.

Place the insertion point where you want to create, edit or paste text. Use the text-related tools in the **Design tools** section of the editor to control the text formatting.

You can also right-click over text to display shortcuts to text-related design tools (see Using Design Tools).

Figure 176 Right-Click (Text)

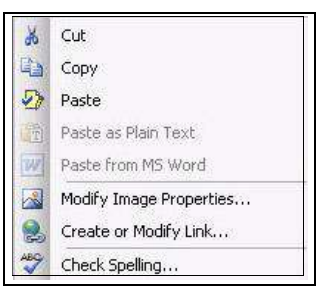


Manipulating Images

The HTML editor's **Edit** tab allows you to drag-and-drop images, and change their size and aspect ratio.

You can also right-click over an image to display shortcuts to image-related design tools (see Using Design Tools).

Figure 177 Right-Click (Image)



Dragging-and-dropping an Image

To drag-and-drop an image, select the image and, holding the left mouse button down, drag it to the desired location (the new location must be within an HTML section capable of containing images). The cursor indicates the exact position to which the image will move. Release the left mouse button.

Note: The way in which an image displays is controlled by its image properties. To change the properties, select the image and click the **Insert or modify image** button (). See Inserting and Editing Images for information on modifying image properties.

Resizing an Image

To resize an image, select it and use the handles that display to drag it to its new size or shape.

Use the handles at the corners of the image's borders (circled in **orange**) to resize the image, preserving its aspect ratio. Use the handles at the center of the image's borders (circled in **red**) to reshape the image, changing its aspect ratio.

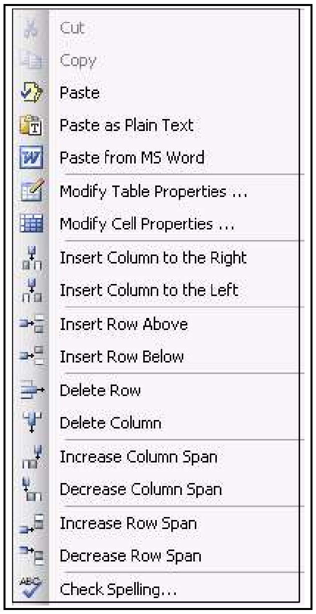
Figure 178 Resizing Images

Manipulating Text and Image Containers

The email software's HTML document layouts are based on HTML tables. Text and images are placed inside the table cells. Use the HTML editor's **Edit** tab to resize tables, add and delete rows and columns.

You can also right-click over a table to display shortcuts to table-related design tools (see Using Design Tools).

Figure 179 Right-Click (Table)

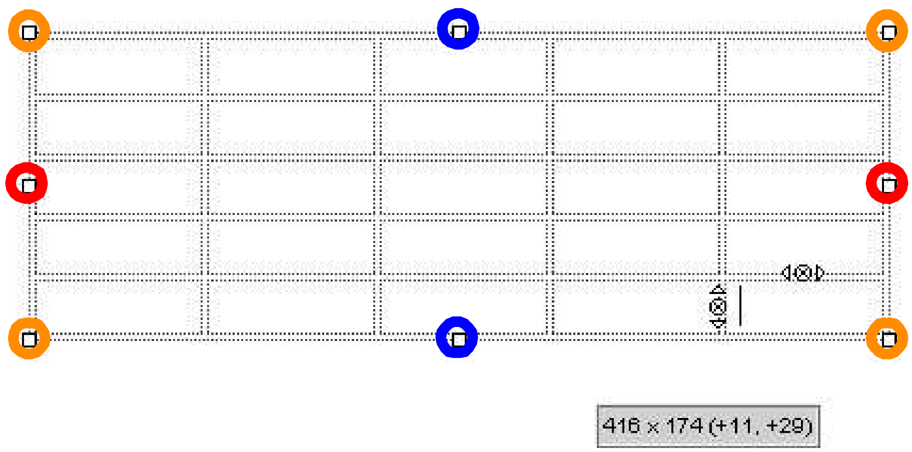


Resizing Tables

To resize a table, click anywhere in the table. Use the handles that display to drag it to its new size or shape.

- Use the handles at the corners of the table's borders (circled in **orange**) to alter the table's width and height simultaneously.
- Use the handles at the center of the image's vertical borders (circled in **red**) to alter the table's width.
- Use the handles at the center of the image's horizontal borders (circled in **blue**) to alter the table's height.

Figure 180 Table Icons



While you are resizing a table, a field displays showing the table's current size (in pixels), and the number of pixels it has changed in each dimension, in the following format:

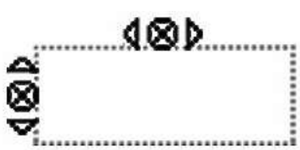
```
[current width] x [current height] ([horizontal change],
[vertical change])
```

Note: When you resize a table, its aspect ratio is not preserved.

Adding and Deleting Table Rows and Columns

To add and delete rows and columns, select a table cell. Icons display at the cell border.

Figure 181 Cell Icons



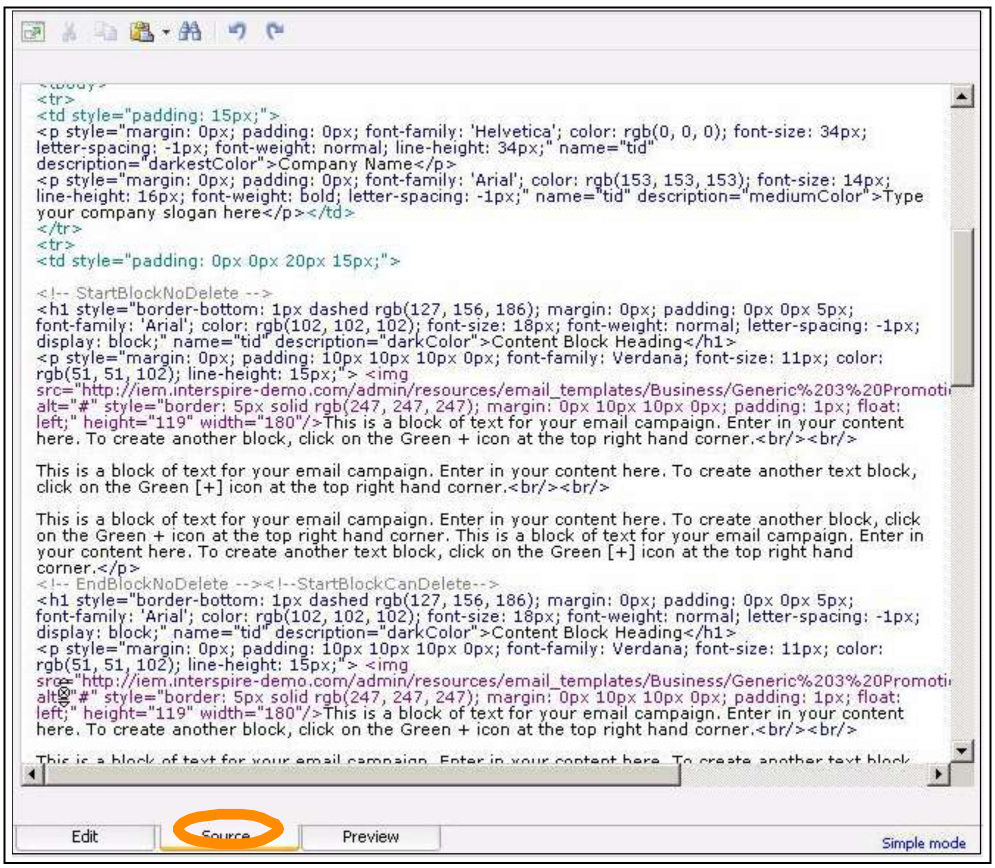
- Click the **left** arrow ( ) to add a column to the right of the selected cell.
- Click the **right** arrow ( ) to add a column to the right of the selected cell.
- Click the **up** arrow ( ) to add a row above the selected cell.
- Click the **down** arrow ( ) to add a row below the selected cell.

- Click the **delete column** ( ) icon to delete the entire column in which the cell is located.
- Click the **delete row** ( ) icon to delete the entire row in which the cell is located.

Composing and Editing HTML

To edit your document's HTML code manually, click the **Source** tab under the editing window.

Figure 182 Editing HTML



The buttons at the top of the screen are described in Using Design Tools.

Previewing Your Email

To see how your email will display in the recipient's email client, click the **Preview** tab under the editing window.

Figure 183 Previewing an Email

Note: To ensure that your email displays correctly in all popular HTML email clients, it is strongly advised that you use the **Email validation** feature as well as the **Preview** screen. See Validating an Email.

Using Tags and Tabs

The **Tags and Tabs** section displays at the bottom of the HTML editor screen.

Custom Fields

The **Tags and Tabs** section offers two shortcut buttons that allow you to quickly add custom fields to your document. Custom fields let you enter variable information into your emails that differs for each contact (or contact list).

Figure 184 Custom Field Buttons

- Click **Insert a custom field** to open the **Custom fields** window. See Inserting Custom Fields. The custom field you select is added to your document at the insertion point.
- Click **Insert unsubscribe link** to place the **%%unsubscribelink%%** variable at the insertion point. This creates a link the recipient can click to be removed from the contact list.

Simple and Complete Modes

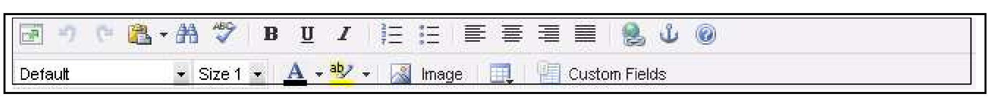
The HTML editor has two modes; simple and complete. In complete mode, you can use more design tools to control text, forms and page properties. See Using Design Tools.

To switch between simple and complete mode, click the link at the bottom of the HTML editor screen.

Figure 185 Simple and Complete Mode Link

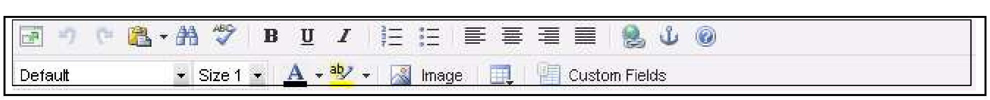
- Click **Simple mode** to go to simple mode. The following design tools are available.

Figure 186 Simple Design Tools



- Click **Complete mode** to go to complete mode. The following design tools are available.

Figure 187 Complete Design Tools



Using HTML Tags

When you click a section of your email document in the WYSIWYG editor (click the **Edit** tab) a variety of HTML tags display beneath the edit window.

Figure 188 HTML Tags

The tags that display are those that affect the element you select.

For example, if you select a piece of text in a table cell that is part of a table in the body of the HTML, the tags that display are those that define the cell, the table row, the table column, the table itself, and the body.

Note: Tags that display with a stylesheet class name (for example, "**span.myClass**") have a style applied to them.

Use the HTML tags to precisely select HTML elements for editing. This is particularly useful when tags are nested and selection with the mouse is difficult or impossible.

When you select a tag, all the elements the tag affects are highlighted in the editing window. **Remove tag** and **Edit tag** links appear in the right of the screen.

Figure 189 Remove and Edit HTML Tags

Removing a Tag

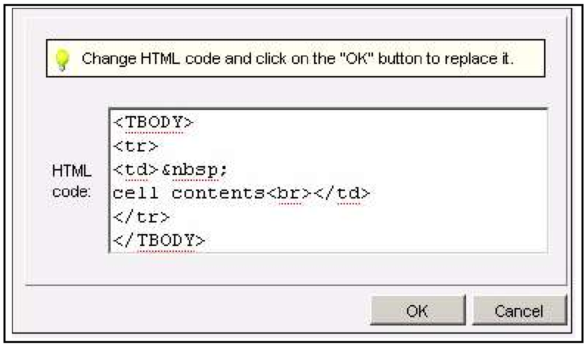
Click **Remove tag** to delete the tag. The corresponding closing tag is also deleted; for instance, if you select "****" (bold text) and then click **Remove tag**, the corresponding "****" tag is also deleted.

Note: When you delete a tag, all other tags between the opening and closing tag are also deleted. However, text is not deleted.

Editing a Tag

Click **Edit tag** to change the tag's properties. A window appears, displaying the opening and closing tags, and all code in between.

Figure 190 Editing a Tag



Edit the code, and click **OK** to save your changes and close the window. Alternatively, click **Cancel** to close the window without saving your changes.

Using Tabs

The tabs at the bottom of the HTML editor allow you to switch quickly between the WYSIWSG editor, the HTML code editor, and the email preview window.

Figure 191 HTML Editor Tabs

- Click **Edit** to go to the WYSIWYG editor (see Using the Editing Window).
- Click **Source** to go to the HTML code editor (see Composing and Editing HTML).
- Click **Preview** to go to the email preview window (see Previewing Your Email).

Using the Text Editor

The text editor controls the text element of your document. This element is sent to the recipient in plain text.

- If your recipient's email client cannot display HTML emails, the text element is all the recipients see.
- If you selected **Text** in the screen where you define your document, the text element is all the recipients see, even if their email clients are capable of displaying HTML emails.
- If you selected **HTML** in the screen where you define your document, the text editor does not display. Select **HTML and text** or **Text** instead.

There are two basic ways of using plain text emails.

1. You can use a plain text email to send the full text of your email. You can do this whether or not you also send an HTML element. If you also send an HTML element, the main text should be the same in both elements since a recipient will see only one element, and not the other.
2. When you want to send multipart emails (those with both HTML and plain text elements) you can also use the plain text element to inform recipients whose email clients cannot display HTML emails of this fact, and to redirect them to the web-based version of the HTML email.

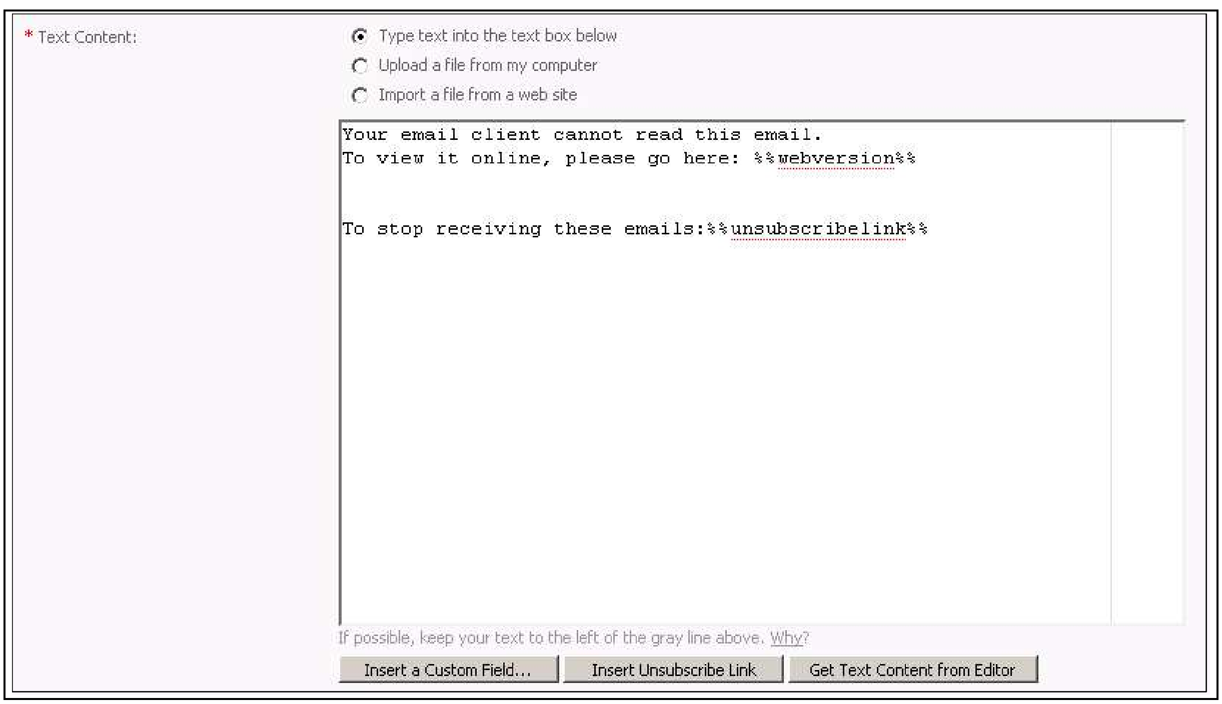
Note: Most built-in templates are multipart.

Creating a Plain Text Email

Take the following steps to build a plain text document:

1. In the editor, scroll down to the **Text content** section.

Figure 192 Create a Custom Document: Text Content



2. Specify how you want to build the text document.

- If you want to use the built-in text editor, select **Type text into the text box below**.
- If you want to use a text file on your computer, select **Upload a file from my computer**. Click the **Browse** button that displays. A file upload window displays; locate and select the file you want to use and click **OK**. Click **Upload**. The text editor screen updates to show the new file.
- If you want to use a file from a page on the Internet, select **Import a file from a web site** and enter the full URL (for example, "http://www.examplesite.com/examplepage.html") in the field that displays. Click **Import**. The text editor screen updates to show the new file.

3 Edit the text manually:

- If you selected **Type text into the text box below**, enter the text you want to send. Alternatively, click **Get text content from editor** (at the bottom of the screen) to paste the text from the HTML editor into the plain text editor.
- If you selected **Upload a file from my computer** or **Import a file from a web site**, you may need to edit the text for formatting so it displays correctly.

Note: Use the vertical grey line in the text editor as a guideline for your email's maximum line width. The line represents a line width of sixty-five characters; longer lines may be wrapped onto the next line by some email clients, making them awkward to read. However, if you are not concerned about this then you can use lines longer than sixty-five characters.

4 Insert custom fields to add variable information to the text, such as your recipient's email address. You can also add links to allow recipients view the online HTML version of the email, and remove themselves from the email list.

- Click **Insert a custom field** to open the **Custom fields** window. See Inserting Custom Fields. The custom field you select is added to your document at the insertion point.
- Click **Insert unsubscribe link** to place the **%%unsubscribelink%%** variable at the insertion point. This creates a link the recipient can click to be removed from the contact list.

Validating an Email

Like web browsers, popular email clients display HTML in different ways. However, email clients are even less consistent than web browsers. For example, some email clients fail to support basic HTML techniques such as forms and CSS (Cascading Style

Sheets). For this reason, it is highly important to check that your HTML email will display acceptably in all common email clients.

Do this using the email software's **Email validation** feature. This feature tests your email by mimicking common email clients display inconsistencies and displaying the results on a single screen.

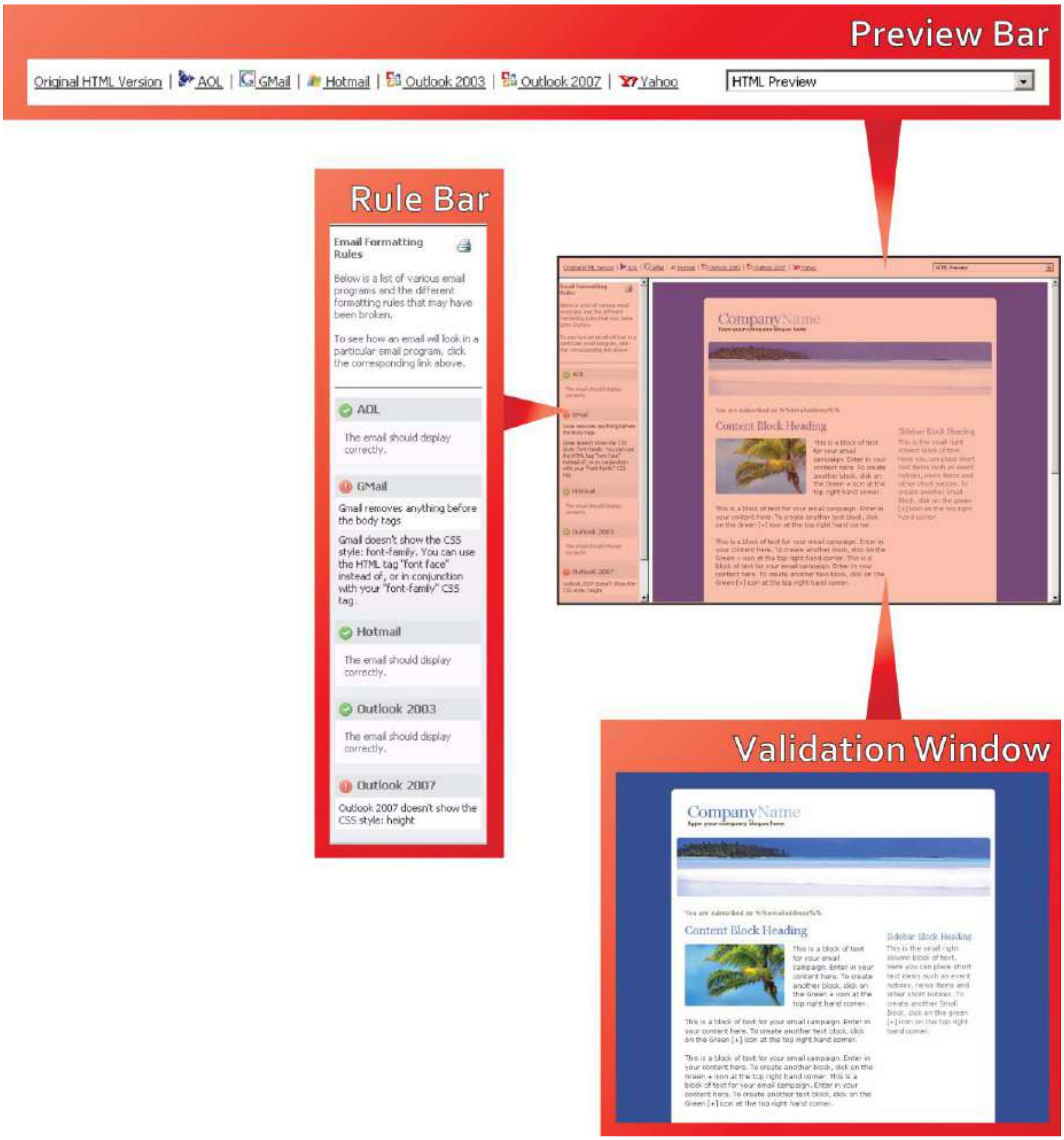
Note: The email software's built-in templates are already optimized to display optimally in all common email clients.

Note: This feature is not available in all instances of the HTML editor (those that allow you to design web pages, for instance).

Take the following steps to validate your HTML document:

1. In the screen where you define your document, scroll down to the **Email validation** section.
2. Click **View your email in different email programs**.
   The **Email Validation** screen is divided into three parts.

Figure 193 Email Validation



- Use the **Preview bar** to select the email client you want the email software to emulate in the validation window. By default, the **Original HTML version** displays.

In the drop-down list box, select **HTML preview** to see how the HTML email will look in the specified client, or select **Text preview** to see how the text version of the email will look.

- Use the **Rule bar** to see whether if your email breaks any of the rules used by each popular email client. If your email is completely compliant with a client's rules, a icon displays. If it is not completely compliant, a icon displays.

Note: Just because a icon displays does not necessarily mean that your email will display poorly; there are many ways in which an email may break a client's rules without significant problems. Read the error message that displays beneath the icon and check the email by clicking on the client program's name in the preview bar.

- Use the **Validation window** to check how your email displays in the client you choose in the preview bar.

III

THE TOOLBAR

This section contains the following chapters:

Using The Home Screen

This chapter discusses the screen that displays when you click the **Home** link in the toolbar.

Note: This is the screen that displays by default when you log in.

Figure 194 The Home Link

Using the Home Screen

Click **Home** in the toolbar.

Figure 195 The Home Screen

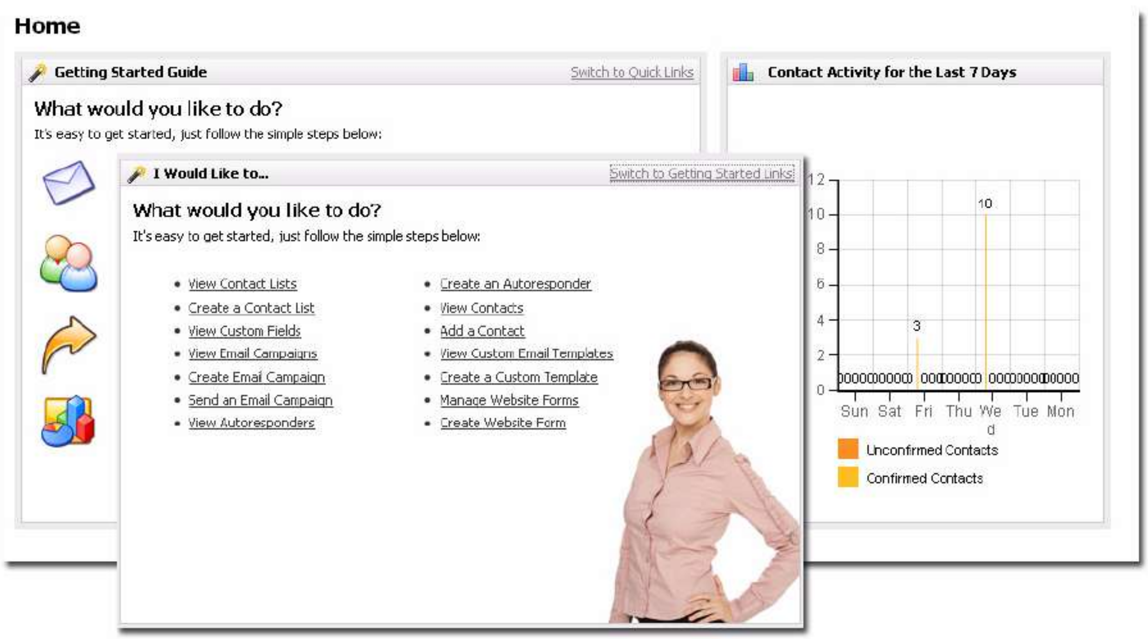


Table 50 The Home Screen

Contact activity for the last seven days	This graph in the upper half of the screen illustrates the activity of your contacts in the last week. • **Unconfirmed contacts** are people who have been added to one of your contact lists, but have not yet confirmed that they want to receive emails. • **Confirmed contacts** are people who have confirmed that they want to receive emails (by clicking a link in a confirmation email). You can also confirm contacts yourself.
I would like to	This section displays links to some common email software tasks. Note: If this section does not display, click **Switch to quick links**.
Getting Started	This section displays a list of tasks that you can take to start sending emails with the email software quickly and easily. Starting at the top of the list, click the links and follow the instructions. Note: If this screen does not display, click **Switch to getting started links**.

Using Templates

This chapter discusses how to use the **Templates** menu in the toolbar.

Figure 196 The Templates Menu

Templates Overview

Templates control the look of your email. They specify which fonts and text colors to use, the background colors and images to display, and the size and shape of the text areas on the user's screen.

How Templates Work

Templates use HTML (HyperText Markup Language) to define your email's aesthetics. The user's email client reads this information and displays the email accordingly. This gives your email the same design flexibility found in HTML web design.

Note: If in doubt, it is strongly advised that you configure email templates to send both HTML and plain text elements (multipart). Some email clients cannot display HTML, and some users turn HTML display off, so it is important to transmit a plain text element as well.

You can assign templates to new email campaigns, or to autoresponders.

Advantages of Templates

Using templates to coordinate your email campaigns confers two main advantages. First, your email is instantly recognizable. You can use templates to define or extend corporate branding by presenting the user with your company's color scheme, logo and associated imagery. Second, your email is consistent. When you use a template for your email campaigns over a period of time, you know that each email you send is based on the same design, and will convey the same message. This is particularly useful when multiple people may be sending out email campaigns from your company.

Built-in and Custom Templates

The email software includes a huge variety of built-in templates, ready for you to use out of the box. They have been designed and tested with interoperability in mind, so they will display correctly in all common HTML email clients.

You can also create your own custom email templates. Either use the included WYSIWYG (What You See Is What You Get) editor, or upload an HTML file from your local computer or a remote URL as the basis for the template.

Testing Your Template

Like Internet browsers, email clients often display email in different ways. What looks correct in one client can look incorrect in another. When you create your own template, use the email validation tool **(**see Validating an Email**)** to check that the template displays correctly in a variety of common email clients.

Managing Custom Email Templates

Once you have created a custom email template (see Creating and Editing Custom Email Templates), you can:

- **Delete**: remove the template from the email software. The template cannot be retrieved.
- **Activate**: allow the template to be used for a new email campaign or autoresponder.
- **Deactivate**: prevent the template from being used for a new email campaign or autoresponder.
- **Make Global**: allow all users to use the template, regardless of their privileges.
- **Remove From Global**: allow only certain users to use the template.

  Configure user template privileges in the **User Account > Create User > User Permissions** screen for each user.

You can also **view**, **edit**, or **copy** a template.

To manage a custom email template you already created, click **Templates** in the toolbar, then **Custom email templates**.

Figure 197 Templates: Custom Email Templates

Table 51 Templates: Custom Email Templates

Create a Custom Template	Click this to go to the **Create a Custom Email Template** screen. See Creating and Editing Custom Email Templates.
Choose an action	Select one or more custom templates, select an option from the list and click **Go** to perform the selected action.
☐ ☐	Select a box belonging to a template before choosing an option from the **Choose an action** list. Select the box at the top of the column to select all custom templates.
Template Name	This displays the name you gave to the template. Click **Edit** to change the name. An identification (**id**) number displays next to the name, indicating the order in which the templates were created.
Created	This displays the date you created the template.
Email Format	• **Text** displays if emails using this template are sent in plain text only. • **HTML** displays if emails using this template are sent in HTML only. • **HTML and Text** displays if emails using this template are sent in multipart form. Note: Multipart emails have both an HTML element and a plain text element. Plain text displays if a user's email client cannot display HTML.
Active	A tick (✔) displays if the template is available to be used for a new email campaign or autoresponder. A cross (✖) displays if the template is not available to be used for a new email campaign or autoresponder.
Global	A tick (✔) displays if all users can use the template. A cross (✖) displays if only the users you allow to may use the template.

Action	• Click **View** to see a full-screen version of the template. • Click **Edit** to update the template. The screens that display are similar to the **Create a Custom Email Template** screens (see Creating and Editing Custom Email Templates). • Click **Copy** to create a new copy of the template. The new template displays, with "Copy of" appended to the original name, and the **id** incremented to the next available number. • Click **Delete** to remove the template from the email software.

Creating and Editing Custom Email Templates

The email software allows you to create custom email templates using the built-in editor. You can build a template from scratch, edit an existing built-in template, or base your template on an HTML file you upload from your computer or a remote URL.

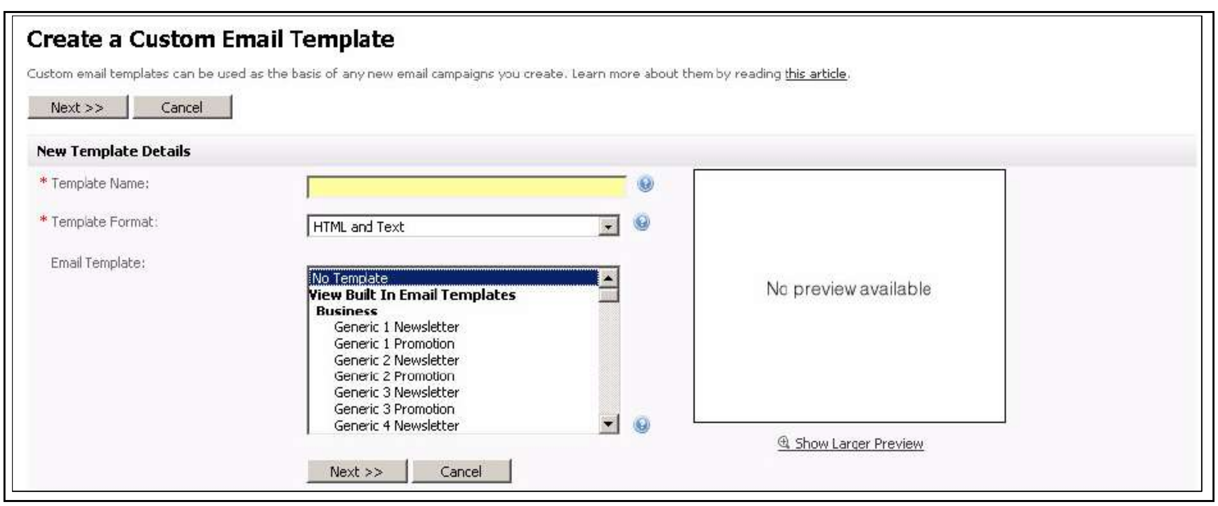
Note: If you want to create a new template based on a custom template you created previously, use the **Templates > Custom email templates** screen to copy the template, then edit the new template. See Managing Custom Email Templates.

Creating a Custom Email Template

Take the following steps to create a custom email template:

1 Click **Templates** in the toolbar and select **Create a custom template**.

Figure 198 Templates: Create a Custom Template

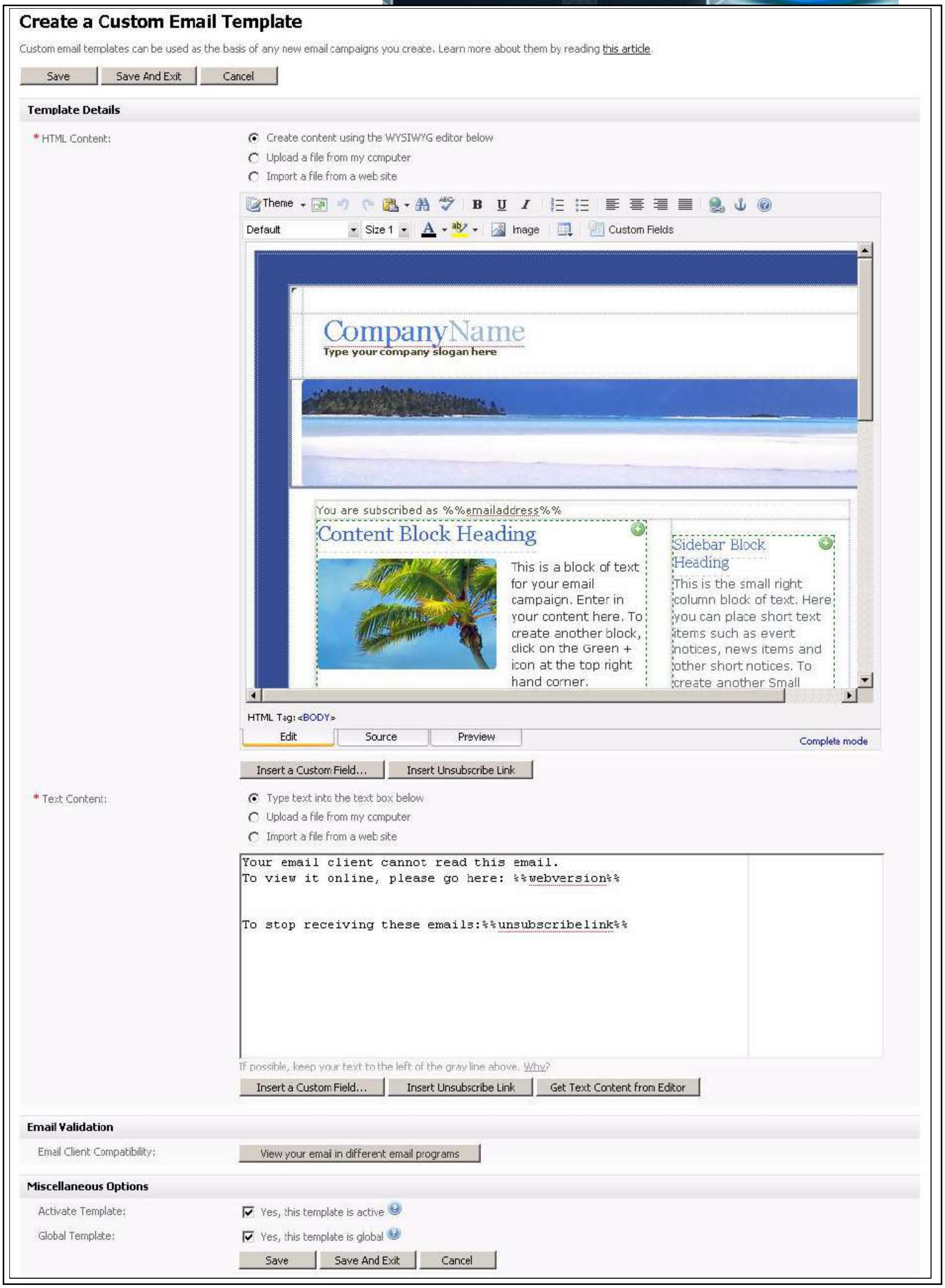


2. Enter a new **Template Name**.
3. Select the type of template you want to create.
   - Select **HTML and Text** if you want emails you send using this template to be sent with both HTML and plain text elements (multipart). Email clients that can display HTML messages use the HTML element, and clients that cannot display HTML use the plain text element.
   - Select **Text** if you want emails you send using this template to be sent in plain text only.
   - Select **HTML** if you want emails you send using this template to be sent in HTML only. If you select this option, your emails will not display in email clients that cannot display HTML messages.
4. If you want to base this email template on an existing template, select the template in the **Email template** list. A preview of the template displays.

   If you do not want to base this email template on an existing template, select **No template** in the **Email template** list.
5. Click **Next**.

Figure 199 The Template Editor


Email Marketing
Market to UNLIMITED Contacts
View Statistics, Customize Templates & Generate Reports.
Everything you need to get your message across.


Create a Custom Email Template
Custom email templates can be used as the basis of any new email campaigns you create. Learn more about them by reading this article.
Save
Save And Exit
Cancel
Template Details
* HTML Content:
Create content using the WYSIWYG editor below
Upload a file from my computer
Import a file from a web site
Theme
Default
Size 1
Image
Custom Fields
CompanyName
Type your company slogan here
You are subscribed as %%emailaddress%%
Content Block Heading
This is a block of text for your email campaign. Enter in your content here. To create another block, click on the Green + icon at the top right hand corner.
Sidebar Block Heading
This is the small right column block of text. Here you can place short text items such as event notices, news items and other short notices. To create another Small
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
* Text Content:
Type text into the text box below
Upload a file from my computer
Import a file from a web site
Your email client cannot read this email.
To view it online, please go here: %%webversion%%
To stop receiving these emails:%%unsubscribelink%%
If possible, keep your text to the left of the gray line above. Why?
Insert a Custom Field...
Insert Unsubscribe Link
Get Text Content from Editor
Email Validation
Email Client Compatibility:
View your email in different email programs
Miscellaneous Options
Activate Template:
Yes, this template is active
Global Template:
Yes, this template is global
Save
Save And Exit
Cancel

Note: If you selected **Text only** in the previous page, the **HTML Content** section in this page does not display. Likewise, if you selected **HTML only**, the **Text Content** section in this page does not display.

6 Customize the HTML template using the editor. See Using the HTML Editor for more information.

7 Customize the text template using the editor. See Using the Text Editor for more information.

8 Check that your template displays correctly in a variety of common email clients. Click **View your email in different email programs**. The **Email Validation** screen displays in a new window (see Validating an Email). When you have finished, close the window.

9 Configure the **Miscellaneous options**.

- Select **Yes, this template is active** if you want the template to be available for use once you have saved it. Otherwise, deselect this option. You can activate the template later.
- Select **Yes, this template is global** if you want the template to be available to all users. If you want to restrict the template to certain users, deselect this option. You can configure individual user's privileges in the **User Account > Create User > User Permissions** screen.

10 Finish the template.

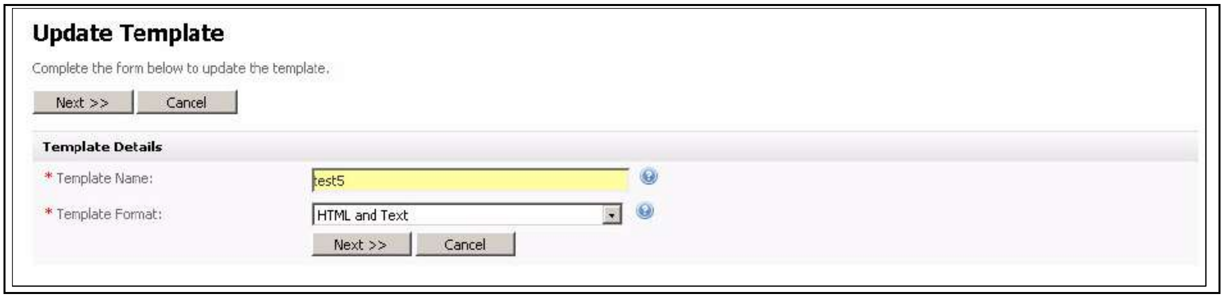
- Click **Save** to save the new template and remain in this screen to make further changes.
- Click **Save and exit** to save the new template and go to the **View Custom Templates** screen (see Managing Custom Email Templates).
- Click **Cancel** to return to the **View Custom Templates** screen without saving the template. Any changes you made are lost.

Editing a Custom Template

Take the following steps to edit an existing template:

1 Click **Templates** in the toolbar and select **Custom email templates**. Click **Edit** next to the template you want to edit. The **Update Template** screen displays.

Figure 200 Custom Email Templates: Update Template



2 Configure the template details.
- If you want to change the **Template Name**, enter the new name.
- If you want to change the **Template Format**, select the new format.

3 Click **Next**. The screen that displays is the same as Figure 199. Follow steps 6 to 10 in Creating a Custom Email Template.

Viewing Built-In Email Templates

The email software has a wide variety of built-in email templates designed for different uses.

To view the built-in templates, click **Templates** in the toolbar and select **View built-in templates**.

Figure 201 View Built-in Templates

- To see a template in full-screen mode, click **Show larger preview** or click the template's thumbnail icon.
- To use a template in an email campaign, click **Email campaigns** > **Create email campaign** and select the template.
- To modify a template for later use in an email campaign, create a new custom template based on the built-in template. See Creating and Editing Custom Email Templates.

Using Forms

This chapter discusses how to use the **Forms** menu in the toolbar.

Figure 202 The Forms Menu

Forms Overview

Forms allow members of the public to interact with the email software by signing up to contact lists, unsubscribing from contact lists, and changing the details stored about them. Contacts can also easily forward emails on to their friends using a form.

- The forms you use to allow people to sign up to, or unsubscribe from, contact lists are hosted on your own website. The forms you add to your site on the Internet use scripts to interact with the email software.
- The forms you use to allow contacts to change the details stored about them on the email software or to forward an email to a friend are not hosted on your website. Instead, you can add them to the emails you send.

  The forms you add to your emails also use scripts to interact with the email software. Therefore, such forms will work correctly only when the form is able to access the email software over the Internet, and not when contacts view the emails offline.

Viewing and Managing Forms

To view and manage your forms, click **Forms** in the toolbar and then click **View website forms**.

Figure 203 Viewing and Managing Forms

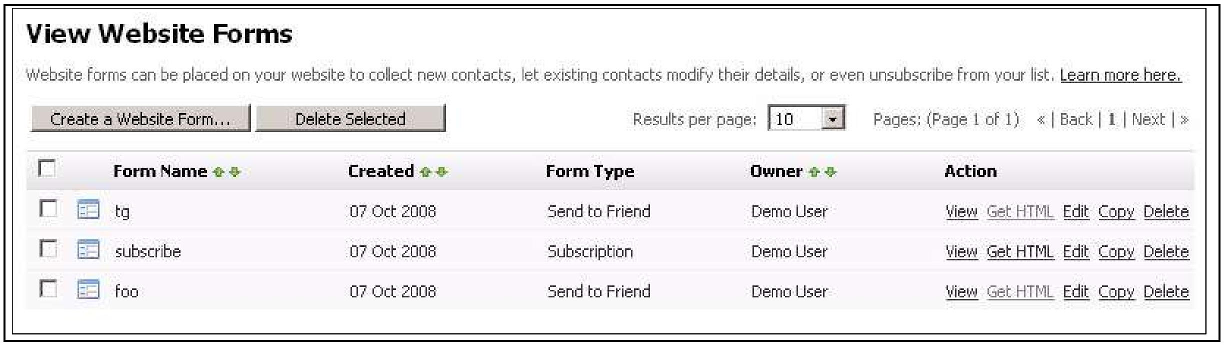
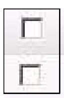


Table 52 Viewing and Managing Forms

Create a website form	Click this to create a new form. See Creating and Editing Forms.
Delete selected	Select one or more forms in the list and click this to remove the forms from the email software. The form or forms cannot be retrieved.
	Select a box belonging to form and click Delete selected to remove the form from the email software. The form cannot be retrieved. Select the box at the top of the column to select all form.
Form name	This displays the name of the form
Created	This displays the date on which the form was created.
Form type	This displays the function of the form (**Subscription**, **Unsubscribe**, **Modify details** or **Send to Friend**). See Creating and Editing Forms for more information on the types of form available.
Action	• Click **View** to see what the form looks like in a new browser window. • Click **Get HTML** to see the form's HTML code. Note: This feature is not available for **Modify details** and **Send to friend** forms. • Click **Edit** to change the form's configuration. See Creating and Editing Forms for information on the screens that display. • Click **Copy** to create a new copy of the form. The new form displays in the list, with "Copy of" appended to the original name. • Click **Delete** to remove the form from the email software. The form cannot be retrieved.

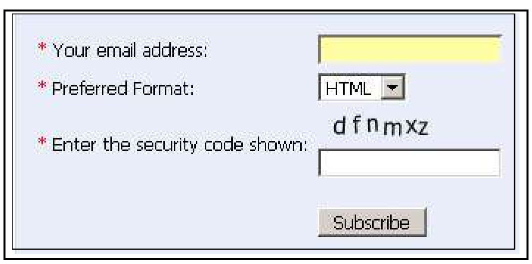
Creating and Editing Forms

You can create various types of forms in the email software:

- **Subscription**: lets contacts sign up for your emails. See Creating or Editing a Subscription Form.
- **Unsubscribe**: lets contacts unsubscribe from your list, and stop receiving emails. This has the same effect as the unsubscribe link you can add to your emails. See Creating or Editing an Unsubscribe Form.
- **Modify details**: lets contacts change the information recorded about them in your contact list. See Creating or Editing a Modify Details Form.
- **Send to friend**: lets contacts forward an email to another person. See Creating or Editing a Send to Friend Form.

Creating or Editing a Subscription Form

Figure 204 Example Subscription Form



Take the following steps to set up or edit a **Subscription** website form. See the corresponding sections for information on how to complete each step.

1. Click **Forms** in the toolbar, then **Create a website form**.
2. Select **Subscription** in the **Choose a form type** field. Configure the other basic form settings (form name, form design and format, CAPTCHA security, and the contact list - or lists - for the form). See Configuring Basic Form Settings.

Note: The options in steps 3 and 4 are available only when you select the corresponding options in step 2.

3. Design the confirmation page (a page that displays when contacts have filled in their details, requiring that they click another link to be added to the list) and the confirmation email (an email sent to contacts requiring that they click a link to be added to the list). See Designing a Confirmation Page and Email.

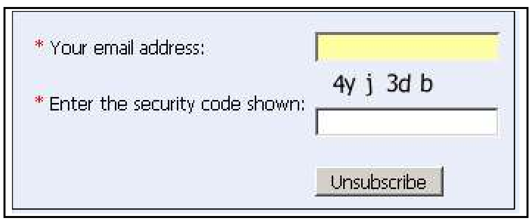
4 Design the thank-you page (the page that displays once contacts have been successfully added to the list) and the thank-you email (an email sent to contacts once they have been successfully added to the list). See Designing a Thank-You Page and Email.

5 Design the error page (a page that displays if an error occurs in the sign-up process). See Designing an Error Page.

6 Add the form to your website. See Adding a Form to Your Website.

Creating or Editing an Unsubscribe Form

Figure 205 Example Unsubscribe Form



Take the following steps to set up or edit an **Unsubscribe** website form. See the corresponding sections for information on how to complete each step.

1 Click **Forms** in the toolbar, then **Create a website form**.

2 Select **Unsubscribe** in the **Choose a form type** field. Configure the other basic form settings (form name, form design, and the contact list - or lists - for the form). See Configuring Basic Form Settings.

3 Design the confirmation page (a page that displays when contacts have filled in their details, requiring that they click another link to be removed from the list) and the confirmation email (an email sent to contacts requiring that they click a link to be removed from the list). See Designing a Confirmation Page and Email.

4 Design the thank-you page (the page that displays once contacts have been successfully removed from the list) and the thank-you email (an email sent to contacts once they have been successfully removed from the list). See Designing a Thank-You Page and Email.

5 Design the error page (a page that displays if an error occurs in the unsubscription process). See Designing an Error Page.

6 Add the form to your website. See Adding a Form to Your Website.

Creating or Editing a Modify Details Form

Figure 206 Example Modify Details Form

Take the following steps to set up or edit a **Modify details** form. See the corresponding sections for information on how to complete each step.

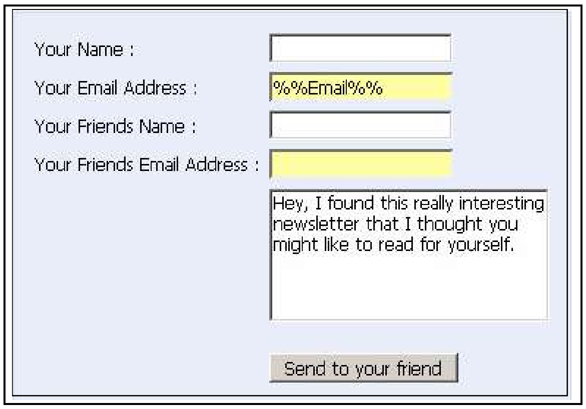
1. Click **Forms** in the toolbar, then **Create a website form**.
2. Select **Modify Details** in the **Choose a form type** field. Configure the other basic form settings (form name, form design and format, CAPTCHA security, and the contact list - or lists - for the form). See Configuring Basic Form Settings.
3. Design the thank-you page (the page that displays once contacts have successfully modified their details) and the thank-you email (an email sent to contacts once they have been successfully modified their details). See Designing a Thank-You Page and Email.
4. Design the error page (a page that displays if an error occurs in the modification process). See Designing an Error Page.
5. Include a link to the form in your emails or autoresponders using the corresponding custom field.

   When you are editing a template, email or autoresponder, click the **Custom fields** button. Then, select **Modify details forms**. Select the name of the form from the list that displays.

Note: You cannot add **modify details** forms to your website. Use the custom field link to add them to your emails instead.

Creating or Editing a Send to Friend Form

Figure 207 Example Send to Friend Form



Take the following steps to set up or edit a **Send to friend** form. See the corresponding sections for information on how to complete each step.

1. Click **Forms** in the toolbar, then **Create a website form**.
2. Select **Send to Friend** in the **Choose a form type** field. Configure the form design. See Configuring Basic Form Settings.
3. Design the thank-you page (the page that displays once contacts have successfully forwarded the email). See Designing a Thank-You Page and Email.
4. Design the forwarded email headers (the HTML and text headers that display above the forwarded email, identifying the sender by whom it was forwarded). See Configuring Forwarded Email Headers.
5. Design the error page (a page that displays if an error occurs in the sending process). See Designing an Error Page.
6. Include a link to the form in your emails or autoresponders using the corresponding custom field.

   When you are editing a template, email or autoresponder, click the **Custom fields** button. Then, select **Send to friend forms**. Select the name of the form from the list that displays.

Note: You cannot add **send to friend** forms to your website. Use the custom field link to add them to your emails instead.

Configuring Basic Form Settings

Use this screen to configure basic form settings such as form name and type, form design, and the contact list (or lists) with which the form is associated.

Note: The fields that display in this screen depend on the selection you made in the previous screen.

Figure 208 Configuring Basic Form Settings

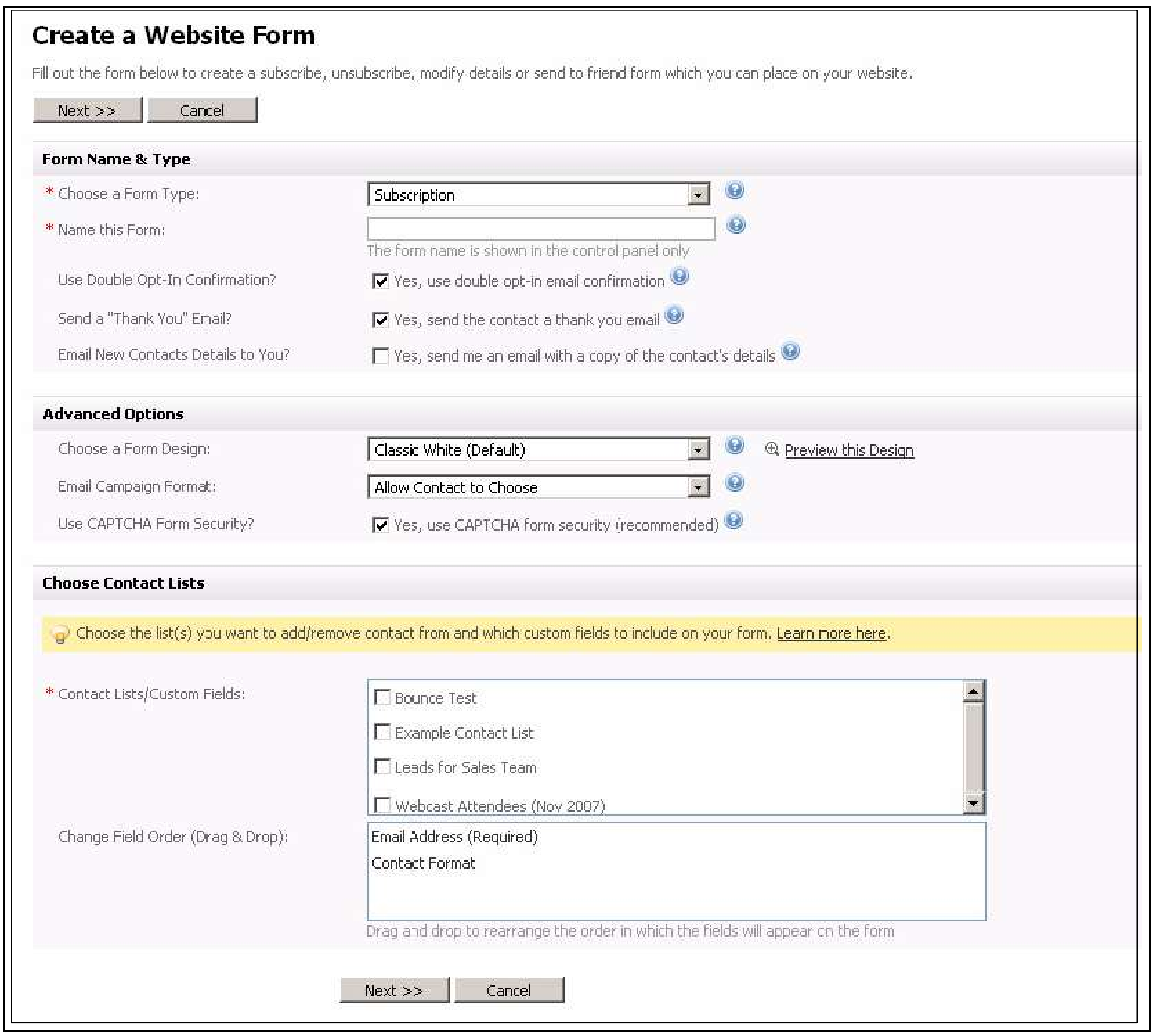


Table 53 Configuring Basic Form Settings

Form name and type	
Choose a form type	Select the type of form you want to create. See Creating and Editing Forms.
Name this form	Enter a name for this form. This name identifies the form in the email software.
Use double opt-in confirmation	Select this if you want to send an email to contacts in which they must click a link to confirm that they want to subscribe to this list. Deselect this if you do not want to send such an email.
Send a "thank you" email	Select this if you want to send an email to contacts once they have successfully subscribed to the list. Deselect this if you do not want to send such an email.
Email new contact details to you	Select this if you want to receive the information that a contact enters by email. Deselect this if you do not want to receive such emails. Note: You can use this feature to turn a website form into a contact form; a contact can use it to send you information or queries directly. Usually, a contact who is already subscribed to a list and tries to subscribe again is directed to the error page (see Designing an Error Page). However, since a contact may want to send information to you on more than one occasion, contacts who complete a form with this feature configured directed to the thank-you page, and not the error page.
Advanced options	
Choose form design	This controls the text and background design of the form. Select a design from the list. Click **Preview this design** to see how the form will look. Note: You need to configure a name for the form (in the **Name this form** field) and select a contact list and custom fields (in the **Choose contact lists** section) before you can preview the design.
Email campaign format	• Select **Allow contact to choose** to let contacts who sign up using this form choose whether to receive HTML or plain-text emails. • Select **HTML** to send HTML emails to contacts who sign up using this form. • Select **Text** to send plain-text emails to contacts who sign up using this form.

Change format	Select this to allow contacts to change the format of the emails they receive (from HTML to text, or from text to HTML). Deselect this if you do not want to allow contacts to change the format of the emails they receive. Note: This field displays only when you select **Modify details** in the **Choose a form type** field.
Use CAPTCHA form security	Select this if you want to use a CAPTCHA field in your form. CAPTCHA security presents the user with an image of numerals and text, arranged in a manner unreadable by machines. The user must enter the numerals and text in a nearby field. Use CAPTCHA if you want to prevent automated software signing up to your lists, which could degrade service for real contacts and make the information in your contact lists unreliable. Deselect this if you do not want to use CAPTCHA security. Note: CAPTCHA stands for "Completely Automated Public Turing test to tell Computers and Humans Apart". A Turing test, named after mathematician and cryptographer Alan Turing, is a test intended to differentiate between an intelligent agent (such as a human), and an unintelligent agent (such as a piece of pre-programmed software). Ideally, only intelligent agents can pass a Turing test.
Choose contact lists	
Contact lists/custom fields	Select the contact lists you want to associate with this form. • If you selected **Subscription** in the **Choose a form type** field, contacts are added to the list or lists you select. • If you selected **Unsubscribe** in the **Choose a form type** field, contacts are removed from the list or lists you select. • If you selected **Modify details** in the **Choose a form type** field, contacts from the lists you select may modify their details. If a contact list is associated with one or more custom fields, the fields display when you select the list. Select the fields you want to display in this form. If you choose multiple lists, **List options** displays. Use this to allow users to choose the list (or lists) to which they want to be added. Note: If a custom field is mandatory, make sure you include it in your form.
Change field order (drag & drop)	Use this section to change the order in which the fields display in your form. Simply click and drag a field to its new location.

Next	Click this to proceed to the next screen. The next screen depends on the option you selected in the **Choose a form type** field.
Cancel	Click this to return to the **View website forms** screen.

Designing a Confirmation Page and Email

Use this screen to configure a page in which contacts must confirm they want to receive emails, and an email in which contacts must click a link to confirm they want to receive emails.

Note: The fields that display in this screen depend on the type of form you are creating. Not all fields display for all form types.

Figure 209 Designing a Confirmation Page and Email


Email Marketing
Market to UNLIMITED Contacts
View Statistics, Customize Templates & Generate Reports.
Everything you need to get your message across.

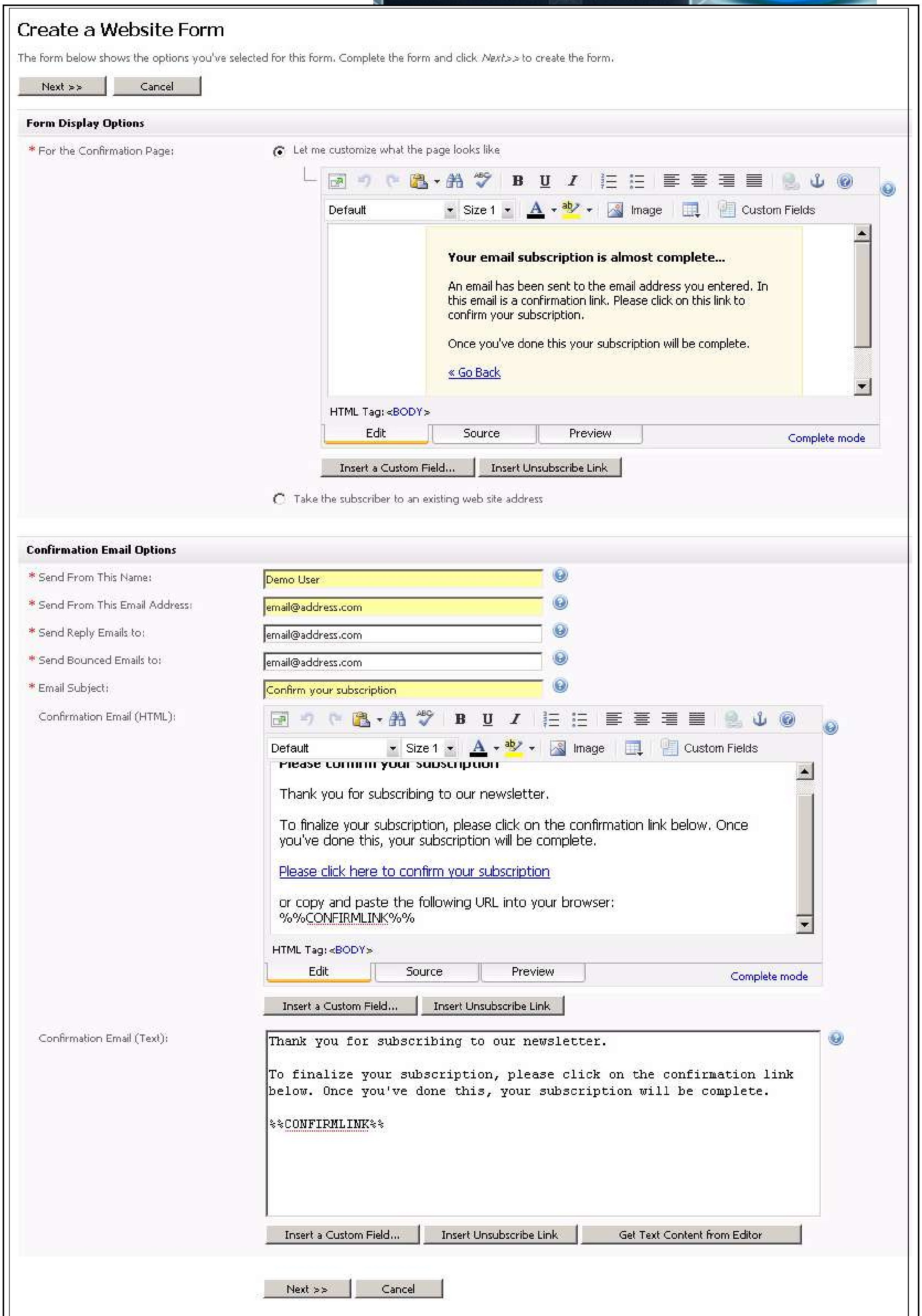

Create a Website Form
The form below shows the options you've selected for this form. Complete the form and click Next>> to create the form.
Next >>
Cancel
Form Display Options
* For the Confirmation Page:
Let me customize what the page looks like
Default
Size 1
Image
Custom Fields
Your email subscription is almost complete...
An email has been sent to the email address you entered. In this email is a confirmation link. Please click on this link to confirm your subscription.
Once you've done this your subscription will be complete.
« Go Back
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
Take the subscriber to an existing web site address
Confirmation Email Options
* Send From This Name:
Demo User
* Send From This Email Address:
email@address.com
* Send Reply Emails to:
email@address.com
* Send Bounced Emails to:
email@address.com
* Email Subject:
Confirm your subscription
Confirmation Email (HTML):
Default
Size 1
Image
Custom Fields
Please confirm your subscription
Thank you for subscribing to our newsletter.
To finalize your subscription, please click on the confirmation link below. Once you've done this, your subscription will be complete.
Please click here to confirm your subscription
or copy and paste the following URL into your browser:
%%CONFIRMLINK%%
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
Confirmation Email (Text):
Thank you for subscribing to our newsletter.
To finalize your subscription, please click on the confirmation link below. Once you've done this, your subscription will be complete.
%%CONFIRMLINK%%
Insert a Custom Field...
Insert Unsubscribe Link
Get Text Content from Editor
Next >>
Cancel

Table 54 Designing a Confirmation Page and Email

Form display options	
Let me customize what the page looks like	Select this option to design the confirmation page in the WYSIWYG editor that displays. See Using the HTML Editor for information.
Take the subscriber to an existing website address	Select this option to redirect the user to another page on the Internet. Enter the page's full URL in the field that displays (for example, "**http://www.someite.com/somepage.html**")
Confirmation email options	
Send from this name	This is the name of the person from which the confirmation email will be sent. This displays the default "from" name for the contact list you selected. If you want to change this name, enter the new name in this field.
Send from this email address	This is the email address from which the confirmation email will be sent. This displays the default "from" email account for the contact list you selected. If you want to use a different email account, enter the new address in this field.
Send reply emails to	This is the name of the person from which the confirmation email will be sent. If a contact replies to your confirmation email, this is the address to which the reply is sent. This displays the default reply email address for this contact list. If you want to use a different address, enter the new address in this field.
Send bounced email to	This is the address to which undeliverable emails are sent. This displays the default bounced email address for this contact list. If you want to use a different address for handling bounced emails, enter the new address in this field.
Email subject	Enter the subject line for the confirmation email.
Confirmation email (HTML)	Design the HTML version of the confirmation email in this section. See Using the HTML Editor for information.
Confirmation email (text)	Design the plain-text version of the confirmation email in this section. See Using the Text Editor for information.
Next	Click this to proceed to the next screen. The next screen depends on the option you selected in the **Configuring basic form settings** screen.

Cancel	Click this to return to the **View website forms** screen.

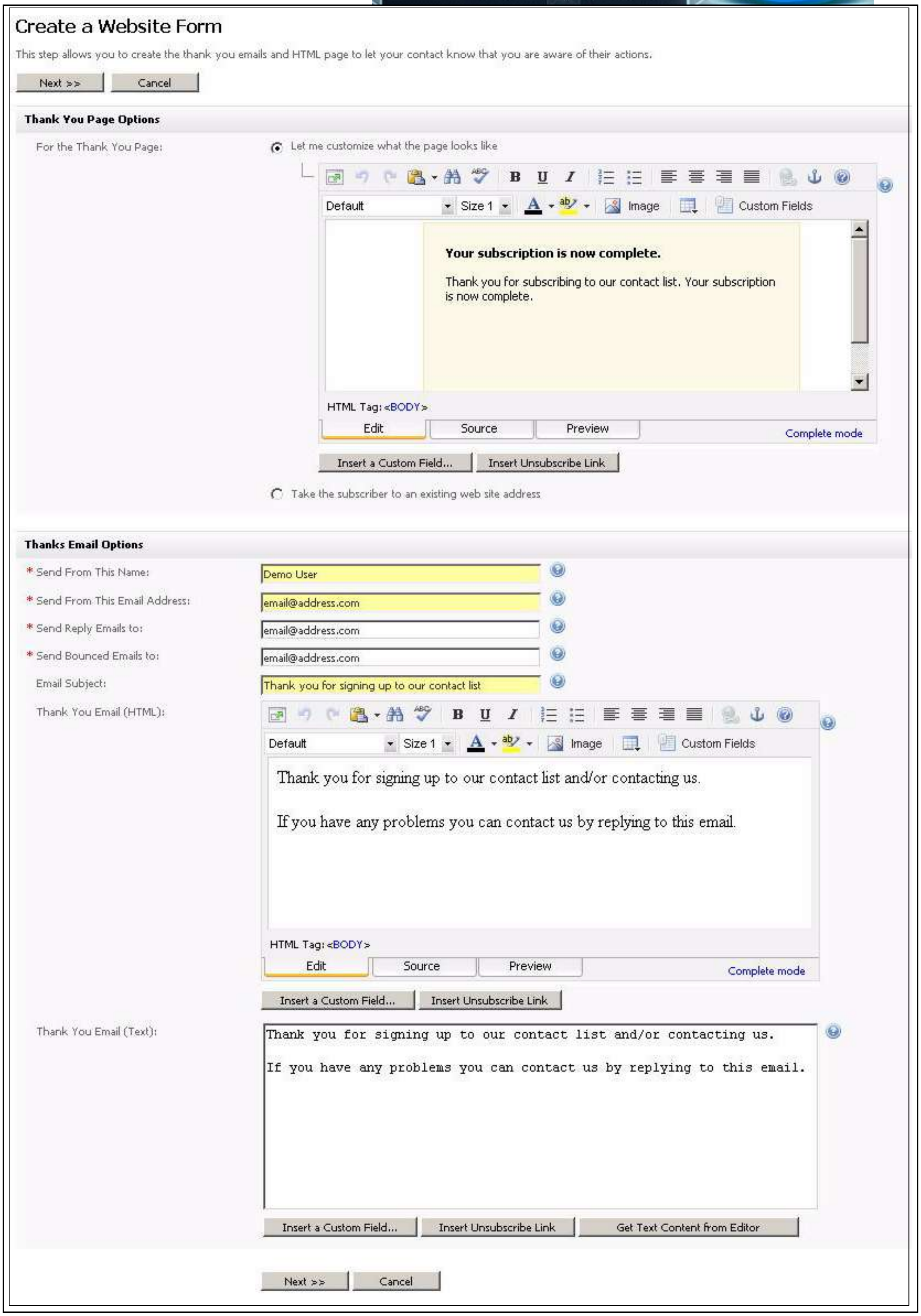
Designing a Thank-You Page and Email

Use this screen to configure a page informing contacts that the subscription (or unsubscription, modification, or forwarding) process is complete, and an email in which the same information is conveyed.

Note: The fields that display in this screen depend on the type of form you are creating. Not all fields display for all form types.

Figure 210 Designing a Thank-You Page and Email


Email Marketing
Market to UNLIMITED Contacts
View Statistics, Customize Templates & Generate Reports.
Everything you need to get your message across.


Create a Website Form
This step allows you to create the thank you emails and HTML page to let your contact know that you are aware of their actions.
Next >>
Cancel
Thank You Page Options
For the Thank You Page:
Let me customize what the page looks like
Default
Size 1
Image
Custom Fields
Your subscription is now complete.
Thank you for subscribing to our contact list. Your subscription is now complete.
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
Take the subscriber to an existing web site address
Thanks Email Options
* Send From This Name:
Demo User
* Send From This Email Address:
email@address.com
* Send Reply Emails to:
email@address.com
* Send Bounced Emails to:
email@address.com
Email Subject:
Thank you for signing up to our contact list
Thank You Email (HTML):
Default
Size 1
Image
Custom Fields
Thank you for signing up to our contact list and/or contacting us.
If you have any problems you can contact us by replying to this email.
HTML Tag: <BODY>
Edit
Source
Preview
Complete mode
Insert a Custom Field...
Insert Unsubscribe Link
Thank You Email (Text):
Thank you for signing up to our contact list and/or contacting us.
If you have any problems you can contact us by replying to this email.
Insert a Custom Field...
Insert Unsubscribe Link
Get Text Content from Editor
Next >>
Cancel

Note: If you are creating a **Send to friend** form, the **Thanks email options** do not display; the **Configuring forwarded email headers section** displays. See Configuring Forwarded Email Headers.

Table 55 Designing a Thank-You Page and Email

Thank you page options	
Let me customize what the page looks like	Select this option to design the thank-you page in the WYSIWYG editor that displays. See Using the HTML Editor for information.
Take the subscriber to an existing website address	Select this option to redirect the user to another page on the Internet. Enter the page's full URL in the field that displays (for example, "**http://www.someite.com/somepage.html**")
Thanks email options	
Send from this name	This is the name of the person from which the thank-you email will be sent. This displays the default "from" name for the contact list you selected. If you want to change this name, enter the new name in this field.
Send from this email address	This is the email address from which the thank-you email will be sent. This displays the default "from" email account for the contact list you selected. If you want to use a different email account, enter the new address in this field.
Send reply emails to	This is the name of the person from which the thank-you email will be sent. If a contact replies to your thank-you email, this is the address to which the reply is sent. This displays the default reply email address for this contact list. If you want to use a different address, enter the new address in this field.
Send bounced email to	This is the address to which undeliverable emails are sent. This displays the default bounced email address for this contact list. If you want to use a different address for handling bounced emails, enter the new address in this field.
Email subject	Enter the subject line for the thank-you email.
Confirmation email (HTML)	Design the HTML version of the thank-you email in this section. See Using the HTML Editor for information.
Confirmation	Design the plain-text version of the thank-you email in this section. See

email (text)	Using the Text Editor for information.
Next	Click this to proceed to the next screen. The next screen depends on the option you selected in the **Configuring basic form settings** screen.
Cancel	Click this to return to the **View website forms** screen.

Configuring Forwarded Email Headers

When you select **Send to friend** in the **Configuring basic form settings** screen, use this screen to configure the headings that display above the forwarded HTML and text emails, identifying the sender by whom it was forwarded.

Note: This section displays beneath the **Thank you page options**. See Designing a Thank-You Page and Email.

Figure 211 Designing Forwarded Email Headers

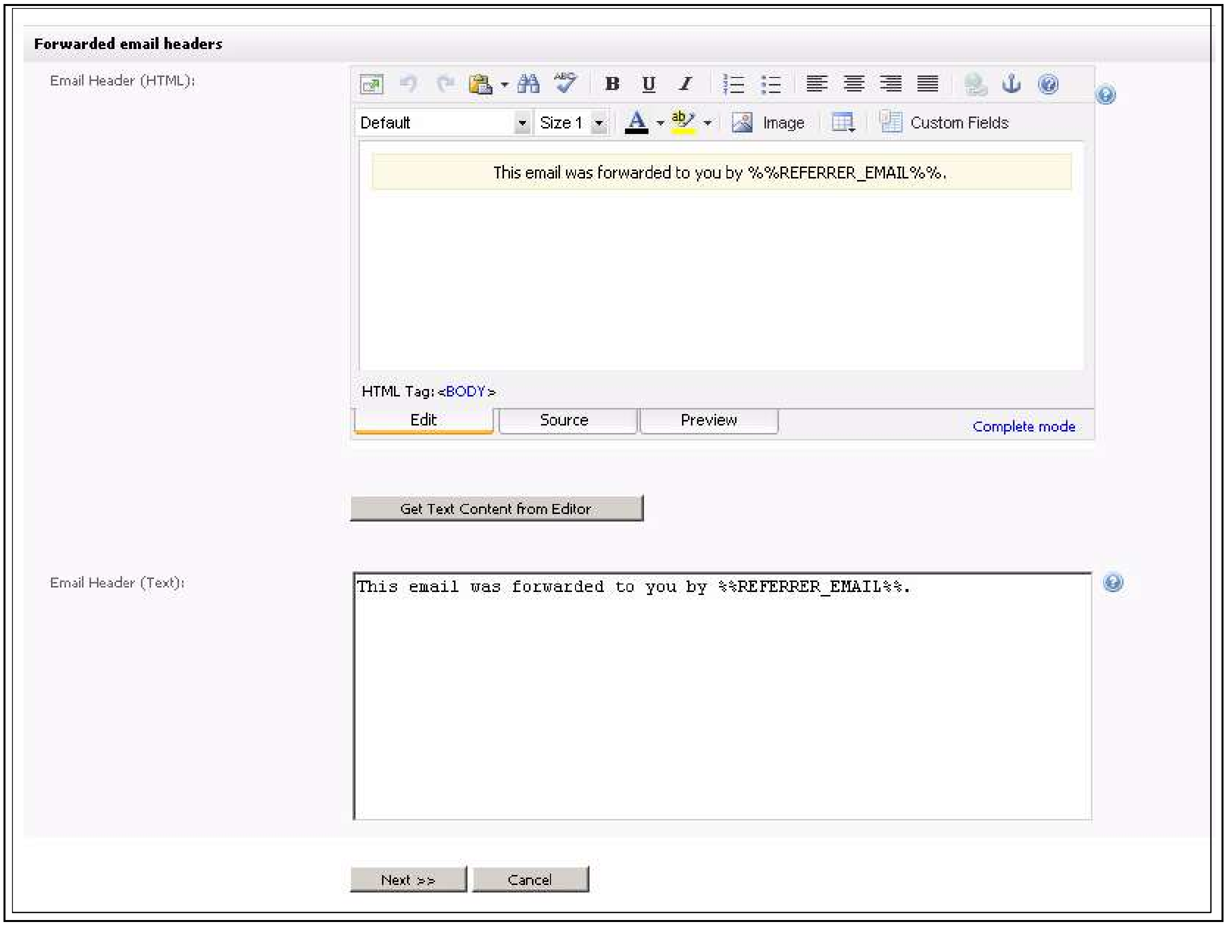


Table 56 Designing Forwarded Email Headers

Email header (HTML)	Design the HTML header in the WYSIWYG editor that displays. See Using the HTML Editor for information. Note: The **%%REFERRER_EMAIL%%** variable places the email address of the contact who forwarded the email into the HTML header.
Email header (text)	Enter the text that displays in the plain-text header. Note: The **%%REFERRER_EMAIL%%** variable places the email address of the contact who forwarded the email into the HTML header.
Next	Click this to proceed to the next screen. The next screen depends on the option you selected in the **Configuring basic form settings** screen.
Cancel	Click this to return to the **View website forms** screen.

Designing an Error Page

Use this screen to configure a page that displays if there is an error in the subscription (or unsubscription, modification, or forwarding) process.

Figure 212 Designing an Error Page

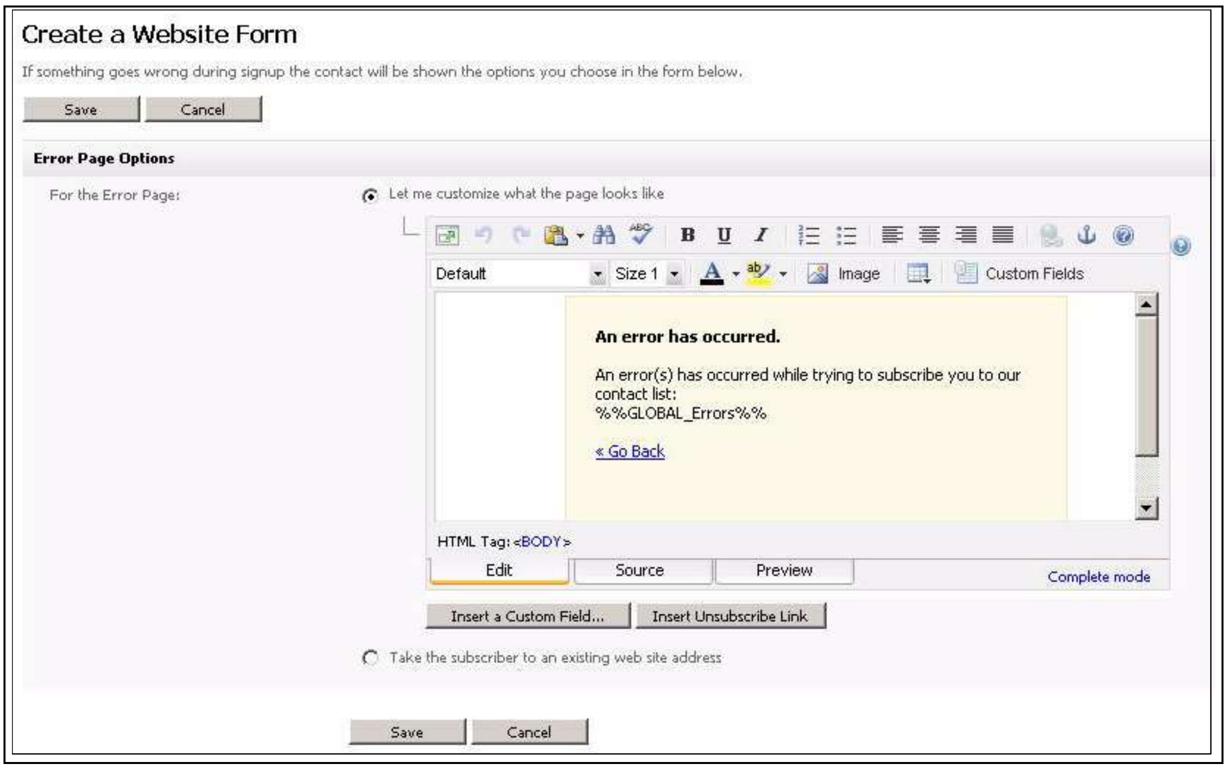


Table 57 Designing an Error Page

Let me customize what the page looks like	Select this option to design the error page in the WYSIWYG editor that displays. See Using the HTML Editor for information.
Take the subscriber to an existing website address	Select this option to redirect the user to another page on the Internet. Enter the page's full URL in the field that displays (for example, "**http://www.someite.com/somepage.html**")
Save	Click this to save the changes to your form and continue to the **Add the form to your website** screen.

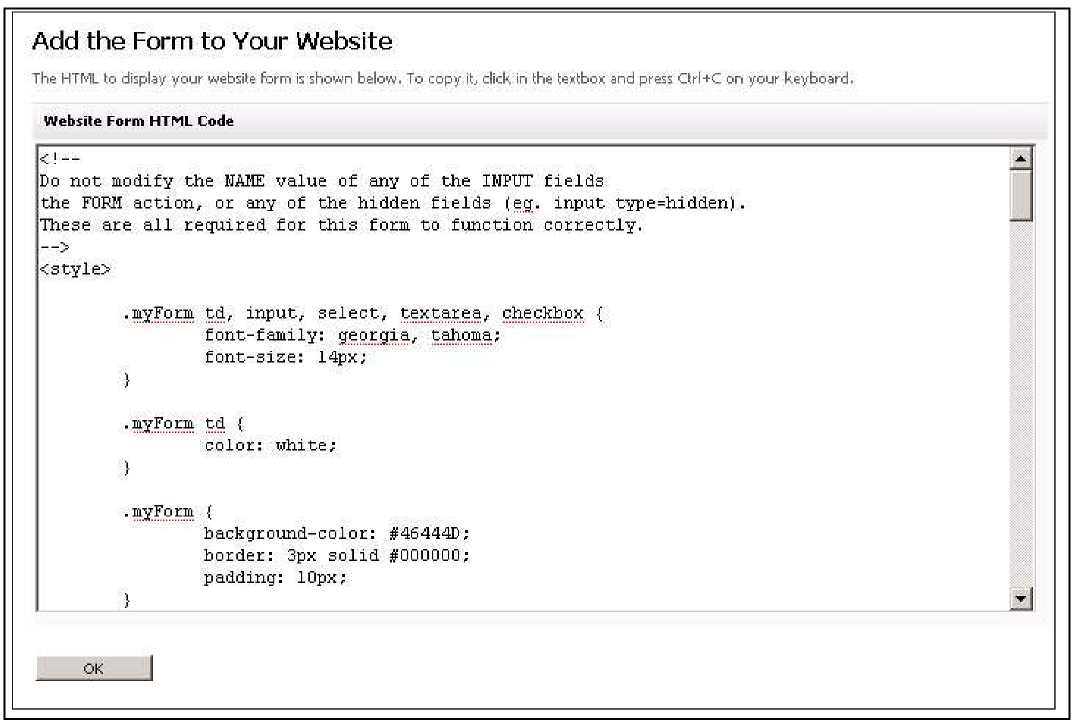
Cancel	Click this to return to the **View website forms** screen.

Adding a Form to Your Website

Take the following steps to add a form you already created to your website.

1. In your web development application (for example, Adobe Dreamweaver), open the web page into which you want to add the form.
2. In the email software, go to the **Add the form to your website** screen. This screen displays after the **Designing an error page** screen. Either create a new form, or edit and existing form and click **Next** until you reach this page.

Figure 213 Adding a Form to Your Website



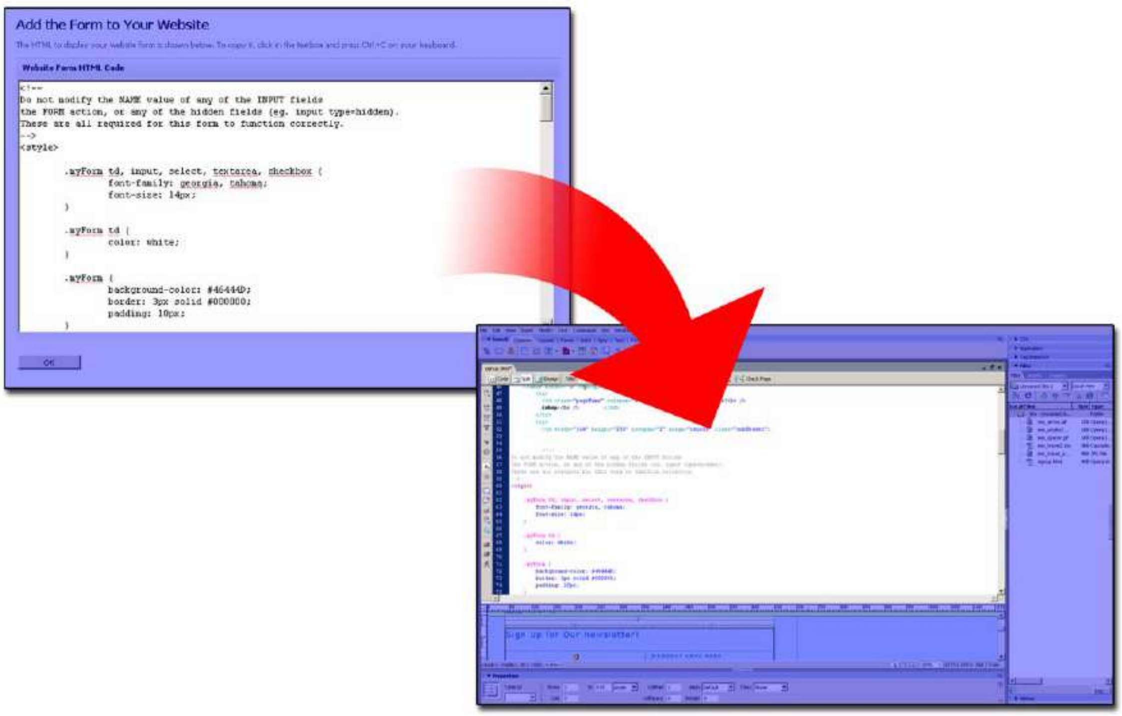
3. Select the code in the **Website from HTML code** section, and copy it (**CTRL-C**).

Note: Bear in mind the warning included at the top of the HTML: "**Do not modify the NAME value of any of the INPUT fields, the FORM action, or any of the hidden fields (e.g. input type=hidden). These are all required for this form to function correctly**."

4 In your web development application's HTML code editing window, paste (CTRL-V) the code into the required location.

Note: If your web development application requires that you copy files from the email software, do so.

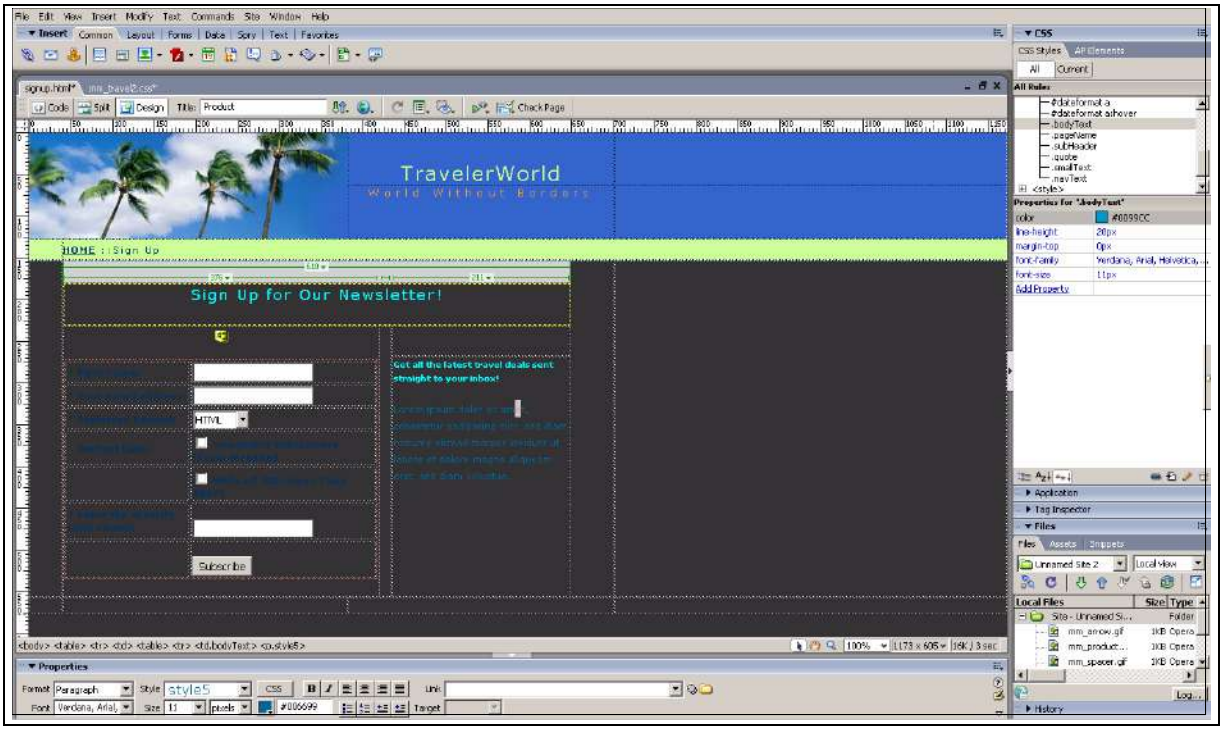
Figure 214 Paste HTML into Web Development Application



5 Check, align and modify the form in your web development application's WYSIWYG or text editor.

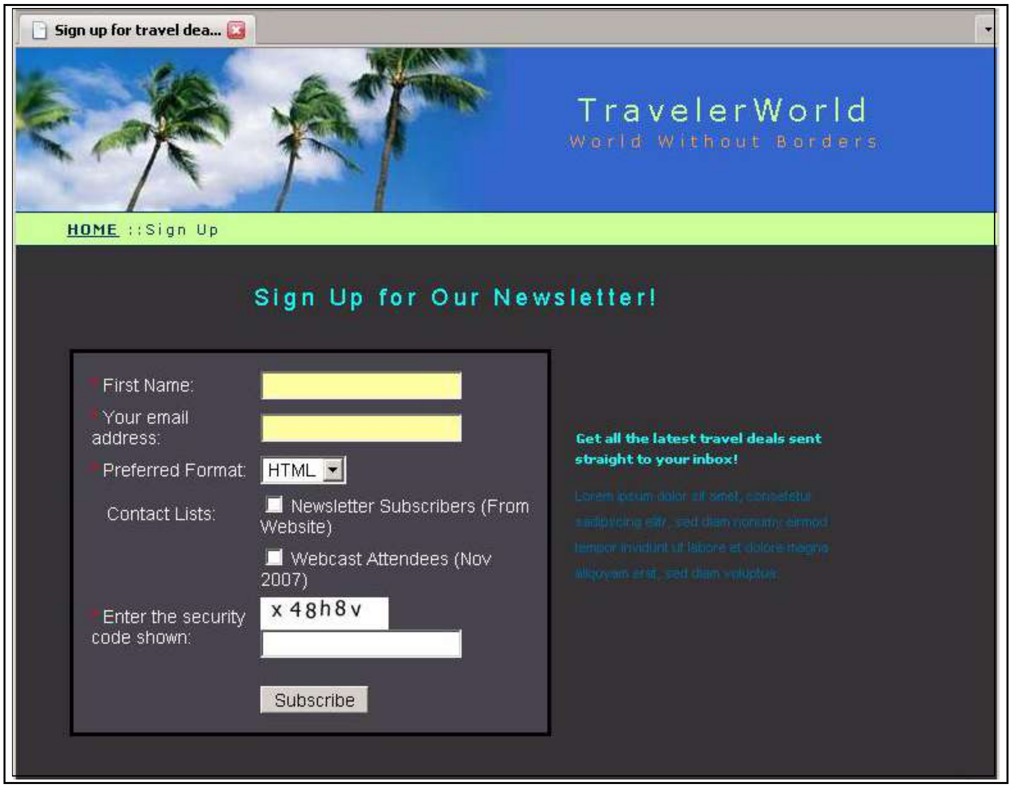
Note: When you edit the form, remember that its styles are defined in the form code and are not inherited from your page or CSS. If you want to change the appearance of text, modify the form code (bearing in mind the earlier warning against modifying other aspects of the form).

Figure 215 Edit Form in Your Web Development Application



6 Test the page into which you placed the form in a web browser.

Figure 216 Subscription Form in a Web Page



7 With access to the Internet, test the form:

- Make sure that you are able to sign up to the list (and that the correct confirmation or thank-you screen displays) by entering the required information, using an email address to which you have access. If you chose double-opt-in confirmation, test that the link in the email you receive works correctly.
- When you attempt to sign up to the list, but do not include a required field, a warning should display. Make sure that required fields are actually required by attempting to sign up without entering one of the required fields. Repeat the test for all required fields.
- Force an error (by entering an incorrect CAPTCHA security code, for example) to ensure that the error page displays correctly.

8 When you are happy with the form's appearance and operation, upload the page to your website.

Configuring User Accounts

This chapter discusses how to use the **User Accounts** link in the toolbar.

Figure 217 The User Accounts Link

User Account Overview

The email software allows you to set up and manage unlimited user accounts. Use different user accounts to control what different users of the email software may and may not do.

You may want to do this if only certain employees should have access to email lists, while other employees need to design templates or campaigns, or if you are providing the email software as a service to clients who must have access to only certain areas of the application.

User Privileges

You can assign different privilege levels and settings to individual users. These include:

- Whether users may edit their own settings.
- Whether users should see marketing tips.
- Whether users may edit templates.
- How many contact lists users may create, and how many emails they may send.
- Whether users may create, edit, or delete the following: autoresponders, forms, lists, segments, custom fields, campaigns, contacts, and templates.
- What kinds of statistics users may view.
- Whether users may administer and modify settings, lists, templates or users.
- Whether users may modify their SMTP (Simple Mail Transfer Protocol) settings, or use the **smtp.com** server.
- Whether users have access to the XML API (eXtensible Markup Protocol Application Programming Interface).
- Which contact lists, segments, and templates the user may access.

- The user's Google Calendar login details.

Users who may make changes to their SMTP settings can do so using the **User accounts** > **Email Settings** screen.

Managing User Accounts

Use the following sections to create, manage and delete your user accounts:

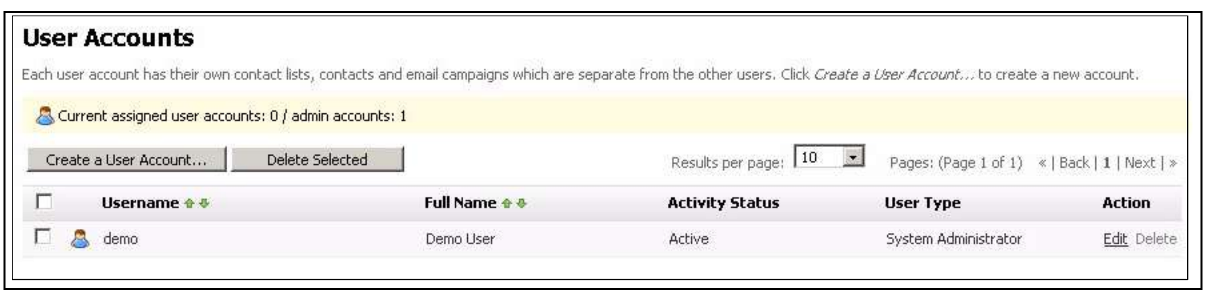
- Creating and Editing User Accounts
- Deleting User Accounts
- Configuring User Settings
- Configuring User Restrictions
- Configuring User Permissions
- Configuring Email Settings
- Configuring Google Calendar Settings

Creating and Editing User Accounts

Take the following steps to create a user account:

1 Click **User accounts** in the toolbar.

Figure 218 User Accounts



2 To create a new account, click **Create a user account**.
To edit an existing user account, click the user account's **Edit** icon.

3 The **Create user** or **Edit user** screen displays at the **User Settings** tab. Configure the settings in this screen (see Configuring User Settings).

4 When you have finished configuring the **User settings** screen, click the **User restrictions** tab (see Configuring User Restrictions).

5 When you have finished configuring the **User restrictions** screen, click the **User permissions** tab (see Configuring User Permissions).

6 When you have finished configuring the **User permissions** screen, click the **Email settings** tab (see Configuring Email Settings).

7 When you have configured the new user account, click **Save** to finish setting up the account. Alternatively, click **Cancel** to return to the **User accounts** screen without saving your changes.

Deleting User Accounts

Take the following steps to remove a user account from the email software.

1 Click **User accounts** in the toolbar.

Figure 219 Delete a User Account

2 Do one of the following:

- Select the checkbox to the left of the user account’s **Username** and click **Delete selected**.
- Click the **Delete** link in the **Action** column.

Configuring User Settings

The **User setting** screen allows you to control a user account’s personal details (user name, password, email address, time zone, etc.), and administrative settings such as:

- Whether a footer is added to HTML and text emails.
- Whether the account is active, and may be used to send emails.
- Whether the user may edit account settings.
- Whether the user sees email marketing tips.
- Whether the user may use the HTML editor (and use it to produce XHTML output).

Click **User accounts** in the toolbar, then click the **User settings** tab.

Figure 220 User Settings

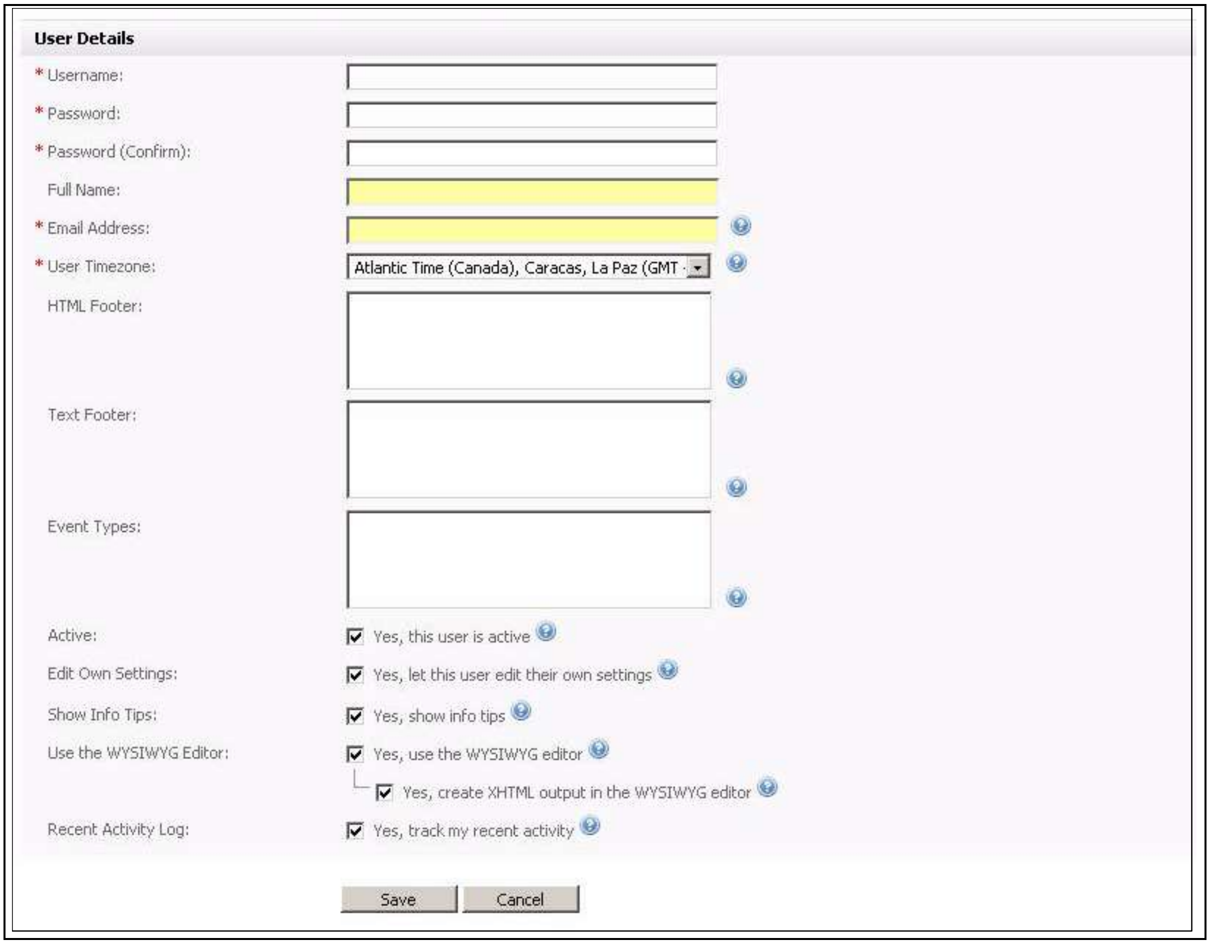


Table 58 User Settings

Username	Enter the name you want to give to this user account (required).
Password	Enter the password for this user account (required).
Password (confirm)	Re-enter the **Password** (required).
Full name	Enter the user's full name.
Email address	Enter the user's email address (required). If the user requests the account password, it is sent to this address.
User timezone	Select the time zone in which the user is located (required). Time-related reports and statistics viewed by the viewer are converted to this time zone automatically.

HTML footer	This is the footer that displays at the bottom of HTML emails sent by this user. If you do not want to add a footer to HTML emails, leave this field blank.
Text footer	This is the footer that displays at the bottom of text emails sent by this user. If you do not want to add a footer to text emails, leave this field blank.
Events	Enter the types of event that display by default when this user manually creates a contact event log entry. Note: This feature does not limit the event types that the user can enter for a contact event log entry; the user can also enter additional event types.
Active	Select this if the user may log in and use the account. Deselect this if the user may not log into the account, but should still exist in the system.
Edit own settings	Select this if the user may edit the account settings. The user may edit all settings except those in the **User permissions** tab. Deselect this if the user may not edit account settings.
Show info tips	Select this if you want the user to see the email marketing tips that display at the top of many GUI screens, such as the following example. **Figure 221** Email Marketing Tip **Autoresponders - The marketers magic trick.** Sending a series of emails to potential customers automatically is a great way to increase sales and customer loyalty with minimal fuss whether or not you run an online business. Find out how... If you do not want the user of this account to see marketing tips, deselect this option.
Use the WYSIWYG editor	Select this if the user may use the HTML WYSIWYG (What You See Is What You Get) editor in the Email campaigns > Create an email campaign screens (and the **Templates** > **Create a custom template** and **Templates** > **Custom email templates** > **Edit custom template** screens, if the user is permitted to modify templates).
Recent activity log	Select this if you want the user to see a list of recently-visited pages at the top of each screen. The user can then click a link to jump back to the relevant page.

Configuring User Restrictions

Use the **User restrictions** screen to configure the number of contact lists users may create, and the number of emails users may send.

Click **User accounts** in the toolbar, then click the **User restrictions** tab.

Figure 222 User Restrictions

Table 59 Create User: User Restrictions

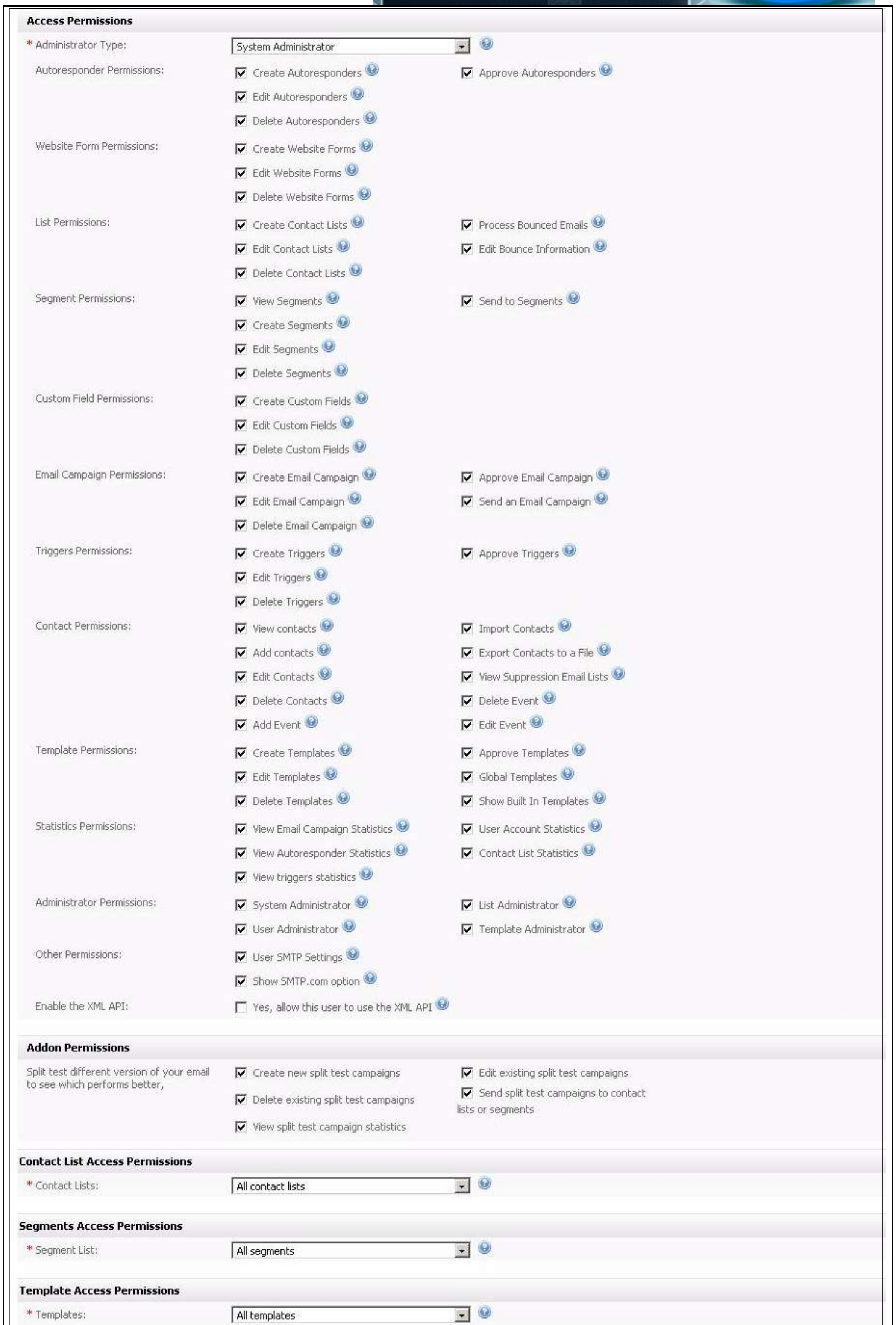
Number of contact lists	Select **Unlimited contact lists** if users of this account may create as many contact lists as they require. If you want to limit the number of contact lists users of this account can create, deselect this option. A **Maximum number of contact lists** field displays. Enter the limit you want to place on contact lists for this account.
Emails per hour	Select **Unlimited emails per hour** if users of this account may send as many emails as they require in each hour. If you want to limit the number of emails users of this account can send in each hour, deselect this option. A **Maximum number of emails per hour** field displays. Enter the limit you want to place on emails per hour for this account.
Emails per month	Select **Unlimited emails per month** if users of this account may send as many emails as they require in each calendar month. If you want to limit the number of emails users of this account can send in each calendar month, deselect this option. A **Maximum number of emails per month** field displays. Enter the limit you want to place on emails per calendar month for this account.
Total number of emails.	Select **Unlimited emails** if users of this account may send as many emails as they require. If you want to limit the number of emails users of this account can send, deselect this option. A **Total maximum number of emails** field displays. Enter the limit you want to place on emails for this account. If you select this option, the number you enter in this field decreases as the user of the account sends emails. For example, if you enter "**1000**" in this field, and the user subsequently sends fifty emails, the next time you view this page the field will read "**950**".

Configuring User Permissions

Use the **User permissions** screen to configure settings specifying the email software features users may access, and their level of access. You can customize each setting manually, or select from a number of preset administrative levels.

Click **User accounts** in the toolbar, then click the **User permissions** tab.

Figure 223 Create User: User Permissions



Access Permissions

* Administrator Type: System Administrator

Autoresponder Permissions: ☑ Create Autoresponders ☑ Approve Autoresponders ☑ Edit Autoresponders ☑ Delete Autoresponders

Website Form Permissions: ☑ Create Website Forms ☑ Edit Website Forms ☑ Delete Website Forms

List Permissions: ☑ Create Contact Lists ☑ Process Bounced Emails ☑ Edit Contact Lists ☑ Edit Bounce Information ☑ Delete Contact Lists

Segment Permissions: ☑ View Segments ☑ Send to Segments ☑ Create Segments ☑ Edit Segments ☑ Delete Segments

Custom Field Permissions: ☑ Create Custom Fields ☑ Edit Custom Fields ☑ Delete Custom Fields

Email Campaign Permissions: ☑ Create Email Campaign ☑ Approve Email Campaign ☑ Edit Email Campaign ☑ Send an Email Campaign ☑ Delete Email Campaign

Triggers Permissions: ☑ Create Triggers ☑ Approve Triggers ☑ Edit Triggers ☑ Delete Triggers

Contact Permissions: ☑ View contacts ☑ Import Contacts ☑ Add contacts ☑ Export Contacts to a File ☑ Edit Contacts ☑ View Suppression Email Lists ☑ Delete Contacts ☑ Delete Event ☑ Add Event ☑ Edit Event

Template Permissions: ☑ Create Templates ☑ Approve Templates ☑ Edit Templates ☑ Global Templates ☑ Delete Templates ☑ Show Built In Templates

Statistics Permissions: ☑ View Email Campaign Statistics ☑ User Account Statistics ☑ View Autoresponder Statistics ☑ Contact List Statistics ☑ View triggers statistics

Administrator Permissions: ☑ System Administrator ☑ List Administrator ☑ User Administrator ☑ Template Administrator

Other Permissions: ☑ User SMTP Settings ☑ Show SMTP.com option

Enable the XML API: ☐ Yes, allow this user to use the XML API

Addon Permissions

Split test different version of your email to see which performs better, ☑ Create new split test campaigns ☑ Edit existing split test campaigns ☑ Delete existing split test campaigns ☑ Send split test campaigns to contact lists or segments ☑ View split test campaign statistics

Contact List Access Permissions

* Contact Lists: All contact lists

Segments Access Permissions

* Segment List: All segments

Template Access Permissions

* Templates: All templates

Table 60 Create User: User Permissions

Administrator type	Specify the type of user for this account. Either select an option from the drop-down list, or select **Custom** and select the options in the rest of this screen manually.
	• Select **System administrator** to give the user access to all aspects of the email software (except the XML API).
	• Select **List administrator** to give the user access to the features listed in the **List permissions** section of this screen, **Contact list statistics** in the **Statistics permissions** section, and the **List administrator** option of the **Administrator permissions** section.
	• Select **Email campaign administrator** to give the user access to the features listed in the **Email campaign permissions** section of this screen, and **View Email Campaign Statistics** in the **Statistics permissions** section.
	• Select **Template administrator** to give the user access to the features listed in the **Template permissions** section of this screen, and the **Template administrator** option of the **Administrator permissions** section.
	• Select **User administrator** to give the user access to **User account** statistics in the Statistics permission section, **User administrator** in the **Administrator permissions** section, and **User SMTP Settings** and **Show SMTP.com option** in the **Other Permissions** section.
	• features listed in the **Template permissions** section of this screen, and the **Template administrator** option of the **Administrator permissions** section.
Autoresponder permissions	Select the actions a user of this account may take related to autoresponders in the **Autoresponders** > **View autoresponders** and **Create autoresponders** screens.
Website form permissions	Select the actions a user of this account may take related to website forms.
List permissions	Select the actions a user of this account may take related to contact lists and bounced emails.
Segment permissions	Select the actions a user of this account may take related to contact list segments. Segments are groups of contacts in a list that share certain features (such as all contacts whose addresses end in "**.com**", for example.

Custom field permissions	Select the actions a user of this account may take related to custom fields.
Email campaign permissions	Select the actions a user of this account may take related to email campaigns.
Triggers permissions	Select the actions a user of this account may take related to event triggers.
Contact permissions	Select the actions a user of this account may take related to contacts in your contact lists and suppression email lists (lists of email addresses that remain in the contact list but do not receive emails).
Template permissions	Select the actions a user of this account may take related to templates.
Statistics permissions	Select the type of statistics a user of this account may view.
Administrator permissions	If you want to assign other permissions to users of this account, select the appropriate option or options. • Select **System administrator** to allow users of this account to access the settings page, and all lists and users. • Select **User administrator** to allow users of this account no additional access. • Select **List administrator** to allow users of this account to access and edit all contact lists for all users. • Select **Template administrator** to allow users of this account to access and edit all templates for all users.
Other permissions	Select **User SMTP settings** to allow users of this account to edit their own SMTP (Simple Mail Transfer Protocol) settings. Select Show SMTP.com option to allow users of this account to have the option to send their emails using **smtp.com**'s service.
Enable the XML API	Select this to allow users of this account to use the email software's XML API (eXtensible Markup Protocol Application Programming Interface).
Addon permissions	This section contains access permissions that relate to the addon modules currently installed and enabled in the email software (see Managing Addon Settings). Select the actions that a user of this account may perform.

Contact lists	This section controls the contact lists that users of this account may use. Select **All contact lists** to allow users of this account to use every contact list stored in the email software. Select **User's own lists plus the following lists** to allow the user to access contact lists configured in the user's account, plus the other lists that display below (if other contact lists are already configured). Note: The other permissions in this screen also affect this section. For example, users of an account which has **Edit contact lists** turned off in the **List permissions** section will not be able to view segments for other accounts, even if they are permitted to in this section.
Segment list	This section controls the templates that users of this account may use. Select **All templates** to allow users of this account to use every template stored in the email software. Select **User's own templates plus the following** to allow the user to access templates configured in the user's account, plus the custom templates that display below (if custom templates already exist). Note: The other permissions in this screen also affect this section. For example, users of an account which has **View segments** turned off in the **Segment Permissions** section will not be able to view segments for other accounts, even if they are permitted to in this section.
Templates	This section controls the contact list segments that users of this account may use. Select **All segments** to allow users of this account to use every contact list segment stored in the email software. Select **User's own segments plus the following lists** to allow the user to access contact list segments configured in the user's account, plus the other lists that display below (if other contact lists are already configured). Note: The other permissions in this screen also affect this section. For example, users of an account which has **Edit templates** turned off in the **Template Permissions** section will not be able to edit templates for other accounts, even if they are permitted to in this section.

Configuring Email Settings

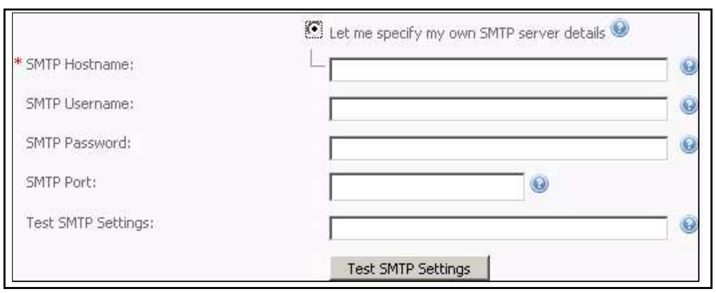
Use the **Email settings** screen to configure each user account's SMTP (Simple Mail Transfer Protocol) settings. Take the following steps:

1. Click **User accounts** in the toolbar, then click the **Email settings** tab.

Figure 224 Create User: Email Settings

2. Set up this user account's email server settings:
   - Select **Use my default SMTP server** to have this account use the email software server's default settings.
   - If you want to configure an SMTP server for this account alone, select **Let me specify my own SMTP server details**. The following screen displays.

Figure 225 User Account: SMTP Server Details



Specify the **SMTP hostname** (required).

If your SMTP server requires a username and password for authentication, enter them in the fields **SMTP username** and **SMTP password** fields.

If your SMTP server uses a non-standard port number, enter it in the **SMTP port** field (the standard SMTP port number is 25).

To ensure that the SMTP settings are functioning correctly, enter an email address in the **Test SMTP settings** field and click **Test SMTP settings** to send an email to the specified address.

If you want users of this account to use **smtp.com**'s server to send email, click **Sign up for an SMTP.com account**. The following screen displays.

Figure 226 User Account: Sign up For smtp.com Service

Click **Sign up for an SMTP.com account here** and follow the instructions in the screen that displays.

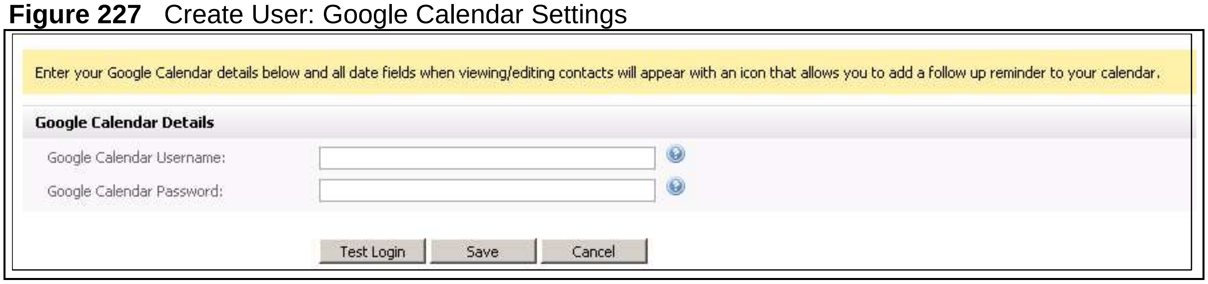
When you have signed up and received your **smtp.com** SMTP server settings, select **Let me specify my own SMTP server details** and enter the details you were given.

Configuring Google Calendar Settings

Use the **Google Calendar settings** screen to configure each user's Google Calendar account settings. Take the following steps:

1 Click **User accounts** in the toolbar, then click the **Google calendar settings** tab.

Figure 227 Create User: Google Calendar Settings



2 Set up this user account's Google calendar settings:

- In the **Username** field, enter the name with which the user logs into Google Calendar.
- In the **Password** field, enter the password associated with the above username.

3 Click **Test login**. The email software checks the login details you entered, and displays a dialog box that lets you know if they are correct or incorrect.

4 If the details are correct, click **Save**.

Using Email Software Settings

This chapter discusses how to use the **Settings** link in the toolbar.

Figure 228 The Settings Link

Email Software Settings Overview

Use the **Settings** screen to control:

- Top-level application settings (see Managing Application Settings).
- Global email settings (see Managing Email Settings).
- Cron jobs (see Managing Cron Jobs).
- Login security settings (see Managing Security Settings).
- Addon settings (see Managing Addon Settings).

Managing Application Settings

Use **Application settings** screen to view and manage top-level application setting such as:

- The email software's URL.
- Your contact email address (for forgotten password requests from users).
- IP address tracking.
- The email software's system message (use this to inform users about scheduled maintenance, and so on).
- Information about the email software's database (such as login details, location, type and version).
- License key information.

You can also test the email sending system.

Take the following steps to configure application settings:

1 Click **Settings** in the toolbar. The **Application settings** tab displays by default. Configure your settings.

Figure 229 Settings: Application Settings

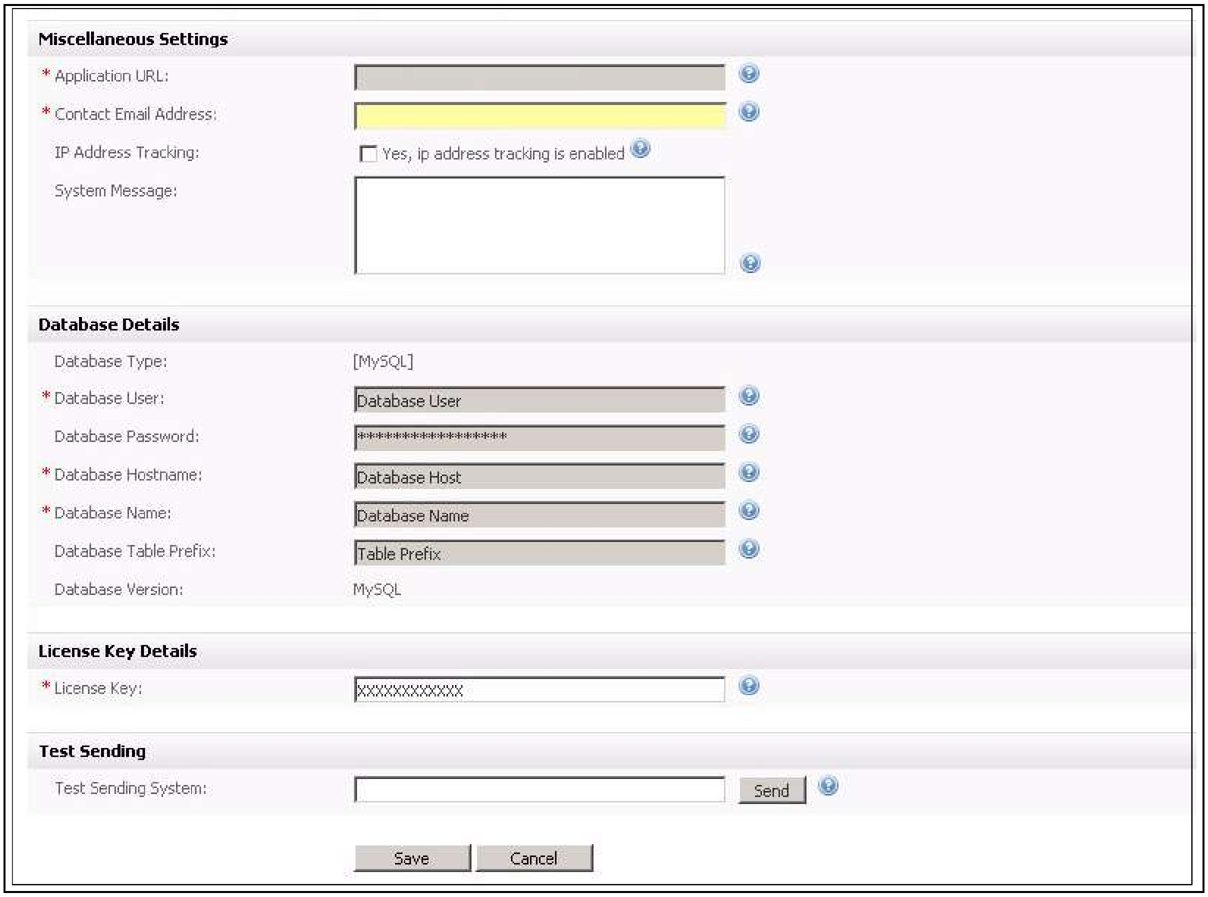


Table 61 Settings: Application Settings

Miscellaneous Settings	
Application URL	Enter the email software's full URL (Uniform Resource Locator), for example "**http://www.somedomain.com/somefolder/**".
Contact Email Address	Enter the email address to which users' forgotten password requests should be sent.
IP Address Tracking	Select this to log the IP address used when a contact subscribes to or unsubscribes from a list. Deselect this if you do not want to log IP addresses.

System Message	If you want a message to display to your users when they log in to the email software, enter the message here. The message displays beneath the usage graph in the **Home** screen.
Database Details	
Database Type	This displays the type of database the email software is using. See the **Database version** field for the database application's version details.
Database User	Enter the username you use to log into the database.
Database Password	If your database requires a password for login, enter it here.
Database Hostname	Enter the hostname or IP address of the database the email software uses.
Database Name	Enter the name of the database the email software uses.
Database Prefix	Enter text to affix to tables. Use this if your database includes multiple tables.
Database Version	This displays the version number of the database application the email software is using. Note: The email software supports MySQL v4.0 and above, and PostgreSQL v7.4 and above.
License Key Details	
License Key	Enter the license key you were given when you purchased the email software. Note: If you are not sure what to enter here, contact your vendor.
Test Sending	
Test Sending System	Enter an email address (to which you have access) in this field and click **Send** to test the email sending system. If the email arrives in the address's inbox, the sending system is working correctly. Note: Configure global email server settings in the **Email settings** tab's **Mail server details** section.

2 Click **Save** to save your changes. Alternatively, click **Cancel** to return to the **Home** screen without saving any changes.

Managing Email Settings

Use the **Email settings** screen to view and manage global email settings relating to:

- Email size, rate and number.
- Resend attempts.
- The maximum size of images users may upload and use in campaigns.
- Email footers.
- Unsubscribe links.
- Attachments.
- Embedded images.
- Test mode (when in test mode, no emails are sent to contacts).
- Mail server details.
- Default bounced email settings.

Note: The fields in this screen control global settings. To configure user-specific email settings, use the **User accounts** > **Email settings** screen (see Configuring Email Settings).

Take the following steps to configure global email settings:

1 Click **Settings** in the toolbar, then click **Email settings**. Configure your settings.

Figure 230 Settings: Email Settings

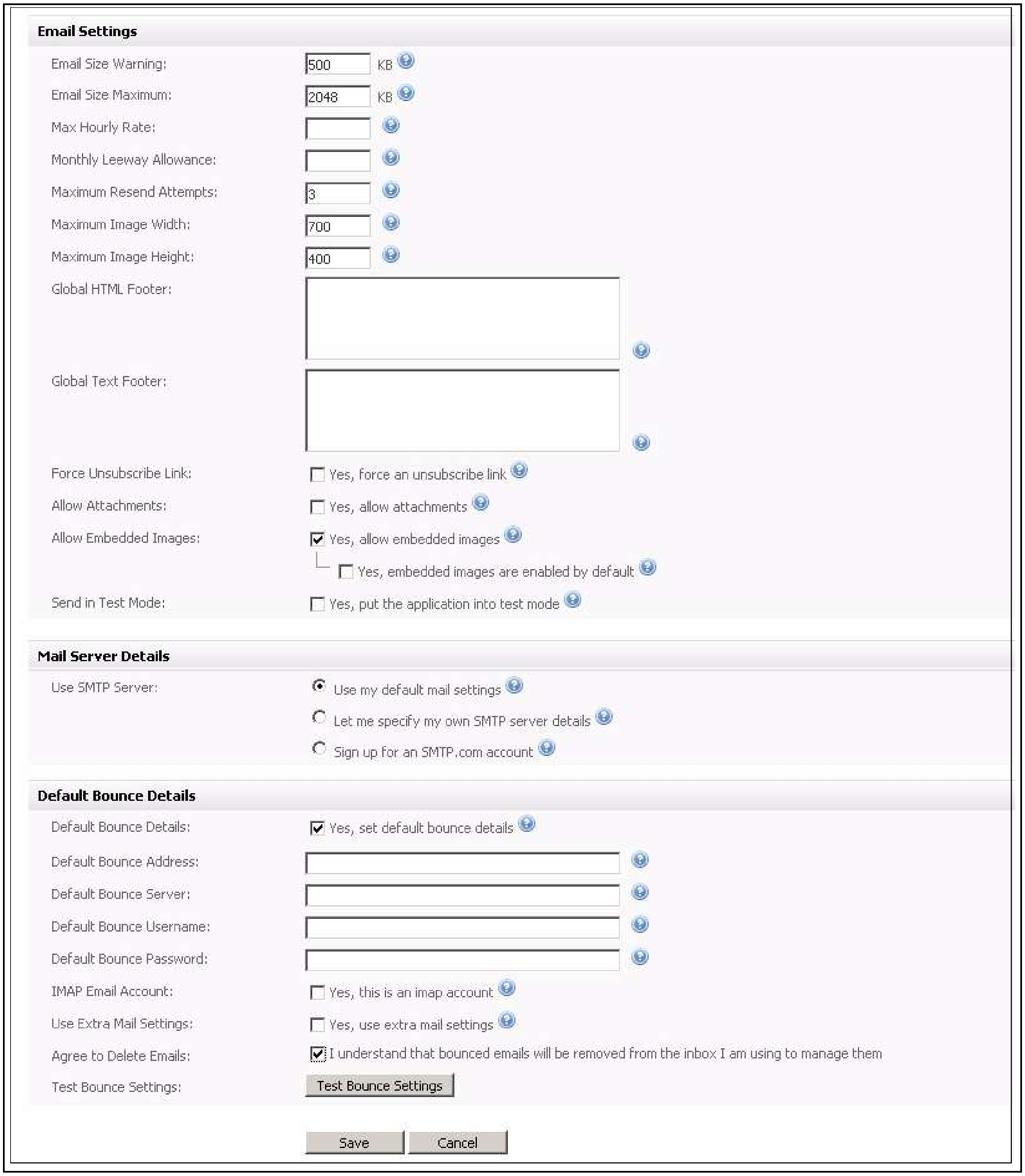


Table 62 Settings: Email Settings

Email Settings	
Email Size Warning	You can have the email software display a warning message if a user tries to send an email or autoresponder over a certain size. Enter the size (in kilobytes) above which this warning should display. Note: Enter zero ("**0**") to not sand email size warnings.
Email Size Maximum	Enter the maximum size (in kilobytes) for an email campaign or autoresponder. The email software won't send an email campaign larger than this. Note: Enter zero ("**0**") to allow email campaigns and autoresponders of any size.
Max Hourly Rate	Enter the maximum number of emails a user may send, per campaign, per hour. Note: If users have multiple campaigns, they may send up to this number of emails per campaign per hour. Note: Enter zero ("**0**") to allow any number of emails per campaign per hour.
Monthly Leeway Allowance	If you want to allow users to go over their monthly email limit, enter the number of "grace" emails here. Note: Enter zero ("**0**") to allow no "grace" emails.
Maximum Resend Attempts	Enter the number of times the email software allows users to re-send email campaigns.
Maximum Image Width	Use this, in conjunction with the **Maximum image height** field, to limit the size of images users may upload to the email software server. Enter the maximum image width (x-axis) in pixels.
Maximum Image Height	Use this, in conjunction with the **Maximum image width** field, to limit the size of images users may upload to the email software server. Enter the maximum image height (y-axis) in pixels.
Global HTML Footer	If you want to add information to every HTML email, enter the information here. Note: If you also set a user-specific HTML footer (see Configuring User Settings), the global footer displays after the user-specific footer.

Global Text Footer	If you want to add information to every plain-text email, enter the information here. Note: If you also set a user-specific text footer (see Configuring User Settings), the global footer displays after the user-specific footer.
Force Unsubscribe Link	Select this to ensure that all emails and autoresponders sent by users include an unsubscribe link (the `%%unsubscribelink%%` variable). Deselect this to allow users to send emails and autoresponders without unsubscribe links.
Allow Attachments	Select this to allow users to attach files to their emails and autoresponders. Deselect this to forbid users from attaching files.
Allow Embedded Images	Select this to allow users to embed images in their emails and autoresponders. Deselect this to forbid users from embedding images.
Send in Test Mode	Select this to activate test mode. In test mode, emails are not sent. This allows users to test the email software without the danger of sending emails to contact lists. Deselect this to deactivate test mode.
Mail Server Details	
Use SMTP Server	Use the fields in this section to configure global SMTP settings. • Select **Use my default mail settings** to use the default settings configured on the email software's server. • Select **Let me specify my own SMTP server details** if you have another SMTP server you want to use. • Select **Sign up for an smtp.com account** if you want to use smtp.com's services for sending mail. See Managing Global SMTP Settings for more details.
Default Bounce Details	
Default Bounce Details	Select this to specify the global default method for handling bounced emails. Note: Bounced emails are emails that could not be delivered to the intended recipient. The following fields appear when you select this option.

	Default Bounce Address: enter the email address to which bounced emails should be sent by default.
	Default Bounce Server: enter the name of the server you want to use for handling bounced emails by default. Note: If your server uses a non-standard port, enter the port number after the hostname in the format "**hostname:port**".
	Default Bounce Username: enter the username for the **Default bounce server**.
	Default Bounce Password: enter the password associated with the **Default bounce username**.
	IMAP Email Account: select this if the account on the **Default bounce server** is an IMAP (Internet Message Access Protocol) account. Deselect this if the account on the **Default bounce server** is a POP3 (Post Office Protocol version 3) account.
	Use Extra Mail Settings: select this if you need to configure the **Default bounce server** account further. The following fields display: **Do not validate certificate**: select this if you do not want to validate the server's SSL (Secure Sockets Layer) certificate. Use this if your server uses a self-signed certificate. If you are not sure whether your server uses a self-signed certificate, do not select this. **Do not use TLS**: select this if you do not want to use TLS (Transport Layer Security) to connect to the server. If you are not sure whether you want to use TLS, do not select this. **Do not use SSL**: select this if you do not want to use SSL (Secure Sockets Layer) to connect to the server. If you are not sure whether you want to use SSL, do not select this. **Others**: enter any other options required to connect to the server.
	Agree to Delete Emails: select this if you want to delete emails from the server once you have read them. If you did not save an email on your computer, you will not be able to re-read the email.
	Test Bounce Settings: click this to test the bounce email account by sending a test email.

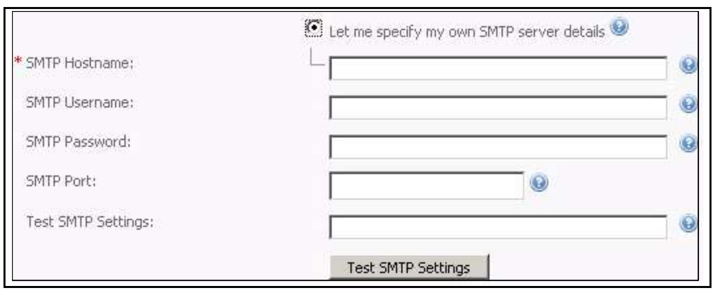
2 Click **Save** to save your changes. Alternatively, click **Cancel** to return to the **Home** screen without saving any changes.

Managing Global SMTP Settings

Take the following steps to configure global SMTP settings:

1. Click **Settings** in the toolbar, then click the **Email settings** tab.
2. Set up this global email server settings in the **Mail Server Details** section:
   - Select **Use my default SMTP server** to use the default server for the email software. Configure the default server in the **Settings** > **Email settings** screen.
   - If you have other SMTP server details that you want to use, select **Let me specify my own SMTP server details**. The following screen displays.

Figure 231 Email Settings: SMTP Server Details



Specify the **SMTP hostname** (required).

If your SMTP server requires a username and password for authentication, enter them in the **SMTP username** and **SMTP password** fields.

If your SMTP server uses a non-standard port number, enter it in the **SMTP port** field (the standard SMTP port number is 25).

To ensure that the SMTP settings are functioning correctly, enter an email address in the **Test SMTP settings** field and click **Test SMTP settings** to send an email to the specified address.

If you want to use **smtp.com**'s server to send email, click **Sign up for an SMTP.com account**. The following screen displays.

Figure 232 Email Settings: Sign up For smtp.com Service

Click **Sign up for an SMTP.com account here** and follow the instructions in the screen that displays.

When you have signed up and received your **smtp.com** SMTP server settings, select **Let me specify my own SMTP server details** and enter the details you were given.

Managing Cron Jobs

Cron jobs are operations that run on your server at pre-scheduled times ("cron" is an abbreviation of "chronograph"). Cron relies on crontabs; configuration files that manage cron jobs.

Cron jobs can invoke standard command line commands, or call scripts.

Note: In order to process cron jobs, your server must be running cron. Contact your service provider for information.

The email software uses cron jobs to automatically send pre-scheduled email campaigns at specified times, and to process autoresponders and bounced emails at specified intervals.

Note: Schedule email campaigns in the **Email campaigns** > **Send email campaign** screens.

To set up cron jobs, you need to:

- Configure cron settings in the email software (see Configuring Cron Jobs in the Email Software).

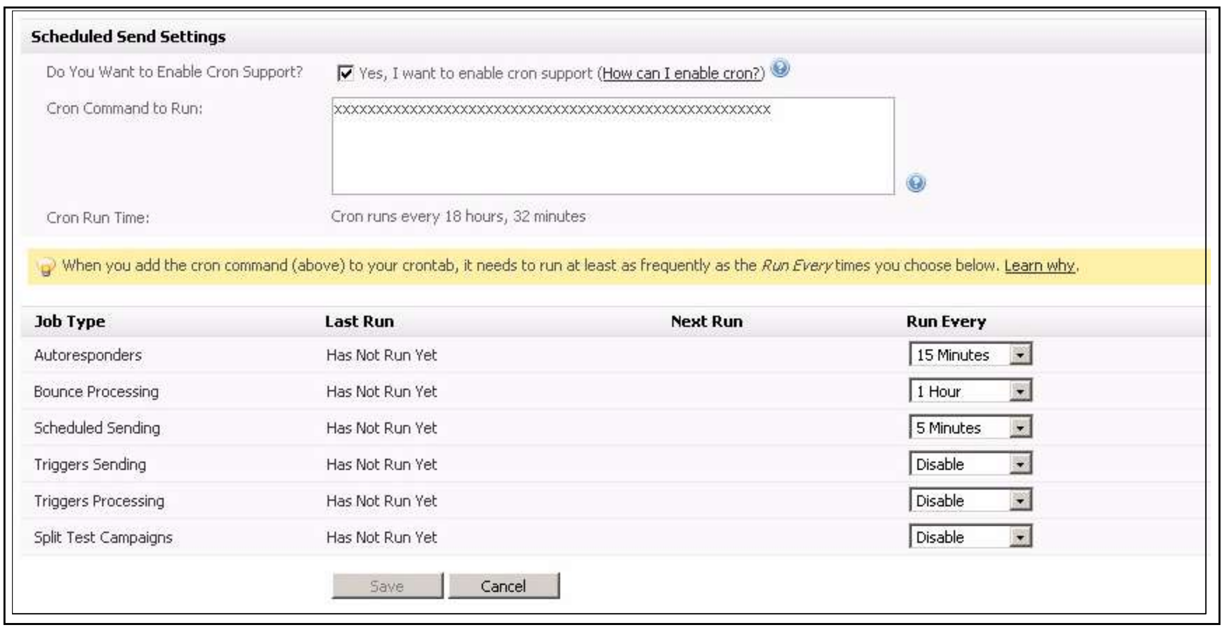
- Configure your server's crontab file to run the cron job (see Configuring Cron Support on Your Server).

Configuring Cron Jobs in the Email Software

Take the following steps to configure cron jobs in the email software.

1 Click **Settings** in the toolbar. Then, click the **Cron jobs** tab.

Figure 233 Settings: Cron Jobs



2 Select **Yes, I want to enable cron support**.

If you want to turn the email software's cron support off, deselect **Yes, I want to enable cron support**. The rest of the fields in this screen are hidden.

Note: Cron is enabled by default.

3 Use the **Run every** lists to select the frequency with which you want to run the following cron jobs:

- **Autoresponders**: this controls sending responses to contacts who join your contact lists.
- **Bounce processing**: this controls emails that could not be delivered to their recipients.
- **Scheduled sending**: this controls sending pre-scheduled email campaigns.

- **Triggers sending**: this controls sending email campaigns initiated by a trigger event.
- **Triggers processing**: this controls performing all actions (including administrative actions) specified in triggers.
- **Split test campaigns**: this controls performing split testing of two or more email campaigns.

If you want to stop a cron job, select **Disable** in its **Run every** list.

The **Last run** fields display the time at which the job was last performed. The **Next run** field displays the time at which the job is next scheduled to run.

4 Click **Save** to save your changes in this screen. Alternatively, click **Cancel** to return to the **Home** screen without saving your changes.

Configuring Cron Support on Your Server

Take the following steps to configure cron support on your server:

1 Click **Settings** in the email software's toolbar. Then, click the **Cron jobs** tab (see Figure 233).

2 Copy the command in the **Cron command to run** field. This is the path to the batch script that runs the email software's cron jobs.

3 Note the most frequent entry in the **Run every** column. You will need to configure the cron job to run on your server at least as often as this.

4 Log in to your server and configure the crontab file to run the command you copied from the email software's **Cron command to run** field.

   - For information on configuring your server's crontab via command line commands, see Configuring Cron Via Commands.
   - For information on configuring your server's crontab via a graphical interface such as cPanel, see Configuring Cron Via a Graphical Interface.

Configuring Cron Via Commands

To set up cron via command line interface, telnet to your server, or use its control panel command line interface. Enter the edit crontab command:

```
crontab -e
```

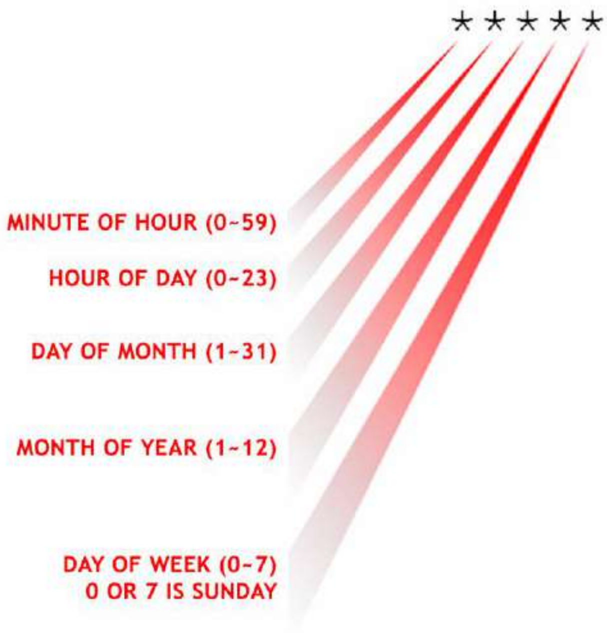
Next, configure the cron job. Enter the command you copied from the email software's **Cron command to run** field, preceded by five asterisks:


```
*****/path/to/php  -f
/path/to/emailmarketer/admin/cron/cron.php
```

Note: This command is only an example; yours may be different.

The asterisks allow you to specify the frequency with which the `.../cron.php` script is called, as shown:

Figure 234 Cron Timing Configuration



Note: For the **Day of week**, you can also enter the full day (for example, "tuesday"). This is not case-sensitive.

- An asterisk indicates a wildcard. Thus, if you enter "*****" the script is run every minute of every hour of every day of every month.
- Alternatively, you can enter a number to specify a time, or enter a range ("3-6", for instance).
- You can also specify frequency by entering "***/n**", meaning every **n** units. So, entering "***/5**" in the **Minute of hour** column means "every five minutes."

Note: If you have no specific reason to limit frequency, it is recommended that you set your cron to run every minute; this allows you to use the email software's email

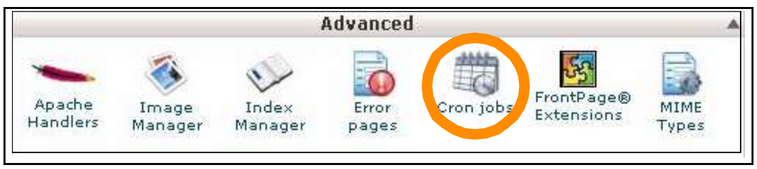
scheduling feature with minute-to-minute precision. You can set other features (autoresponders and bounce processing) to run more infrequently in the email software's interface, if required.

Configuring Cron Via a Graphical Interface

Depending upon your server's configuration, you may be able to configure cron jobs using a graphical user interface such as cPanel or Plesk. This example uses cPanel X.

1 Log into cPanel and select **Advanced** > **Cron jobs**.

Figure 235 cPanel: Advanced

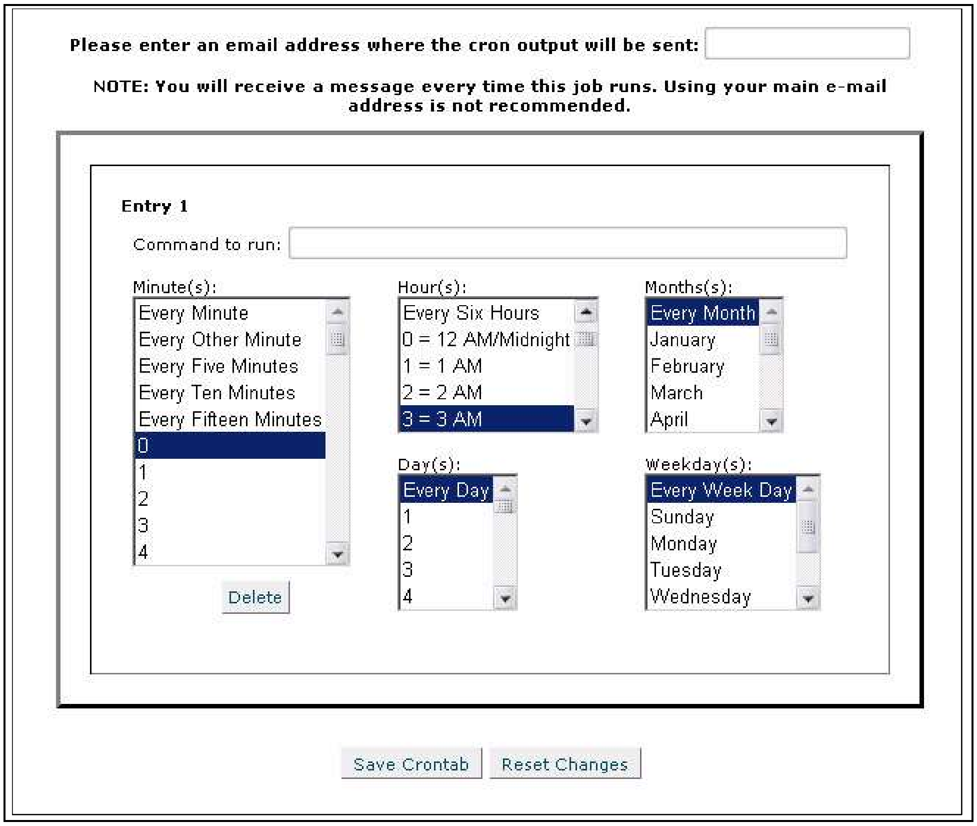


2 Select **Standard** (step 3) or **Advanced** (step 4).

Figure 236 cPanel: Standard or Advanced Cron Mode

3 If you selected **Standard**:

Figure 237 cPanel: Standard Cron Setup



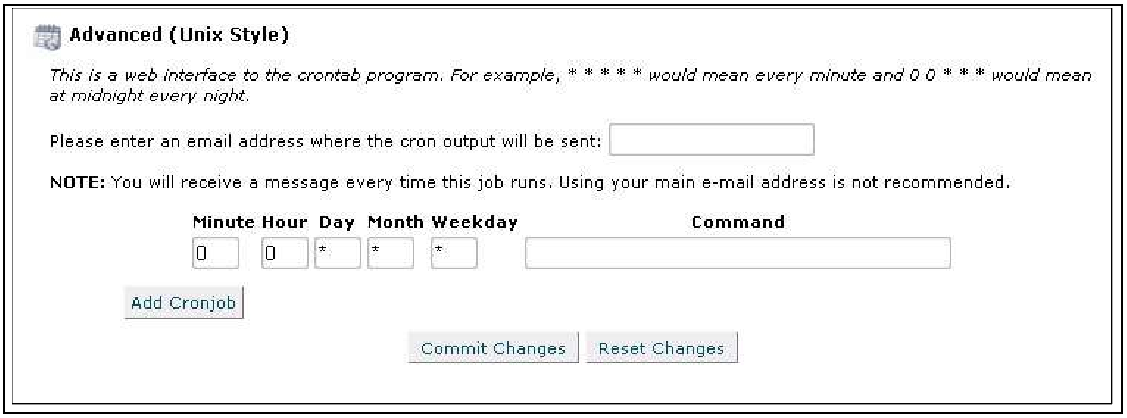
- Paste the command you copied from the email software's **Cron command to run** field into cPanel's **Command to run** field.
- Configure the **Minute(s)**, **Hour(s)**, **Day(s)**, **Month(s)** and **Weekday(s)** fields. Select the frequency you require from the lists.

Note: If you enter an email address in the field at the top of the screen to receive a message every time the job runs, bear in mind that this may be quite frequent.

- Click **Save crontab**. Alternatively, click **Reset changes** to return the fields in this screen to their defaults.

4 If you selected **Advanced**:

Figure 238 cPanel: Advanced Cron Setup



- Paste the command you copied from the email software's **Cron command to run** field into cPanel's **Command** field.
- Configure the **Minute**, **Hour**, **Day**, **Month** and **Weekday** fields. Use the options defined in Configuring Cron Via Commands to define the job's frequency.

Note: If you enter an email address in the field at the top of the screen to receive a message every time the job runs, bear in mind that this may be quite frequent.

- Click **Add cronjob**. Then, click **Commit changes**. Alternatively, click **Reset changes** to return the fields in this screen to their defaults.

Managing Security Settings

The **Security settings** tab allows to prevent automated attacks and password-guessing attempts by locking out people who repeatedly provide incorrect login details. You can specify the number of times that users may attempt to log in, and the length of time for which users who exceed this number of login attempts are locked out.

When a user is locked out, login attempts from the user's IP address are not allowed. The amount of time that the user must wait before trying again displays.

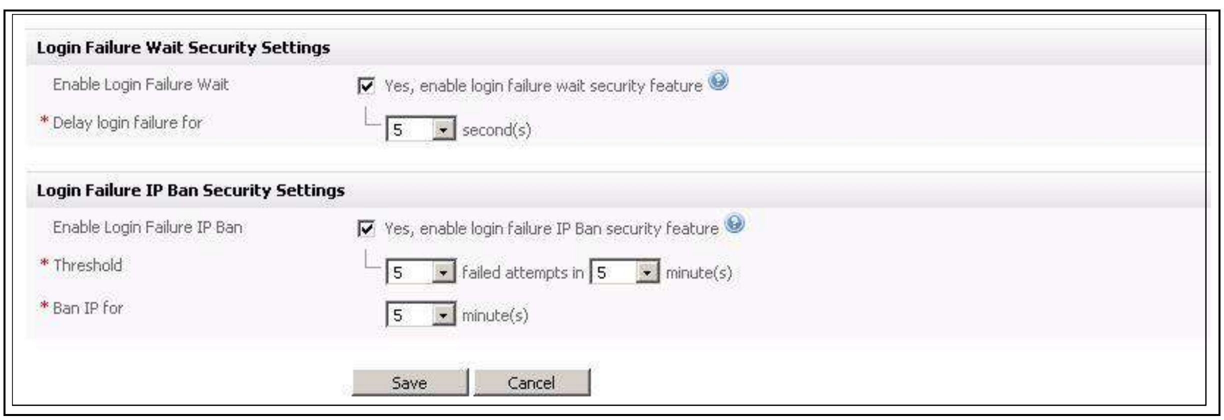
Figure 239 User Locked Out

You can also set a time delay for the login screen. When you do this, a user who has provided incorrect login details must wait the specified number of seconds before being able to attempt to log in again.

To manage the email software's login security settings:

1. Click **Settings** in the toolbar, then click the **Security settings** tab.

Figure 240 Settings: Security Settings



2. If you want to set a time delay for login attempts, select **Enable login failure wait** and select the delay time (in seconds) from the list that displays.
3. If you want to prevent users who repeatedly provide incorrect login information from attempting to log in again after a specified time, select **Enable login failure IP ban**.

   In the **Threshold** field, select the number of failed login attempts permitted (from the same IP address) in the first list, and the time period in which these failed attempts must occur in the second list.

   In the **Ban IP** field, select the length of time for which the IP address is banned from attempting to log in.

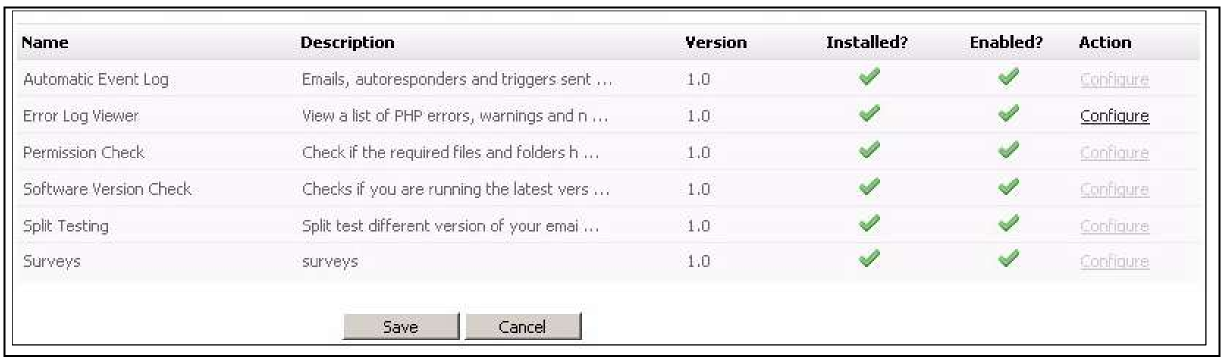
4 Click **Save** when you have finished.

Managing Addon Settings

The **Addons settings** tab allows you to install and enable additional "addon" software modules that enhance the email software.

To manage the email software's addon settings, click **Settings** in the toolbar, then click the **Addons settings** tab.

Figure 241 Settings: Addons Settings



Name	Description	Version	Installed?	Enabled?	Action
Automatic Event Log	Emails, autoresponders and triggers sent ...	1.0	✓	✓	Configure
Error Log Viewer	View a list of PHP errors, warnings and n ...	1.0	✓	✓	Configure
Permission Check	Check if the required files and folders h ...	1.0	✓	✓	Configure
Software Version Check	Checks if you are running the latest vers ...	1.0	✓	✓	Configure
Split Testing	Split test different version of your emai ...	1.0	✓	✓	Configure
Surveys	surveys	1.0	✓	✓	Configure

Save Cancel

Note: The above figure displays the available addons at the time of writing. By the time you read this, others may be available.

Table 63 Settings: Addons Settings

Name	This displays the name of the addon module.
Description	This displays a short description of the addon module's purpose.
Version	This displays the addon module's version number.
Installed	• A tick (✓) displays if the addon module is installed in the email software. Click the tick to uninstall the addon module. Note: When you uninstall an addon module, all related settings and data are deleted, and cannot be retrieved. • A cross (✗) displays if the addon module is not installed in the email software. Click the cross to install the addon module.

Enabled	• A tick ( ) displays if the addon module is currently active. Click the tick to disable the addon module. Note: When you disable an addon module, its related settings and data are not deleted. • A cross ( ) displays if the addon module is not currently active. Click the cross to enable the addon module.
Action	Some addon modules have configuration options that you can configure. Click an addon module's **Configure** link to see its available options.

Using Tools

This chapter discusses how to use the **Tools** menu in the toolbar.

Figure 242 The Tools Menu

Email Software Tools Overview

Use the **Tools** screen to:

- See information about the email software server (see Viewing System Information).
- Check for updates to the email software (see Checking For Updates).
- View the email software's PHP error logs (see Viewing Error Logs).
- Check that the email software's components have the correct permissions necessary for the application to function correctly (see Checking Permissions).

Viewing System Information

Use the **Tools** > **System Information** screen to see information about the email software server's setup.

The fields in this screen are read-only, and display the results of the email software's server setting detection process. If you want to modify the server settings that display in this screen, contact your host or service provider.

Figure 243 System Information

Table 64 System Information

View full system info	Click this link to open a new window displaying detailed server information.
Product version	This displays the application version number of the email software.
Character set	This displays the character set used for sending emails.
Server timezone	This displays the time zone in which the email software's server is located. If you are sure this is correct, contact your hosting service provider. Note: If you want to change this for an individual user, use the **User accounts** > **Edit** > **User settings** screen's **User timezone** field.
Current server time	This displays the current time in the **Server timezone**.
PHP version	This displays the version number of PHP the server is running.
Safe mode enabled	This displays whether the server is running PHP in safe mode. If PHP is running in safe mode, you cannot change the "from" address in the database.
Imap support found	This displays whether the server supports the PHP-IMAP (Internet Message Access Protocol) protocol.

	Note: The email software requires PHP-IMAP to process bounced emails.
Curl support found	This displays whether the server supports Curl.
GD version	This displays whether the server supports the PHP graphics library GD. The email software uses the GD library to create the CAPTCHA images you can insert in website forms. Note: If the GD graphics library is not supported, it is possible to use other methods to generate CAPTCHA images.
Mod security enabled	This displays whether the ModSecurity open-source web application firewall is supported on the server. See **www.modsecurity.org**.
Server software	This displays the web server application the server is using. For Linux, Unix, Unix variants and Windows, the email software supports Apache v1.3.2 and above. For Windows, the email software also supports IIS5 and above.
Database version	This displays details of the database management system running on the server. The email software supports MySQL v4.0 and above, and PostgreSQL v7.4 and above.

Checking For Updates

To check whether updates to the email software are available, click **Tools** in the toolbar, then click **Check for update**.

If an update is available, a message to that effect displays.

Figure 244 Update Available

Click **OK** to close the window.

Viewing Error Logs

To see the email software's PHP error log, click **Tools** in the toolbar, then click **View error logs**.

Figure 245 Viewing Error Logs

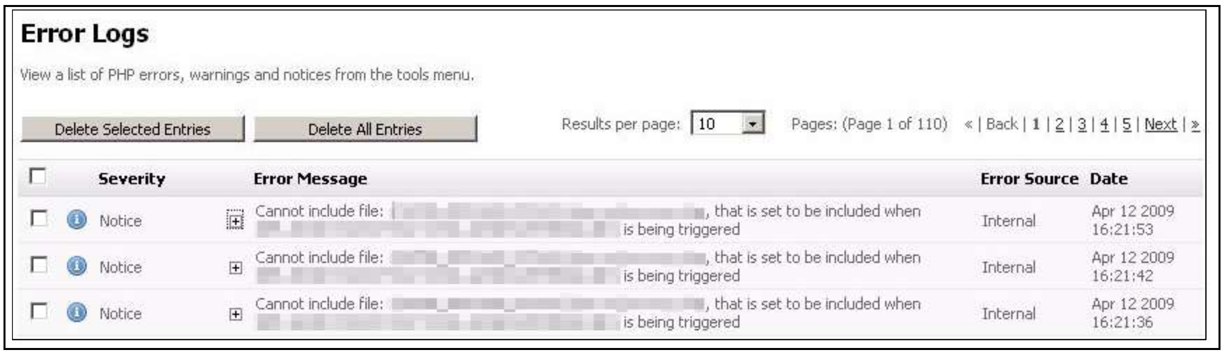
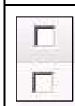


Table 65 Viewing Error Logs

Delete selected entries	Select one or more entries' checkboxes and click this to remove them from the email software. Deleted log entries cannot be retrieved.
Delete all entries	Click this to remove all log entries from the email software. Deleted log entries cannot be retrieved.
	Select one or more log entries' checkboxes before clicking **Delete selected entries**. Select the box at the top of the column to select all log entries.
Severity	This displays the severity of the log entry (**Notice**, **Warning** or **Error**).
Error message	This displays a short description of the error that caused the log entry. Click an entry's **Expand** icon ( ) to see the full log entry message.
Error source	This displays the origin of the error.
Date	This displays the date and time that the error occurred.

Checking Permissions

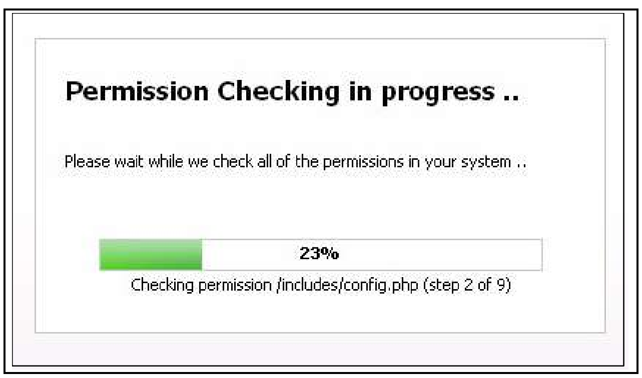
To check that the email software's components have the correct permissions necessary for the application to function correctly:

1 Click **Tools** in the toolbar, then click **Check permissions**.

Figure 246 Checking Permissions

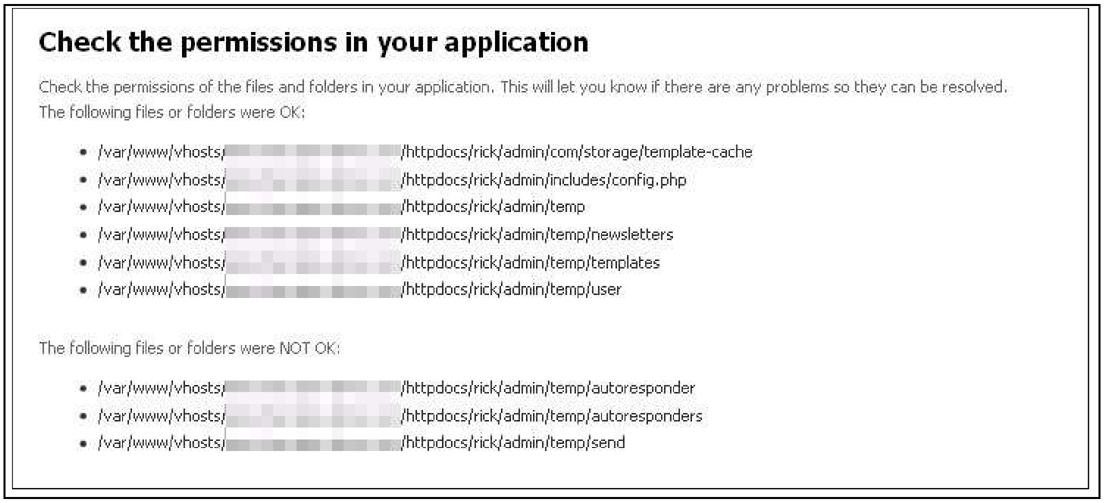
2 Click **Start checking**. The email software checks your installation's permissions.

Figure 247 Permission Checking in Progress



3 When it has finished, the permissions report displays. You can use this report to assist in troubleshooting problems.

Figure 248 Permission Report



Check the permissions in your application

Check the permissions of the files and folders in your application. This will let you know if there are any problems so they can be resolved.
The following files or folders were OK:

- /var/www/vhosts/[redacted]/httpdocs/rick/admin/com/storage/template-cache
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/includes/config.php
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp/newsletters
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp/templates
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp/user

The following files or folders were NOT OK:

- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp/autoresponder
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp/autoresponders
- /var/www/vhosts/[redacted]/httpdocs/rick/admin/temp/send

IV

TROUBLESHOOTING

This section contains the following chapters:

Troubleshooting

This chapter describes some common problems, and their likely solutions. Use this chapter to diagnose and solve problems you may have with the email software.

If you are not sure what effects a certain troubleshooting action will have, contact the relevant administrator or service provider, or get in touch with customer support. Make all configuration changes at your own risk!

Note: If you cannot perform a task that you think you should be able to, the most likely reason is that your user account does not have the required privileges. Before you take any other steps, use the **User accounts** screens (see Configuring User Accounts), or check with your organization's email software administrator.

Problem: General Problems

If the email software is not working correctly (in a manner not explained elsewhere in this chapter), many problems can be solved by doing one or both of the following:

- **Check the email software's permissions**: the email software's components require certain permissions in order for it to function correctly. To check that all components have the required permissions, click **Tools** in the toolbar, then click **Check permissions**. See Checking Permissions for more information.
- **Update to a newer version of the email software**: installing a newer version of the email software can fix some issues. To check to see if updates are available, click **Tools** in the toolbar, then click **Check for update**. See Checking For Updates for more information.

Problem: I Forgot My Password

1. Go to the login screen (see Logging In to the Email Software).
2. Click the **Forgot your password?** link.
3. In the screen that displays, enter your **Username**.
4. Click **Send email**. An email is sent to the email address associated with your username in the email software. Follow the instructions in the email.

Problem: I Can't Send Emails

- You may have exceeded the mail quota imposed by your host. This limits the number of emails you may send in a specific period. Check with your host if you are unsure.
- Your host may require that the emails you send have a particular **From** or **Return-Path** (bounce) address, or a specific domain name (for example, any account **@exampledomain.com**). Check with your host.
- Your server's IP address may have been blacklisted. This can happen if emails from the server appear to be spam. You can use an online service to check whether your server's IP is blacklisted, for example the Anti-Abuse Project's multi-RBL (Real-time BlackList) check, at the following URL:

  `http://www.anti-abuse.org/multi-rbl-check/`

- If you are using a third-party SMTP server, check to ensure that your server, login and port details are correct. Also, ensure that you are allowed to make connections to remote servers on the desired port. Firewall restrictions on outgoing connections may disallow the **fsockopen** PHP function.

Problem: I Can't Import Contacts From a CSV File

- You may not have permission to upload contacts from a CSV file. To change a user's permissions, use the **Export contacts to a file** checkbox in the **User accounts** > **Edit** > **User permissions** screen.
- Your CSV file may be incompatibly formatted. Check the CSV formatting to ensure that it can be read by the email software. Check that the information in your CSV file is correctly formatted:

1. Each entry must be on a new line; one line of details per contact.
2. There must be no blank lines.
3. The number of fields in each contact's entry must be consistent.

Note: Make sure you are using a CSV file and not an Excel (or other spreadsheet) file.

- Your CSV file may contain information that breaches the email software's content type rules. For example, if some of the email address with which you want to populate **Email address** fields in your contact list do not follow a correct email address convention, the data may be rejected.
- Your CSV file may be too large. Break the file into two halves and upload both.

- PHP on the the email software server may be in safe mode. Check with your server administrator.

Problem: Bounced Email Processing Isn't Working, Or Is Working Erratically

- Bear in mind that for bounce processing to work, the email software must have access to the bounced emails. If you manually download the bounced emails from the email server before the email software accesses them, they cannot be processed by the email software.
- If you received an error relating to certificates, click **Settings** > **Email settings**. Look at the **Default bounce settings** section and ensure that **Use extra mail settings** and **Do not validate server certificate** are selected (checked).

Note: If you are not using the default bounce settings, check that the same settings are configured in the relevant **Edit contact list** screen.

- If you have set up the same bounce settings for multiple contact lists, make sure that the settings are correct in each list that uses the same server for bounce processing. If the settings are incorrect in one list, all lists using that server are adversely affected.

Problem: Cron Isn't Working

- Ensure that cron is enabled in the **Settings** > **Cron jobs** screen.
- Ensure that the cron job is correctly configured; for example, ensure that it is set to use the full path, for example:

  ```
  /usr/bin/php -f /path/to/iem/admin/cron/cron.php
  ```

  and not

  ```
  /path/to/iem/admin/cron/cron.php
  ```

- Ensure that the email or autoresponder send, or bounce processing, is not set to run more frequently than the cron job on your server.
- If you are a Windows user, ensure that **Scheduled tasks** are set to run frequently enough.
- Ensure that your cron job is set to use the correct path to PHP.

Problem: I Can’t Edit Forms / I Receive “Internal Server 500” Errors

- You may experience this problem if your server has **mod_security** enabled. Check with your server administrator. Alternatively, disable **mod_security** by adding an **.htaccess** file to the email software’s root directory, including the following:

```
<IfModule mod_security.c>

# Turn off mod_security filtering.

SecFilterEngine Off



# The below probably isn't needed, but better safe than
sorry.

SecFilterScanPOST Off

</IfModule>
```

Problem: I Can’t Save Campaigns, Autoresponders, or Other Settings

- Make sure your user permissions allow you to perform the desired action. Check with the email software administrator in your organization, or check the **User accounts** > **Edit** > **User permissions** screen.
- Make sure that you have the permissions necessary to write to the email software server’s **admin/includes/config.php** file and the **admin/temp/ folder** (and all sub-folders). If you are unsure, check with your host.

Problem: I’m Having Trouble with the WYSIWYG (HTML) Editor

Check that the HTML code you are using is valid. You can use an online service such as the World Wide Web Consortium’s HTML validator tool, available at the following URL:

```
http://validator.w3.org/
```

Make sure that the browser you are using to edit your template, email or autoresponder does not have the **Skype toolbar**, **Skype add-on** or **RealPlayer toolbar** installed. If you have any of these installed, disable or uninstall them. They can adversely affect the HTML code in the editor.

Problem: I Want to Change the Time Zone

- If you want to change the time zone of an individual user, see Configuring User Settings.
- If you want to change the email software's core time zone, you must edit the email software database. The setting is located in the `email_config_settings` table. Contact your server's administrator.

  Alternatively, perform the following SQL query to reconfigure the core time zone:

  ```
  UPDATE email_config_settings SET areavalue="GMT+HH:MM" WHERE
  area="SERVERTIMEZONE";
  ```

  where **HH:MM** defines the number of hours (HH) and minutes (MM) after Greenwich Mean Time (GMT).

Note: The email software does not make allowance for daylight savings time and other such regional variations. If you want to make changes for such variations, repeat the process above, modifying "**GMT+HH:MM**" to reflect the change.

Problem: I Want to Add a Contact to Multiple Contact Lists

You cannot add a contact to multiple lists using the email software interface. However, you can create a website form that allows a user to join multiple contact lists.

1. Click **Forms** > **Create website form**.
2. Select multiple contact lists in the **Contact lists/custom fields** section.
3. Ensure that the **List choices** field appears in the **Change field order (drag & drop)** section.

See Creating and Editing Forms.