

CAMPAIGNManager

USER GUIDE

INTERNET Marketing Toolkit



Internet marketing





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Welcome to Campaign Manager!

Campaign Manager is a versatile email marketing module that works in conjunction with Customer Manager. Campaign Manager lets you create email and newsletter campaigns, which you can then aim at your entire registered customer base or demographically relevant slices of your customer database you have identified in Customer Manager.

Campaign Manager can be configured to send out campaigns on an immediate basis or carefully tailored based on timing, customer actions, and programmable logic. Campaign Manager also provides post-campaign metrics, allowing you to see important data like how many customers have viewed your campaign and how many have clicked through to your promoted site.

Section 1: General Settings

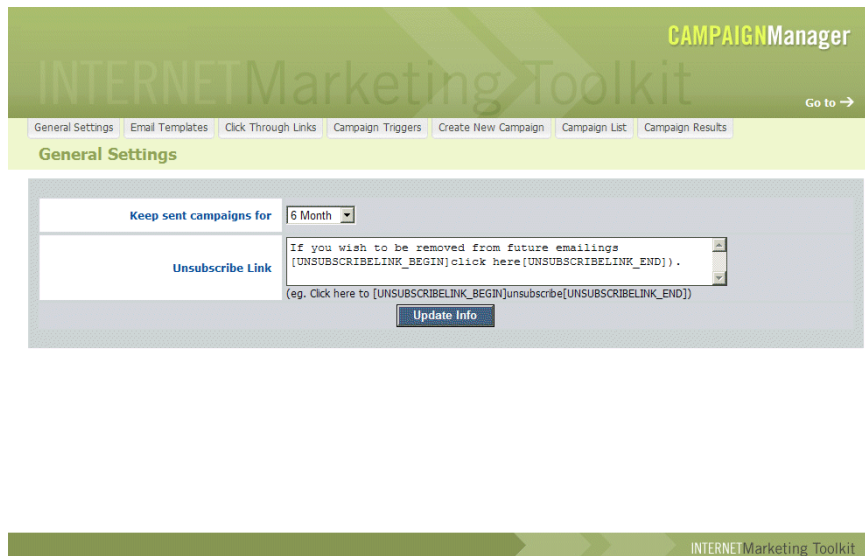


Figure 1-1 General Settings page

Before you begin creating campaigns, you should select the **General Settings** tab and complete the page as follows:

Keeping Sent Campaigns

From the **Keep sent campaigns for** drop-down box, select how long you want Campaign Manager to keep your campaigns before the system deletes them.

Unsubscribe Link

Before you begin managing campaigns and sending out emails, it is important to configure your unsubscribe link. Providing your customers with no way to opt out of future campaigns can not only anger customers but in some jurisdictions might prove unlawful.

In the **Unsubscribe Link** field enter the standard unsubscribe text that will appear on all of your email campaigns. The text you want to appear hyperlinked and clickable for the actual unsubscribe action place between the [UNSUBSCRIBELINK_BEGIN] and [UNSUBSCRIBELINK_END] tags.

For example, in the Unsubscribe Link field you might enter the text:

Click here to [UNSUBSCRIBELINK_BEGIN]unsubscribe[UNSUBSCRIBELINK_END].



Section 2: Email Templates

If you're creating many different email campaigns, you will want to repeat certain portions of text, images, and styles. Instead of recreating this anew, you can create a template that contains the "boilerplate" information.

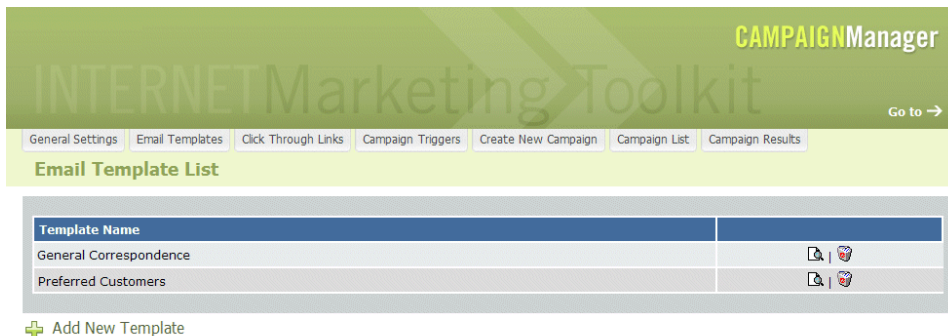


Figure 2-1 Email Template List

Adding a New Template

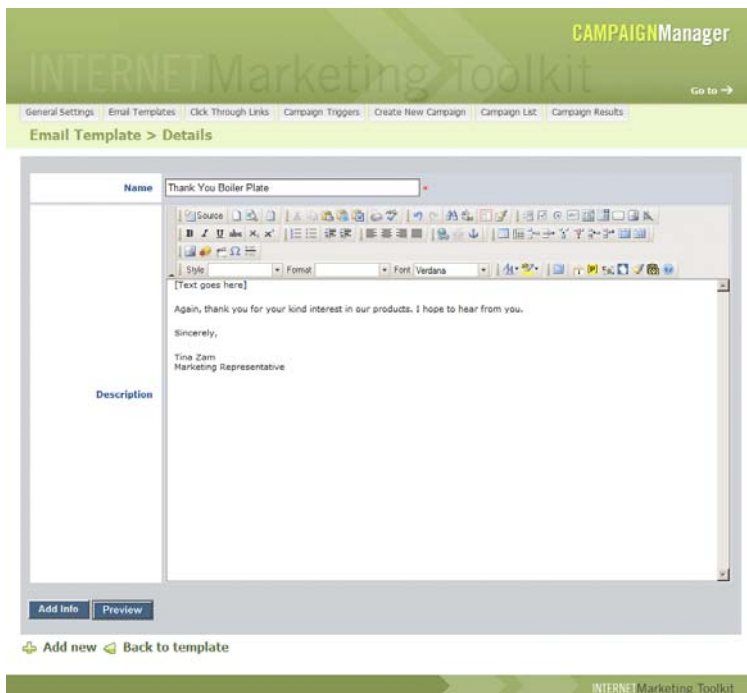


Figure 2-2 Email Template Details page

- 1) Click the **Email Templates** tab to begin creating templates you can use and reuse with your campaigns. You will see the **Email Template List** page (see Figure 2-1).
- 2) Click the **Add New Template** button to create a new template. You will see the **Edit Template Details** page (see Figure 2-2).
- 3) In the **Name** field, enter a reference name for this template.
- 4) Use the **Description** field's Web Content Editor (WCE) to define text and images you want to be automatically included in any email using this template (bear in mind some clients will have email readers that don't support overly complex formatting).

Entering Click Through Links



If you have created a click through link under the **Click Through Link** tab (see "Click Through Links" on page 8), place it in your template using the **[p]** toolbar icon. Over write the **{text link here}** portion with the hyperlinked text you wish the customer to see (not the URL). For example over write **{text link here}** with "Click here!" (If you are having trouble over writing the text link portion, click the toolbar's **Source** button twice.)

Entering Tags

You may use the following tags with your template: [FIRST NAME], [LAST NAME], [EMAIL], [ADDRESS1], [CITY], [PROVINCE], [POSTAL], [PHONE], [FAX]. Campaign Manager uses the tags to substitute the actual customer-specific details.

- 5) Click the **Add Info** button.
- 6) Click the **Preview** button to see how your template might look in a browser.
- 7) Click the **Back to Email Template** button to return to your Template grid.

Editing and Deleting a Template

- 1) Click the **Email Templates** tab.
- 2) To delete a template, click the **Delete**  icon next to the template you wish to delete.
- 3) To edit a template, click the **Edit**  icon next to the template you wish to edit.
- 4) Modify the template as necessary.
- 5) Click the **Update Info** button.
- 6) Click the **Back to Email Template** button to return to your Template grid.



Section 3: Click Through Links

The **Click Through Links** tab allows you to configure which URLs you want Campaign Manager to track and report on when a user clicks on the link in your newsletters (see "Step 2: Create Your Campaign Email(s)/Newsletters" on page 12). The number of click throughs is reported under the **Campaign Results** tab.

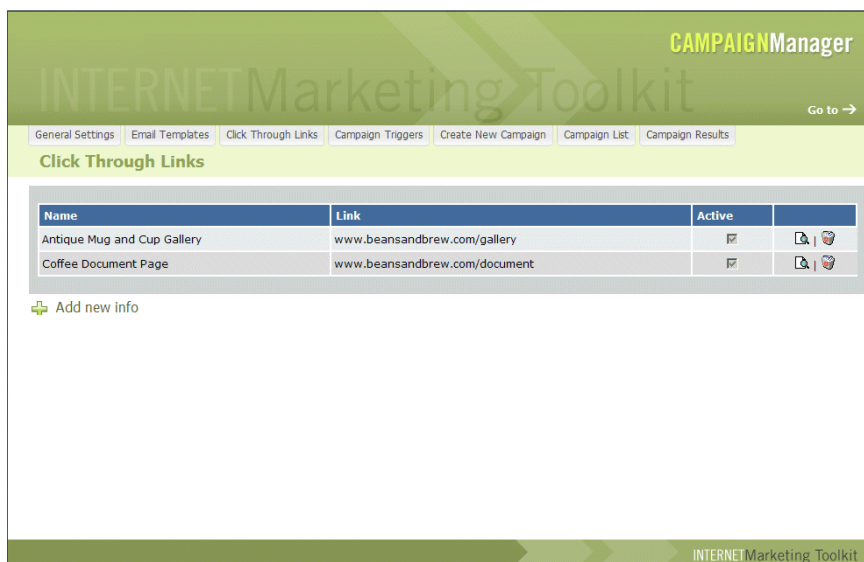


Figure 3-1 Click Through Links page

Adding a New Click Through Link

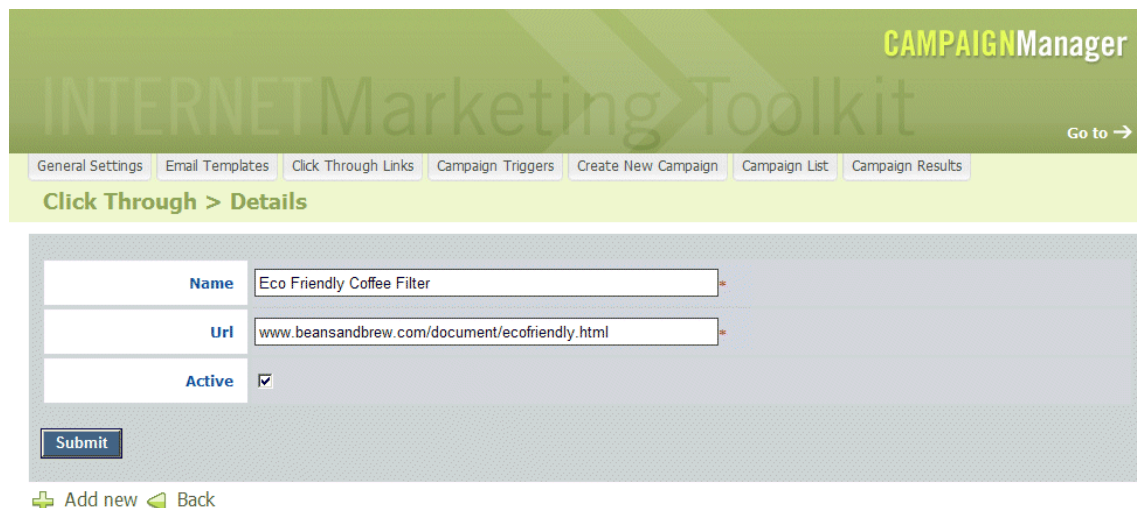




Figure 3-2 Click Through Details page

- 1) Click the **Click Through Links** tab. You will see the **Click Through Links** page (see Figure 3-1).
- 2) Click the **Add New Info** button. You will see the **Click Through Details** page (see Figure 3-2).
- 3) In the **Name** field, enter a name for the URL.
- 4) In the **URL** field, enter a link. You do not need to enter http://.
- 5) Click the **Active** checkbox to make this link available for use.
- 6) Click the **Submit** button.
- 7) Click the **Back** button to return to the **Click Through Links** page.

Your click through is now available placement in a template or an email/newsletter, using WCE's **[p]** toolbar icon.

Editing and Deleting a Click Through Link

- 1) Click the **Click Through Links** tab.
- 2) To delete a link, click the **Delete**  icon next to the link you wish to delete.
- 3) To edit a link, click the **Edit**  icon next to the link you wish to edit.
- 4) Modify the link as necessary.
- 5) Click the **Submit** button.
- 6) Click the **Back** button to return to the **Click Through Links** page.



Section 4: Campaign Triggers

The **Campaign Triggers** tab lets you configure triggers your campaigns can respond to. Triggers can automatically launch campaigns when preconfigured logic is met.

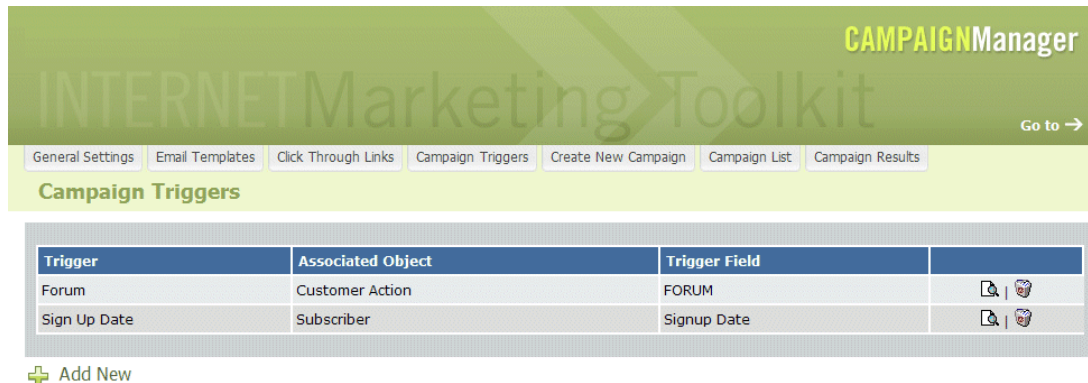


Figure 4-1 Campaign Trigger page

Adding a New Trigger



Figure 4-2 Campaign Trigger Details page

- 1) Click the **Campaign Triggers** tab. You will see the **Campaign Triggers** page (see Figure 4-1).
- 2) Click the **Add New Campaign Trigger** button. You will see the **Campaign Triggers Details** page (see Figure 4-2)

- 3) In the **Trigger Name** field, enter a name for the event.
- 4) Using the **Associated Object** drop-down box, select which object you wish to set up a trigger for. You can select:

Associated Object	Description
Subscriber	Triggers associated with a customer registering with a module.
Extra Field	If you've created any date-type Customer form extra fields in Customer Manager or one of the modules, you can select it here as a trigger.
Customer Action	Select a customer action you want to launch a campaign. This trigger will send your campaign to all targeted customers upon one customer taking the selected action.

- 5) Using the **Associated Trigger Field** drop-down box, select the trigger associated with the object.
- 6) Click the **Add** button.



Section 5: Campaigns

Campaigns allow you to send out emails and newsletters to subscribers. Using Campaign Manager, emails can be intelligently targeted at subsets of the subscriber and email campaigns can be launched using pre-programmed logic.

Adding a Campaign

Step 1: Name your campaign

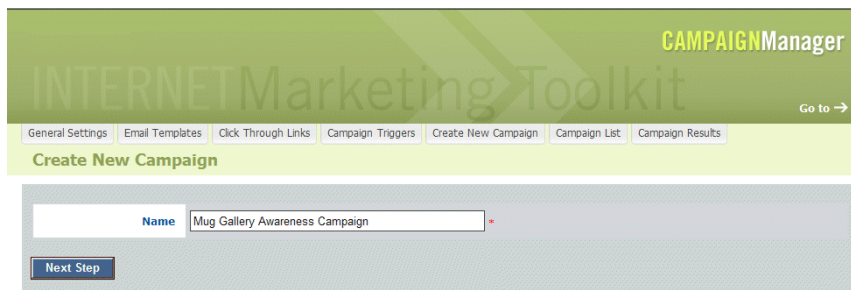


Figure 5-1 Create New Campaign, Step 1

- 1) To add a new campaign, click the **Create New Campaign** tab. You will see the **Create New Campaign page** (see Figure 5-1),
- 2) Enter a name for this campaign.
- 3) Click the **Next Step** button.

Step 2: Create Your Campaign Email(s)/Newsletters

A campaign primarily consists of letting registered subscribers know of products, services, and helpful information via email. In Step 2 you create the actual email you would like to send out.

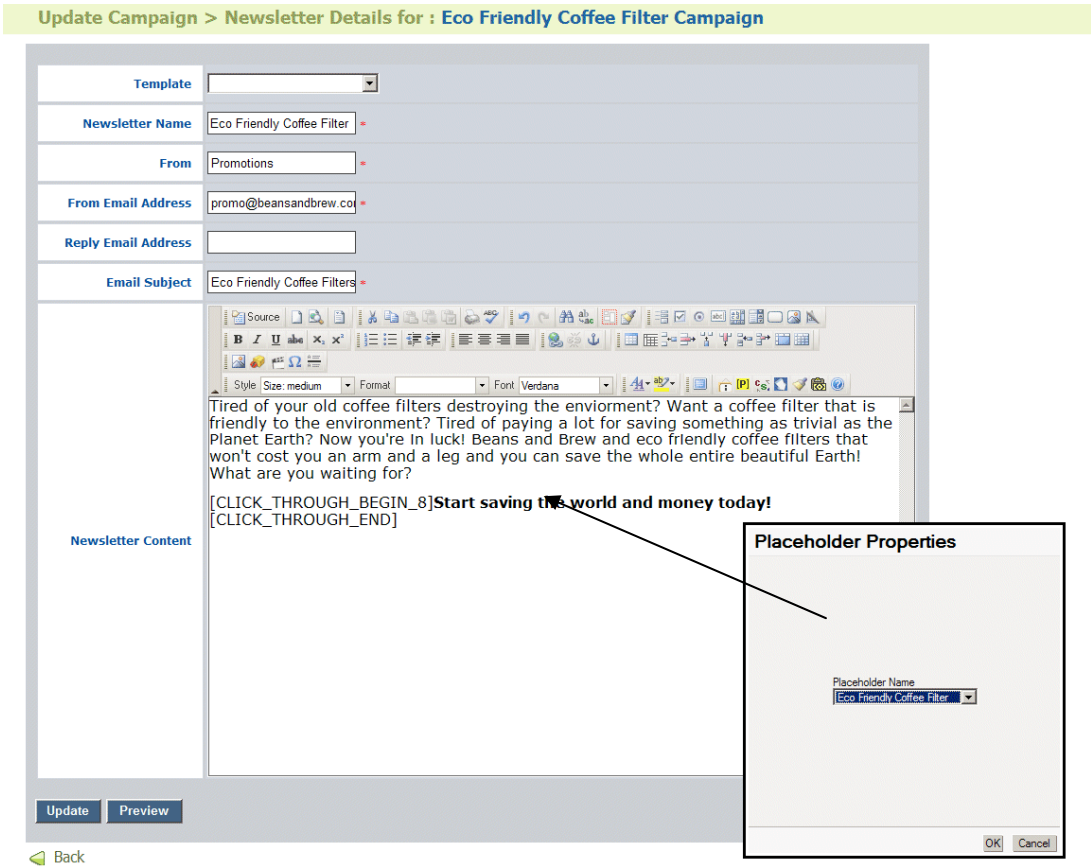


Figure 5-2 Create New Campaign, Step 2, Newsletter creation

- 1) After clicking the **Next Step** button from Step 1, you can now create your emails. Click the **Add Newsletter** button.
- 2) In the **Newsletter Detail** page (see Figure 5-2), select a template from the **Template** drop-down box. For information on template creation, see "Email Templates" on page 6.
- 3) In the **Name** field, enter a name that will identify the email for you. This text will not appear in the actual email sent to the subscribers.
- 4) In the **From Name** field, enter the name you wish subscribers to see the email to be coming from.
- 5) In the **From Address** field, enter the email address you wish the email to be coming from.
- 6) In the **Reply Address** field, enter the email address you wish replies to sent. You might have all emails sent from info@yourcompany.com. However, you might not want responses all going to the info account. Some emails you might want replies going to a sales account or a customer service account.
- 7) In the **Subject** field, enter an appropriate email subject line.
- 8) In the **Content** field, enter the desired message using the WCE.



Entering Click Through Links

If you have created a click through link under the **Click Through Link** tab (see "Click Through Links" on page 8), place it in your newsletter using the **[p]** toolbar icon. Over write the **{text link here}** portion with the hyperlinked text you wish the customer to see (not the URL). For example over write **{text link here}** with "Click here!" (If you are having trouble over writing the text link portion, click the toolbar's **Source** button twice.)

Entering Tags

You may use the following tags with your newsletter/email: [FIRST NAME], [LAST NAME], [EMAIL], [ADDRESS1], [CITY], [PROVINCE], [POSTAL], [PHONE], [FAX]. Campaign Manager uses the tags to substitute the actual customer-specific details.

- 9) Click the **Preview** button to see how your email will look.
- 10) When you are done click the **Add** button. You will be returned to the **Newsletters** grid.
- 11) When you are done creating emails, click the **Next Step** button from the **Newsletters** grid.

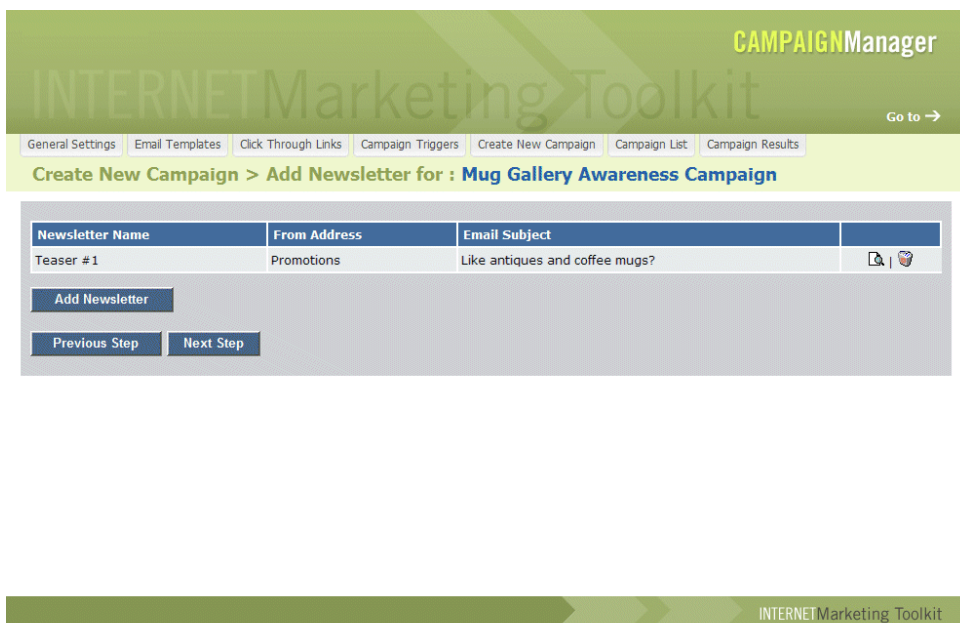


Figure 5-3 Create New Campaign, Step 2, Newsletter list page

Step 3: Schedule Your Emails





The screenshot shows the 'CAMPAIGNManager' interface. At the top, there is a navigation bar with the following tabs: General Settings, Email Templates, Click Through Links, Campaign Triggers, Create New Campaign, Campaign List, and Campaign Results. Below the navigation bar, the current step is highlighted: 'Create New Campaign > Schedule Campaign for : Mug Gallery Awareness Campaign'. The main content area asks 'How would you like this Campaign to be scheduled :'. There are three radio button options: 'Immediately', 'by Date on' (with a date field containing '11/13/2008' and an 'Edit' icon), and 'by Campaign Trigger(s)'. At the bottom of the form, there are two buttons: 'Previous Step' and 'Next Step'.

Figure 5-4 Create New Campaign, Step 3

Campaign Manager allows you to configure when emails are sent. They can be sent immediately (as soon as the campaign has been created), you can schedule a certain day (for example, a week before Mother's Day), or you can send the emails when subscribers take certain actions within the context of the website (for example, they newly register).

- 1) After clicking the **Next** button from Step 2, you can now schedule when you want Campaign Manager to deliver the emails.
- 2) Click the **Immediately** radio button to deliver the emails after the completing of the Campaign creation.
- 3) Click the **Schedule on** radio button and enter a date to deliver the emails on a future date.
- 4) Click the **Campaign Trigger** radio button. Click the **Edit** link associated with the email. See below for information on how to configure a campaign trigger.
- 5) When you are done scheduling, click the **Next** button from the **Scheduling** step.
- 6) Click **Update** and then click the **Back** button.
- 7) Click the **Next Step** button.

Setting up an Campaign Trigger

After clicking the **Campaign Trigger** radio button, you will see a list of all emails you have created for this campaign (see Figure 5-5). Each email has an associated **Edit**  icon. You use the **Edit**  icon to link the letter to a trigger.



Create New Campaign > Schedule Campaign for : Mug Gallery Awareness Campaign

How would you like this Campaign to be scheduled :

Immediately
 by Date on
 by Campaign Trigger(s):

Send Newsletter	Day(s)	After	On	Using Condition	
Teaser #1					

Figure 5-5 Create New Campaign, Step 3, scheduling by trigger

- 1) Click the appropriate **Edit** icon. You will see "Send [your newsletter name]" followed by several boxes that need to be complete (see Figure 5-6).
- 2) In the **Day(s)** field, enter how long after the trigger the email should be sent. For example if you wish the email to be sent immediately after the trigger, leave the field blank. If you wish the email to be sent one day after the trigger, enter 1. If you wish the email to be sent a week after the trigger, enter 7.
- 3) In the **After** field select a trigger from the drop-down box. Triggers are configured under the **Trigger** tab. See "Campaign Triggers" on page 10.

CAMPAIGNManager
INTERNETMarketing Toolkit

Go to →

[General Settings](#) |
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 [Create New Campaign](#) |
 [Campaign List](#) |
 [Campaign Results](#)

Create New Campaign > Newsletter Schedule Details for : Mug Gallery Awareness Campaign

Send Newsletter Teaser #1 day(s) after on using condition

Back

Figure 5-6 Create New Campaign, Step 3, scheduling by trigger

- 4) From the **On** drop-down box, select the type of day you want the emails to be sent out. If you do not care if it is a weekday or weekend, select **Any**. If you want the email to be sent only on a weekday or weekend, select the appropriate option.
- 5) The **Rounding** drop-down box allows you to configure how Campaign Manager should respond to a conflict between the **Send Day** setting and the **Day Type** setting. For example, if you set Campaign Manager to send the email 2 days after a trigger, the day might fall on a Saturday. However if you've selected the Weekday setting from the **Day** type drop-down box, your two settings are in conflict. You can use the **Rounding** settings to instruct Campaign Manager on how to resolve the conflict.

Round Up: If the send day falls on a weekend, Campaign Manager will send the email on the Monday after.

Round Down: If the send day falls on a weekend, Campaign Manager will send the email on the Friday before.

Round to Nearest: If the send day falls on a Saturday, Campaign Manager will send the email on the Friday before. If the send day falls on a Sunday, Campaign Manager will send the email on the Monday after.

Step 4: Targeting Subscribers

Campaign Manager also allows you to target email delivery based on subscriber data. While you can send your email campaigns to all subscribers, it is ideal to properly target emails. If a subscriber receives too many irrelevant emails from the web site, the subscriber is likely to ignore or filter out future emails. Campaign Manager links in with Customer Manager's saved search results (saved lists of actual customers) and saved searches (the saved search logic) and allows you to use these Customer Manager searches to target customers.



Figure 5-7 Create New Campaign, Step 4

- 1) After clicking the **Next Step** button from Step 3, you can now select which subscribers you want Campaign Manager to deliver the emails to (see Figure 5-7). The targeting step gives you two main options:

Saved Searches: You can target subscribers based on a search you've predefined in the Customer Manager module. Campaign Manager will run this search before launching the campaign and email the campaign to all records found in the search.

Saved Search Results: You can target subscribers belonging to a set of results you've saved in the Customer Manager module. Campaign Manager will email the campaign to records found in the saved results.

- 2) Click a **Saved Search Lists** or **Saved Search Results** radio button and select the saved list or result from the drop-down box.
- 3) Click the **Next Step** button.



Step 5: Confirmation



Figure 5-8 Create New Campaign, Step 5

- 1) After clicking the **Next Step** button from Step 4, you can now review the details of your campaign (see Figure 5-8).
- 2) If you wish to send a test email to your designated email address so you can see how the email will look to subscribers, enter your email address in the **Test Email** field and click the **Send test Email** button.
- 3) Click the **Initiate This Campaign** button when you've completed the campaign setup.

Managing Campaigns

Viewing Campaigns

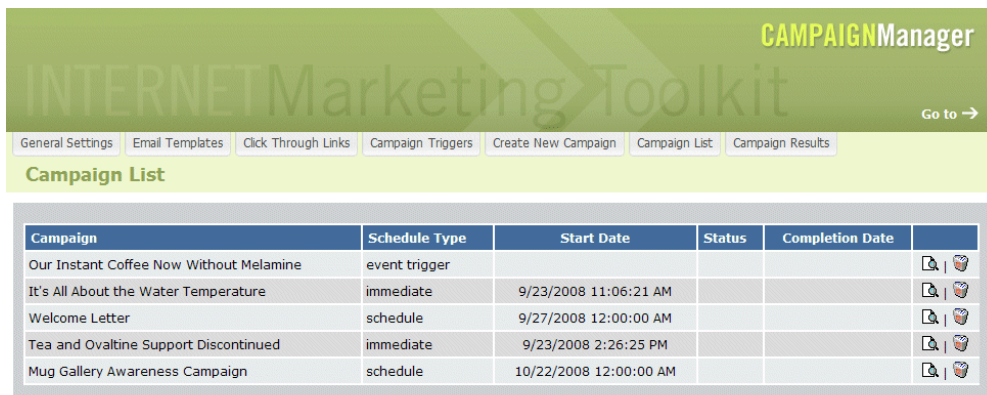




Figure 5-9 Campaign List page

To view your existing campaigns, select the **Campaign List** tab. If you find you have too many old campaigns listed, you can expire them more quickly under the **General Settings** tab.

Editing and Deleting a Campaign

- 1) Select the **Campaign List** tab
- 2) To delete a campaign, click the **Delete**  icon next to the campaign you wish to delete. If the campaign has not begun, Campaign Manager will not send emails to a deleted campaign.
- 3) To edit a campaign, click the **Edit**  icon associated with the desired campaign.
- 4) You will see a summary of the campaign. To edit the campaign details, click the **Edit Campaign** button.
- 5) Click the **Next Step** buttons to move through the campaign and edit the campaign as necessary.



Section 6: Campaign Results

The **Campaign Results** tab gives you basic information about your campaign's performance and subscriber activity.

Name	Schedule Type	Start Date	Status	Completion Date	Total Sent	Total Opened	Total Bounced	Total Converted
Our Instant Coffee Now Without Melamine	event trigger	9/2/2008	Completed	10/2/2008	256	210	11	88
It's All About the Water Temperature	immediate	9/23/2008AM	Completed	10/2/2008	782	680	7	134
Welcome Letter	schedule	9/27/2008AM	Completed	10/2/2008	411	380	5	278

Figure 6-1 Campaign Results page

Viewing Results

- 1) To view a result, click the **Campaign Results** tab. You will see the **Campaign Results** page (see Figure 6-1).
- 2) Enter a date range with the **Calendar** icons.
- 3) Click the **Search** button.

Campaign Results

Your results are summarized in a table format. Most of the information should be self evident, however pay attention to the last four columns of the table. These columns list the results of your campaign.

Total Sent: Displays the number of emails sent.

Total Opened: How many were opened by recipients.

Total Bounced: How many did not reach a valid email address. If you are not hosting on Voloper's servers and using Voloper's mail server, this result will be unavailable.

Total Converted: How many users clicked on a link in the email (links are configured under the **Click Through Links** tab).

Section 7: Switching to Other Modules

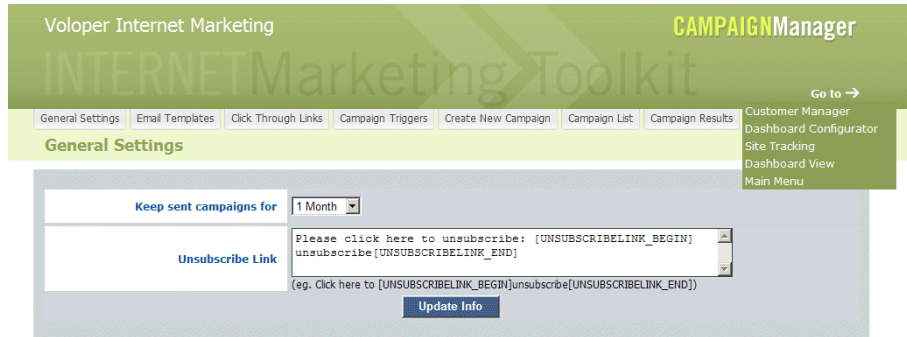


Figure 7-1 Go to -> menu

If you wish to change to another module in the Internet Marketing toolkit or return to the Admin main menu page, mouse over the **Go to ->** menu item. You will see a drop-down list. Select the appropriate item to navigate to.



Section 8: The Web Content Editor Toolbar Page

- | | | |
|-----------------|------------------------|---------------------|
| Open File | Horizontal Line | Split Cell |
| Save File | Special Character | Style Sheet Manager |
| Format | Cut | Apply Style |
| Font | Copy | |
| Bold | Paste | |
| Italic | Paste Text | Link |
| Underline | Paste from Word | Unlink |
| Color | Undo | Select All |
| Align Left | Redo | Remove Format |
| Align Center | Find Text | Show Details |
| Align Right | Insert Table | Insert File |
| Align Center | Show Invisible Borders | Insert Image |
| Number List | Insert Row | Insert Rollover |
| Bullet List | Delete Row | Insert Thumbnail |
| Decrease Indent | Insert Column | Insert Script |
| Increase Indent | Delete Column | Insert HTML Tag |
| Break | Insert Cell | |
| Subscript | Delete Cell | |
| Superscript | Merge Cell | |

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