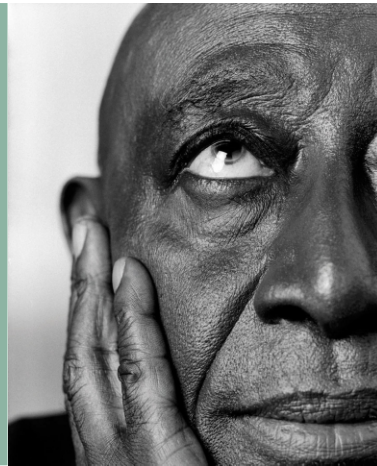
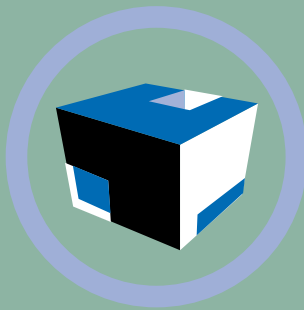


# LOGIFORMS.COM SOFTWARE

QUICKSTART GUIDE SERIES



## EMAIL CAMPAIGN MANAGER

The effectiveness of personalized Email marketing has been proven to result in a greater return on investment over traditional methods of marketing such as; direct marketing, advertising, and traditional mail. Smart businesses understand the importance of personalized one-to-one marketing and this can be achieved faster, and cheaper, than ever before with Logiforms Email Campaign Manager.

# EMAIL CAMPAIGN MANAGER QUICK START GUIDE

## GETTING STARTED

You might notice that the Email Tools Icon is grayed out and inaccessible at first. The Email Tools Icon in the toolbar will not be available until you have first set up an email campaign. Once you have followed the steps below to create a campaign, then you will have access to the functions of the Email Tools sub menu.



To get started creating a new email campaign, select the **Create New Component** icon from the navigation menu



Next, select the **Email Campaign Manager** icon from the list of available components wizards.

The campaign set up process is a series of steps. Click  throughout the process to complete the setup process.

## GENERAL CAMPAIGN SETTINGS

**A**

The first step in creating an email campaign is giving it a name and a description. Enter a name and description now.

**B**

Next select the project folder and email campaign folder, where you want to save the campaign. Click on the plus icon next to the project folder to expand it. Next, expand the **Email Campaign Folder** and select a destination folder. If you want to create a new email folder, use the **New Folder** link.

### 1. General Campaign Information

Enter the name of this email campaign

Campaign Description

### 2. Select Destination Project Or Create a New one

Select the Project and Email folder for this campaign

[New Folder](#)

- Sample Project Folder
  - Email Campaign Folders
    - General Email Campaigns**

Selected Project: **Sample Project Folder**  
Selected Campaign Folder: **General Email Campaigns**

**?**

Notice that the selected Project and the selected Campaign Folder are shown in red just below the folder tree.

Make sure that both the Project folder AND the email campaign folder are selected before you continue.

## SELECT THE RECIPIENT LIST

**A**

Using logiforms, you can send email to any of your forms and/or content bins. Navigate your project folders and select the form or content bin that contains the recipient email addresses that you want to send the campaign to.

Once you select the content bin, it will be shown as selected in red. Click Next to continue.

### Select a content bin/form to use as a recipient list

Select a content bin/form to use as a contact list. You will be able to create a filter to select specific records (users) from your contact list in the following setup page.

- Sample Project Folder
  - Forms & Content Bins (2)
    - Referral Email List (contentbin)**
    - Sample Form (form)

Selected Content Bin: **Referral Email List**

# EMAIL CAMPAIGN MANAGER QUICK START GUIDE

## RECIPIENT LIST OPTIONS

- A** The next screen shows you how many eligible recipients are in the form/content bin previously selected and give you the option to **Send to all X recipients** or to **Create Recipient Filter**. Click the radio button next to your choice. If you choose to Create Recipient Filter, the next screen will present you with an opportunity to create a filter and rules.
- B** If you decide to send the email campaign to all recipients, the option to preview those recipients is available by clicking the link in blue. Clicking this link will open a pop-up window to display the eligible recipients.

### Recipient Filter Options

The contact list selected contains 3 records. Select an Option below, then click Next to continue.

- A**  **Create Recipient list filter**  
Build a query to select a targeted recipient list from the 3 records returned.
- Send to all 3 recipients**  
Send this campaign to the entire recipient list.  
[Click here to view the current recipients.](#)

**B**

ID	Date Submitted	fname	lname	address1	address2	email
1	05-16-2005 18:31:50	Bob	Jones	11 Apple St	New York	bob@bobk
2	05-16-2005 18:33:43	Mike	Summers	44 South Rd	LA	mike@hoti
3	05-16-2005 18:35:15	Mel	Tissard	55 Long Street	Seattle	mel@bigcc

## CREATING A RECIPIENT FILTER

- A** If you selected to create a recipient list filter, the next screen you will see will be the familiar filter creation screen. Note, this step is skipped if you had selected to send to all recipients.  
  
A rule is made up of between 1 to 10 filters. Each filter includes the field to filter, the operator to use and the criteria. Shown here are two simple filters that will select all recipients who had selected the response method as "email" and who had submitted a "High Priority" Support request.
- B** Use the **Match All**, **Match Any** and the **Custom Match** radio buttons to refine your filter criteria. Clicking the **Custom Match** option reveals a text area where you can type an advanced filter clause.

Use the Preview Filtered Results button shown here to check on your filter results as you build your filter. When you are happy with the results, click next.

**A**

Preview Filtered Results

Filter 1 address1 contains New York

Filter 2 date greater than 01/01/2000

Match All  Match Any  Custom Match (Advanced)

[Filter1] AND [Filter2] OR [Filter1]

**B**

Clicking Next, will open a prompt that asks you to give the filter a name. The next time you send email to this list, you will have the option of selecting your previously created recipient filters.

# EMAIL CAMPAIGN MANAGER QUICK START GUIDE

## GENERAL CAMPAIGN SETTINGS

**A** Next you begin to enter some details about your email campaign. Select the field from your database that contains the email address of your recipients. It is important that this field contain your recipients email address(s).

Next enter a from email address and a from name. When your recipients receive your email, it will look like it came from this address.

Enter a subject line next. You also have the option of customizing the subject line, as shown here, with wildcard values. Click Next to continue when you are ready.

**General Email Campaign Information**

Select the field on your form which contains the email address of the recipients. Be sure to select a field which contains valid email addresses.

Enter a FROM address which will appear in the FROM field of the email. This will give the appearance that the email is coming from you.

It is a good idea to personalize the subject line using any available wildcards. Insert wildcards to create an engaging subject line.

**Example:**  
Using wildcards to customize the subject line:  
[First Name], How is the wheather in [CITY]?

**Resulting Email Subject line:**  
James, How is the wheather in Seattle?

**A**

Email Field  
email

From Address (ie: newsletter@greenappleco.com)  
bob@greenappleco.com

From Name (ie: Green Apple Co.)  
Bob

Email Subject Line:  
Iname

Dear [fname] [lname]

Previous Continue

## DESIGNING YOUR EMAIL CAMPAIGN

**A** Use the inline Email Designer to create your email campaign. You can create an HTML campaign and/or a TEXT campaign. Click the link shown below to toggle between the text and HTML versions of your email campaign.

**B** Use the wildcard menu to insert wildcard values into your email campaign. If for example, your form/database has a first name field in it, you can select the First Name Wildcard card to personalize your email. When you are happy with your email campaign, click next to continue. You will have the opportunity to preview the campaign in a few steps.

The screenshot shows the Email Designer interface. At the top, there are buttons for 'Dynamic Content', 'HTML Email', and 'Text Version'. Below these is a toolbar with various icons for text formatting and alignment. A dropdown menu titled '---Insert Wildcard---' is open, showing a list of database fields: address1, address2, date, datesub, email, fname, lname, optout, and record id. A mouse cursor is pointing at 'address2'. A large green letter 'A' is overlaid on the main design area.

The email designer makes it easy to create professional quality email campaigns. Use the word processing interface to add color and images to your emails.

To insert images, click the image icon in the toolbar and point to an image hosted on your server or elsewhere.

You can also use your favorite HTML designer program to design your email campaigns and then cut & paste into the editor show here. Be sure to Toggle to Code View before pasting your HTML.



Click next to Save any changes. At this point your email campaign has been created. You are still using the Next and Previous buttons to complete the set up process, but if you left now, you would be able to access this new campaign from your main menu and continue setting it up later. During the set up process you are guided (using the next & Back buttons) through the entire set up process.

## EMAIL CAMPAIGN MANAGER QUICK START GUIDE

### UNSUBSCRIBE LINKS

**A** Every email campaign sent from logiforms.com includes an unsubscribe link. When a user unsubscribes, they are not deleted from the database, but they are flagged as unsubscribed and you will no longer be able to send mail to them using logiforms.com

You will be asked to enter the unsubscribe link text next. If you have both an HTML and a TEXT version of your email, you will be asked to enter the HTML link and the TEXT link. You can also specify an optional unsubscribe redirect url. When a recipient unsubscribes, they will be redirected to this URL.

**A**

#### Un subscribe link and Redirect Options

##### Text Un subscribe Link:

This text only link will appear at the bottom of the email with a link (<http://www.logiforms.com/unsubscribe.tf>) to unsubscribe.  
Example: Please click this link to un subscribe.

##### Un subscribe Redirect Url

You may optionally specify a redirect url. After a user has clicked your unsubscribe link, you may redirect them to a page on your website with a goodbye message. Example: <http://www.mysite.com/thankyou.html>

### TRACKING LINKS

**A** If your campaign contains any URL's, you will be presented with a list of them and asked if you want to track any of the links. Click the checkbox next to each link you want to track.

When a link is set to be tracked, you will be able to view how many times and who clicked it in the resulting email reports after your campaign has been delivered.

**A**

#### Link Tracking Options

The following Anchors were found in your email campaign. Select the ones you would like to track click through rates on. Make sure your links start with <http://www>. Links without this prefix will not link correctly from an email.

- <http://www.myhomepage.com/quickstart.pdf>
- <http://www.myhomepage.com>
- <http://www.myhomepage.com/method/unsubscribe>

### SUBSCRIPTION PREFERENCES

**A** Logiforms provides a way for your email subscribers to log in and edit their subscription preferences. Enter the text that you would like to appear on this link. If you do not want to allow your users to log in and edit their preferences, leave this option blank.

Completing this step will add the link to the bottom of your email campaign. When the recipients of your campaign click the link it will load their profile information and they will be able to edit their profile. This option works great to manage subscription preferences and to allow the subscriber to update their email address.

**A**

#### Preferences Management

You may provide a link, in addition to an unsubscribe link, to allow your users to edit their preferences. Recipients will be able to follow this link and edit their subscription preferences. Leave this section blank if you do not want to provide an edit preferences link.

##### Text Edit Preferences Link:

Similar to the unsubscribe link. This is the text description of the "edit preferences" link.

# EMAIL CAMPAIGN MANAGER QUICK START GUIDE

## PREVIEWING YOUR CAMPAIGN

- A** The next screen in the setup process gives you the option to preview your campaign and/or schedule it to be delivered or save it as a draft to deliver later. Lets preview the campaign first. Click the preview link shown here
- B** Previewing your campaign is a two step process. First a new window will open showing you a spreadsheet with all of your recipients. From this pop up window, click the email icon next to the recipient to preview. Since the email content can be different for each recipient, you need to select which recipient you want to preview for.
- A new window will open and show you a preview of the email. Notice the links at the top of the preview window. If you have both a TEXT and an HTML version of your email you can toggle between the two using the links shown here.
- C** To send a preview copy of your email, click the Email Preview to test address link. This will open a prompt, shown here and deliver both the TEXT and HTML version of the email to your inbox. You can enter multiple recipients, which can be convenient if you need to get approval on the email campaign prior to sending it.

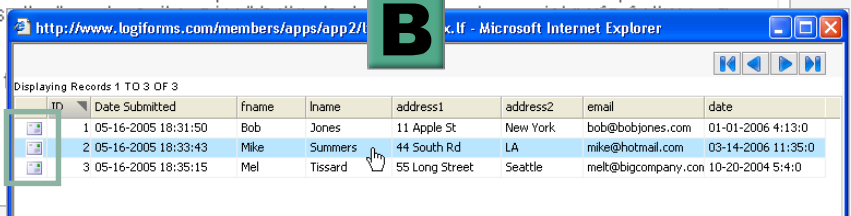
### Preview Your Campaign

Testing your campaign prior to sending it a very important step. We recommend you test your campaign using our preview & testing tools to get a good idea of how your content will look for each recipient and format.

**Instructions:** Follow the link below to open a new window with a list of recipients. Click the email icons next to the recipient record to preview that recipients email. You should also use the testing tool.

It is important to note that when you make changes to your campaign you should preview again for the changes to be reflected.

[Click here to preview and test your campaign.](#)



ID	Date Submitted	fname	lname	address1	address2	email	date
1	05-16-2005 18:31:50	Bob	Jones	11 Apple St	New York	bob@bobjones.com	01-01-2006 4:13:0
2	05-16-2005 18:33:43	Mike	Summers	44 South Rd	LA	mike@hotmail.com	03-14-2006 11:35:0
3	05-16-2005 18:35:15	Mel	Tissard	55 Long Street	Seattle	melt@bigcompany.com	10-20-2004 5:4:0

If you want to go back and make changes you can. Just close the preview windows and use the Back button to step back through the set up process. Then use the next button to continue and complete

### Email Campaign Preview

Below is a preview of your email campaign as it will appear for the selected recipient.

[Return to recipient list](#) [Print](#) [Email Preview to Test Address](#) [HTML Version](#) [TEXT Version](#)

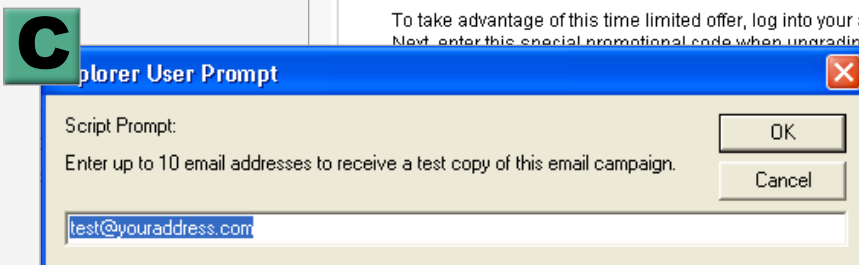
Hello Christopher,

logiforms.com is currently offering a special upgrade incentive to our 15 day trial members. Upgrade your account before September 3rd 2004 and you are eligible to receive 50% off your first purchase. To make the most of this money saving offer, purchase a 12 month subscription and **save the equivalent of 5 full months or \$124.75 USD.**

[Log in now and select upgrade to take advantage of this limited time offer](#)

Special Promotional Code: **5021072**

To take advantage of this time limited offer, log into your accounts and select upgrade. Next, enter this special promotional code when upgrading to save your money and add it to your account.



Internet Explorer User Prompt

Script Prompt:

Enter up to 10 email addresses to receive a test copy of this email campaign.

OK Cancel



You should always close both preview windows when leaving them. If you go back and make changes to your email campaign, be sure to close the preview window prior to previewing the changes. Otherwise some changes may not be shown.

# EMAIL CAMPAIGN MANAGER QUICK START GUIDE


## SCHEDULING DELIVERY

**A** From the same page that you launched the preview windows, you can select a delivery date for your email campaign. All times shown are in Pacific Standard Time. You can cancel the delivery and continue to make changes to the campaign right up until the time of delivery.

**B** You may optionally save the campaign as a draft and send it later. You can also come back and edit this campaign later.

### Preview & Test Your Campaign

Testing your campaign prior to sending it a very important step. We recommend you test your campaign using our preview & testing tools to get a good idea of how your content will look for each recipient and format.

 [Click here to preview and test your campaign.](#)

**A**

### Schedule Delivery

When you are happy with the preview of your campaign, schedule delivery by setting the date and time below. You can specify a delivery date of up to one year in advance. You will receive email confirmation when your campaign is delivered.

May | 31 | 2005 | 4 | 00 | PM

**\*\*ALL TIMES SHOWN ARE PACIFIC STANDARD TIME**

**B**

### Or Save as a Draft

You can save your campaign as a draft, and edit it later.

## AFTER THE SET-UP PROCESS

**A** The Setup process is finished. As soon as you save your campaign scheduled or as a draft, the set-up process ends. The Email Tools Sub menu becomes active and you can now access any of the Email Tools Editing Screens directly.

**Edit Campaign** - returns you to the email designer to edit the email content and from/subject line.

**Recipients** - modify the recipient list for your campaign







**Delivery Schedule** - update your campaign schedule or cancel the delivery

**Preview Email** - view and modify the recipient filters and selection

The other two options, **List Cleaner** and **Campaign Reports**, are available only after your campaign has been delivered.

**B** You are also presented with a list of options for your email campaign.

Form Tools | Data Management | Integration | **Email Tools**

 Edit Campaign  Recipients  Delivery Schedule  Preview Email  List Cleaner  Campaign Reports

**A**

**Your Email Campaign has been scheduled for delivery on May 16, 2006 at 7:30 PM.**

You will receive an email notification when your email is sent.

To continue editing your email campaign, use the menu bar above or select from one of the following options.

Preview Campaign

**Schedule and Delivery Settings**

Manage Recipient Selections

Edit Email HTML and Textual Body Content

Link Tracking, Un subscribe options and Subscription Prefs

Dynamic Content Options

**B**

[Return to your main menu](#)

# EMAIL CAMPAIGN MANAGER QUICK START GUIDE

## ACCESSING YOUR EMAIL CAMPAIGN FROM THE MAIN MENU

**A** Once your campaign has been created, you can access it via the main menu. When you access your email campaign through the main menu, an overview of the email campaign will load in the component details window.

The component details window (on the right side below) provides a link to preview the email campaign, the delivery status and other useful information.

**Components**

- Your logiforms Components
  - Sample Project Folder
    - Forms & Content Bins (3)
      - Email Campaigns (1)
        - General Email Campaigns
          - Referral Rewards Promotion
- Users (0)

**Component Details**

Referral Rewards Promotion Email Campaign

Edit Campaign | Delete | Duplicate | Move to New Folder

Campaign Description: Referral Rewards Email Campaign - Feb

Status: **Scheduled for Delivery**

Status Details: **This campaign is scheduled and will be automatically delivered on the delivery date shown below. You may still edit this campaign prior to delivery.**

Scheduled Delivery: 05/16/06 07:30 PM

Date Created: 05/16/05 06:59 PM

Last Modified: 05/16/05 07:22 PM

Content Bin Used: Referral Email List

Recipients: [Preview](#)

Subject: Dear [fname] [lname]

**TIP:** Use the duplicate feature (accessible from the component details window shown here) to duplicate a campaign. This is a great way to send the next newsletter in a series. Just duplicate the email campaign, update the content and schedule it for delivery.

Using this method can save you time setting up a new campaign.

## DELIVERY STATISTICS & REPORTS

**A** Once your email campaign has been delivered you will receive an email confirmation of delivery. You will also be able to access real time campaign reports. The Email Tools Sub Menu includes a link to the campaign reports. These links are grayed out and inaccessible until the campaign has been delivered.

**B** Use the reports drop down menu to access the various reports available.

**A**

PRINT Campaign Activity Overview

**LITE USERS DISCOUNT OFFER : CAMPAIGN ACTIVITY OVERVIEW**

	Total	% of Total Received	% of Know Un Opens
Recipients	654	n/a	
Recipients who opened mail	93	14%	
Undeliverable's	242	37%	260%
Clickthroughs Total	0	0%	0%
Recipients who clicked on any links			
Recipients who Unsubscribed			

**B**

Campaign Activity Overview

- Campaign Activity Overview
- Click-Through Activity Overview
- Click-Throughs by URL
- Click-Throughs by Day & URL
- Recipient:Bounce Summary
- Recipient:Opened
- Recipients:Unsubscribed
- Recipients:Clicked Any Link

**LITE USERS DISCOUNT OFFER : CLICK-THROUGH BY DAY & URL**

	Total Click-Throughs	% of Total Click-Throughs
http://www.logiforms.com/index.ll/method/featuretour/psec/producttour/		
September 26, 2002	4	10%
September 27, 2002	20	51%
September 28, 2002	3	8%
September 29, 2002	1	3%
September 30, 2002	3	8%
October 01, 2002	1	3%
October 02, 2002	1	3%
October 04, 2002	1	3%
October 16, 2002	1	3%
October 18, 2002	1	3%
<b>Total</b>	<b>36</b>	<b>95%</b>
http://www.logiforms.com/index.ll/method/support/		
September 26, 2002	2	5%
September 28, 2002	1	3%