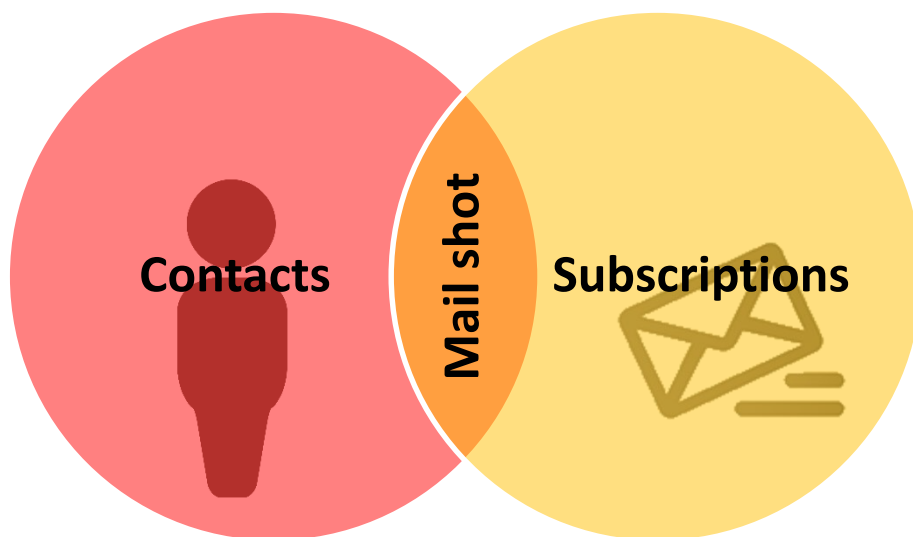


# Subscriptions and mailshots

CRM software gives you the ability to quickly transmit bulk email and text messages to your contact lists. This can be very rewarding if managed responsibly and ethically. Keep in mind that in many countries, South Africa included, we are protected by law from receiving unsolicited email and text messages (POPI act). Add to that: mail service providers do not tolerate SPAM and will filter out emails going through their servers that they believe are SPAM – unwanted, unsolicited communications. We are therefore obligated to behave responsibly. A golden rule we are wise to adopt is - “Send only to those who have requested it”. **DevMan** has provided a subscription model to improve bulk communication and make it easy for subscribers to remove themselves from your lists.



## How it works

**Subscriptions** are types of communications that contacts can opt in or out of receiving from your organisation, for example Newsletters. When a contact is added to DevMan it is assumed that written permission to send communication has been received. We recommend broad categories of subscriptions such as:

- Events
- Newsletters
- General

A **mail shot** is an instance of communication. When sending a mail shot from DevMan to a special interest groups of contacts you will be required to apply a subscription list, ensuring that only those within your selection who have opted in will receive the communication.

Contacts not on the subscription will automatically be added for future communications, however, they will have the option to opt out – this ensures you continually grow and update your subscriptions.

## Add a subscription

The first step is to ensure you have subscriptions set up. Subscriptions will allow contacts to opt-in or out via the online subscription page. We suggest the following three generic subscriptions:

- General notifications
- Events
- Newsletter

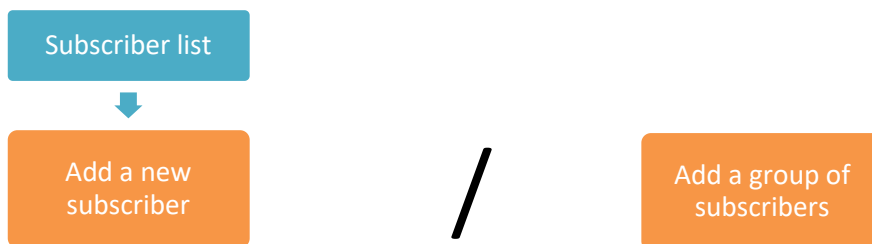
To add a subscription select:



Complete all fields and save.

<b>Subscription name:</b>	eg, General notifications.
<b>Comments:</b>	Add your comments about the subscription here
<b>Type:</b>	Internal – For internal organisational communication, the opt-in or out will not be available on the online update page. Online – Subscription will be available online for contacts to opt-in or out.
<b>Managed by:</b>	The internal person responsible for managing the subscription group.

Contacts can be added directly on the subscription or via the mail shot. To add from the subscription page select the following:



Search for a specific person or organisation using the inline search feature to add a single contact.

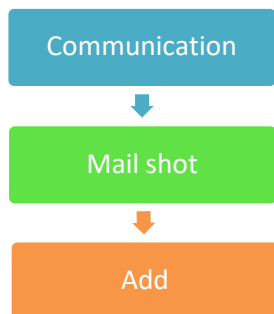
Search for a groups of contacts using the reporter. Once you have the results select 'Add to subscription', on the bulk update page select 'Begin process'. When done you can return to the subscription page.

Select save and close.

To see subscribers added, view the summary page of the subscription and click on the subscriber grid to view details.

## Add a mail shot

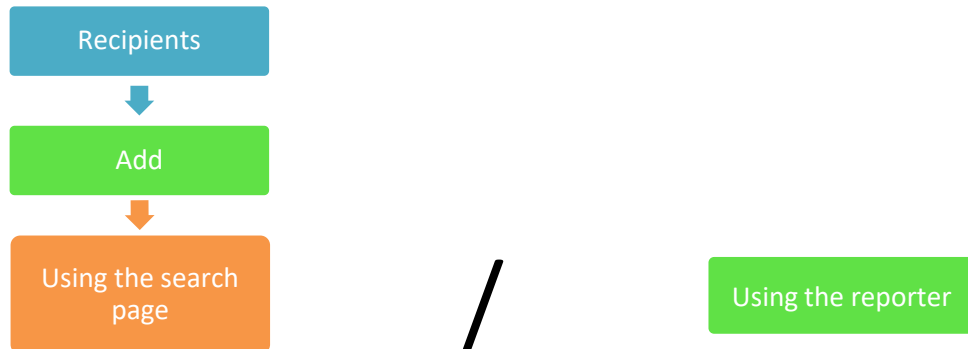
To add a mail shot select:



Complete all fields and save.

<b>Mail shot name:</b>	eg, 'Institute closure notification'.
<b>Subscription:</b>	Select the applicable subscription list from the drop down.
<b>Date of mail shot:</b>	When it will be sent.
<b>From:</b>	Internal person responsible to send the email – this is also the 'from' email address.
<b>For:</b>	The project related to the mail shot (if applicable).
<b>Campaign:</b>	The campaign related to the mail shot (if applicable).
<b>Attachments:</b>	Upload any related attachments.
<b>Recipients:</b>	The list of added recipients

To add recipients to the mail shot select:



Search for a group of contacts using the search function, then:

- select specific contacts by using the checkbox on the grid
- or select all contacts by selecting no checkboxes

Then select:

Add to mailshot

On the bulk update page select:

Begin process

When done you can return to the mail shot page.

## PLEASE NOTE

Contacts added to the mail shot who were not already on the applied subscription list will automatically be added to it.

## Send the mail shot

A mail shot can also be created directly from the person / organisation search result page:

- once you have your search results select 'Send email' – this will create a mail shot with all selected contacts (if more than 5)
- add mailshot details and save as above.

## PLEASE NOTE

All those who have opted-out of the applied subscription will not receive the mailshot.

## Manage subscription preferences

Contacts manage their subscription preferences themselves via the online update page, or some may contact you to request a change – these can easily be updated directly via their profile page.

View the contacts' profile in edit or summary mode, select the relevant subscription from the grid. On the Subscriber management page select:

Update

Select the applicable phase then Save.

## FAQ

Following are some of the frequently asked questions regarding subscriptions and mailshots:

- |   |     |
|---|-----|
| • Can I create a mailshot directly from search results? | Yes |
| • Can I view the email send results of the mailshot     | Yes |

Please contact our support team for training and assistance on these steps.