



# Email Marketing Application

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## Introduction

The Email Marketing Application is a fully-featured email marketing application to enhance and further your business development so that you can manage your email campaigns, lists, create/modify the templates you want, track and follow-up on your campaigns and have website tools at your disposal if you have your own website.

Your area is private and your lists, campaigns and personal templates are not shared whatsoever.

Below is a summary of the main features of the Mailer Application and this document will show you how to use these features.

**Lists** – You can create/import any type of list – personal contacts, outside sales associates, clients and any other type you have or need.

**Templates** – You can create, design, modify, store and re-use any template you want. Further, you may find a template you like on the web, save it to your system and upload to your 'My Templates' area.

**Campaigns** – You can create unlimited campaigns to your lists, sending manually or you can set up auto-responses to your subscribers.

**Tracking/Follow-up** – One of the most important aspects of any online system is a tracking method to engage in client follow-up. The Mail Application gives you detailed tracking logs so you may engage those clients who have shown interest merely by their click activity.

**Tools** – Multiple forms are available for you to simply copy and paste into your webpages if you have a website. The more forms you use, the better tracking methods you can create.

**Terminology** – If you are unfamiliar with Email Marketing, please view the Terminology area at the end of this manual before reading so that you will have an understanding of the terms throughout.

**Abuse** – Please note that this Email Marketing Application does come with some responsibility and accountability by each user with respect to lists. For example, if you purchase or have an old list that you are unsure of their verification, you may subject your own email address to being blacklisted.

Most online email marketing systems require all users to have a Subscribers who have 'opted-in' from a website form. If you are not required to do so, and use your own lists, you would be wise to have some type of 'verification' process or program to determine if your lists emails are active and will not bounce, or your bounce rate is minimal. A bounce rate of less than 5% helps to keep you under the 'blacklist' radar.

It is strongly recommended to have this manual in front of you upon your first login and begin some of the set up procedures listed herein.

**IMPORTANT** – TO CREATE YOUR FIRST CAMPAIGN, YOUR PROFILE/ACCOUNT, LISTS AND TEMPLATES MUST BE SET UP AND CREATED FIRST!

Required order before creating your first campaign:

1. Set Account requirements.
2. Create at least one List.
3. Create or import at least one Template.
4. Create your first Campaign.

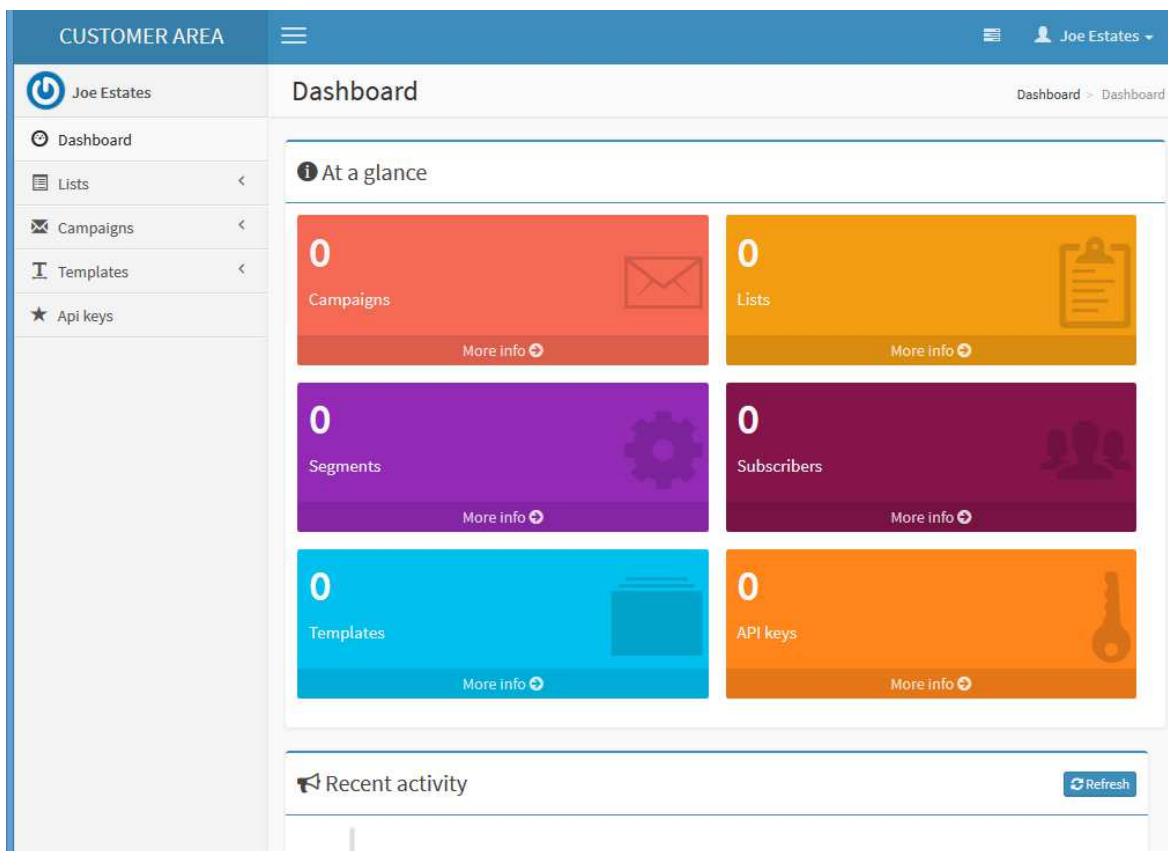
Login with your email address and email password.



The image shows a login form within a 'CUSTOMER AREA' header. The form is titled 'Please login' and contains the following elements: an 'Email \*' input field with the placeholder text 'Email', a 'Password \*' input field with the placeholder text 'Password', a checked checkbox labeled 'Remember me', a 'Forgot password?' link, and a blue 'Login' button.

## 1. THE DASHBOARD

Once logged in, your Dashboard will be displayed.



The image displays the 'CUSTOMER AREA' dashboard for 'Joe Estates'. The dashboard features a left-hand navigation menu with items: 'Dashboard', 'Lists', 'Campaigns', 'Templates', and 'Api keys'. The main content area is titled 'Dashboard' and includes a breadcrumb trail 'Dashboard > Dashboard'. Below the title is a section 'At a glance' containing six colored cards, each with a large '0' and a 'More info' link: 'Campaigns' (red), 'Lists' (orange), 'Segments' (purple), 'Subscribers' (dark purple), 'Templates' (cyan), and 'API keys' (orange). At the bottom of the dashboard is a 'Recent activity' section with a 'Refresh' button.

## A. Dashboard Title Bar

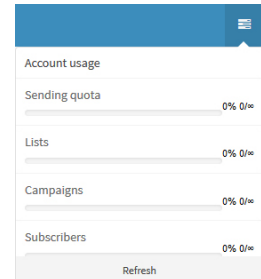
The Title Bar at the top of the Dashboard is for quick links and your account settings.



1. **Customer Area icon** is simply a 'home' link, available on any page to take you back to the Dashboard.
2. **Collapse icon** 'hides' the left menu to give you more workspace in the main body.
3. **Account Usage icon** gives you a quick summary of your Lists, Campaigns and Subscribers.



- a. Sending quota
- b. Lists
- c. Campaigns
- d. Subscribers



4. Your name in the upper right has two links, one to your 'My Account' settings and the other 'Logout.'



- a. **Logout** - It is important that if you are using an office computer or a public computer that you log out of your account or your account profile – email, password and other private information such as all customer information would be at risk.
- b. **My Account** – Has two tabs, each are very important information that is used for your templates and the Campaigns you create. Without some of this information, you will not be able to finish building a campaign, which goes without saying, you will not be able to send a campaign.
  - i. **Profile tab** – Includes First name, Last name, Email, Password, Timezone, Language and a Browse button so that you can upload an image of yourself. You must use your email address and assigned password that matches your email password.

CUSTOMER AREA | Joe Estates

Account info | Dashboard > Account > Update

Profile | **Company**

First name \* | Joe

Last name \* | Estates

Email \* | skywaterestates@theskywatergroup.com

Confirm email \* | skywaterestates@theskywatergroup.com

Password | Password

Confirm password | Confirm password

Timezone \* | (GMT-05:00) America/New\_York

Language | Application default

New avatar

Browse... No file selected.

Save changes

- ii. **Company tab** – Includes company name. Company information are those items that will be auto-filled in your templates if you use ‘tags’. (More on that later in this manual.)

Company address items that are required are designated with an \*. For company phone, it could be your direct contact number, whether it is a cell phone or landline if you are an independent contractor (such as a real estate agent). As will be explained, the information in the templates can be changed by you.

CUSTOMER AREA | Joe Estates

Account info | Dashboard > Account > Update

Profile | Company

First name \* | Joe

Last name \* | Estates

Email \* | skywaterestates@theskywatergroup.com

Confirm email \* | skywaterestates@theskywatergroup.com

Password | Password

Confirm password | Confirm password

Timezone \* | (GMT-05:00) America/New\_York

Language | Application default

New avatar

Browse... No file selected.

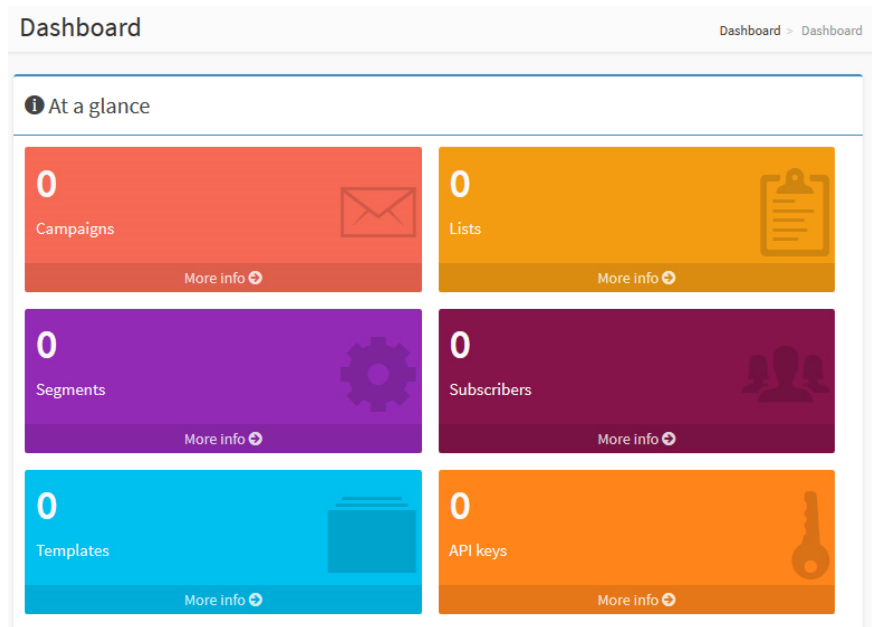
Save changes

## B. Dashboard Summary Areas

Under the Title Bar the Dashboard contains 7 summary areas:

1. At a glance
  - a. Campaigns
  - b. Lists
  - c. Segments
  - d. Subscribers
  - e. Templates
  - f. API Keys

Each 'glance box' is a link to view, search, modify and create that area. (For example, if you have sent out 20 campaigns, you will be able to use the headers to search a campaign, click on that campaign to view and if it has not been sent, to modify it.)



The remaining summary areas

allows you to quickly view all current activity with respect to what you recently did, Subscriber, List, Campaign and Unsubscribe growth as your activities with each expands and a quick view on Delivery vs. Bounces.

Delivery are those emails that reached their destination, whether unopened or not. Bounces are those email addresses which were unable to be delivered. There are many reasons for this – the email address is no longer valid, the server was down, etc. Bounce emails are acceptable to a certain rate within your lists.

If you have a bounce rate of more than 3-4%, you must remove those email addresses that are not reaching their destination or you can become blacklisted and it will harm your ability to reach those email addresses that are valid. It is imperative that you protect your own lists or it could harm your own business!

2. Recent activity
3. Subscribers growth
4. Lists growth
5. Campaigns growth
6. Delivery vs Bounces
7. Unsubscribe growth

## 2. THE MENU

The left menu contains the most important aspect of the application as it features the most important aspects of your email campaigns. There are three distinct areas of any email marketing – contact lists (Lists), the products or services you want to inform a contact list of (Campaigns) and the appearance of the sent campaign (Templates).

You have the ability to create, modify, add and delete any of your Lists, Campaigns and Templates. As you work in these areas, you will increase your knowledge in the power of this application and email marketing.

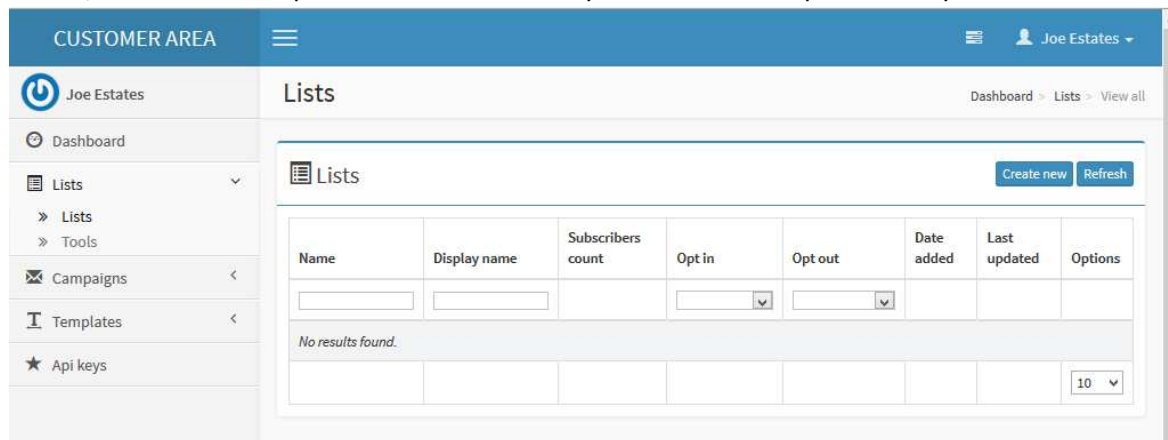
There are hidden treasures, such as forms (to place on your website) and tracking (which aids greatly in your follow-up) and so much more that can and will develop your business if used methodically.

The following gives you an overview of the main links of the left menu:

### A. Lists > Lists menu

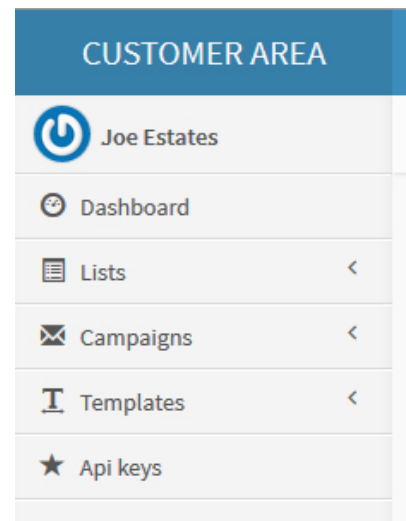
#### 1. LISTS – LISTS > LISTS MENU

Clicking on the List link you can view current lists or create a new list. If there are a large number of lists, the text and drop down boxes will allow you to search for specific lists you have



The screenshot shows the 'CUSTOMER AREA' interface. The top navigation bar is blue with 'CUSTOMER AREA' on the left and 'Joe Estates' on the right. The left sidebar menu includes 'Dashboard', 'Lists', 'Campaigns', 'Templates', and 'Api keys'. The main content area is titled 'Lists' and contains a table with columns: Name, Display name, Subscribers count, Opt in, Opt out, Date added, Last updated, and Options. The table is currently empty, displaying 'No results found.' and a pagination control for 10 items.

For any new list you are creating, you must create the list name before being able to add or upload any contacts (lists) you may have to import. At this stage, you are only concerned about creating the list name and the list criteria, not adding or importing names.





The create window requires you to input pertinent data such as General Data, Defaults, Notification settings and Company information needed for any campaign.

The screenshot shows a 'Create new list' form with the following sections:

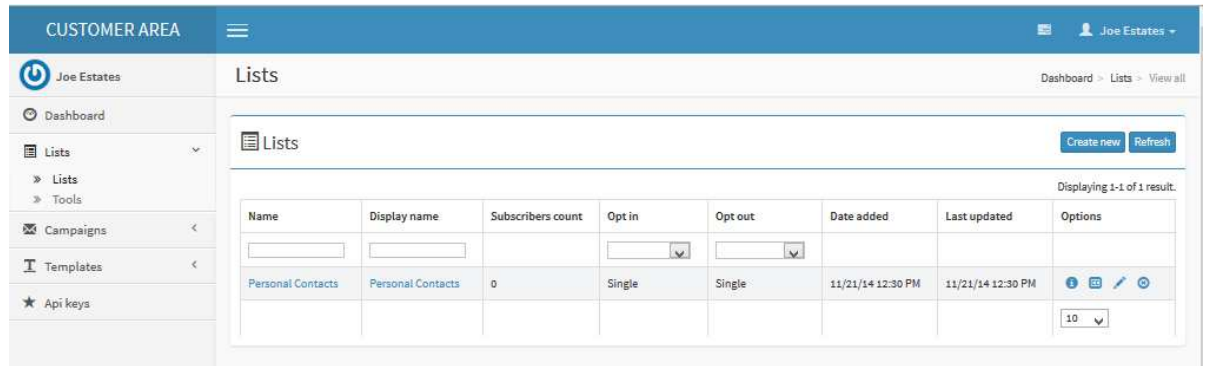
- General data:** Name, Display name, Description, Opt-in (Double opt-in), Opt-out (Double opt-out).
- Defaults:** From name, From email, Reply to, Subject.
- Notifications:** Subscribe To, Unsubscribe To.
- Company details:** Name, Type/Industry, Country, Zone, Address 1, Address 2, Zone name, City, Zip code, Phone.

**General Data** – Name of the list and your display name of the list if you want it different. A summary description of your list. Contact defaults would be those set in your Account Settings. If you wish to change these for a certain list, you would do so here. Opt In or Opt Out type, either single or double. For example, a double opt-in is when a subscriber signs up on your website (first opt-in) and then receives an email to confirm the registration. A single opt-in or opt-out is when someone clicks to register (or unregister) and is immediately opted in or out without receiving an email that must be confirmed.

**Notifications** – Whether you wish to receive email notifications of each opt-in or opt-out. Keep in mind that you can login to your Dashboard to see the opt-ins and opt-outs.

**Company Details** – Defaults would be those in your Account Settings. As in the Contact information in the General Data above, the Company Details default to your Company Account Settings. If you wish to change these for a certain list, you would do so here.

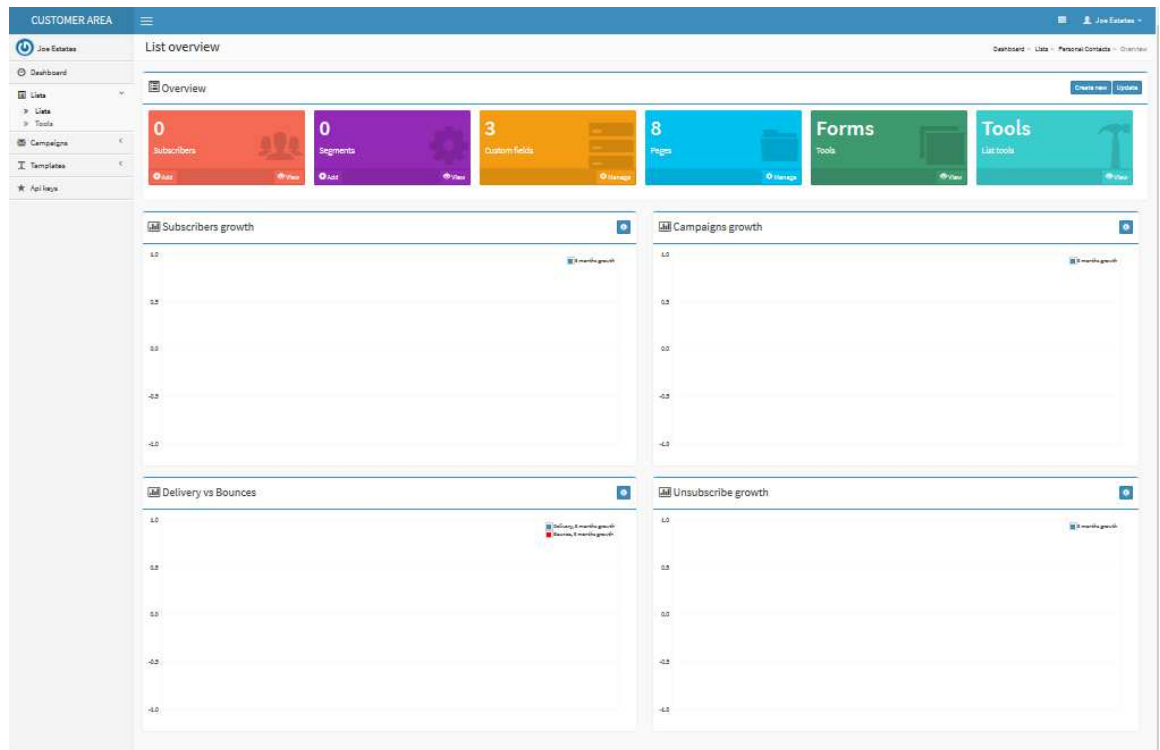
Once you have created your list, it will appear in the list window, with the name of the list, display name if you gave it one, and there will be 4 icon links to the right of the list.

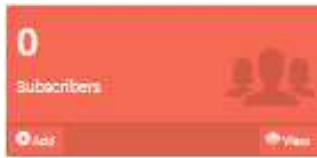


The **4 icons** on the right are Overview, Copy, Update and Delete. Copy and Delete are self-explanatory for the list. The Update icon is to edit any criteria you originally inputted.

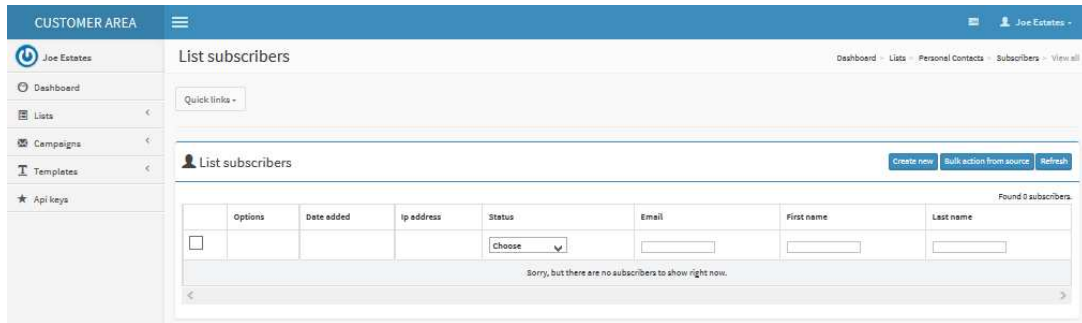
The Overview icon, the first one, is of most interest here as **it is has some powerful features over time you will make more use of**. It is noteworthy here to clarify even though it is implied, the 'Overview boxes' and 'Information headers' that appear from the Overview icon are for that list only! Each list will have their own Overview, Copy, Update and Delete icons.

Once you click on the Overview icon, the List Overview will appear. You will, by applying your time, realize this area has extremely powerful features for your marketing development:

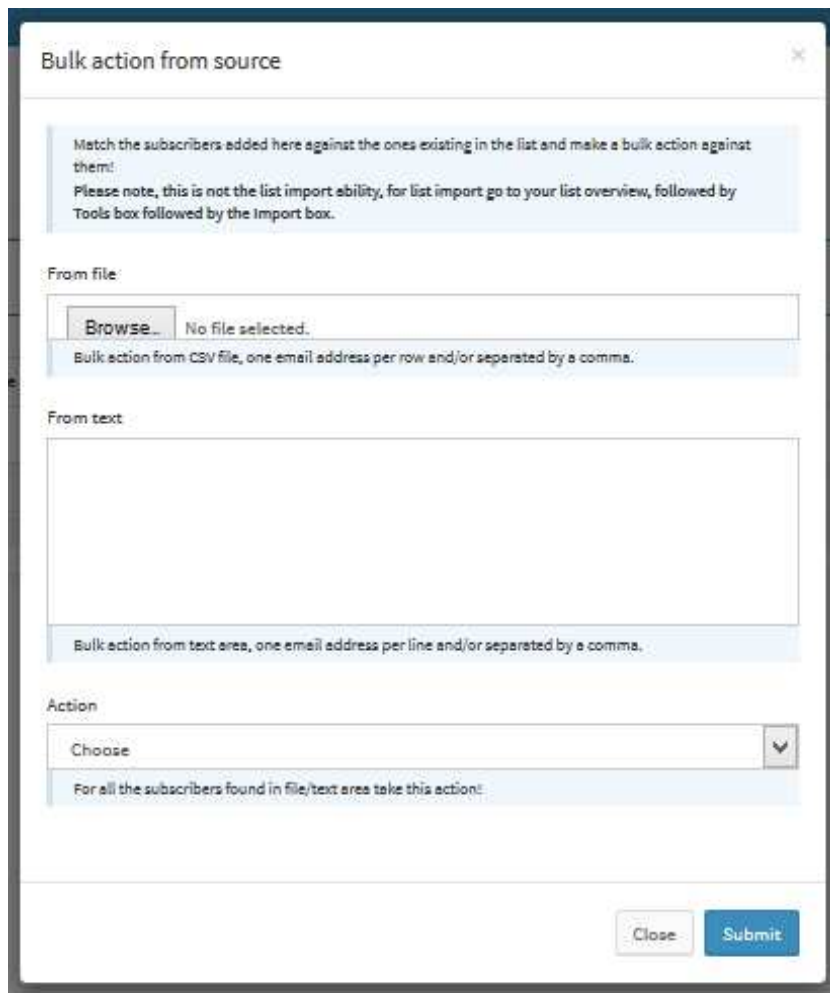




**Subscriber box** - you can manage your existing subscribers (create/update/remove) and also you can adjust your list depending on your subscribers. For example you can add new custom fields or remove existing.

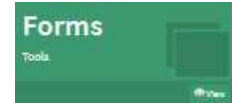


The second icon on the upper right, 'Bulk Action from Source' is one of the most powerful features. Allowing you to be able to match subscribers added here against the ones existing in the list and make a bulk action against them! It will allow you to make one of the following actions – Subscribe, Unsubscribe or Delete. **Please note, this is not the list import ability, for list import go to your list overview, followed by Tools box followed by the Import box.**





**Segmentation box** - you can segment your list with various criteria based on your custom list fields and on a high number of operators. Segmentation will help you target a specific type of users when sending campaigns.



**Custom Fields box, Pages box and Forms box** - are for your website and visitor subscriber areas. You have the ability to create, customize and add these forms to your website for your site visitors to subscribe or unsubscribe. You will not need much web building knowledge to apply these areas.

Below is the **Custom Fields page**. You can create and customize the register/subscribe fields for your website pages where visitors can fill out and they will be added to your list. You can make multiple lists for not only contact type, i.e. Broker, Agent, etc., but for different products or services. For example, if you have clients interested in Real Estate and Yachts, you can have them subscribe or unsubscribe to one, the other, or both!

Below is the **Pages page** and previews the first page of the 8 pre-built pages you can use for your website.

The pre-built pages are:

- Subscribe form
- Pending subscribe
- Subscription confirmed
- Update profile
- Unsubscribe form
- Unsubscribe confirmation
- Subscribe confirm email
- Unsubscribe confirm email

## Mail list Subscribe form

Dashboard > Lists > Personal Contacts > Subscribe form

Quick links -

Select another list page to edit -

- Subscribe form
- Pending subscribe
- Subscription confirmed
- Update Profile
- Unsubscribe form
- Unsubscribe confirmation
- Subscribe confirm email
- Unsubscribe confirm email

Your subscribe form url is:

<http://www.thealcywatergroup.com/mailex/index.php/lists/mk1990d0e1012/subscribe>

When the user will reach the subscription form, he will see this page:

### Subscribe form

Content

Source

Styles - Format - Font - Size - A - ?

[LIST\_NAME]

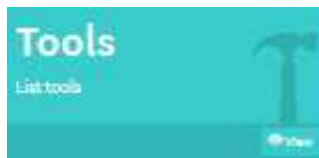
We're happy you decided to subscribe to our email list.  
Please take a few seconds and fill in the list details in order to subscribe to our list.  
You will receive an email to confirm your subscription, just to be sure this is your email address.

[LIST\_FIELDS]

[SUBMIT\_BUTTON]

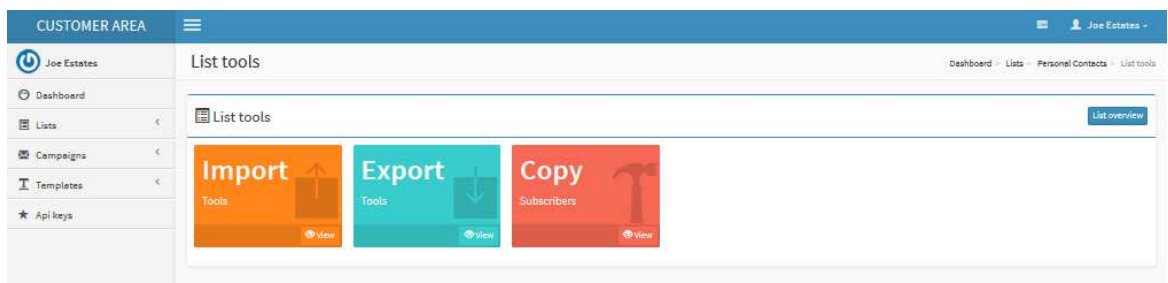
Available tags: [LIST\_NAME] [LIST\_FIELDS] [SUBMIT\_BUTTON]

Save changes

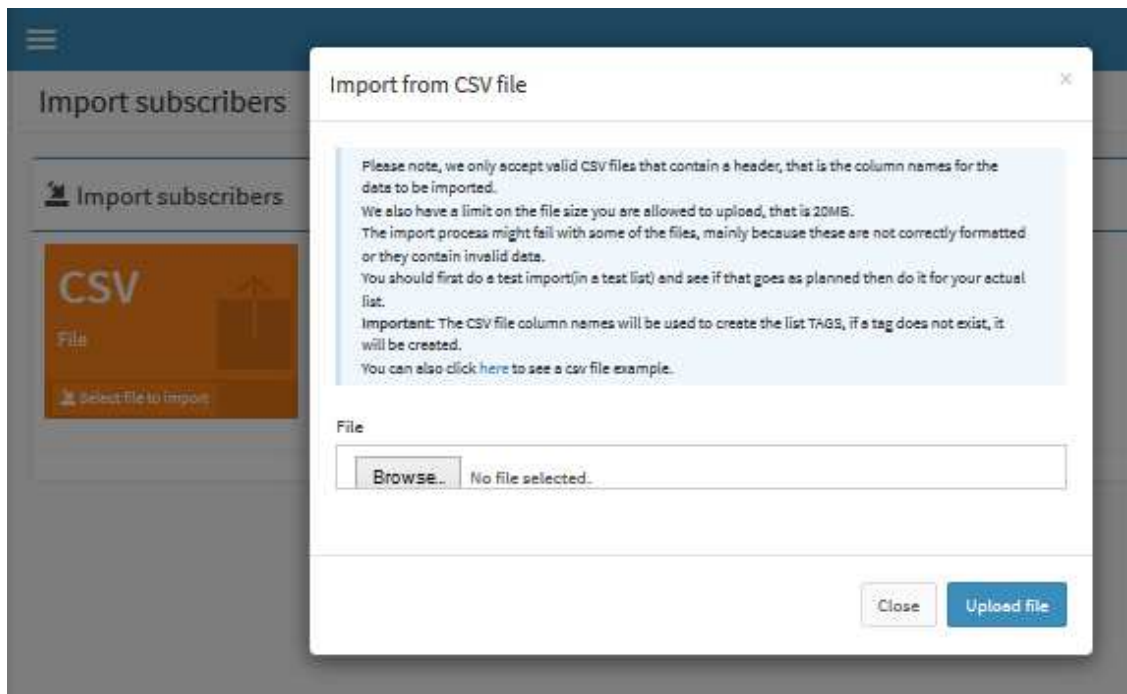


**Tools box** - is used to import, export and copy your list/subscribers. CSV and Text files will be most applicable to you, while the database box is for more advanced users that do have their own MySQL databases.

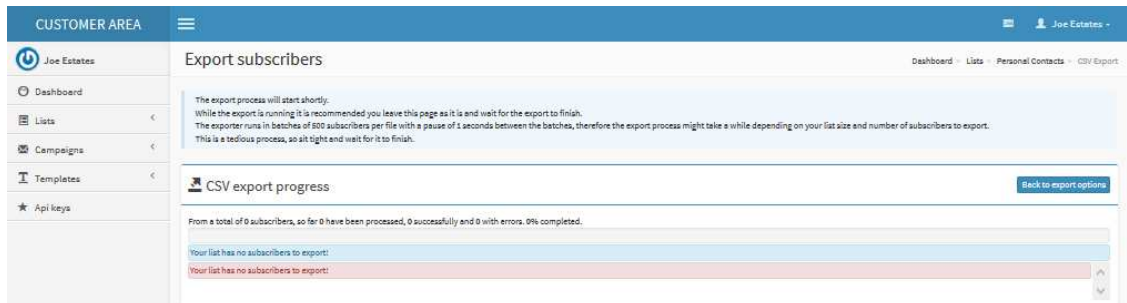
Clicking on the **Tools box** brings you to the options to Import, Export or Copy a list:



Clicking on the **Import box** brings up a window to choose a list you have in CSV file format. NOTE: Excel documents may be saved in CSV format. The window includes a link for a CSV file example.

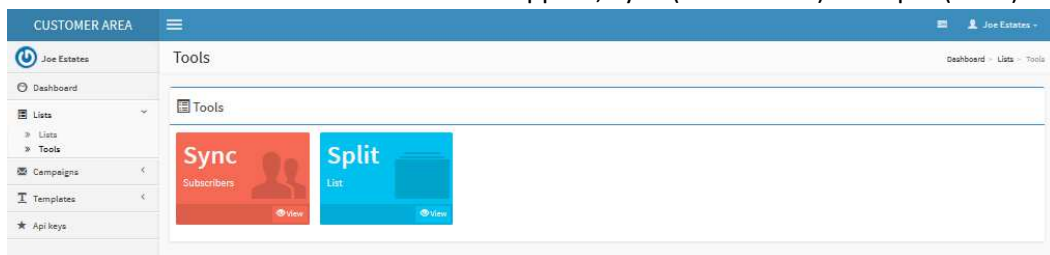


Clicking on the Export box brings up a window to choose the Subscriber list you wish to export. Simply choose a list, click on export and save it to a location on your computer.



## 2. TOOLS – LISTS > TOOLS MENU

Click on Lists > Tools menu and two boxes appear, Sync (Subscribers) and Split (Lists.)



i. Sync Subscribers box

Sync lists

Primary list \*

Personal Contacts

Secondary list \*

Personal Contacts

Action on missing subscribers

Do nothing

What actions to take when a subscriber is found in the primary list but not in the secondary list

Action on duplicate subscribers

Do nothing

What actions to take when same subscriber is found in both lists

Action when distinct subscriber status

Do nothing

What actions to take when same subscriber from primary list has a distinct status in the secondary list

Close Sync

ii. Split List box

Split list

This tool allows you to split a big list into multiple smaller ones. Please note that subscribers from the selected list will be moved into new lists, not copied.

List \*

Personal Contacts

Number of sublists \*

2

How many subscribers to move at once \*

500

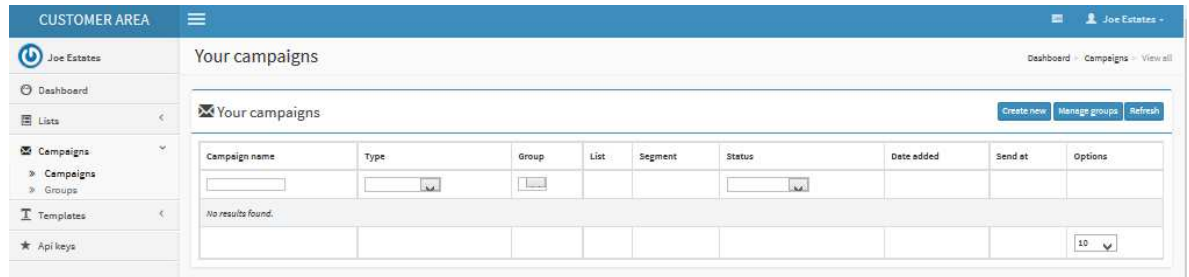
Close Split

## B. Campaigns > Campaigns menu

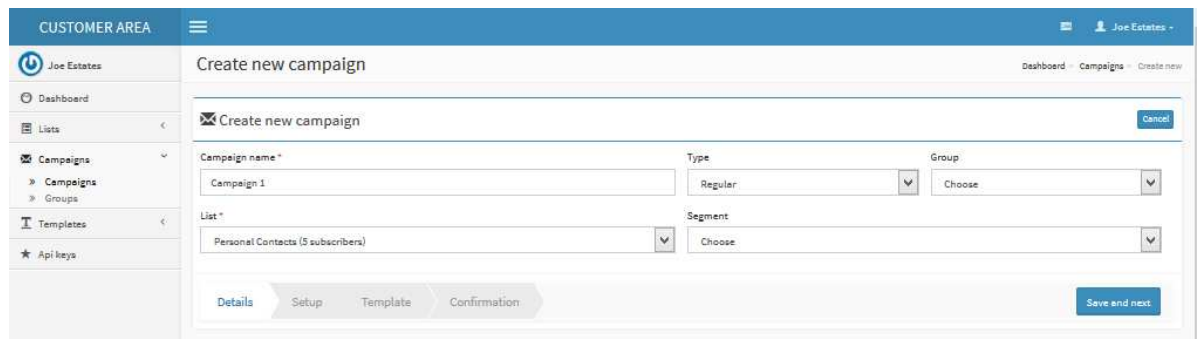
(NOTE\* - Be sure to set up your Account, and create/import at least one List and one Template before creating your first Campaign.)

### 1. CAMPAIGNS – CAMPAIGNS > CAMPAIGNS.

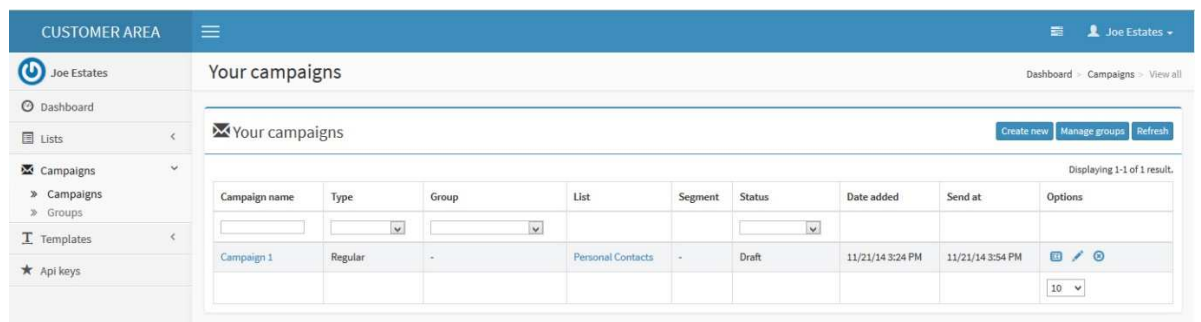
Click on the left menu, Campaigns > Campaigns and you can either create or modify a campaign (if it was not yet sent) or manage Groups.



Click on the 'Create new' button to begin creating a new campaign. There are two required fields, you must type in a campaign name and then in the drop down list, choose which list you want to send the campaign to. NOTE – There are four stages to creating a campaign, Details, Setup, Template and Confirmation.



Your new campaign can be seen on the campaign list. Click on the 'Campaign name' or the 'Pencil icon' to the right to edit/modify the campaign.





Click on the 'Pencil icon' to go to the 'Setup' page of this campaign

CUSTOMER AREA | Joe Estates

### Update campaign

Dashboard | Campaigns | Campaign 1 | Update

Update campaign [Cancel]

Campaign name \*  
Campaign 1

Type: Regular | Group: Choose

List \*  
Personal Contacts (5 subscribers)

Segment: Choose

Details | Setup | Template | Confirmation | Done | Save and next

Note the Campaign 'Steps menu' and the 'Save and next' buttons as you continue.

Details | Setup | Template | Confirmation | Done | Save and next

The Campaign set up options for tracking and receiving stats. Click on each header title for information on each setting.

CUSTOMER AREA | Joe Estates

### Campaign setup

Dashboard | Campaigns | Campaign 1 | Setup

Campaign setup [Cancel]

From name \*  
Joe Estates

From email \*  
skywaterestates@theskywatergroup.com

Reply to \*  
skywaterestates@theskywatergroup.com

To name \* [Available tags]  
[EMAIL]

Subject \* [Available tags]  
Weekly Newsletter

**Campaign options**

Url tracking \*  
No

Json feed \*  
No

Xml feed \*  
No

Embed images \*  
No

Plain text email \*  
Yes

Email stats  
Email stats

**Change subscriber custom field value upon campaign open** [Add field/value]

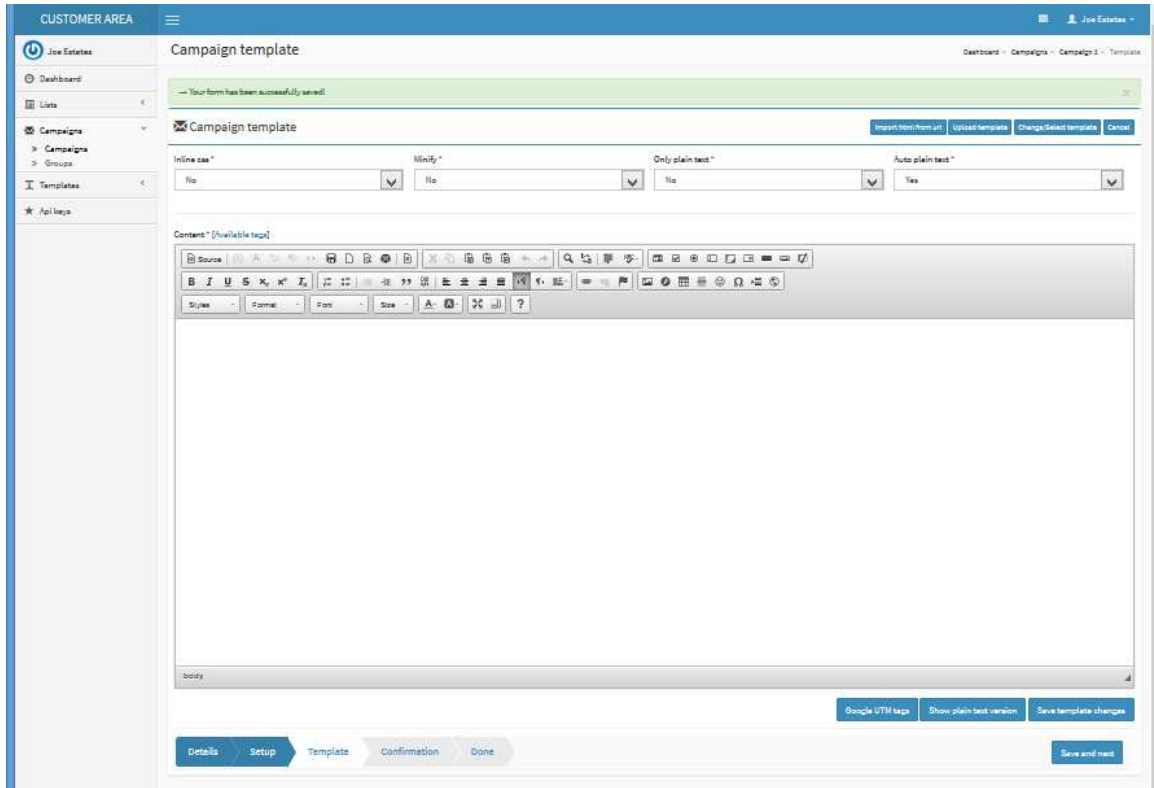
This is useful if you later need to segment your list and find out who opened this campaign or who did not and based on that to take another action, like sending the campaign again to subscribers that did not open it previously. In most of the cases, you will want to keep these fields as hidden fields.

**Actions against subscribers upon campaign open** [Add action]

When a subscriber opens your campaign, do following actions against the subscriber itself.

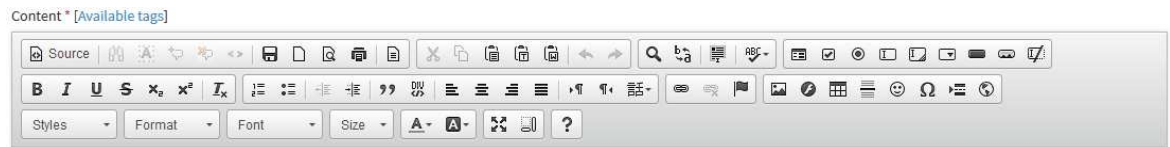
Details | Setup | Template | Confirmation | Done | Save and next

Clicking next will take you to the template area. Here you can create or choose a template.

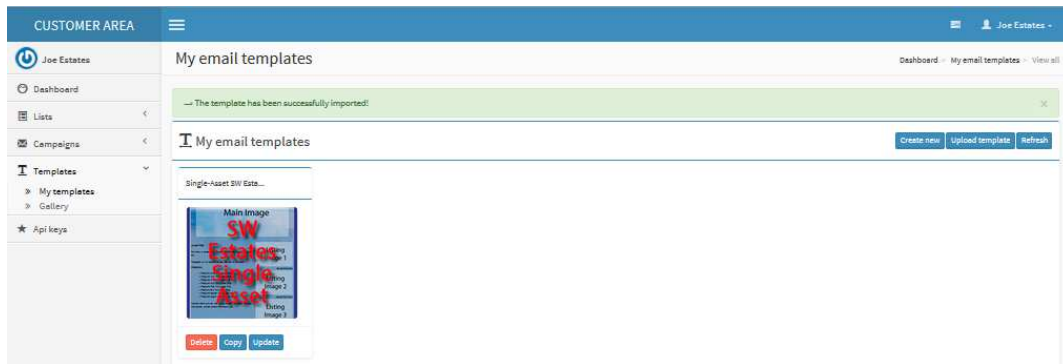


The Mailer Application uses the CKeditor which is a WYSIWYG, a visual template builder. You are encouraged to educate yourself on this editor in the Template area and on their website.

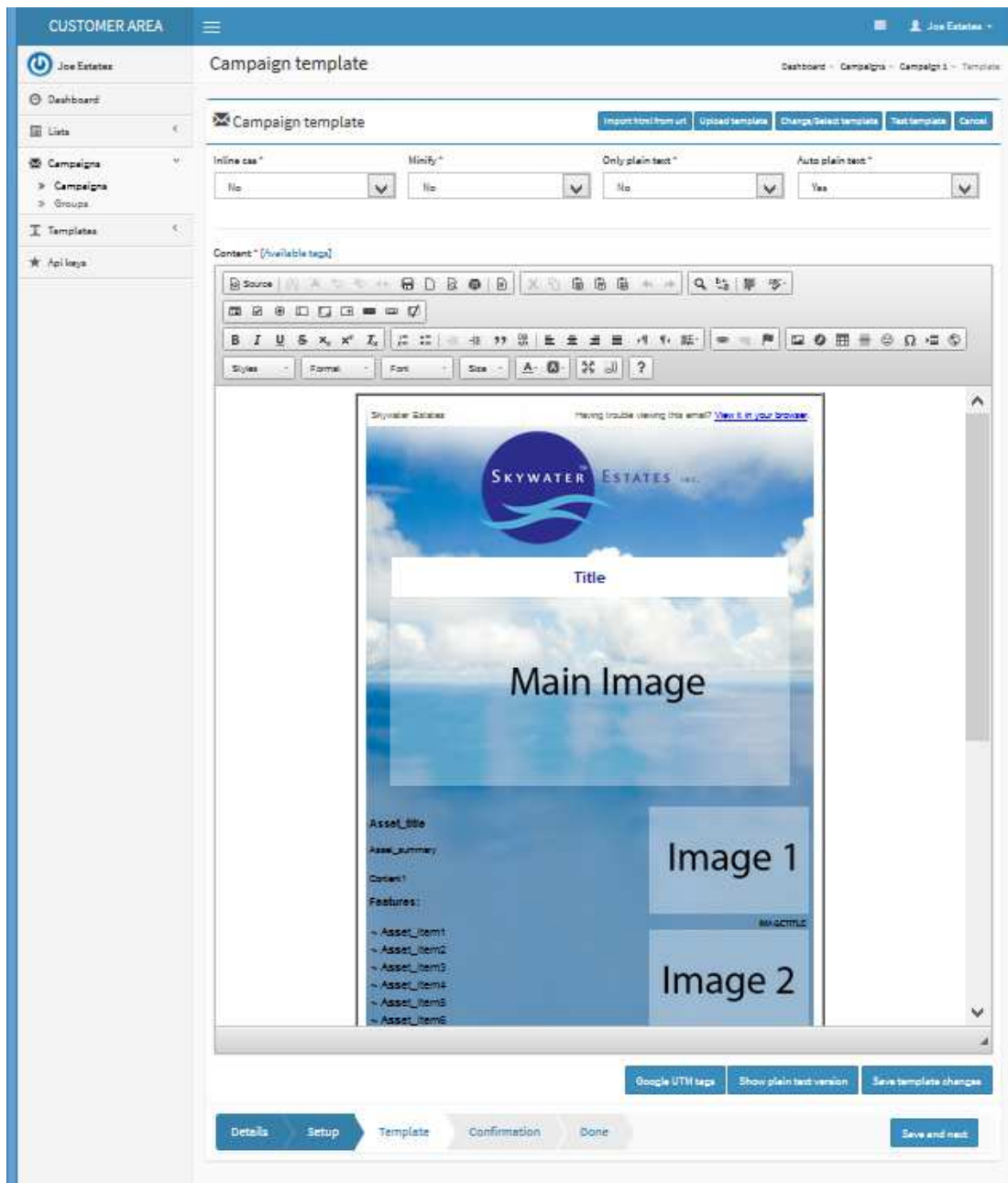
Without going into detail, moving your cursor over each button will give you an information box of what it does. Also, if you are familiar with html coding, you may click on the 'Source' button to view/modify/paste code.



In this case, we will choose the 'Change/Select Template' button above the editor. Your 'My email templates' will appear that you have in your templates page. If more than one, you will choose the template you want for this campaign.



The template you chose will appear in the CKEditor window.



It is here you would modify the template. See the **Template Modification Tutorial Addendum** at the end of this manual.

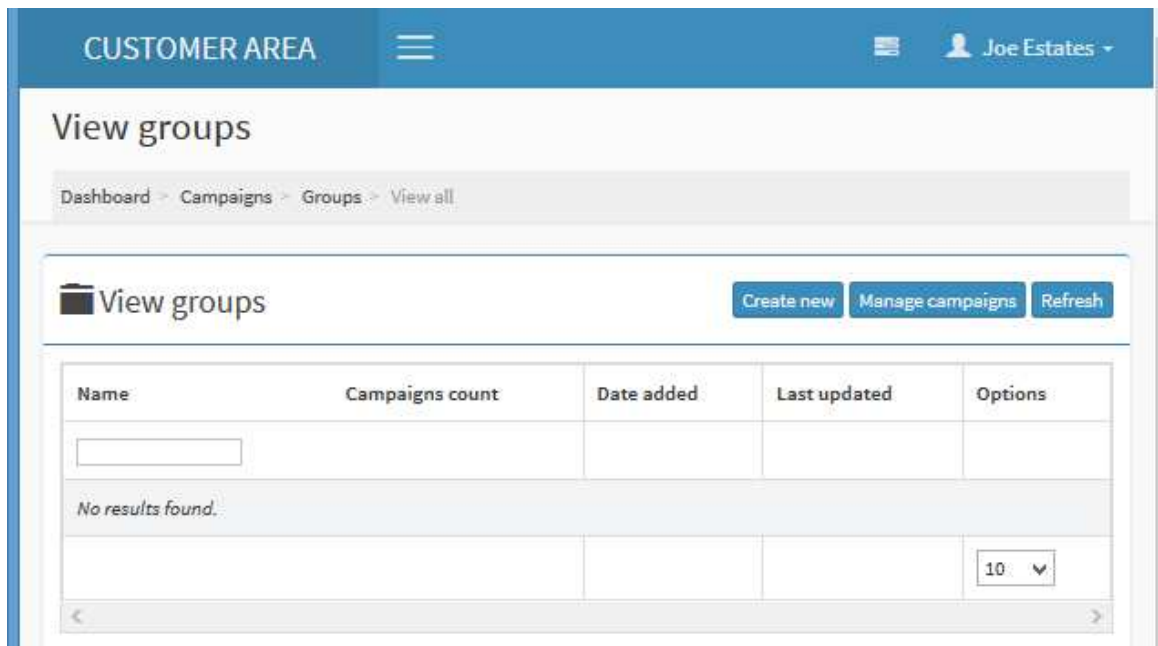
There are a number of html tutorials available online and one very popular recommended one is at <http://www.w3schools.com/html/>. NOTE – The editor used within the application is called CKeditor and documentation and tutorials can be read at <http://docs.cksource.com/>.

2. GROUPS – CAMPAIGNS > GROUPS.

Campaign Groups are a way to categorize your Campaigns. As an example, if you eventually have 40-50 or more campaigns of both Estates and Yachts, you could create Estate and Yacht groups and simply categorize each of your campaigns within these groups for an easier search feature instead of having to search through all campaigns.

To get more in-depth, if you begin building for example, a 15-series autoresponder (see the Terminology section), you can create an AR15 group. You can create innumerable types of Groups to filter and create views of your campaigns.

For now, we will for simplicity sake create two groups. Click on ‘Groups’ to access the Group View page.



Click on the 'Create new' button, type in "Estates" and click 'Save changes'. Repeat the process creating a "Yachts" group.

CUSTOMER AREA

Joe Estates

### Create new campaign group

Dashboard > Campaigns > Groups > Create new

Create new campaign group Cancel

Name \*

Estates

Save changes

Once complete, click on the 'Groups' link again to take you to the 'Groups view' page. You should see the two groups you created.

CUSTOMER AREA

Joe Estates

### View groups

Dashboard > Campaigns > Groups > View all

View groups Create new Manage campaigns Refresh

Displaying 1-2 of 2 results.

Name	Campaigns count	Date added	Last updated	Options
<input type="text"/>				
Yachts	0	11/25/14 11:47 AM	11/25/14 11:47 AM	<span>✎</span> <span>⊘</span>
Estates	0	11/25/14 11:46 AM	11/25/14 11:47 AM	<span>✎</span> <span>⊘</span>

10

At this point, whether you create a new campaign or to edit / update an existing one, you can assign the campaign to one of the groups created. Simply choose from the Group dropdown box that group you would like to categorize that campaign with. In this example, 'Estates' group.

**CUSTOMER AREA** Joe Estates

### Update campaign

Dashboard > Campaigns > Campaign 1 > Update

**Update campaign** Cancel

Campaign name \*

Type

Group  
  
 Choose  
 Yachts (0 campaigns)  
**Estates (0 campaigns)**  
 (0 subscribers)

Segment

Details Setup Template Confirmation Done **Save and next**

If you click on 'Campaigns' to see 'Your Campaigns' list, you will now be able to 'filter' the view of your campaigns. Below, by choosing 'Yachts' in the dropdown box, (0 campaigns) is listed, thus no campaigns appear.

**CUSTOMER AREA** Joe Estates

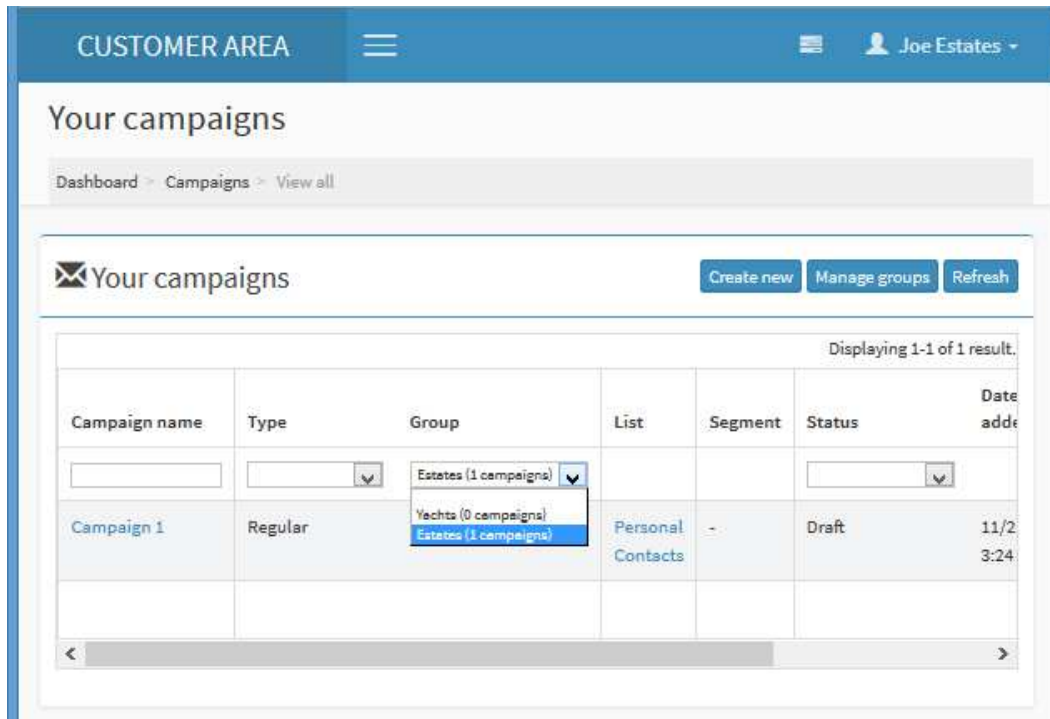
### Your campaigns

Dashboard > Campaigns > View all

**Your campaigns** Create new Manage groups Refresh

Campaign name	Type	Group	List	Segment	Status	Date added
<input type="text"/>	<input type="text" value=""/>	<input type="text" value="Yachts (0 campaigns)"/>			<input type="text" value=""/>	
<i>No results found.</i>						

Below, by choosing 'Estates' in the dropdown box, the 'Estate' campaign appears in the 'Your campaigns' list. Again, the purpose of the 'Groups' link is to categorize and view your lists so that as your campaigns grow, you will have a smaller list of campaigns to view.



### C. Templates > Templates menu

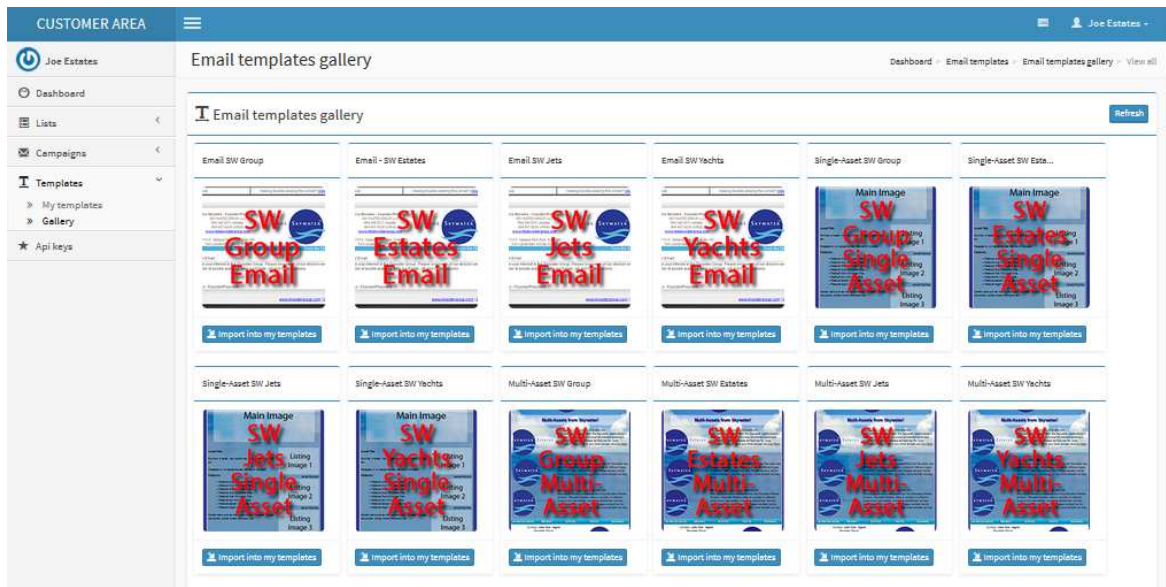
The first time you login in, you will not have any templates in the 'My Templates' area. You can do one of three things – create your own template, upload your own template either created by another application or downloaded or import it from the provided 'Gallery.'

#### 1. MY TEMPLATES – TEMPLATES > MY TEMPLATES

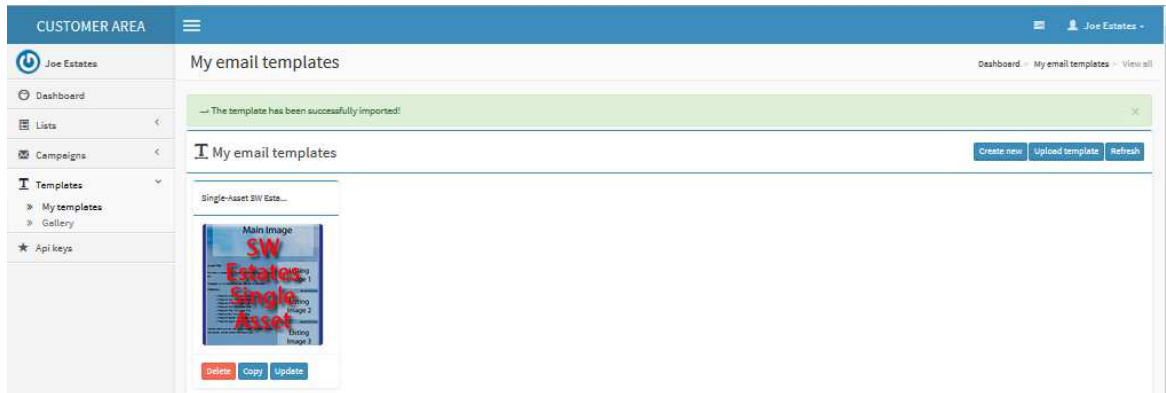
On first use, this area is blank. It will require creating or uploading a template. This does require a bit of html knowledge which we won't go into here. There are a number of html tutorials available online and one very popular recommended one is at <http://www.w3schools.com/html/>. As noted above, the editor used within the application is called CKeditor and documentation and tutorials can be read at <http://docs.cksource.com/>. For more details on modifying a template, see the Template Modification Tutorial Addendum at the end of this manual.

#### 2. GALLERY – TEMPLATES > GALLERY

The Templates > Gallery link takes you to ready-made templates for you to import and use. These templates, once imported, can be modified for your custom use.



To import a template into 'My Templates', click on the menu Templates > Gallery and choose one to import by clicking on the button titled 'Import into my templates' below the template you choose. The chosen template will then show in 'My Templates.' You may choose some of the templates or all of them.





## TERMINOLOGIES

Below are basic terminologies of email marketing that are helpful to understand some of the words used in this reference manual:

- **WYSIWYG - What You See Is What You Get.** This is used to describe a web editor interface that lets you design newsletter templates using buttons similar to those found in a word processor such as Microsoft Word. Examples of buttons include bold, italic, using headings, a button to insert images, and more.
- **Autoresponder** – An autoresponder sends off an email to a subscriber automatically. A **single autoresponder** is most common – this typically just replies to a subscriber when they sign up. A **sequential autoresponder** is a little more advanced and allows you to schedule a series of predefined emails to be sent out on a specified schedule to each subscriber.
- **Email Lists** – A list of contact email addresses, usually created by personal contact, subscribed, registered or customers that have purchased products or services.
- **Subscriber Lists** – Lists that have been created by either in a physical store or website whereby email addresses were acquired by opt-in processes. Ex. Customer enters store and provides an email address or a visitor on a website receives a newsletter, an offer of a discount, a free gift, information or other by providing an email address.
- **Unsubscribed Lists** – Lists of contacts that did not ‘opt-in’, sign up, register or subscribe in giving out their contact information, including email address. These lists are normally acquired from government or public lists that have email addresses exposed or from websites that have been ‘scraped’. It is critical that lists like these are verified and further, have a clear ‘Unsubscribe’ link with the email campaign.
- **Purchased Lists** – Lists that have been bought from a company that includes contact information such as email addresses. These are considered a form of an Unsubscribed List. Sending a Purchased List also has a higher degree of blacklisting with **Email Marketing Service Providers (EMSP)** as the contacts may not only contact the sending person/company, but file a complaint with the EMSP. If there are a number of complaints, the EMSP will terminate the account.
- **List Segmentation** – Send messages to subsets of your subscriber base to help establish a stronger connection via more relevant newsletters. You can target subsets of your subscriber base and mail out promotions and offers based on demographics, purchasing history, geographic location, and more.
- **Attachments** – most EMSP’s **do not allow** attachments for a simple reason – they increase the probability of a given message being viewed as spam (as a result, the EMSP (and your) delivery rates may be affected. Attachments can also be flagged as computer virus files. You’re better off using inline links in your email, which you can then link to a hosted file. When the user clicks the link, they are given the option to download the file. Not as streamlined as an email attachment, but much more likely to allow the email to reach its full audience.
- **Spam Score/Checking** – finding out whether your subscribers actually got your email is important. If they didn’t, why not? Some EMSP’s offer **spam score** utilities that help you determine the likelihood of your newsletter ending up in a spam box *before* you hit send.
- **Opt-In or Unconfirmed Opt-In:** When an e-mail service provider requires an “opt-in” process, this means that e-mail recipients have agreed to receive e-mail advertising, e-mail marketing or e-mail communication specifically from the company or individual sending e-mails.

- **Double Opt-In or Confirmed Opt-In:** When an e-mail service provider requires a “double opt-in” process that means that e-mail recipients have signed up to receive e-mail advertising, marketing or communications specifically from the company or individual sending e-mails. In addition, these individuals have confirmed (usually by clicking a link) that they did indeed, sign up to receive such e-mail communication.
- **No Opt-In Requirements:** Very few e-mail service providers these days allow for e-mail addresses to be imported without any opt-in requirements. Opt-in requirements have been established to reduce SPAM mail and e-mail abuse.
- **List Verification** – A process that verifies that email addresses exist. If a server does not respond or returns an email address does not exist, it is called a bounce. The higher a bounce rate, the higher probability of your email address being blacklisted.
- **Blacklist** - A list of known or suspected spammers. There are a number of ways one can be blacklisted – DNS (Web site, email address), IP address (number assigned to your devices) are the more evident ones. What is important to understand here is that while your individual computer cannot be tracked, the IP Address (see below) your internet service provider assigns you can be blacklisted. For example, if you send high-bounce bulk email out from your home, your provided IP Address (from ATT&T, Verizon or other) could become blacklisted. Not only will your email to your particular list not get through, but ANY email you send out from your home could be prevented from getting out, and for anyone residing there.
- **Spam Triggers** - There are a number of other ‘factors’ such as subject line words, use of emphasis (exclamation!), body context words (trigger words such as free, for sale, discounts that are considered off limits or dangerous.) For more information on trigger words see the following website that has some, not all spam trigger words - [http://webmarketingtoday.com/articles/spamfilter\\_phrases/](http://webmarketingtoday.com/articles/spamfilter_phrases/). You do not have to memorize this list, it is a list to give you an idea of what can trigger a message as spam. Using one or two of these phrases hardly places your message as spam. But when used in greater number with other factors it will. Spam triggers are also determined by not only ‘content’ words, but what is in headers, URL’s and the body. Again, you may want to take a quick glance at the following website - for examples of what a major anti-spam program is looking for - [http://spamassassin.apache.org/tests\\_3\\_0\\_x.html](http://spamassassin.apache.org/tests_3_0_x.html). Other factors include high send rates, messages marked as spam by receivers, high number of images, etc. There are many factors.
- **Internet Protocol Address (IP Address)** - This number is an exclusive number all information technology devices (printers, routers, modems, et al) use which identifies and allows them the ability to communicate with each other on a computer network. It is a number \*\*\*\*.\*\*\*\*.\*\*\*\* (IP) that could be blacklisted if you have high bounce rates or other factors.
- **Domain Name System (DNS)** - This allows the IP address to be translated to words. It is much easier for us to remember a word than a series of numbers. The same is true for email addresses. It is the website name www.\*\*\*.com or email name server @\*\*\*.com (DNS Name) that could be blacklisted if you have high bounce rates or other factors.

## TEMPLATE MODIFICATION TUTORIAL ADDENDUM

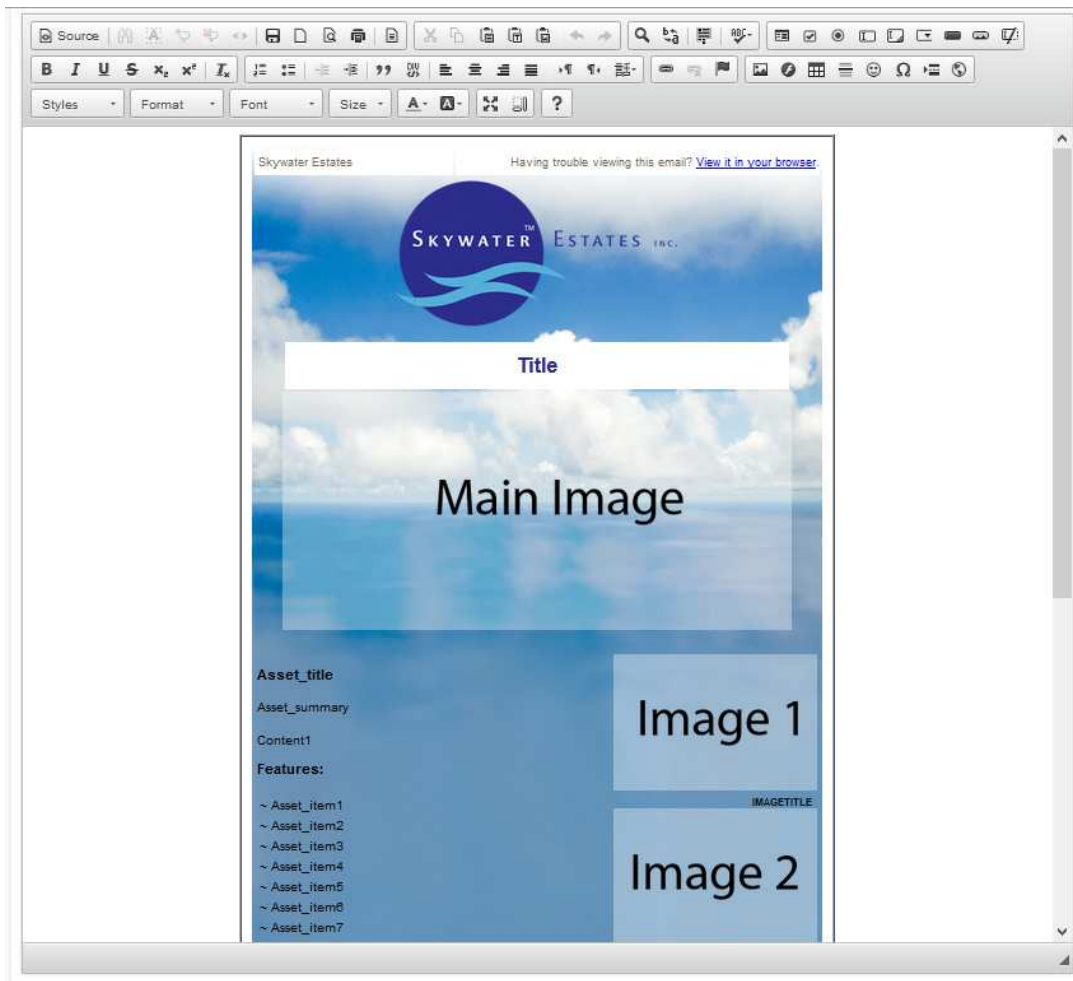
**CKeditor** is the template-html editor used within the Mailer Application program. The documentation and tutorials of the editor can be read at <http://docs.cksource.com/>

The CKeditor is a **What You See Is What You Get (WYSIWYG)** editor as defined in the Terminology section above:

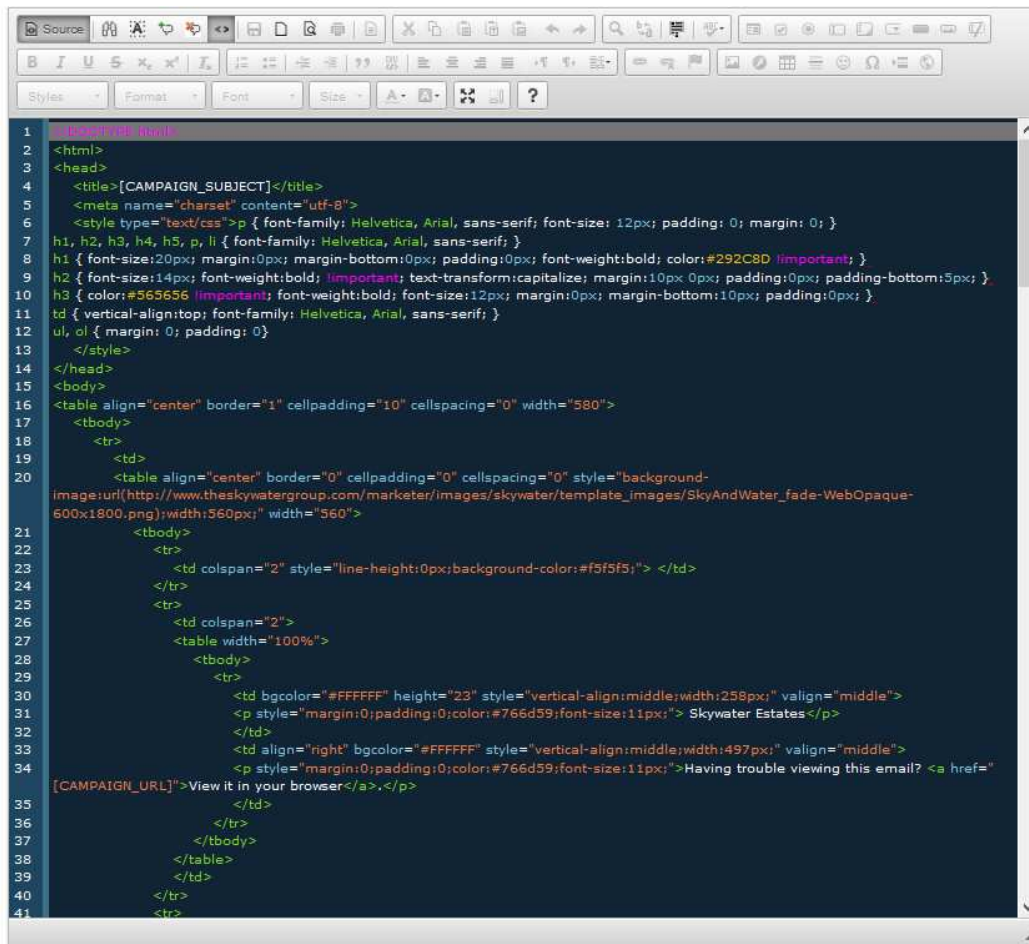
*“This is used to describe a web editor interface that lets you design newsletter templates using buttons similar to those found in a word processor such as Microsoft Word. Examples of buttons include bold, italic, using headings, a button to insert images, and more.”*

In the following template modification tutorial, the CKeditor will be used in the image examples displayed. Most of the examples will show the ‘WYSIWYG’ display setting, not the ‘Source’ (HTML) setting. As stated in the manual, there are a number of html tutorials available online and one very popular recommended one is at <http://www.w3schools.com/html/> if you have a desire to learn some html coding.

As a precursor, I will quickly show you the difference between the WYSIWYG display and the Source display. The WYSIWYG display visually shows the template as one receiving it by email or viewing it in a web browser:



The Source display (by clicking on the 'Source' button in the upper left icon area) visually shows the template in the html coding behind the page. This coding normally includes tables, cells, image/website links, CSS styling and content text:



```
1 <!-- Do not edit the header -->
2 <html>
3 <head>
4 <title>[CAMPAIGN_SUBJECT]</title>
5 <meta name="charset" content="utf-8">
6 <style type="text/css">p { font-family: Helvetica, Arial, sans-serif; font-size: 12px; padding: 0; margin: 0; }
7 h1, h2, h3, h4, h5, p, li { font-family: Helvetica, Arial, sans-serif; }
8 h1 { font-size:20px; margin:0px; margin-bottom:0px; padding:0px; font-weight:bold; color:#292C8D !important; }
9 h2 { font-size:14px; font-weight:bold; !important; text-transform:capitalize; margin:10px 0px; padding:0px; padding-bottom:5px; }
10 h3 { color:#565656 !important; font-weight:bold; font-size:12px; margin:0px; margin-bottom:10px; padding:0px; }
11 td { vertical-align:top; font-family: Helvetica, Arial, sans-serif; }
12 ul, ol { margin: 0; padding: 0}
13 </style>
14 </head>
15 <body>
16 <table align="center" border="1" cellpadding="10" cellspacing="0" width="580">
17 <tbody>
18 <tr>
19 <td>
20 <table align="center" border="0" cellpadding="0" cellspacing="0" style="background-
image:url(http://www.theskywatergroup.com/marketer/images/skywater/template_images/SkyAndWater_fade-WebOpaque-
600x1800.png);width:560px;" width="560">
21 <tbody>
22 <tr>
23 <td colspan="2" style="line-height:0px;background-color:#f5f5f5;" </td>
24 </tr>
25 <tr>
26 <td colspan="2">
27 <table width="100%">
28 <tbody>
29 <tr>
30 <td bgcolor="#FFFFFF" height="23" style="vertical-align:middle;width:258px;" valign="middle">
31 <p style="margin:0;padding:0;color:#766d59;font-size:11px;"> Skywater Estates </p>
32 </td>
33 <td align="right" bgcolor="#FFFFFF" style="vertical-align:middle;width:497px;" valign="middle">
34 <p style="margin:0;padding:0;color:#766d59;font-size:11px;">Having trouble viewing this email? <a href="
[CAMPAIGN_URL]">View it in your browser</a></p>
35 </td>
36 </tr>
37 </tbody>
38 </table>
39 </td>
40 </tr>
41 </tbody>
</table>
```

For the most part, this tutorial will discuss template modifications in the WYSISWYG display setting.

NOTE – the following modifications of a template can be done in either the Templates or Campaigns area. This addendum is two-fold, to show you how to modify templates and to show you why you would use one area or the other to make those modifications.

There are two reasons for modifying a template -

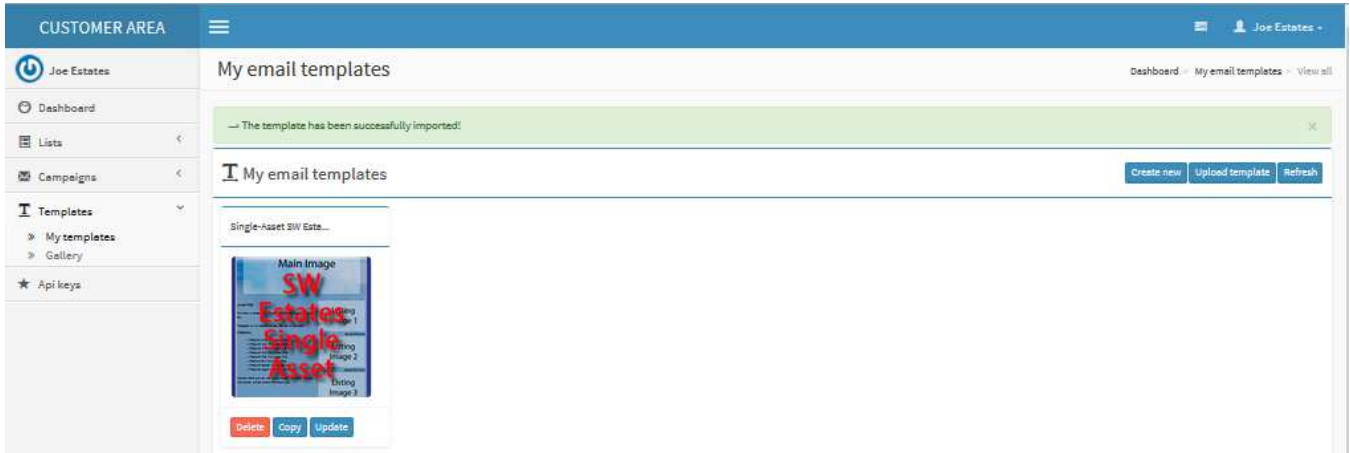
First, when you import a template into 'My Gallery', you will want to make changes that you know will be used throughout all of your campaigns for that template. For example, a company logo that you will want displayed on every campaign. If you don't make the change here, then every time you go to create a new campaign with the template, you will have to add the logo.

Second, when you create a new campaign, there will always be something you want to possibly add/delete or modify. For example, if you are a real estate agent and have a new listing, you will want to add new text content about that newly listed property and pictures.

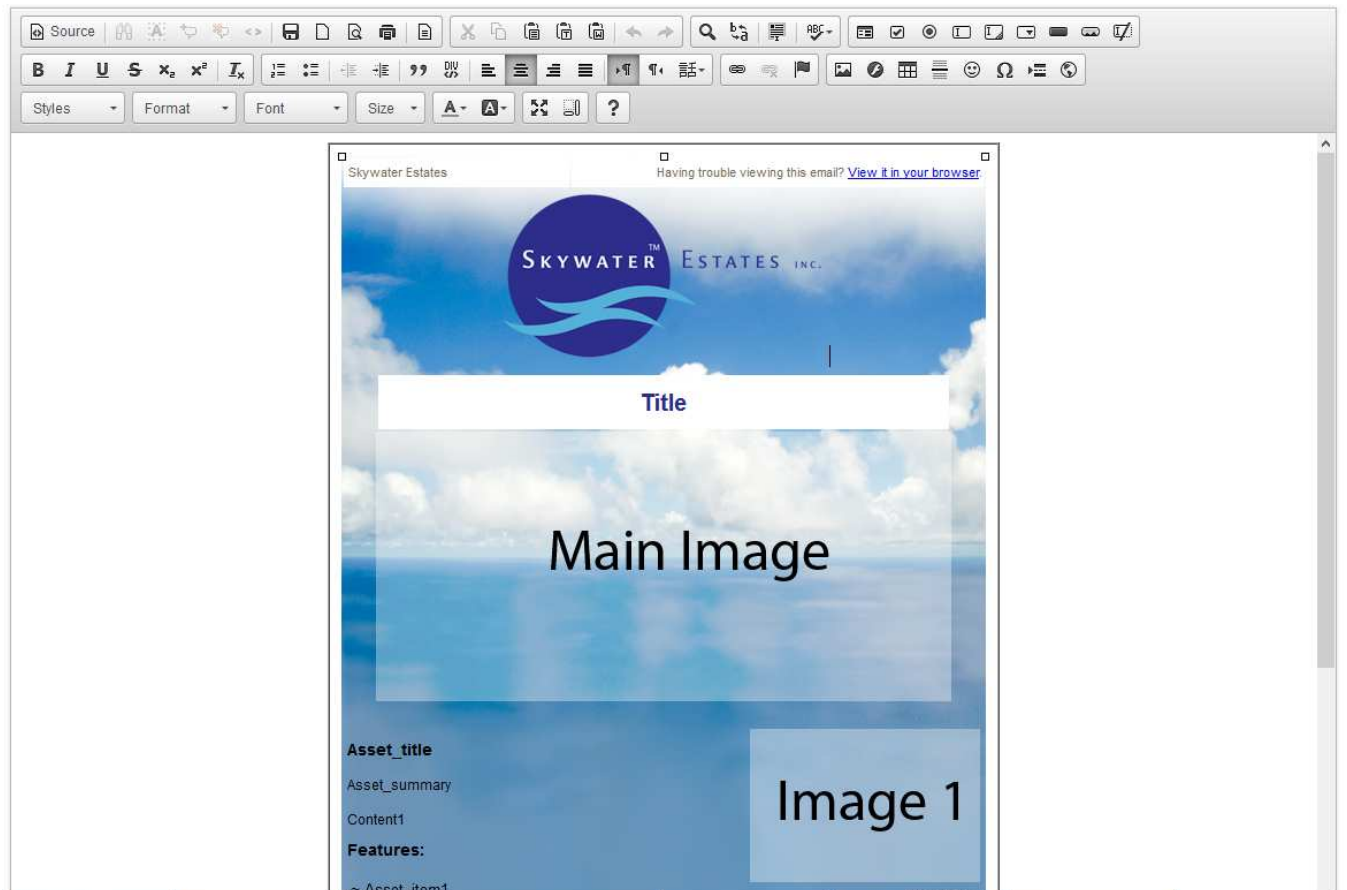
Below explains how to modify templates in both the Templates > My templates and Campaigns > Campaigns areas. It will be in the Campaign section where modifying images will be shown.

## 1. Modifying Templates in 'My templates'

Click on Templates > My templates, this takes you to the 'My email templates' page and the template you imported from the Gallery.



Click the 'Update' button to open up the template in the CKeditor.



Here were going to make a simple text edit. Use your cursor and highlight 'NAME' and then just type in the name you want. Once you click save, this saves the template so that your name will now appear every time you choose this template for a campaign.



The next feature to introduce are the use of 'dynamic tags'. Dynamic tags serves two roles:

### Email content personalization -

By inserting information you already have about your contacts in your lists into your email send. For example, if you have a column header of your subscribers first names titled FNAME, you can start a campaign with a personal "Dear [FNAME],".

If the first row of your list has the first name "Lisa", she would open her email from you and it would begin with "Dear Lisa,". NOTE: You must make sure that your List column names match the tag names or the receipt of your email will read "Dear ,". Thus every one of your List contacts would receive an email with their first name included.

To extend the use of dynamic tags, if your List has a column with a reason for their contacting you, (ex. Looking to buy or sell their property titled CONTACT\_REASON) and another column with a type of property titled PROPERTY\_TYPE), you can send an autoresponse email, with an email personalized even further, as in the following example:

Dear [FNAME], thank you for your inquiry concerning [CONTACT\_REASON] your [PROPERTY\_TYPE].

The output they would see upon receipt:

Dear Lisa, thank you for your inquiry concerning selling your condo.

### Replace Key Information -

Tags also offer an easier way to make changes to all of your templates simply by replacing key information with a tag. For example, if your name is 'Elizabeth Jones' in your Account Profile, instead of typing in "Elizabeth Jones" in all of your templates, you can add the tag, [LIST\_FROM\_NAME]. The tag will pull in your first and last name.

The great thing about this is if you had 30, 50, 100 or more templates and they all needed your name changed, all that would be needed is to change your profile name, as an example, 'Elizabeth' changed to 'Liz' would change all templates! How convenient is that!

For example, the following shows the standard text in the template being used in this manual, which is fine if you had a handful of customized templates in your Templates area. However, what if you eventually have 30, 40 or over 50 different templates and you changed your phone number or your company moved to another location? You would have to change the information in every template in your Templates > My Templates.



The alternative is to use Tags. Consider the following, if Joe Estates wanted to change his name in the template to Joseph Estates, all he would do is change his name from Joe to Joseph in his Account area had he used the Tag – [LIST\_FROM\_NAME] in all his templates in Templates > My templates.

In this manner, a one-setting name modification changed all the templates! See the above image compared to the image below as an example use of the tags. NOTE – Make sure you use the applicable commas, periods and hyphens.



A full list of tags are listed on the next page.

Tags are an extremely powerful tool to make use of, saving time and creating a more personal message. Below are the tags associated with the Mailer Application.

**CAUTION** - Keep in mind, the exact title must exist in your List's column headings for those tags related to your contacts. For instance, your contact List headings must be EMAIL, FNAME and LNAME to be able to call their email addresses, first names and last names.

If you are using a tag for your List that does not exist or spelled wrong, it will not output information. For example, if you use the [LNAME] tag and the column header for all last names in your list is titled LAST\_NAME, not LNAME, the last name will not be displayed.

Also, if you have a blank cell for a last name for one of your contacts, a last name of course will not appear. (Example – Dear Mr. .) So you need to be careful! All tags calling your information is simply calling your Account information so there are no column headings to be concerned about.

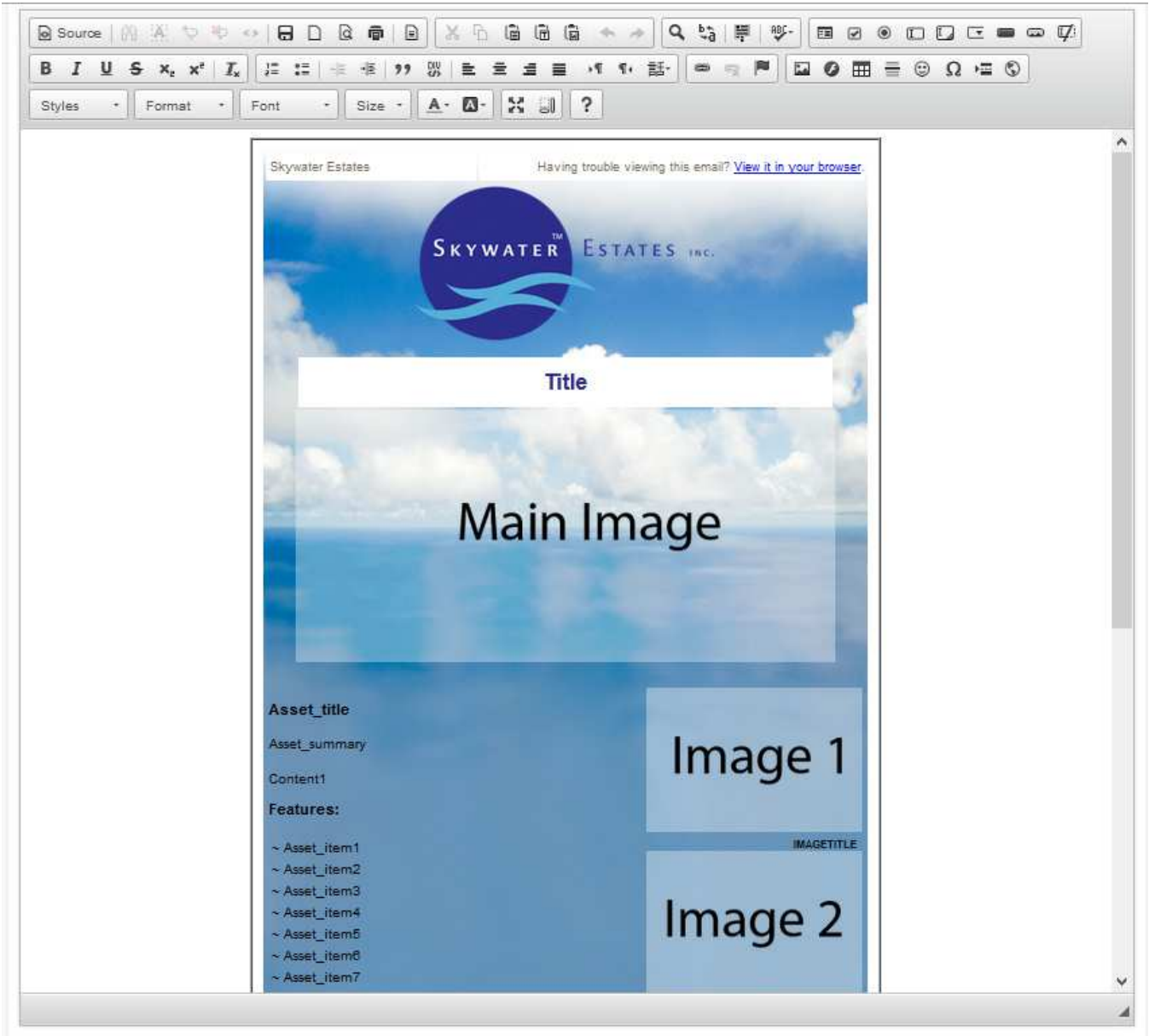
Tag	Output
[UNSUBSCRIBE_URL]	Link to Unsubscribe
[COMPANY_FULL_ADDRESS]	User's Company name/address
[UPDATE_PROFILE_URL]	Update profile URL
[WEB_VERSION_URL]	Web URL
[CAMPAIGN_URL]	Campaign URL
[LIST_NAME]	Name of the List used
[LIST_SUBJECT]	List subject name
[LIST_DESCRIPTION]	List description
[LIST_FROM_NAME]	Sent from (Your name)
[CURRENT_YEAR]	Current Year
[CURRENT_MONTH]	Current Month
[CURRENT_DAY]	Current Day
[CURRENT_DATE]	Current Date
[COMPANY_NAME]	User's Company name
[COMPANY_ADDRESS_1]	User's Company address #1
[COMPANY_ADDRESS_2]	User's Company address #2
[COMPANY_CITY]	User's Company City
[COMPANY_ZONE]	User's Company Zone (State)
[COMPANY_ZIP]	User's Company Zipcode
[COMPANY_COUNTRY]	User's Company Country
[COMPANY_PHONE]	User's Company Phone
[CAMPAIGN_SUBJECT]	Campaign Subject
[CAMPAIGN_TO_NAME]	Email address sent to
[CAMPAIGN_FROM_NAME]	User's Email Address
[CAMPAIGN_REPLY_TO]	Reply to
[CAMPAIGN_UID]	Campaign ID
[SUBSCRIBER_UID]	Subscriber ID
[EMAIL]	Email address sent to
[FNAME]	List's first name
[LNAME]	List's last name



## 2. Modifying Templates in 'Campaigns'

Click on Campaigns > Campaigns and create a new campaign. At template stage, choose the template you imported into 'My Gallery'. We will begin by editing some of the text as completed in the Templates area.

In the text of the following – 'Title', 'Asset-title', 'Content1', 'Asset\_item1', 'Asset\_item2', 'Asset\_item3' and 'Asset\_item4' each of those can be highlighted and typed with new words.



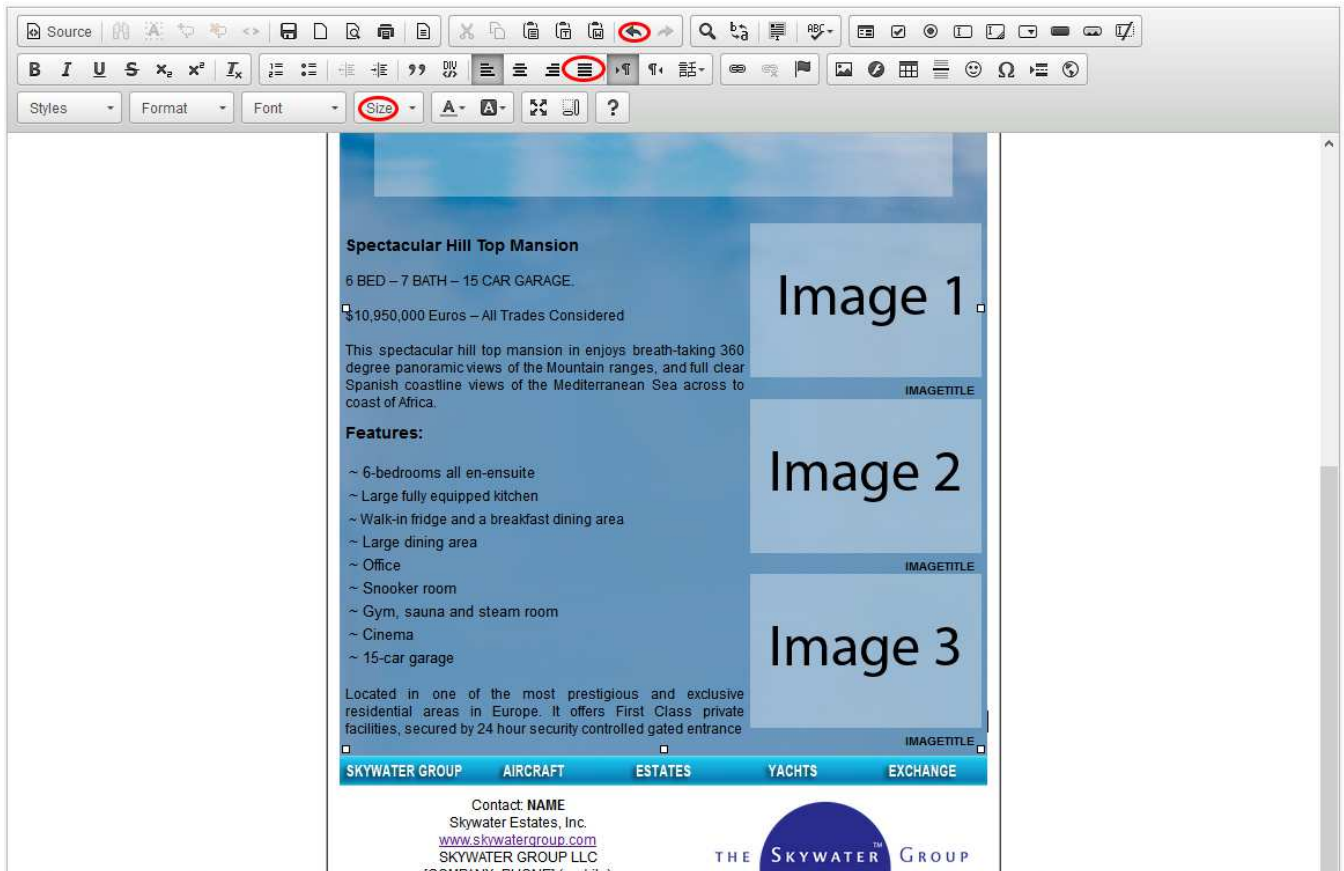
Replacing text in the WYSIWYG editor is almost as simple as using Word, Notepad or any other text editor with some of the same features of the icons to use. In the modification below, the text has been replaced except for the image titles. **NOTE: It is highly recommended during your editing, that you save your template periodically by clicking on the ‘Save template changes’ button below the editor window. You will remain on the page after saving. This will prevent any browser freeze up from losing your work.**

The red highlighted are some of the most common icons you will use.

The top arrow circled in red is the Undo button. Anytime you don’t like something you just did, no matter what change – text, image, link or other, you can easily click on the arrow and you will step back the last change. You may also step back multiple times.

The format lines circled in red justifies text from the left border to the right border. The font Size button is highlighted. This may be used often when you paste in text. Sometimes you will find text size formatting is applied from the clipboard so you will have to highlight the text and change the size.

**NOTE: It is recommended if you have different size text in a line or more that has been pasted, highlight the entire paragraph, click the ‘Format’ button, remove formatting and then apply the Font, Size and Style you want. This will preserve better coding in the source code.**



Before showing how to add/modify images, the ‘trick’ is to appropriately present your images in the correct width-height that is visually presentable. There are a number of ways to modify the size of your images in a template.

- Crop the image to the size you wish prior to uploading
- After uploading, and before inserting, change the image size in the Image Properties box
- After inserting, highlight the image and grab a corner or side anchor and drag to change size
- After inserting, highlight the image, right click on the image and click on Image Properties
- If you know html code, change the size in the Source html code

If you do not have a fully featured image program such as Photoshop there are downloadable programs just for image resizing – <https://imageresizer.codeplex.com/> and <http://www.obviousidea.com/windows-software/light-image-resizer/>.

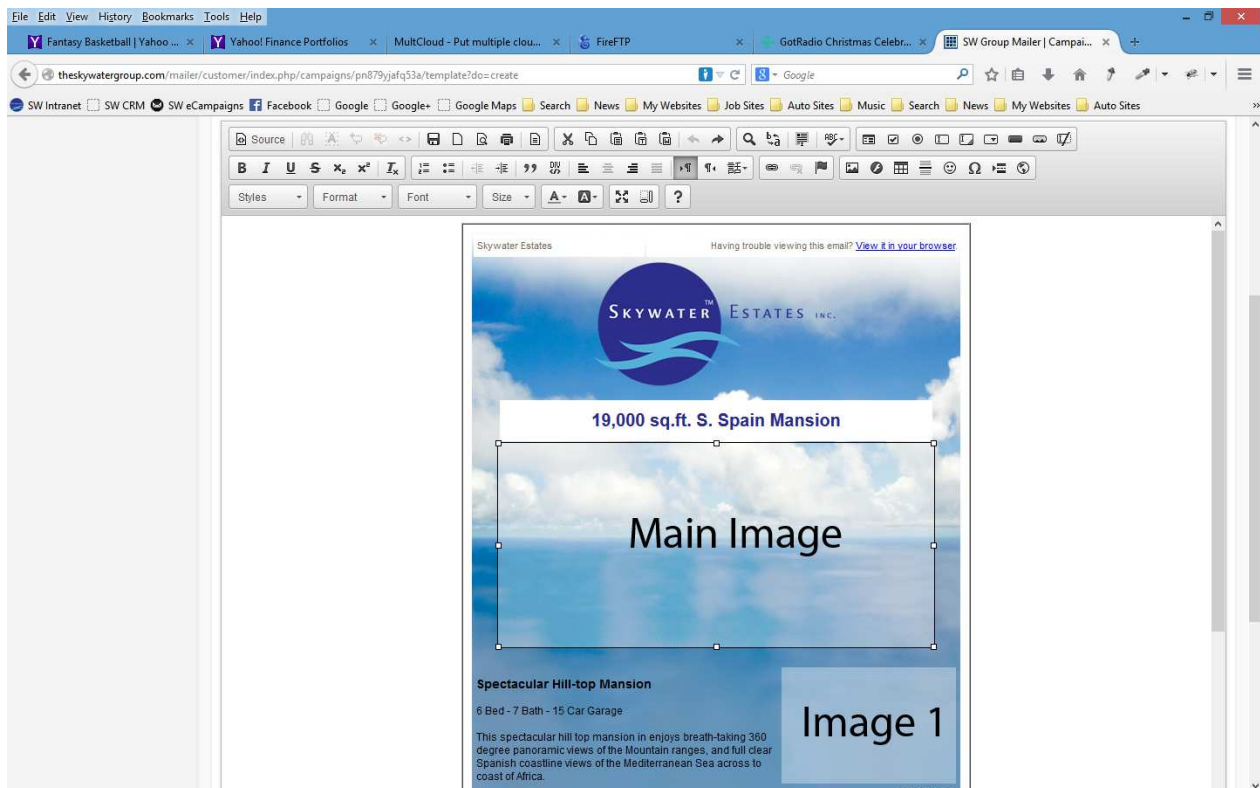
A popular online image resizer is <http://www.webresizer.com/resizer/>.

If you want a well-designed program at no cost, the **Gimp Image Manipulation Program** should do everything you need for applying your images to templates.

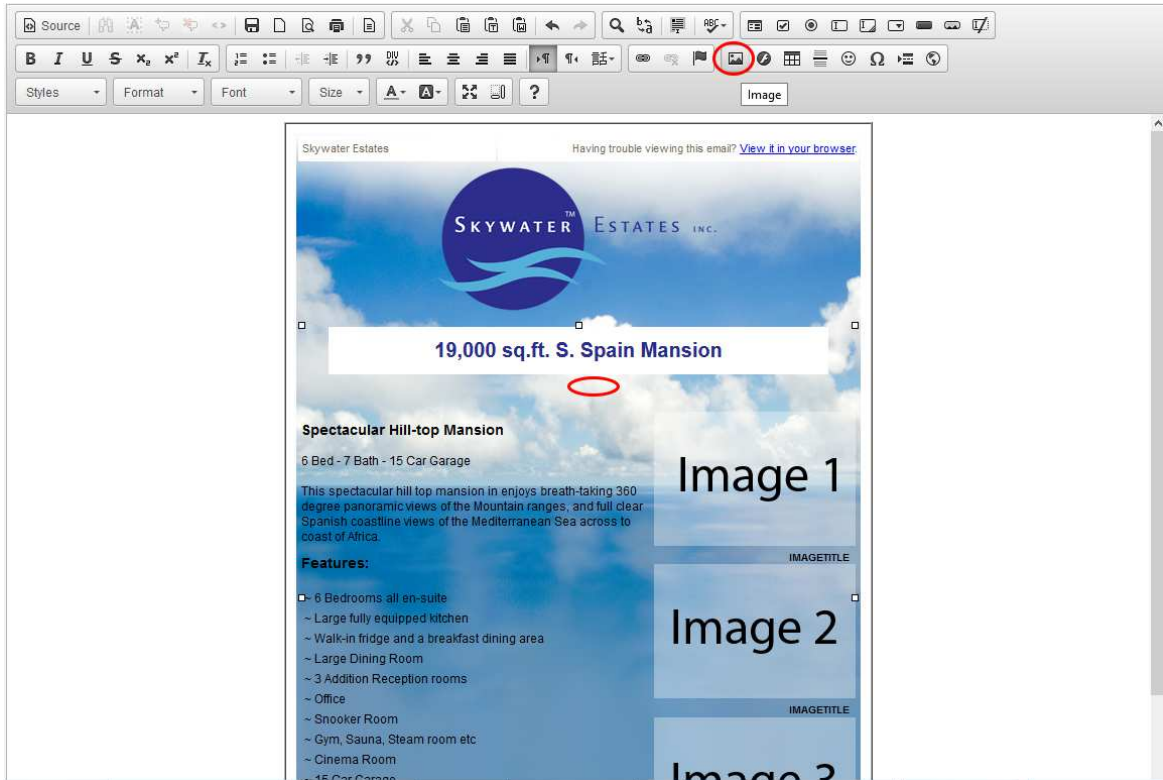
**NOTE** – A word about image preparation, specifically shooting images and cropping. If you are going on location and shooting products such as real estate properties, boats, cars or other, the temptation is to zoom in and ‘crop’ your image in the lens. I strongly recommend taking a number of pictures with a large amount of space around the product. You’ll find it is much easier to resize/re-crop images at various sizes by having that extra space.

The following image modifications will be completed on the Main Image and Image 1, Image 2 and Image 3. The Main Image in the template has a size of 500 x 235 pixels and Image 1, 2 and 3 are 200 x 133 pixels.

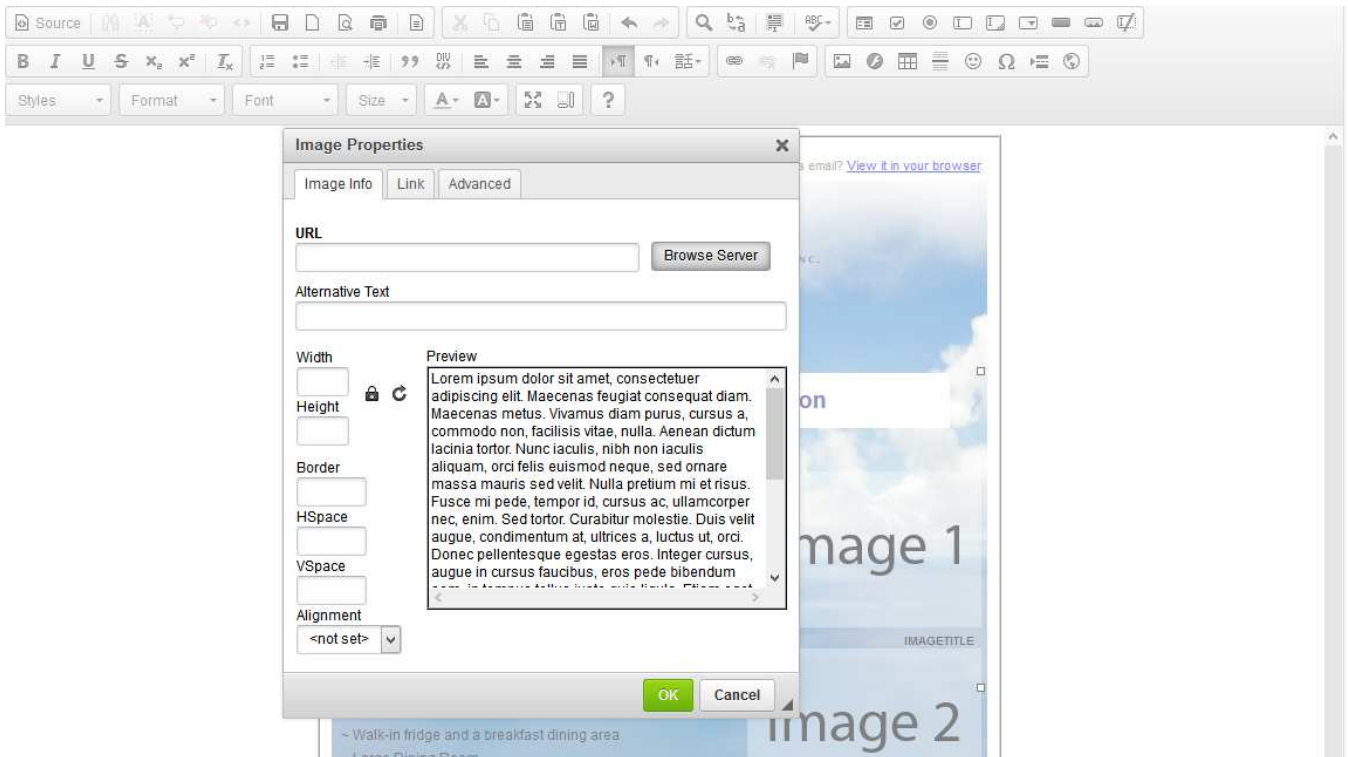
To change existing template images, click on the image with your mouse to highlight it. Delete the image.



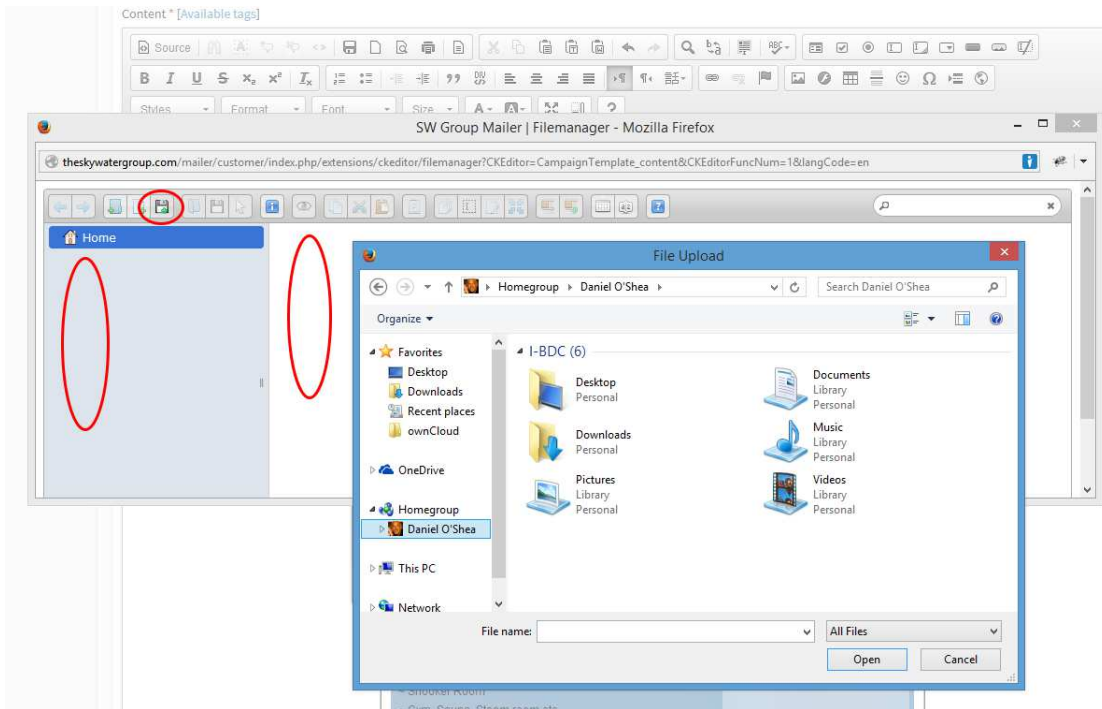
With the cursor still in the image position you deleted, click on the image icon.



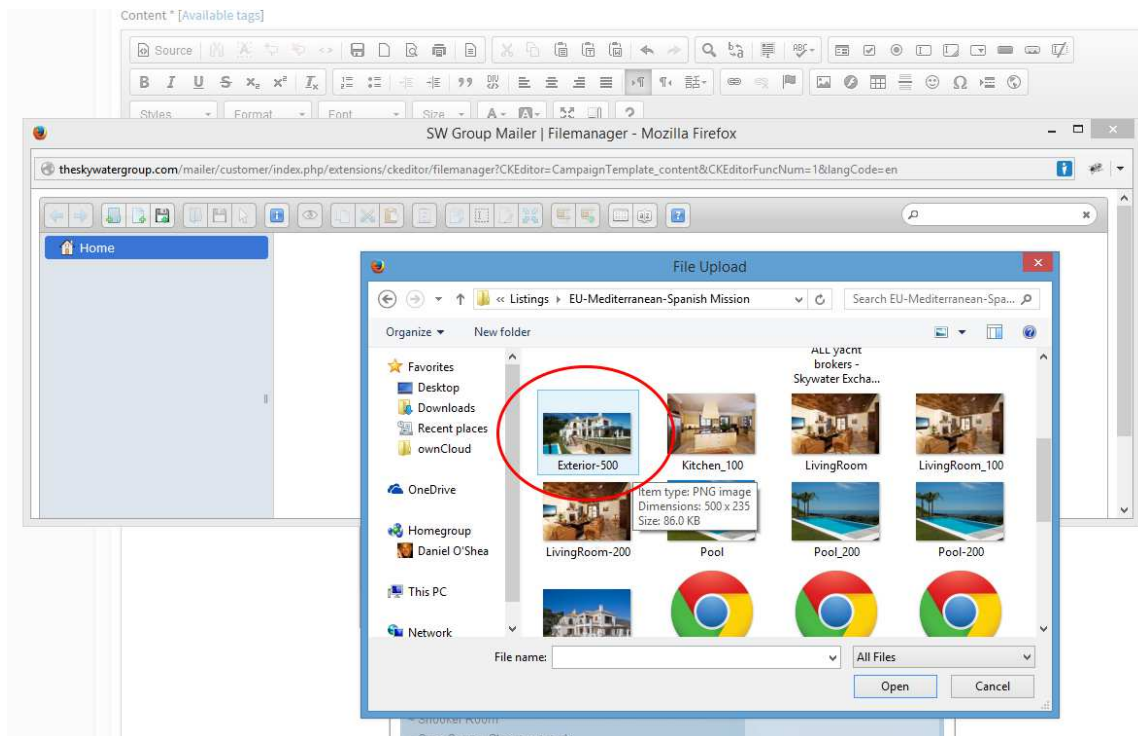
The image properties box will be displayed. You must choose your image. Whether your image is on the server already or you need to upload it, you must click on the 'Browse Server' button.



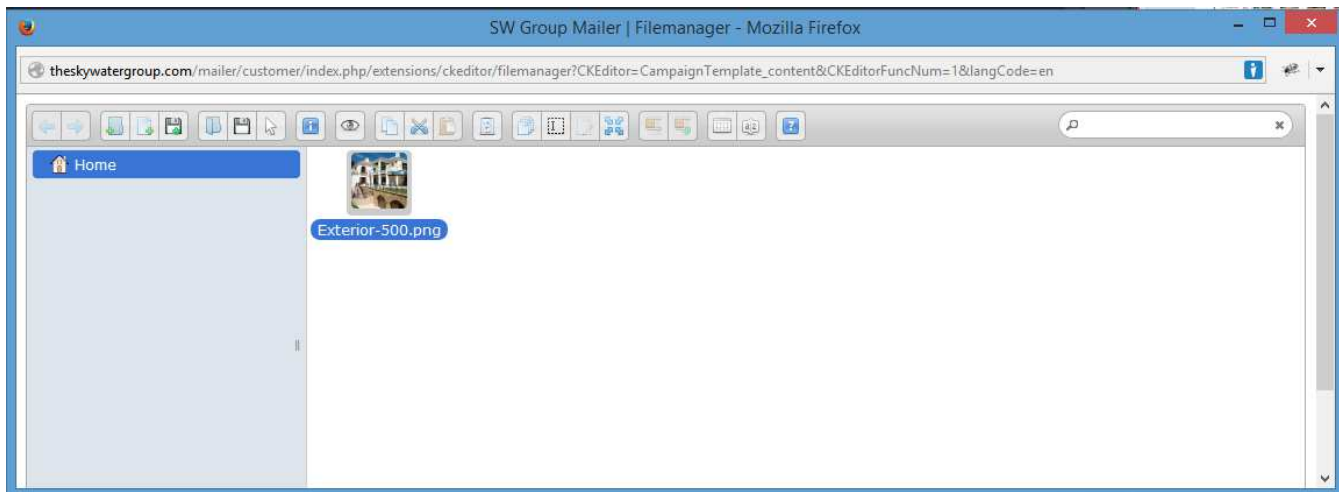
The Filemanager box will appear with a number of available icon tools. In this example, the image does not exist yet on the server. NOTE: You will be able to create folders for organization under 'Home' and any existing files will appear in the main body area. By clicking on the 'Upload' icon (at top in red) this will pop up a 'File Upload' box.



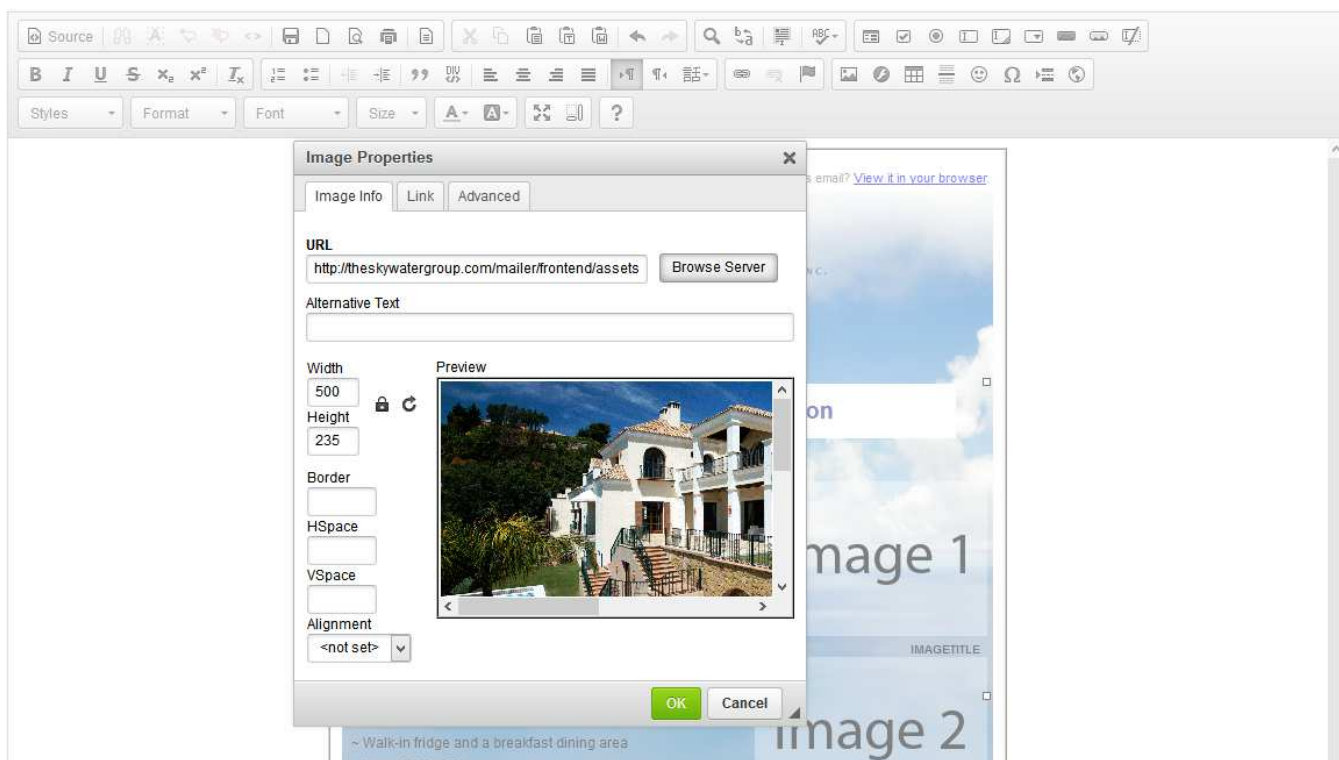
Choose the folder location of the image to upload and double-click on image to choose it or highlight it and click open.



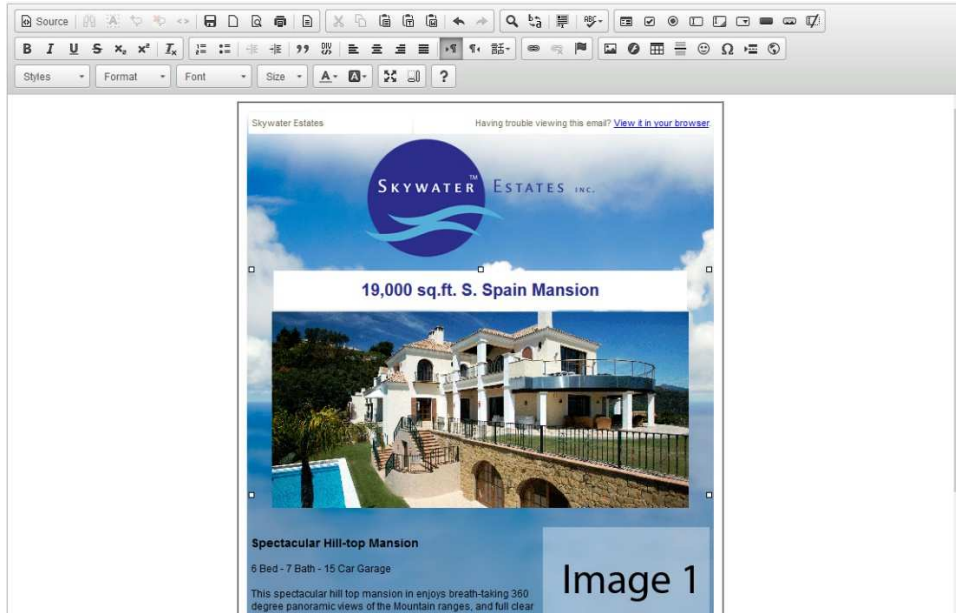
The image will upload and appear in the main file area. Once in the file area, click on the image.



It now appears in the Image Properties box originally opened. The image will appear in the preview window. Sometimes you may want to modify/add/delete some of the settings here. You can always come back to this properties box.



The image now appears, replacing the original template image.



In this example, if you wanted the image width to match the white Title background, highlight the image by clicking on it, and grab either the side or corner anchors and readjust the size.

If you resize by the left or right anchor, it will just resize the width.

If you resize by the top or bottom anchor, it will just resize the height.

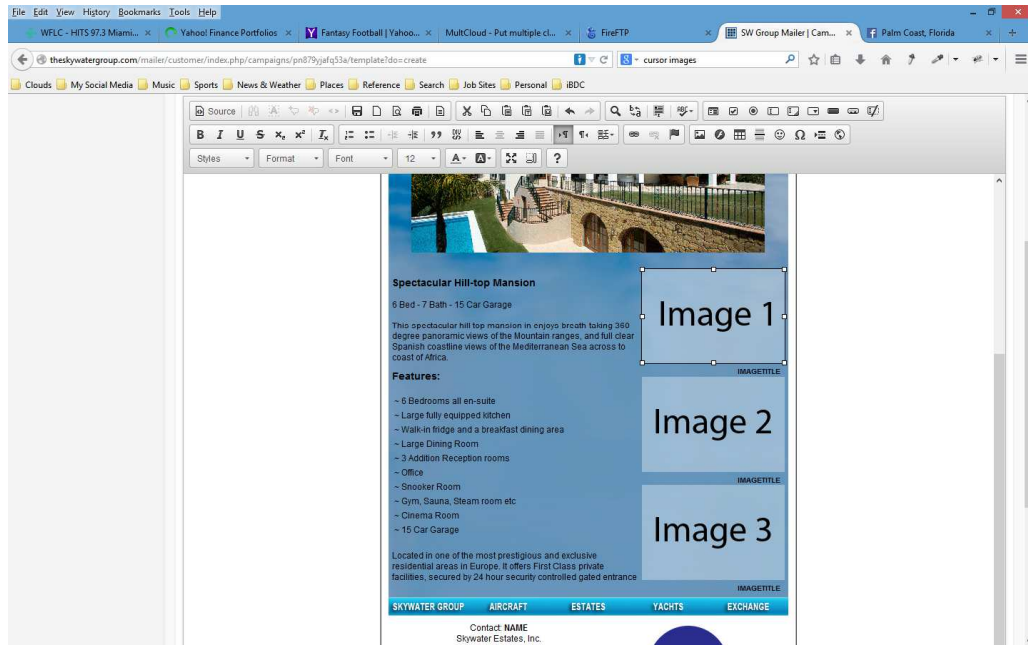
If you resize by a corner anchor, it will resize both the width and height. In this example the corner was used.

After adjusting visually with the anchors, if you like the image size and would want to use it for future use in modifying your images prior to upload, just right click on the image, choose Image Properties and the Image Properties box will pop up showing the image width and height it was modified to.

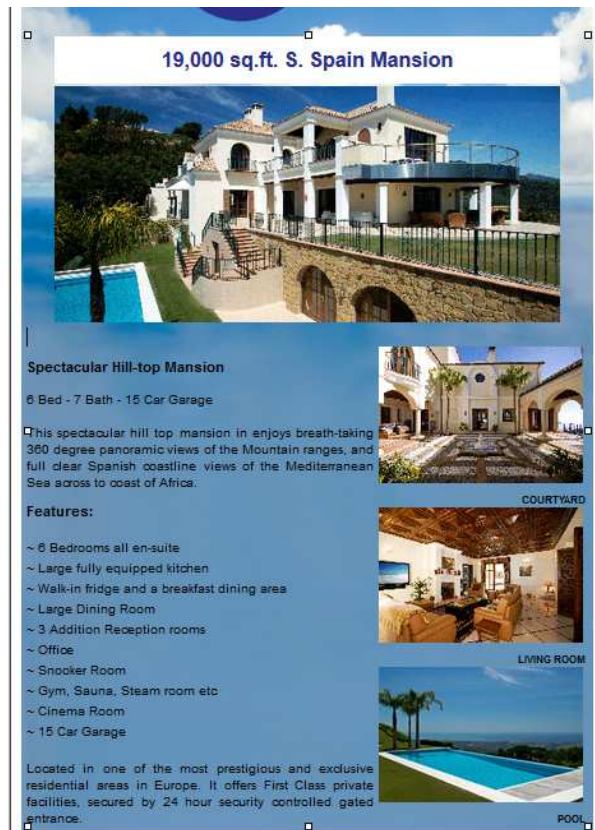
Click anywhere outside of the image area, the anchors disappear and your image will be displayed correctly.



Now, do the same as completed above with each of the Image 1, 2 and 3 images. Highlight, delete, choose the image icon, Browse server, click on the upload image, and choose the image to insert. Each of the images in this example are 200 x 133 pixels.



The finished campaign below. Once you have modified several you'll find it to be very easy. You'll also find that the text and image preparation will take most of your time once you have the templates modified the way you like.





## AUTORESPONDER TUTORIAL ADDENDUM

The following is a summary on what and how autoresponders work. The tutorial with respect to the Email Marketing Application will eventually be added. The important thing to understand is that Autoresponders are in most cases used for two reasons, new customers generated from a subscribed campaign or established customers who have signed up to a new offer on a product or service. Either way, autoresponders are for the most part used in lists that have 'opted-in.' **NOTE – It is important to know that using autoresponders should not be used on lists of customers who have not 'opted-in' or you open yourself up to blacklisting.**

### Create an Autoresponder Publishing Schedule

Developing a publishing schedule is the final building block of a solid autoresponder sequence. This tool is the ultimate way to manage the effectiveness of your email campaigns.

A publishing schedule doesn't have to be complex. Simply open up a spreadsheet and include a column for each of the following:

- The title of the autoresponder
- The interval number (days since the last message)
- What product is promoted
- The type of email
- The affiliate tracking ID
- Any notes you have about this email

Don't worry if you're confused by some of this information. All will be revealed by the end of this post!

To illustrate what a publishing schedule looks like, here's a mock-up using the fitness example from before:

1	Title	Interval #	Product	Type	Tracking ID	Notes
2	Why P90X Doesn't Work	2	3 Minute Abs	Personality	promo	Blah Blah
3	[Free Report] THE Ultimate Guide to Home Ab Exercises	2	3 Minute Abs	Value	freeget	Blah Blah
4	You're NOT Going to Believe This Video...	3	3 Minute Abs	Product	video	Blah Blah
5	How to Develop Six Pack Abs in Exactly Five Minutes	2	3 Minute Abs	Sales	sales	Blah Blah
6	Did you Get it?	2	3 Minute Abs	Follow-Up	followup	Blah Blah
7	7 Ways to Instantly Improve your Physical Fitness	3	n/a	Bridge	n/a	Blah Blah
8	Why I Decided to Work Out at Home	2	Home Fitness Mastery	Personality	home	Blah Blah
9						

This is a very low-tech approach to an autoresponder sequence. But it's still extremely effective. It allows you to manage email without having to open multiple files and/or websites.

### Autoresponder vs. Broadcast Messages

With email marketing you're given two basic choices:

- 1) Set up an autoresponder sequence
- 2) Send broadcast messages

Let's go over each:

### What is an Autoresponder?

**An autoresponder** is simply email that's sent to a subscriber in a timed sequence.

Think of those automatic messages you get when a person is "out of the office" or on vacation. The moment you send an email to this person you get back a pre-written response.

The moment a person subscribes he/she receives a series of pre-written messages based on a sequence that you've already set up.

As an example, this is what happens when someone subscribes:

- On day 1 email #1 is sent
- On day 4 email #2 is sent
- On day 7 email #3 is sent

The beauty of an autoresponder sequence is you only have to set it up ONE time. Then these emails work on autopilot as you get to enjoy the rest of your life.

The moment a prospect joins your email list, he or she will automatically receive this sequence – *WITHOUT* you doing a thing.

### What is a Broadcast Message?

A broadcast message is an email that's sent to prospects – Regardless of when they joined. In theory, a person who just subscribed receives the same message as someone who's been on your list for years.

Sending a broadcast message is useful for those times when you deliver **date specific** information. Like a link to new blog post or a promotion for a new product that's just hit the market.

Another great thing about a broadcast message is you can target a certain group of people on your list.

Instead of sending an email to everyone, you can target people based on a set criteria:

- Date joined
- Traffic source
- Location
- Activity

Ultimately broadcast messages are the best way to stay current with your list and make sure you're sending up to date information to each subscriber.

### Should I Use Autoresponders *OR* Broadcast Messages?

Now that you understand the difference between the two, let's answer a simple question:

*"What should I use with my email list?"*

BOTH.

Put subscribers through an autoresponder sequence. And then add them to the list of people you contact via broadcast messages.

### How to Set Up an Autoresponder Sequence

Now let's talk about how to set up an autoresponder sequence.

My advice is to pick 5 (or more) subjects. Each will tightly focus on a different topic in your niche. As an example, in real estate, different informative topics such as current real estate trends, contract offers, your company news, steps to buying or selling a property, etc.

Finally there should be 2 to 4 days between each message. Test this on your own and see what works best with your market. Some will respond to a high volume of email, while others won't like getting a lot of email.

### 5 Types of Autoresponder Messages

My autoresponder sequence has five types of email. These will follow a set pattern that builds on the content of the previous messages:

1) **Personality Email:** With this email you relate a topic to an event/experience in your life. It doesn't require a lot of content. The important thing is you tell a story about an experience, issue or other and casually point out how the reader *might benefit*.

At the end (or the P.S.) briefly mention a service and/or product that's related to your message. Don't be pushy. Just introduce it and provide a simple link. That's it.

2) **Value Email:** This is the workhorse of your autoresponder sequence. With this message you give away a great piece of content that *partially* informs subscribers about your topic. With the *value email* you want to talk about the same topic you mentioned in the last message.

Again...don't be pushy. But make sure that the reader is primarily getting GREAT content.

3) **Product Email:** With this email you'll change tempo. You've already introduced your service or product.

4) **Sales Email:** Here's where you *seal the deal*. The last three messages introduced your service or product. With this email you'll make a more definitive case to use your services and/or buy a specific product.

5) **Follow-Up Email:** This message is completely optional.

To be honest, some folks need an extra step to take action. Sending a follow-up email is a great way to get people buy a product before they miss out.

**Keep in mind this is just an example. A general rule of thumb, the larger the price of the service/product, the longer a drip campaign should be. As an example, in the auto industry, it is normally 90 days, for real estate, it should be 6 months or more.**

## An example of the Autoresponder Sequence

A customer opts-in to view the MLS search on your real estate website.

Day 1: Auto-welcome email.

Day 1: Welcome introduction.

Day 2: Questionnaire on what they are looking for.

Day 4: Summary of the current market.

Day 7: Search tips for the MLS.

Day 10:

Day 15:

Day 20:

Day 30 and approximately every 14 days thereafter.

## How to Create Content for an Autoresponder Sequence

Okay...You might be wondering *how* to come up with so much content for your autoresponder sequence.

Fortunately it's not that hard! Probably you *already* have a bunch of content that can be reused as an autoresponder.

To start I recommend reading my post about [10 ways to recycle your web content](#).

In addition you can get content (and ideas) from the following:

- Blog posts and articles you've previously created
- Audio/Video versions of your written content
- Questions readers have asked
- Questions *you wish* readers would ask
- PDF collections of articles around one theme
- How a recent trend/event relates to your niche
- An interview with an expert
- A personal story and how it relates to a topic
- An elaboration of something you mentioned in your [lead magnet](#).
- How a popular idea/concept is completely wrong
- A technique that's personally helped your success

This list could go on and on.

The important thing is to blend content with great marketing. Basically you're giving away top-level content and branding yourself while earning your customers trust and loyalty.

## Tracking and Tweaking Your Autoresponder Sequence

This is the final but most important step in this process.

Remember how every email has its own tracking code? Well, periodically track the results and measure the performance of each email.

Once every month (or two) record the following:

- The open rates
- The click thru rates
- How much each email earned.

You can put this information on a new spreadsheet or simply add a few columns to your autoresponder publishing schedule.

The POINT of this task is to measure the performance of a certain message. Obviously a sales email will do better than a personality email. But you want to monitor the overall success of a particular autoresponder sequence.

Ultimately your goal is to tweak each autoresponder, find out which emails are not as popular and work to improve on those.