

## Quick Start Guide to Using Email Builder

### Permission Email Policy:

Customer Paradigm recommends opt-in, permission-based email marketing and messaging. Sending unsolicited commercial email (UCE) will likely result in consumer backlash, damage to your reputation, brand, and blacklisting by anti-spam organizations of your domain (which will prevent you and anyone else on your domain from sending email to much of the Internet).

The fact that so many people – 136 million active email users in the US alone – put up with porn, body-part extension offers, herbal extracts, the chance to earn \$15,000 a week from the comfort of their home – attests to how important email is in the lives of the everyday citizen.

**Bottom line: Don't send unsolicited email.** This guide is meant to help legitimate businesses and organizations.

### Introduction:

Email Builder is an easy-to-use, web-based email marketing system that allows you to send out email campaigns and measure and track the responses. This quickstart guide will allow you to send out a simple campaign in a few easy steps. For best results, please make sure that your pop-up blocker is turned off for the domain that email builder is installed on. Email Builder works best with Internet Explorer 6.0. For more complicated campaigns, please refer to the full email builder manual.

### Quick Start Guide:

#### Step 1: Upload A Test List

- Email campaigns require two basic things: a message and a list. Before you send out to your main list, we recommend that you set up a test list of a few people so that you can test out everything before you send out to your entire list (also known as your production list).
- To upload a test list, first create a text file somewhere on your computer that looks like this:

```
first,last,email  
Joe,User,joe.user@domain.com  
Jill,User,jill.user@domain.com
```

This is called a comma separated values list, and email builder needs to have the field names on the first row of the list in order to upload the test list properly.

- From the main menu, select 'Upload List'
- On the upload list page, create a new user table, and give it a simple name (i.e. TESTlist). Please note that you can't use commas or spaces in this list name.



- e. Press the Browse button, and find the file on your computer. Click 'Upload.' If you had two people on your list, then you should receive a message that says 2 users were uploaded.
- f. If you receive an error message, you likely didn't create the test list properly, the delimiter may not be set to a ',' or the software may not be set up properly.
- g. NOTE: If you have limited access to lists, you are allowed to create a list, but you may need to have an administrator grant you access to this new list before you can send to it. This is done for security reasons.

## Step 2: View / Edit Users:

### 2. View / Edit Users:

- a. After you've uploaded a list, it's best to make sure that the people were actually uploaded. From the main menu, select 'View / Edit Users'. Once on this page, select the name of the test list (ie TESTlist) from the dropdown menu.
- b. To view everyone on the list, simply press the 'Search' button with nothing in the email address field or first and last name search fields. The system will display everyone who is on that list in your browser window. We don't recommend this option if you have a really large list.
- c. You can add a new person to this list manually as well – simply click 'Add New Recipient To Selected List', and a window will pop-up that allows you to enter in their information. Scroll to the bottom of this window to press save when done.
- d. To Export the selected list into a CSV file format to view with Excel, simply press, 'Export the Selected Table List.'

## Step 3: Edit List Settings:

### 3. Edit List Settings:

- a. After you have uploaded a test list, and verified that people are on the list, you can go to the view / edit list settings area to update the settings for your list. Make sure that you select the proper list from the drop-down menu.
- b. **Select 'List Settings'** to set the message preferences for your list.
  - i. Set the FROM display (i.e. 'Company Name'). This is what the end user who receives an email from you will see when the message is in their inbox.
  - ii. Set the FROM email address & return path email address. This is the email address that the message is sent from; it is also where the bounces for the message will go if someone's email address is no longer valid or their inbox is full.
  - iii. Select to TO line personalization: if you have the first and last name for most of the people on your list, you'll probably want to select to first option that personalizes the TO line.
  - iv. Default first name if blank: It's never a good idea to have a message sent out that says "Dear ," – very embarrassing. If the first name is blank in the database, you can set it to say "Dear Friend," (default) or "Dear Past Customer".
  - v. The Can Spam Act of 2003 requires that you include a physical address for people who want to unsubscribe. Type in your physical mailing address into this line.
  - vi. Subject line: We recommend putting in a |||TEST|| in the subject line of your test messages so that other people on your test list don't freak out



- when they see a test message come in to their inbox that perhaps isn't ready to go to the entire list.
- vii. HTML Version: Use the HTML editor to create a template that you can then go and modify later, with your logo at the top of the message. If you are using Dreamweaver to design your messages, we recommend that you leave this blank for the moment.
  - viii. TEXT version: Email builder sends out messages in a multi-part message format, so that people who are on mobile devices or on older computers can still see a properly formatted email message. Create a text-version of your message that is simple and basic.
  - ix. Message Field: You can leave this blank for now
  - x. Savings Code: type in a '1' for now, unless you are using the sales tracking system.
  - xi. Select the following options:
    - 1.  Track Message Opens – Tracking who is opened which message
    - 2.  Track Links Clicked – Track who clicks on what link in a message
    - 3.  Track text links – Track who clicks on text-only messages
    - 4.  Please include an automatic unsubscribe link at the bottom of the message
    - 5.  Please add a 'View Message as Web page' link at top of message
  - xii. Send Campaign Summary information to: enter your email address into this box.
  - xiii. Press [Save List Settings]
- c. Set Header / Footer:**
- i. If you'd like to have a logo placed at the top of each page when a user clicks through to special forms (i.e. contact me now, newsletter subscribe or unsubscribe, calendar, etc), then you can paste HTML into the header / footer tab for your TESTlist
- d. Set Bounce Settings:**
- i. It's important to keep track of email addresses that are no longer valid (people changing jobs or ISPs), as some mail servers will stop accepting your mail if the rate of non-deliverable messages is a significant percentage of your email list.
  - ii. In order to set bounce settings, you will need the POP email account information for the email address that is in the FROM line and return path of your list settings.
  - iii. Click on 'Bounce Handling' from the menu, then click '[Create New Bounce Account For A List]'
  - iv. Next, type in the:
    - 1. Account info (this is a friendly name to remember the account)
    - 2. POP Server (i.e. mail.domain.com)
    - 3. POP Username: (i.e. joe.user)
    - 4. Pop Password: (i.e. password1)
    - 5. Database Table: (Select the list)
    - 6. Select  Check every [5] minutes for [90] days
    - 7. Select  Bounced Messages: Increment Bounce Count by 1
    - 8. Select  Remove Requests: Change status of REMOVE field to 'TRUE'



- 9. Delete Mail? Select: [x] Delete all messages, Forward unprocessed messages to this email account [email@domain.com]
- v. Press 'Submit'
- vi. There are lots of other options in the View / Edit List Settings area... please explore and look around.

## Step 4: Send Test Campaign

### 4. Send a test email campaign

- a. Now that you have a list set up, and have created a few default options, the next step is to send out a test message to your test list. For this step we will assume that you are using Dreamweaver or another HTML editor to create the HTML message.
- b. From the main menu, select 'Send Email Campaign (Non-HTML Editor).
- c. Once there, select the table from the drop down list.
- d. Then, select, '[USE DEFAULT SETTING FOR SELECTED TABLE]'. Your information will pre-populate into all of the form fields, saving you from having to enter in all of the information again. If you want to change anything, please do so.
- e. **Copy and paste the HTML version** of your message into the HTML Version box.
- f. **Copy and paste the Text version** of your message into the Text Version Box. Please make sure that the word-wrap feature is turned off if you are using Notepad, or you will have line breaks inserted automatically. If you want to send a text-only message (or test out the text-only message), simply leave the HTML box blank.
- g. **For mail-merge or personalization**, you can use the following codes in the subject line, HTML or text version:
  - i. If you'd like to use some of the advanced features, like Send to a Friend, Contact Me Now, Edit Profile, or customized unsubscribe links, the list below also allows you to do this, but you will need to set up these options in the View / Edit List Settings Area.

ID	\$ID
First Name	\$first
Last Name	\$last
Email Address	\$email
Phone	\$phone
Address	\$address
Address 2	\$address2
City	\$city
State	\$state
ZIP	\$zip
Company	\$company
List	\$list
Message	\$message
Savings Code	\$pc



Misc1	\$misc1
Misc2	\$misc2
Misc3	\$misc3
Misc4	\$misc4
Misc5	\$misc5
Misc6	\$misc6
Misc7	\$misc7
Misc8	\$misc8
Misc9	\$misc9
Misc10	\$misc10
Send To Friend Link	\$send_to_friend
Edit Profile	\$editprofile
Contact Now Form	\$contactmenow
Send To Friend Url	\$send_to_friend_URL
Edit Profile Url	\$editprofile_URL
Contact Now Form Url	\$contactmenow_URL
Newsletter Url	\$newsletterjoin_URL
Unsubscribe Url	\$removelink_URL
Calendar URL	\$calendar_URL
Send Date	\$SendDate

- h. **Message Field:** Type in something that you will remember for the campaign into the message field. You can't use spaces or other punctuation in here, but this is used for the message tracking information.
- i. **You're almost ready to send to the test list.** But first, type in your email address into the 'Send Preview To Single Recipient:' box, and click 'Send Preview'.
  - i. The email that you type in must be in the list in order for you to use this feature.
  - ii. Please note that advanced features like send to a friend, contact me now, edit profile, view this message as a web page may not work properly with the preview message. It's meant solely as a way to see if the layout looks okay.
- j. **Press 'Send Email Messages to All Recipients.'** This will bring you to the next screen where you can verify how many messages will be sent. If you selected the wrong list, you'll have one more chance to make sure before you send it out.
- k. **Check your inbox,** and test out all of the links in the message.
  - i. Print out the message, and read through it with a pen in hand to look for typos and misspelled words.
  - ii. Copy and paste the HTML message into a blank Word document, and use the spell check and grammar checking features to make sure that everything is perfect.
  - iii. Have someone else on the test list sign off on the message before you send it to your production (main) list.



## Step 5: Reporting:

### 5. Check the Reports:

- a. From the main menu in email builder, select 'Main Report', and then select your test list. **Click 'Show Full Report'**.
- b. Find the current message (they are sorted by the 'Message' field that you entered in before on your campaign), and select the report icon '[#]' to the left of the message name to drill down.
- c. You should be able to see that you and others on the test list have opened the message and clicked on multiple links.
  - i. **Messages Opened:** How many times the message that was sent out was opened (total number of times)
  - ii. **Unique Opens:** How many times a message was opened by a unique person (i.e. [joe.user@domain.com](mailto:joe.user@domain.com) opened their message 3 times, but only once on a unique basis.
  - iii. **Total Clickthroughs:** How many times links in the message were clicked
  - iv. **Unique Clickthroughs:** How many times links in a message was clicked on a unique basis (i.e. [jill.user@domain.com](mailto:jill.user@domain.com) clicked on two different links – but only once on a unique basis.
  - v. **Forwards:** How many people received the message as a result of someone forwarding them a message.
  - vi. **Opt-Outs:** Number of people unsubscribing from this campaign.
  - vii. **Opens By Date:** Graph of who has opened the message on a day-by-day basis, starting with the first day of the campaign.
  - viii. **Opens by User:** List of people who have opened their message in descending order of how many times they have opened it. Click on the green dot next to the email address to drill down another level.
  - ix. **Clickthroughs by Link:** List of links that were clicked in a message.
  - x. **Clickthroughs by User:** List of people who clicked through on a campaign. Click on the green dot next to the email address to drill down another level.
- d. If you filled out the Send Campaign Summary option, you will receive an HTML report of the message open and links clicked information via email at the following intervals:
  - i. Immediately after the campaign, telling you how many messages were sent, with a copy of the HTML and text message and subject line.
  - ii. 1 hour, 12 hours, 1 day, 3 days, 7 days, 14 days, 21 days – an HTML report will be sent to you.
  - iii. Email builder does this automatically because it's often difficult to remember to log in to the system each day to view the results. This way the reports come to you automatically. If you are sending out a lot of test messages, you may want to remove your email address from this list, otherwise you'll likely receive a lot of campaign reports over the course of the next couple of weeks.

## Step 6: Production List:

### 6. Prepare the Production List

- a. If you're an administrator, you can use the duplicate list function to create a new list with the same settings as your test list.



- b. Or, simply repeat the steps above so that your production list is set up just like your test list.
- c. There are many reasons to keep a test list and a production list:
  - i. It keeps the message open and links clicked tracking separate.
  - ii. Three people testing a message will make it appear like there is a lot more interaction with a campaign than is normal, even if there are many thousands of people on a list. Most people don't click on each an every link in a message (unless they're looking for typoos).
  - iii. Often you will send many, many test messages to a list, but only a few production messages. This keeps the reporting interface cleaner, especially if you want to grant report-only access to someone.
- d. **De-Duplication:**
  - i. If your list has duplicates in it (i.e. several records that contain the same email address), email builder will only send an email to the first record in the database.
  - ii. For performance and list hygiene reasons, it's best, though, to remove the duplicates from the list. Simply use the 'De-Duplication' link from the main menu.
- e. When you've tested everything, send your campaign to the production list, or schedule it to be sent sometime in the future. It's also best to send a copy of the message to the test list, too, so that people on the test list know that the actual message has gone out.

## Power User Tips:

- **Check the 'View Past Campaigns'** to view a past campaign, with all of the HTML and text email settings. You can use a past campaign (from a test list, for example) to send out a new campaign. Note: with complicated HTML, you may want to re-paste the HTML into the HTML box before sending.
- **Test Different Creative / HTML messages:** use a filter to split a list in half, and send one message to one group, the other to another. See which message performs better.
- **Send to a Friend:** allow people to send a copy of the message to their friends with a simple link in the HTML or text message.
- **Contact Me Now Form:** allow people to have you contact them (vs. them contact you) via a pre-filled form. Set up the settings in the View / Edit List Settings system. The system will send you an alert email, and a confirmation message to the end user.
- **Edit Profile:** allow users to update their information with a simple link in a form (see personalization settings); post this form to your site (see 'Additional Forms' → 'Code for Site' in the View / Edit List Settings section).
- **Calendar System:** create events that will be displayed as a calendar and can be posted on your website.
- **Post a newsletter signup form on your website:** see 'Additional Forms' → 'Code for Site' in the View / Edit List Settings section. Set the 'Signup Form' and 'List Signup Forms.'
- **Post an unsubscribe form on your website:** see 'Additional Forms' → 'Code for Site' in the View / Edit List Settings section.
- **Use Message Filters:** send only to a portion of your list (i.e. users where State = CO, or users who have clicked on a message in a previous campaign). See filter wizard in the 'Send Email Campaign' section.



- **Text Only Domains:** restrict certain domains so that email builder will only send out the text version of the message. This is helpful for email addresses that cater to mobile providers, or can be handy for testing.
- **Sales Tracking:** set up the sales tracking system, so that when someone converts to purchase, the tracking system can determine the Return On Investment (ROI) for your email campaign.
- **Recurring Campaigns:** Schedule a campaign that will be sent out on a regular basis. You can schedule a reminder message to be sent out on the first day of the month, or send a birthday card each month or day to people whose birthdays are that month.
- **Create Report-Only Users:** create users that can only access certain lists to see their reports in email builder. You can set a custom header / logo at the top and bottom of the page when they log in, with their company's logo or a message that greets them by name. Or, create a medium-level user, who can view reports and also view and edit users on their selected lists.

## Email Deployment Checklist:

- Valid FROM email address?
- SUBJECT line not misleading?
- Email address is working and available for at least 30 days?
- Size of email address is sufficient to hold bounced / returned messages?
- Physical Postal Address included in message?
- Domain name registration information accurate?
- Opt-out / remove system working properly?
- Warning label in subject line if non-affirmative consent?
- Your mail server is not an open relay or gives non-authorized users access?
- You have permission to send via the appropriate mail server?
- List was gathered appropriately (see above)?
- Spellcheck message (to prevent typos and misspelled words)?
- Common Sense Test: Does the message make sense to a potential recipient?
- Message is relevant to target audience? Somehow adds value to their lives?
- Personalization is used properly?
- Test messages to make sure they render properly in different email platforms?
- Privacy Policy posted on Website?
- Abuse@ & privacy@ email addresses working?
- Are messages flagged by anti-spam filters?
- Is your server Blacklisted?
- Is your server Whitelisted?
- Names are not all pasted into TO: line?  
(Note: this mistake cost Eli Lilly \$160,000)

**Questions? Need to help with understanding CAN-SPAM?  
Call: 303.473.4400 x 22 today.**

