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DREAMmail User Guide

Version 4.9

Epsilon Learning
Delivering Your Knowledge

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PREFACE

About this Guide

This guide is part of a set of documents that describe Epsilon's email marketing platform, DREAMmail. DREAMmail is a web-based, email-marketing application that you use to deploy large-scale campaigns to promote a product, company, service, newsletter, or website by sending email messages. DREAMmail enables you to optimize your campaigns by letting you personalize, target, and validate the messages that you send out as part of the campaign to subscribers.

The content of your messages can range from one-time promotional offers and online newsletters to notifications that are automatically sent to your customers who conduct transactions on the web such as purchases or requests for information.

Once your message is sent, DREAMmail tracks delivery and response data such as the number of messages opened, the number of messages not delivered, the number of times that links in the message were clicked, purchases resulting from the message, and other data. You can analyze this data through DREAMmail reports to determine the effectiveness of your campaigns.

Who Should Read this Guide

This guide is intended for those users responsible for creating and managing email marketing campaigns and/or who administer user and customer accounts in DREAMmail. This guide is a reference guide and not a tutorial and is therefore not meant to take the place of DREAMmail training offerings. For information on available classroom and online training, please contact your account representative.

How this Guide is Organized

This guide is divided into the following sections.

Section	Description
Understanding DREAMmail	Provides an overview of the DREAMmail application and how to deploy campaigns using DREAMmail.
Getting Started with DREAMmail	Describes the key activities required to begin using DREAMmail.
Setting Up DREAMmail	Provides detailed information on using Client Manager to create and delete clients, using Site Manager to create additional sites for a client, implementing List Generator, and using User Manager to create and manage user accounts.
Managing Mailing Lists	Provides information on using Subscriber Manager to make changes to individual subscriber records, using Mailing List Manager to create and manage mailing lists, and using FTP Import Manager to create and manage recurring FTP import jobs.
Managing DREAMmail Email Addresses	Provides information on using Address Manager to create and manage DREAMmail email addresses.
Managing Messages	Provides information on composing messages; using content segments, templates, and offer tables in messages, and creating business rules for messages.
Managing Campaigns	Provides information on deploying campaigns and using Campaign Manager.
Personalizing Messages	Provides information on personalizing messages and creating content segments.
Validating Messages	Provides information on proofing and approving messages.
Sending Messages	Provides information on sending, scheduling, and terminating messages.
Managing Filters	Provides detailed information on using the Filter Manager, creating and saving, and editing filters.
Managing Hygiene Rules	Provides detailed information on using the Hygiene Rules Manager; and creating, editing, deleting, and enabling hygiene rules.
Reports	Provides detailed information on using reports; types of reports, including Delivery and Response reports, RTM reports, list reports, customer reports; and exporting reports from DREAMmail.
Administrative Reports	Provides information on reports used by DREAMmail administrators.

Guide Conventions

The following table lists the conventions used in this guide.

This…	Indicates…
Successive menu choices	Successive menu choices are indicated with a great-than sign (>) between the items you select consecutively.
Bold text	This shows the names of menu items, dialog boxes, dialog box elements, and commands.
`Courier` text	Code examples appear in courier text. This may represent text you type of data you read.
Note:	Notes contain additional useful information. Pay special attention to information highlighted in this way

Document Revisions

The following table lists the document revisions.

DREAMmail Release	Date	Document Revision
4.9.5	May 2010	Initial release for DREAMmail 4.9.5.
4.9.6	September 2010	Added redirect and confirmation URL information.

UNDERSTANDING DREAMMAIL

This unit of the guide includes the following sections:

- **What is DREAMmail?**
- **Deploying Campaigns**

What is DREAMmail?

DREAMmail is a web-based, email-marketing application that you use to deploy large-scale campaigns to promote a product, company, service, newsletter, or website by sending email messages. DREAMmail enables you to optimize your campaigns by letting you personalize, target, and validate the messages that you send out as part of the campaign to subscribers.

The content of your messages can range from one-time promotional offers and online newsletters to notifications that are automatically sent to your customers who conduct transactions on the web such as purchases or requests for information.

Once your message is sent, DREAMmail tracks delivery and response data such as the number of messages opened, the number of messages not delivered, the number of times that links in the message were clicked, purchases resulting from the message, and other data. You can analyze this data through DREAMmail reports to determine the effectiveness of your campaigns.

Deploying Campaigns on page 3 provides additional information on deploying campaigns in DREAMmail.

Other DREAMmail Tools

Besides the features in the DREAMmail application itself, there are additional DREAMmail tools that you can use in the deployment of campaigns. These tools include:

- **DREAMmailConnect** – An XML-based application programming interface (API) that lets you integrate your existing customer and content management systems with DREAMmail.
- **Real-Time Messaging (RTM)** – A fault-tolerant, high-volume email solution that lets you send personalized messages to your customers in response to transactions they perform on the web.
- **DREAMmail Ad Manager** – A component that enables you to book and track ads in online newsletters and other types of messages that you create in DREAMmail.
- **List Hygiene Tool** – A component that enables you to perform data hygiene on email addresses before you import them into a mailing list in DREAMmail.

You can find out how to use each tool by accessing the DREAMmail user guides.

Deploying Campaigns

Deploying a campaign is a multi-step process that requires you to use several DREAMmail modules to set up, execute, and analyze the campaign.

Note: Before you can create and deploy a campaign, a DREAMmail administrator must create a client and site in which you create the campaign. To deploy campaigns:

To deploy campaigns:

1. Log in to DREAMmail.

   Logging in to DREAMmail on page 6 provides additional information.

2. Create a mailing list.

   Creating Mailing Lists on page 59 provides additional information.

   Depending on their business needs, many DREAMmail users perform this step only once. You can create one mailing list and use that same list for each email campaign.

   Note: If you are creating a campaign for RTM messages or direct deployment messages, you do not have to create a mailing list.

3. Create DREAMmail email addresses to manage the email campaign.

   Creating DREAMmail Email Addresses on page 71 provides additional information.

   Depending on their business needs, many DREAMmail users perform this step only once. Some users create DREAMmail email addresses and use those same addresses for each email campaign.

4. Create a campaign.

   Creating Campaigns on page 120 provides additional information.

5. Compose messages.

   Composing Messages on page 91 provides additional information.

6. Validate the messages.

   About Validating Messages on page 132 provides additional information.

7. Send the messages.

   Sending Messages on page 85 provides additional information.

8. Report on the results.

   Available Reports in DREAMmail on page 11 provides additional information.

GETTING STARTED WITH DREAMMAIL

This unit of the guide includes the following sections:

Logging in to DREAMmail

To log in to DREAMmail:

1. Open your Internet browser.
2. Enter the DREAMmail URL in the browser's address field.

   Obtain the DREAMmail URL from your DREAMmail administrator.
3. Enter your user name in the **User ID** field.
4. Enter your password in the **Password** field.
5. Click **Enter**.

Note: To access DREAMmail using Internet Explorer 6.0, you must set the security level of the browser to **Medium** or lower. If you set the security level to **High**, you will not be able to access DREAMmail. See the Internet Explorer 6.0 documentation for instructions on how to set the security level.

Setting Up DREAMmail

If you are the DREAMmail administrator, you must complete administrative tasks before users can start deploying campaigns in DREAMmail. The specific tasks you perform depends upon the DREAMmail features you want made available to users and also upon how much of the DREAMmail application your Epsilon representative has already set up for you.

DREAMmail administrative tasks include:

- Creating and configuring clients
- Creating and configuring sites
- Creating user accounts and setting user privileges
- Setting up Closed Loop Confirmation
- Setting up List Generator
- Making your DREAMmail site P3P-compliant

Using DREAMmail Help

DREAMmail Help provides context-sensitive help files to describe the features available in the DREAMmail application. For information about DREAMmail tools accessible outside of the DREAMmail interface (for example, DREAMmailConnect and Real-Time Messaging), see the DREAMmail user guides.

If you are new to DREAMmail, the following help topics will help you get started:

- **What is DREAMmail? on page 2**
- **Deploying Campaigns on page 3**
- **Using the Quicksend Message Wizard on page 77**
- **Available Modules in DREAMmail on page 9**
- **Available Reports in DREAMmail on page 11**

Available Modules in DREAMmail

The DREAMmail menu can display the modules that are described in the list below. However, if your user account has not been granted a specific user privilege, the associated menu item or module does not appear in the menu. The table below describes the DREAMmail modules.

Module	Description
Client Setup	Enables you to configure client settings, such as bounce back and autosense thresholds, exclusion rules, and the List Generator; for DREAMmail administrators only. **Configuring Clients on page 20** provides additional information.
Site Setup	Lets you create new sites in a client and to configure preferences for the sites; for DREAMmail administrators only. **Configuring Sites on page 26** provides additional information.
Addresses	Enables you to create and manage the DREAMmail email addresses used in campaigns. **Managing DREAMmail Email Addresses on page 67** provides additional information.
Filters	Lets you create and manage filters for use in messages and mailing lists. **Managing Filters on page 147** provides additional information.
Hygiene Rules	Enables to you create and manage data hygiene rules that are applied to data being imported into your mailing lists. **Managing Hygiene Rules on page 153** provides additional information.
Mailing Lists	Mailing List Manager lets you create and manage lists of subscribers to whom you want to send messages. The FTP Import Manager enables you to add subscribers to existing mailing lists as well as remove them. Using the Subscriber Manager, you can modify individual subscriber records. **Managing Mailing Lists on page 55** provides additional information.
Campaigns	Lets you set up and manage default information that you want to include in messages associated with a specific campaign. This includes default DREAMmail email addresses and footers in messages. **Managing Campaigns on page 117** provides additional information.
Messages	Message Manager enables you to create and manage the messages that you want to send to subscribers as part of a campaign. Content Manager enables you to create and manage the content segments used to personalize a message. Template Manager creates and manages message templates. Message Wizard lets you quickly create a simple DREAMmail message in a single process. **Personalizing Messages on page 123** provides additional information.

Module	Description
Reports	Enables you to analyze and present data regarding campaigns, mailing lists, customer activity, export activity and message layout. You also use reports to export mailing lists and report data. (DREAMmail initiates a new browser window to display reports.) **Reports on page 161** provides additional information.
Tools	Enables you to manage DREAMmail user accounts, change your password, and check the version of DREAMmail that you are using. **Creating User Accounts on page 54** provides additional information.

Available Reports in DREAMmail

You can use the following reports to analyze and summarize data about the messages that you send to subscribers. The table below describes the DREAMmail reports.

Note: Reports on page 161 provides detailed information on available DREAMmail reports.

Report	Description
Delivery and Response	DREAMmail's main reporting tool for analyzing key campaign metrics from the client level to the email level as well as on the basis of domain.
RTM Reporting	The reporting tool for Real-Time Messaging; similar to the Delivery and Response report.
Delivery Monitoring	Reports on how delivered messages are handled by recipients' Internet Service Providers.
Active Tracking	Monitors the deployment of messages and the immediate response rate. The data in this report is refreshed every 15 seconds.
Response Curve	Displays a graphical representation of the response rate to individual or all messages in a campaign.
Message Layout Report	Analyzes the click-through rate of tracked URLs according to the placement of the URLs in a message.
List Reporting	Reports that provide analysis of mailing lists in terms of size, performance, subscription and unsubscription rates, and import history.
Customer Reports	Reports that quantify customer activity, helping you to develop new mailing lists based upon frequency, recency, and monetary value.
Exports	Tools that enable you to export and download report data.

About the Support Buttons

At the top of each DREAMmail page, a set of buttons provide links to DREAMmail resources. The table below describes these buttons.

Button	Description
System Status	Displays the current DREAMmail system status as reported by the Customer Resource Center
Help	Provides context-sensitive help files for all DREAMmail pages.
Knowledge Base	Provides a link to DREAMmail's knowledge base (http://DREAMmail.kb.epsiloninteractive.com).
Customer Resource Center	Provides a link to the Customer Support Resource Center (http://help.epsiloninteractive.com).
Privacy	Provides a link to Epsilon 's security statement (http://www2.epsiloninteractive.com/security/).

Tips for Entering Data into Fields

Use the following guidelines for entering data in to fields:

- Enter only whole, positive numbers (you cannot enter a decimal number; for example 3.45)
- Use the format YYYY-MM-DD when you are importing dates (hours, minutes, and seconds are optional)
- do not use an apostrophe (‘) in a name field

The DREAMmail Help system indicates when a field has additional data-entry requirements.

Determining the Version of DREAMmail

To display the version of the DREAMmail server and user interface you are using, go to **Tools** > **Version Information**.

Using Passwords

This section includes the following topics:

- **About Passwords on page 15**
- **Changing Passwords on page 15**
- **Resetting a Forgotten Password on page 16**
- **Creating a Challenge Question on page 16**

About Passwords

A password is a case-sensitive combination of numbers and letters. A password must contain the following:

- A minimum of six characters
- At least one number
- At least one uppercase letter

You cannot use punctuation, symbols, and accented characters in a password. Also, you cannot use the following reserved words as a password:

- password
- pswrd
- pwrd
- admin

Your DREAMmail administrator assigns a password for you when he or she sets up your user account. DREAMmail expires a password if you do not access your DREAMmail account for 30 days. DREAMmail invalidates a password if you attempt to log in to DREAMmail 5 consecutive times with an incorrect password. Your password must be reset if it is invalidated.

Changing Passwords

To change passwords:

1. Go to **Tools** > **Change Password**.
2. Enter your old password in the **Old Password** field.
3. Enter the new password in the **New Password** field.
4. Re-enter the new password in **New Password Confirmed** field.

5. If you want to reset the challenge question, enter a new question in the **Challenge Question** field (optional). Otherwise, skip to the next step.

   The challenge question is displayed during the login procedure when a DREAMmail user clicks the **Forgotten Your Password?** button.

6. Enter the answer to the question in the **Challenge Answer** field.
7. Re-enter the answer to the question in the **Confirm Answer** field.
8. Click **Save**.

Resetting a Forgotten Password

If you enter an incorrect password when you log in to DREAMmail, a login failure message displays. You can obtain a new system-generated password by clicking the **Forgot Your Password?** button. DREAMmail prompts you with a challenge question that you must successfully answer to obtain a new system-generated password.

Note: If you cannot log in to DREAMmail, and the **Forgot Your Password?** button is not displayed, this means that you entered an incorrect login name.

Creating a Challenge Question

When you change your password, in addition to prompting you to enter your old and new passwords, DREAMmail prompts you to enter a challenge question and the answer to the question.

The challenge question is displayed during the login process if you request a new system-generated password by clicking the **Forgot Your Password?** button. If you successfully answer the challenge question, DREAMmail sends you a system-generated password that you can use to log in to DREAMmail.

The length of the challenge question is limited to 100 characters; the answer to the question is limited to 30 characters.

SETTING UP DREAMMAIL

This unit of the guide includes the following sections:

Setting Up DREAMmail

If you are the DREAMmail administrator, you must complete the administrative tasks before users can start deploying campaigns in DREAMmail. The specific tasks you perform depends upon the DREAMmail features you want made available to users and also upon how much of the DREAMmail application your Epsilon representative has already set up for you. Administrative tasks in DREAMmail include:

- Creating and configuring clients
- Creating and configuring sites
- Creating user accounts and setting user privileges
- Setting up Closed Loop Confirmation
- Setting up List Generator
- Making your DREAMmail site P3P-compliant

Clients

This section includes the following topics:

About Clients

A client is an element in DREAMmail that represents a marketer or publisher. A client is conceptually equivalent to an Epsilon customer. Each Epsilon customer must create a client or have a client created for them.

After the client is created, you must also create one site in that client. This site is the only site that you create when you create the client. You can create additional sites in Site Manager. Using Site Manager on page 25 provides additional information.

Note: Only channel administrators and Epsilon representatives can create clients.

Using Client Manager

As a channel administrator, you can use Client Manager to create and delete DREAMmail clients. When you create a client, you are prompted to create the first site in the client.

You must set up a client and a site before you can deploy a campaign.

Creating Clients

Only channel administrators and Epsilon representatives can create clients. If you are not a channel administrator, an Epsilon representative creates a client for you or your company.

To create a client:

1. Go to **Client Setup** > **Client Manager**.
2. Enter the name of the client that you want to create in the **Client Name** field.
3. Enter the name of the first site in the **Site Name** field that you want to create in the client.
4. Click **Create**.

Note: After you create a client, you must configure it.

Configuring Clients

You configure a client to specify what DREAMmail components are available to users when they deploy campaigns. Any setting that you specify as part of the configuration is inherited by all sites under the client. For example, if you set the threshold for hard bounce backs to three (3), that threshold applies to all of the client's sites.

Note: As part of the configuration process for clients, you must also declare and configure your web domains.

To configure a client:

1. Go to **Client Setup** > **General**.
2. Select the client in the **Client** drop-down list of the DREAMmail menu that you want to configure.
3. Specify bounce back thresholds in the **Bounce Back** section.
4. Specify an autosense threshold in the **Autosense**, **Threshold** drop-down list.
5. Enable or disable the **Expose Recency and Frequency Data** setting.

   Exposing Recency and Frequency Data for a Client on page 24 provides additional information.

6. Enable or disable **Batch Operational Messages (BOM)**.
7. Enable RTM messaging for the client if you want users to be able to create RTM messages.
8. Click **Save**.
9. Click the **Foreign Key** tab if you want to create a foreign key.
10. Enter a name for the foreign key.
11. Specify the type of the key as **Text** or **Numeric**.
12. Enter a length for the key.
13. Click **Create Foreign Key**.

Note: You cannot change a foreign key after you have set it.

Deleting Clients

When you delete a client, all information associated with the client is deleted. This information includes all sites in the client, subscriber information and profile fields associated with the client, the mailing history of all messages, and so on.

Before you delete a client, contact your Epsilon representative. In some instances, if you delete a client that contains a large amount of data, the deletion process can take up to one day.

To delete a client:

1. Go to **Client Setup** > **Client Manager**.
2. Select the client that you want to delete in the **Client List** drop-down.
3. Click **Delete**.

Creating and Editing Web Domains

You can create a new web domain or edit an existing one. In both cases, you configure the web domain to specify the cookie expiry and P3P policies for the domain.

To add a web domain:

1. Go to **Client Setup** > **Web Domains**.
2. Click **Add**.
3. Configure the web domain.

To edit a web domain:

1. Go to **Client Setup** > **Web Domains**.
2. Click the name of the web domain in the **Domain Name** column that you want to edit.
3. Configure the web domain.

Configuring Web Domains

Configuring a web domain consists of specifying the P3P policies for the domain and the expiration setting of cookies served by the site. By default, only DREAMmail administrators can configure web domains. However, if the **Create/Modify/Delete Web Domains** user privilege has been enabled for a standard user, he or she can define P3P policies and set cookie expiry settings for a web domain.

To configure a web domain:

1. Go to **Client Setup** > **Web Domains**.
2. Click **Add** or click the name of the web domain that you want to edit in the **Domain Name** list.
3. Enter a name for the domain that you want to declare in the **Web Domain** field or verify that the name of the web domain that you are editing is correct.

   Note: The name of the web domain must match the domain in the Redirector URL.
4. Specify when cookies expire in the web domain.
5. Enter your full privacy policy into the **P3P Full Policy** text box.

6. Enter your compact privacy policy into the **P3P Compact Policy** text box.
7. Click **Submit**.

Note: DREAMmail does not validate the P3P full or compact policies that you include in a web domain.

Setting up Closed Loop Confirmation at the Client Level

A client-level Closed Loop Confirmation policy enables your subscribers to receive messages from any of your sites. It is used when you have a preference center that references mailing lists from multiple sites. Building Preference Centers on page 38 provides additional information. Enabling your subscribers to confirm their subscription requests at the client level prevents them from receiving multiple confirmation requests if they sign up to mailing lists that belong to different sites.

To set up Closed Loop Confirmation at the client level:

1. Go to **Client Setup** > **Admin**.
2. Select the type of policy in the **CLC Policy** field that you want to implement.

   If you select No CLC policy, go to step 9.
3. Select **Client Level confirmation** in the **CLC Level** drop-down list.
4. Select the site where the Closed Loop Confirmation campaign is located in the **Default CLC site** field.
5. Select the threshold number required in the **CLC Threshold** field.
6. Select the time (in minutes) required in the **CLC Interval** field.
7. Enter the confirmation URL in the **Confirmation URL** field.
8. Enter the redirect URL in the **Redirect URL** field.
9. Click **Save**.

Note: The settings for CLC Policy, CLC Threshold, and CLC Interval that you choose apply to all the sites for that client.

Choosing Profile Fields at the Client Level

When you choose profile fields at the client level they become available for use in the preference center forms and mini-forms that you create to collect user registration data in your preference center. Building Preference Centers on page 38 provides additional information. When you choose a profile field at the client level, it becomes available for use by the List Generator in all the sites under the client.

Note: To enable visitors to subscribe or unsubscribe at the client level in List Generator, select the **ClientUnsubscribe** profile field at the client level. To enable visitors to subscribe or unsubscribe only at the site level, you must select the **Unsubscribe** profile field for each site.

The maximum number of client profile fields for notification triggered messages is 512. If the number of profile fields for the client exceeds 512, the notification triggered message will time out and will not be deployed.

To choose profile fields at the client level:

1. Go to **Client Setup** > **Client User Profile**.
2. Choose the profile fields that you want to be available when you create preference center forms and mini-forms.
3. Click **Save**.

   These profile fields are applied to all sites under the client and cannot be excluded. However, if you do not include a field at the client level, you can still choose it at the site level.

Adding a New Client Level Field

To enter a New Client Level field to the User Profile Data:

1. Enter the new field name in the **Field Name** box.
2. Select the **Data Type** (TEXT, NUMERIC or DATE) from the drop-down box.
3. If you select the Data Type as TEXT, then enter the **Length for Text** in this field.
4. Then click the **Add a New Field** button.

   The new field gets added to the User Profile Data.

Creating and Applying Exclusion Rules

To create exclusion rules:

1. Go to **Client Setup** > **Exclusion Rules**.
2. Click **Add**.
3. Enter the exclusion rule that you want to create. For example, ***@company.com**.
4. Click **Done**.

To apply an exclusion rule to a mailing list in a client:

1. In the **Client Exclusion Rules** form, select the exclusion rule that you want to apply to the mailing lists in the selected client.
2. Click **Apply**.

   The selected exclusion rules are applied to all mailing lists in the client.

Note: After every import, the suppression rules need to be re-applied.

Exposing Recency and Frequency Data for a Client

You use recency and frequency settings to target messages to subscribers based on the number of messages that they receive from a client or site in a specified time period. These settings prevent subscribers from receiving an excessive number of messages, thus improving the effectiveness of your messages.

When you select the **Expose Recency and Frequency Data** setting, DREAMmail tracks the number of messages that are sent to each subscriber for all of the sites in a client. Each time you send a message, DREAMmail updates the count.

Epsilon recommends that you enable this feature either for a client or for specific sites in that client. Enabling this setting for both the client and individual sites in that client seriously impacts the deployment of messages and is not recommended.

By default, the **Expose Recency and Frequency Data** setting is disabled.

Sites

This section includes the following topics:

About Sites

Sites are individual groups under a client that usually represent separate lines of business within one client. Sites can represent any type of business, such as a website, a publication, or a brick and mortar business.

You must create at least one site in every client. You create the first site in a client when you create the client.

Using Site Manager

As an administrator, you can use Site Manager to create additional DREAMmail sites for a client. (You create the first site when you create a client.) You can create multiple sites for a single client.

You must set up a client and a site before you can deploy a campaign. Deploying Campaigns on page 3 provides additional information.

Creating Sites

To create a site:

1. Select the client from the **Client** drop-down list of the DREAMmail menu under which you want to create a site.
2. Go to **Site Setup** > **Site Manager**.
3. Enter a name for the site that you want to create in the **Site Name** field.
4. Click **Create**.

   The new site is added to the selected client and becomes the current site.

Note: After you create a site, you must configure it.

Configuring Sites

You configure each site that you create to determine the DREAMmail modules and features that are available in the site. For example, if you do not enable the **This Site is Enabled for RTM Messaging** setting, users of the site will not be able to create RTM messages.

To configure a site:

1. Go to **Site Setup** > **General**.
2. Specify the following settings in the **Config** tab.
   - Web Host URLs
   - Email Domain
   - Web Domain
   - Confirmation URL
   - Redirect URL
3. Enter a description for the site in the **Site Description** text box.
4. Click **Save**.
5. Specify the following settings in the **Content** tab.
   - Language Support
   - Indicator Strings
   - Notification Email List
6. Specify the following settings in the **Options** tab.
   - Import Settings
   - Response Data and Recency Frequency Data
   - Batch Operational Messages
   - Epsilon Product Integration
   - Auto-Archive Age
7. Click **Save**.
8. Specify RTM Settings in the **RTM** tab.
9. Click **Save**.

Note: The Bcc (Blind carbon copy) function in DREAMmail is also configured at the site level and is enabled by Epsilon staff. Contact your Epsilon account representative if you are interested in using the Bcc feature.

Choosing Profile Fields at the Site Level

When you choose profile fields for a specific site, they become available for use in the standard forms and mini-forms that you create to collect user registration data in your preference center. Building Preference Centers on page 38 provides additional information.

Note: To enable visitors to subscribe or unsubscribe at the client level in List Generator, select the ClientUnsubscribe profile field. To enable visitors to subscribe or unsubscribe only at the site level, you must select the Unsubscribe profile field for each site.

Customize Profile Updates

To enable updates, mark the checkbox **Enable Profile Update Customization**. You can specify a **custom logo file** or a **custom profile update URL**.

Site Level: User Profile Data Field Visability Configuration

To choose profile fields at the site level:

1. Access **Site Setup** > **Site User Profile**.
2. Choose the profile fields that you want to be available when you create preference center forms and mini-forms.
3. Click **Save**.

   The profile fields are applied to the site. Any profile fields that you choose at the client-level are automatically applied to all sites.

New Site Level Field

To add a new site to the user profile:

1. Enter the new field name in the **Field Name** box.
2. Select the **Data Type** (TEXT, NUMERIC, or DATE) from the drop-down box.
3. If you select the Data Type as TEXT, then enter the **Length for Text** in this field.
4. Click the **Add a New Field** button.

   The new field gets added to the User Profile Data.

Creating a User Account on the DREAMmail FTP Server

In order for DREAMmail users to use the FTP import process, they must save files to the DREAMmail FTP server using a secure FTP application. Using FTP Import Manager on page 65 provides additional information. A DREAMmail administrator must create an account on the DREAMmail FTP server so that users can access this server.

To create a user account on the DREAMmail FTP server:

1. Click **Site Setup** > **General**.
2. Click the **Options** tab.
3. Click **Enable FTP Import** in the **Import Settings** section.

   Note: Disabling this setting has no impact on previously created import jobs. The jobs remain in DREAMmail and are not modified.
4. Click **Change User ID** and enter a user name and password.

   Note: You create one user account per site. For security reasons, the password is encrypted in the system and cannot be retrieved by support personnel.
5. Re-enter the password in the **Password Confirmation** field.
6. Click **Change**.

Note: To change the password for an FTP user account, click the **Change Password** button in the **Import Settings** section.

Closed Loop Confirmation

This section includes the following topics:

About Closed Loop Confirmation

Closed Loop Confirmation (CLC) is a feature that prompts new subscribers to confirm that they want to receive messages from you or your company. This means that subscribers must confirm twice before they can receive messages. Closed Loop Confirmation helps to prevent subscribers who try subscribing to mailing lists by entering an invalid email address or an address that does not belong to them.

The Closed Loop Confirmation process consists of three stages:

1. A potential subscriber's email address is added to a mailing list either because the individual subscribed directly or because the email address was imported into the list.
2. DREAMmail sends a message to the new address requesting that the potential subscriber confirm that he or she wants to receive messages. (If the email address was imported, you must send the message manually.)
3. The potential subscriber clicks a confirmation link in the message or responds to the message to confirm his or her subscription.

Once the subscriber confirms his or her subscription, he or she can receive messages.

Confirmation Web Pages

When potential subscribers confirm a subscription by clicking the URL in the confirmation message, they are taken to a confirmation page that you host on your web site. This page informs them that they have successfully confirmed their subscription.

In order to direct new subscribers to this page, you need to create a Confirmation URL and a Redirect URL, which are used by the confirmation message.

Confirmation URLs

Confirmation URLs are used in Closed Loop Confirmation. Subscribers must confirm their subscriptions to mailing lists by clicking the confirmation URL in the confirmation message that is sent to them when they subscribe directly or are imported in to a mailing list. When subscribers click the confirmation URL they are redirected (via the Redirect

URL) to a confirmation web page that informs them that they have successfully confirmed their subscription.

Epsilon hosts the confirmation URL. However, this URL is not the address of an actual web page, but of a “hidden” page that is used by DREAMmail for tracking mailing list activity.

For example, if your email address is **email.fallriversports.com**, then your confirmation URL is **http://email.fallriversports.com/confirm**.

Redirect URLs

Redirect URLs are used in Closed Loop Confirmation (CLC). The redirect URL specifies a confirmation web page on your website that confirms that the subscribers have been successfully subscribed to a mailing list. Subscribers are directed to this page when they click the confirmation URL in a confirmation message.Closed Loop Confirmation on page 29

Enabling Closed Loop Confirmation

By default, DREAMmail does not enable Closed Loop Confirmation (CLC) for new clients and their sites. To enable CLC, you must carry out the following steps:

1. Create a confirmation web page on your website that informs subscribers that they have successfully subscribed.
2. Create confirmation triggered messages in a Closed Loop Confirmation campaign.
3. Select a Closed Loop Confirmation policy either at the client or site level.

Setting up Closed Loop Confirmation at the Site Level

A site-level Closed Loop Confirmation policy enables your subscribers to receive messages from only a specific site; all other sites must implement separate confirmations. Enabling subscribers to confirm at the site level is useful when you have multiple sites that represent independent divisions between which the subscriber may not realize that a relationship exists. Messages from a different division may be seen as unsolicited mail.

To set up Closed Loop Confirmation at the site level:

1. Go to **Client Setup** > **Admin**.
2. Select the type of policy in the **CLC Policy** field that you want to implement.

   Note: If you select No CLC policy, go to step 9.
3. Select **Site Level confirmation** in the **CLC Level** drop-down list.
4. Select a Closed Loop Confirmation threshold in the **CLC Threshold** drop-down list.
5. Select the time (in minutes) required in the **CLC Interval** drop-down list.

6. Click **Save**.
7. Click **Site Setup** > **General** in the DREAMmail menu.
8. Enter the confirmation URL in the **Confirmation URL** field.
9. Enter the redirect URL in the **Redirect URL** field.
10. Click **Save**.
11. Repeat steps 2-9 for each site managed in the client.

List Generator

This section includes the following topics:

About List Generator

List Generator is a customer-acquisition tool that helps you manage mailing lists by capturing subscriptions, unsubscriptions, preferences, and personal profile information from subscribers and potential subscribers. You capture this information by creating a preference center on your website, which consists of HTML pages with embedded forms that subscribers and potential subscribers use to enter data.

You can use the data entered by subscribers to manage mailing lists, update subscribers' preferences, and filter and customize messages in campaigns.

For in-depth information about using List Generator, see the List Generator Guide.

Implementing List Generator

The time required to implement List Generator varies depending on your requirements and system setup; plan on at least ten days. This does not include the time required to develop your HTML pages, which, depending on their complexity, could take two to three weeks.

You will need a dedicated programming resource who will work with your Epsilon representative to configure List Generator and create and maintain the HTML pages on your website.

Note: As an alternative to implementing List Generator yourself, you can request Epsilon to perform the process.

To implement List Generator:

1. Ask your Epsilon representative to enable List Generator for you.
2. Epsilon sets up your domain name. The setting up of a domain name takes a minimum of four business days and requires an update to the DREAMmail production database. Up to six additional business days are used for the rest of setup and testing.
3. Configure List Generator settings and set user privileges for users who need to access List Generator.

   Configuring List Generator Settings on page 34 and **Setting User Privileges for List Generator on page 38** provide additional information.

4. Choose the user profile fields that you want to make available in the preference center forms or mini-forms that you use to create your preference center. **Choosing Profile Fields in DREAMmail on page 35** provides additional information.
   - Decide whether you want these fields to be available at the client level or site level.
   - Create new profile fields as necessary.
5. Make mailing lists available to List Generator.

   Making Mailing Lists Accessible to List Generator on page 34 provides additional information.
6. Create campaigns for each site associated with the preference center.

   Creating Campaigns for List Generator on page 35 provides additional information.
7. Create notification triggered messages to be sent in response to events that you specify in List Generator.

   Creating Notification Triggered Messages for List Generator on page 36 provides additional information.
8. Develop HTML templates that you will upload to List Generator.
9. Create preference center forms or create mini-forms and associate them with your HTML templates.

   Building Preference Centers Using Preference Center Forms on page 39 provides additional information.
10. Test and publish the forms to create the HTML pages that comprise the preference center.

Configuring List Generator and Setting Up Related DREAMmail Components

As a DREAMmail administrator you configure settings in List Generator and enable specific DREAMmail components and features that are used in conjunction with List Generator. These include:

- User privileges that enable standard DREAMmail users to access List Generator
- Mailing lists that are accessible by List Generator
- Notification triggered messages sent by List Generator
- A campaign that contains the notification triggered messages

If you are not an administrator, coordinate with your Epsilon representative to have List Generator configured according to your requirements.

Configuring List Generator Settings

To configure List Generator settings, you must be a DREAMmail administrator. If you are not an administrator, your Epsilon representative configures List Generator for you.

To configure List Generator:

1. Go to **Client Setup** > **List Generator Configuration**.
2. Select **This is a List Generator Client**.
3. Choose one of the three authentication settings for the preference center that you are creating:
   - Password required
   - Password not required
   - All subscribers share the same client authentication password, which is passed to List Generator automatically from the client's web site

   Note: If you make a change to the authentication setting after you create and publish a preference center form, you must re-publish all forms under the client. If you do not re-publish, the preference center stops functioning.
4. Your Epsilon representative enters the domain to be used for List Generator in the DNS Settings field. This DNS setting must be registered with Epsilon. If it is not, you cannot set up a preference center or mini-form. If the DNS is on a secure site, Epsilon purchases a digital certificate on your behalf.

   Note: You can overwrite the DNS setting when you create individual preference center forms and mini-forms.
5. Click **Save** to save the configuration or click **Next** to save the configuration and continue to the List Generator Form Manager.

Making Mailing Lists Accessible to List Generator

List Generator must be able to access and update DREAMmail mailing lists. This means that for each mailing list that you intend to use with List Generator, you must enable the List Generator property. You can enable this property when you create a mailing list for the first time or you can modify the properties of existing mailing lists.

The reason that mailing lists need to be accessible to List Generator is so that when subscribers make changes to their mailing list preferences, List Generator can update the mailing lists in DREAMmail. If you implement subscription and unsubscription features at the mailing list level, then all applicable lists must be accessible to List Generator. If you implement subscription and unsubscription features at the site or client level, you must make all mailing lists in use accessible to List Generator.

To make a mailing list accessible by List Generator:

1. Go to **Mailing List** > **Mailing List Manager**.
2. Click  next to the mailing list that you want to make accessible and select **Properties**.

3. Select the **List Generator accessible** checkbox in the **Mailing List Properties** section.
4. Click **Save**.
5. Repeat for other mailing lists as required.

Choosing Profile Fields in DREAMmail

To make profile fields available in preference center forms and mini-forms, you must select the fields that you want to use at the client level and site level.

If you want one or more fields to be accessible to all sites, choose a profile field at the client level. If, however, specific fields must be excluded from specific sites, be sure to choose the profile fields at the site level.

Note: To enable visitors to subscribe or unsubscribe at the client level, select the ClientUnsubscribe profile field. To enable visitors to subscribe or unsubscribe only at the site level, you must select the Unsubscribe profile field for each site.

Choosing Profile Fields at the Client Level on page 23 and **Choosing Profile Fields at the Site Level on page 27** provides additional information.

Creating Campaigns for List Generator

To organize the triggered messages that you create to use with List Generator, create a separate campaign on each site. This allows you to personalize messages for each site and organizes your messages in a more intuitive manner.

The steps for creating this campaign are similar to those you follow to create any other campaign except that a List Generator campaign cannot require proof or approval.

To create a campaign for List Generator:

1. Go to **Campaigns** > **Campaign Manager**.
2. Click **Add** and enter a descriptive name for the campaign.
3. Enter an expiration date.

   You want the preference center campaign to last as long as possible, so set the length of the campaign to at least one year.
4. Set the following fields to the values specified below:
   - **Proof List** - set to None specified.
   - **Messages in this campaign must be sent for approval checkbox** - disable.
   - **Approval Lists** - set to None specified
   - **Publisher's: email address** - leave blank.
5. Select the **From address** that, by default, is used in all messages associated with this campaign.

6. Confirm the following settings:
   - **Reply To** – set to None specified.
   - **Subscribe Address** – set to None specified.
   - **Unsubscribe Address** – set to None specified.
   - **Message Footer Text** – leave blank.
7. Leave all fields in the **Profile Update Notification** section blank. If you enter any information in these fields, it is ignored.
8. Click **Save**.

Creating Notification Triggered Messages for List Generator

The process of creating a notification triggered message for use in List Generator is the same as the process for creating regular notification triggered messages except for two differences:

- There is a specific set of event variables that you must use for each type of triggered messages in List Generator.

  Note: Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.
- To protect a subscriber's privacy, you must encrypt a subscriber's email address in a URL in a triggered message that links to a preference center. (In order to enable a subscriber to automatically log in to a preference center, it is necessary to include the subscriber's email address in the URL.)

To create notification triggered messages for List Generator:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list in which you want to create the message.

   Note: You cannot create triggered messages in a campaign that has been configured to require approval.
3. Select **Notification Triggered Message** from the **Create New** drop-down list.
4. Click **Add** and enter a name for the message in the **Name** field.
5. If the message is a notification triggered message, select an item from the **Type** drop-down list. This feature enables Epsilon to report on your triggered messages on the basis of the type you specify. **Other** is the default value.
6. In the **From address** drop-down list, choose an email address that you want to be displayed to subscribers:

   a. Select a From address only if you want to override the default From address specified for the campaign.

   b. If the From address that you want to use is not displayed in the drop-down list, you can create one.

c. Enter a Display Name if you want to modify the way the From address is displayed in the message.

7. Do not select the **This is an RTM Message** checkbox if it is displayed.
8. Enter the text that you want displayed in the subject line of the message in the **Message Subject** field, including any references to dynamic personalization that you want to use.

   If you use dynamic personalization in the subject field of the message, do not enter text after a reference to a profile field, or content segment. If you do so, DREAMmail cannot send your message. (You can enter text before the profile field or content segment.)

9. Click the tab that corresponds to the format in which you want to compose the message and type the content of the message.
   - For HTML-based messages, you must enter the HTML code in addition to the content.
   - For legacy AOL messages, you can either enter the HTML code and text in the **AOL** tab or you can enter text in the **Text** tab and then click **Tools** > **Convert Text to Legacy AOL** to convert the text to legacy AOL format.
10. Click **Insert** if you want to include any references to profile fields, content segments, or offer tables that you want to use for personalizing the message.
11. Click **Insert** > **Event Variables** if you want to pass content to personalize the message as part of the triggering event.

    For each event variable that you specify, click **Add to Subject or Add to Body** to specify where the event variable is to be inserted.

    Note: There is a specific set of event variables that you use with each type of triggered message in List Generator. To use an event variable, you must flag it when you create the Profile page. Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.

12. Click **Insert** > **Subscription address or Insert** > **Unsubscription address** if you want to insert a reference into the message to the Subscription or Unsubscription address that is specified for the campaign or message.
13. Specify the URLs that you want to track.

    To protect a subscriber's privacy, you must encrypt a subscriber's email address when you include it in a URL that allows a subscriber to automatically log in to a preference center.

14. Verify the individual options for the message in the **Settings** section according to your campaign needs.
15. Click **Save**. After saving the message, you can check the message size of each message format.
16. In **Message Manager**, arm the triggered message.
17. Repeat this procedure starting at step 2 for other types of triggered notification messages that you want to use with List Generator.

Setting User Privileges for List Generator

DREAMmail users must have explicit permission to access List Generator. You must either create new user logins or update the privileges of existing logins so that individual users can access the List Generator features.

To set user privileges in DREAMmail:

1. Go to **Tools** > **User Manager**.
2. Make sure the following List Generator privileges are enabled:
   - List Generator: Create/Modify/Delete Preference Centers & Mini-Forms
   - Lists: Create/Modify/Delete Lists
   - Lists: Browse Lists, Client and Site User Profiles, and Client Exclusion Rules
   - Mailings: Create/Modify/Delete Trigger Mailings
   - Mailings: Notification Triggers
   - Mailings: Recurring Triggers
   - Mailings: Confirmation Triggers.
3. Click **Save**.

Building Preference Centers

This section includes the following topics:

- About Preference Centers on page 38
- Using List Generator Form Manager on page 39
- Building Preference Centers Using Preference Center Forms on page 39

About Preference Centers

A preference center consists of one or more form-based HTML pages that you incorporate into your website to collect subscriptions and unsubscriptions, demographic data, and individual customer preferences from subscribers and potential subscribers.

As a DREAMmail administrator, or a standard user with the appropriate privileges, you create a preference center by using HTML templates and preference center forms or mini-forms that you set up in DREAMmail. You associate the HTML templates, the forms, and profile fields in DREAMmail to create the form-based HTML pages that comprise the preference center. If you use preference center forms to create the preference center, Epsilon hosts the HTML pages; if you use mini-forms, you host the HTML pages.

If your business requires it, you can create a separate preference center for each site that you run.

Using List Generator Form Manager

Use List Generator Form Manager to create and edit standard forms and mini-forms that you use to build a preference center.

After, you have configured List Generator, set up the related DREAMmail components, and have created your HTML templates, use Form Manager to associate the templates with preference center forms or mini-forms to create the HTML pages in a preference center. A preference center can be created with either preference center forms or mini-forms but not a combination of the two. If you create multiple preference centers, you can create some based on preference center forms and others based on mini-forms. List Generator Form Manager lets you perform the following procedures:

- Create HTML pages using preference center forms
- Create HTML pages using mini-forms
- Edit and duplicate preference center forms and mini-forms
- Test preference center forms and mini-forms
- Publish preference center forms and mini-forms

Note: Preference center forms or mini-forms that are displayed in gray text in the List Generator Form Manager have been customized by Epsilon and cannot be edited by you. Contact your Epsilon representative to make changes to a customized preference center form or a mini-form.

Building Preference Centers Using Preference Center Forms

After you configure List Generator and create your HTML templates, you can use preference center forms to build preference centers.

To build a preference center using standard forms:

1. Create an HTML template for each page that you plan to use in your preference center.
2. Go to **Client Setup** > **List Generator Form Manager**.
3. Select **Preference Center** from the **Create New** drop-down menu and click **Add**.
4. Configure the settings for the preference center.

   If you edit an existing preference center, some settings cannot be changed.
5. Set up the preference center forms for the HTML pages that you want to use in your preference center.
   - Login Page
   - Profile Page
   - Notification Page
   - System-generated Password Change Page
6. If necessary, override any profile field names specified in the preference center forms that were incorrectly mapped when you uploaded the HTML template.

7. Save the preference center.
8. Test and publish the preference center.

Configuring a Preference Center Using Preference Center Forms

To use preference center forms to create a preference center, you must first configure the preference center.

To configure a preference center that is based on standard forms:

1. Go to **Client Setup** > **List Generator Form Manager**.
2. Select **Preference Center** from the **Create New** drop-down menu and click **Add**.
3. Enter a name in the **Preference Center Name** field.

   Once you save this form, you cannot change the name.

4. Specify the layout of the login page:
   - Two forms on a single page
   - Two forms on separate pages
   - Single form on a single page

   Note: Once you have selected and saved a layout, you cannot change it.

5. Edit the DNS Setting if you do not want to use the default DNS setting.
6. Enter the name of a folder in which the files that comprise the preference center will be located. (The folder is a directory in List Generator.)

   Note: The name of the folder must be unique in the domain in which it is created. You cannot use the same folder name for other preference centers or mini-forms in the same domain.

7. Enter the name of a file that will contain the preference center. The name of the file and its parent folder are included in the URL of the preference center. For example, in the URL **http://company.net/sales_pc_subs/newsubcenter.aspx**, the folder name is **sales_pc_subs** and the file name is **newsubcenter**. (The suffix **.aspx** is appended by List Generator to the file name.)
8. Select the **Bypass the login page when accessing the form from an email link** checkbox if you want the subscriber to skip the login procedure when he or she clicks a URL in a message to access a preference center.
9. Click **Next** to continue to the Login page.

Creating Login Pages for a Preference Center

You can specify three types of layouts for the Login page of a preference center that you create with support forms:

- Preference Center with one Login/Sign-Up page (2 forms) – One page that contains an HTML login form for existing subscribers and an HTML sign-up form for new subscribers.
- Preference Center with different pages for Login and Sign-Up – Two login pages: one page with an HTML login form for existing subscribers and another page with an HTML sign-up form for new subscribers.
- Preference Center with one Login/Sign-Up page (1 form) – One page with one HTML form that can be used by existing subscribers to login and by new subscribers to create a login for the preference center.

Creating the Profile Page Using Preference Center Forms or Mini-Forms

The Profile page is an HTML page you can create as part of a List Generator center using either standard forms or mini-forms. The Profile page allows users to enter and submit personal preference data that DREAMmail updates in the DREAMmail database. You can create only one Profile page per preference center.

Note: Before you can create the Profile page in List Generator Form Manager, you must configure a preference center and create HTML templates.

To create the Profile page:

1. Enter or browse in the **HTML Template File Name** field the name of the HTML template that you created for this page.

   For examples of HTML templates, see the List Generator Guide.

2. Click **Upload**.

   List Generator automatically maps the HTML attributes in the template to profile fields and mailing lists in DREAMmail that have the same names. You can validate that these fields are correctly mapped (see step 4).

3. In the **Profile Page – Profile Fields Selection** section, confirm that **ProfileForm** is displayed in the **Form** drop-down list.

   If it is not displayed, select it from the drop-down list.

4. If necessary, override any incorrect mappings.
5. Choose any event variables that you want to use in notification triggered messages in List Generator.

   Note: Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.

   Select the Event Var checkboxes next to each field that you want to use as an event variable.

6. In the **Profile Page – Password Change Fields Selection** section, override any incorrect mappings.

   The Password Change Fields Selection section is displayed only for password-protected preference centers.

   Note: To implement a notification triggered message when a user creates a new password, select the Event Var checkbox for New Password.

7. In the **Mailing Lists Selection** section, validate that the correct **HTML Form List Name** is mapped to each mailing list.

   If necessary, override the profile field names of any incorrect mappings.

8. In the **Mailing Lists Selection** section, enter a clear and meaningful name in the **Display Name in Notification Email** column.

   This is the list name that is displayed in notification triggered messages in place of the list name used internally in DREAMmail.

9. Click **Save**.
10. Click **Next** to continue to the System-generated Password Change page.

Creating the System-generated Password Change Page

System-generated Password Change page is one of the HTML pages you can create when you use standard forms to build a preference center.

List Generator displays the System-generated Password Change page when an existing subscriber uses a system-generated password to access a preference center. A subscriber requests a system-generated password by clicking a "lost your password" link.

To create this page:

1. Enter or browse in the **HTML Template File Name** field the name of the HTML template that you created for this page.

   For examples of HTML templates, see the List Generator Guide.

2. Click **Upload**.

   List Generator automatically maps the HTML attributes in the template to profile fields in DREAMmail that have the same name. You can validate that these fields are correctly mapped (see step 4).

3. In the **System-generated Password Change Page – Password Change Fields Selection** section, confirm that **ChangePasswordForm** is displayed in the **Form** drop-down list.

   If it is not displayed, select it from the drop-down list.

4. If necessary, override any incorrect mappings.
5. Click **Save**.
6. Click **Next** to continue to the Notification page.

Creating the Notification Page Using Preference Center Forms

The Notification page is an HTML page you can create as part of a preference center using either standard forms or mini-forms.

This page enables you to specify notification text that is displayed to the subscriber when events occur in the List Generator center (for example, when a subscriber successfully updates a profile). You can also specify individual notification triggered messages to be sent by DREAMmail in response these events.

Note: Before you can create the Notification page in List Generator Form Manager, you must configure a preference center and create HTML templates.

To create the Notification Page using preference center forms:

1. Enter or browse in the **HTML Template File Name** field the name of the HTML template that you created for this page.

   For examples of HTML templates, see the List Generator Guide.

2. Click **Upload**.

   List Generator automatically maps the HTML attributes in the template to profile fields in DREAMmail that have the same name.

3. In the **Notification Text** section, replace the default notification messages with your own text or keep the default text.

   Note: If you include HTML code in the notification text, the content must be correctly tagged with both opening and closing HTML tags.

4. Select a tab that corresponds to the type of notification triggered message in the **Notification Triggered Email Messages** section.
5. Select the notification triggered message to be triggered.

   Use the **Site Name**, **Campaign Name**, and **Message Name** drop-down menus to find a message that you created previously.

6. Repeat these steps starting at Step 4 for all message types that you are using.
7. Decide whether to prevent subscribers from receiving two profile update messages when they create a profile on the Login page and subsequently enter information on the Profile page:
   - If you do **not** enable this field, when a subscriber enters an email address on the Login page, a **new profile** message is triggered even if the subscriber has not entered any other profile or subscription information. When the subscriber continues to the next step of profile creation and enters information on the Profile page, a **profile update** message is triggered.
   - If you enable this field, new subscribers receive only the profile update triggered message and not the **new profile** triggered message.
8. Click **Finish** to save changes and return to the List Generator Form Manager.
9. The next step in the process of building a preference center is testing and publishing the preference center forms.

Encrypting a Subscriber's Email Address in Links to a Preference Center

When a subscriber clicks a URL in a notification message that was triggered by an action, a new URL that links to a preference center is sent back to the subscriber. When the subscriber clicks the link:

- If the preference center is not password-protected or a generic password is used, the subscriber is automatically logged into the preference center
- If unique passwords are implemented in the preference center, the subscriber is not automatically logged in

If you want subscribers to be able to automatically log in to a preference center, the subscriber's email address must be encrypted in the URL that you send; otherwise, the email address is displayed in the address field of the browser. From a privacy perspective, this is unacceptable. This only occurs for notification triggered messages specific to List Generator.

To prevent the subscriber's email address from being displayed, you must use the **#EncryptedEMAILADDR#** event variable when you create a URL that links to the preference center. In addition, you must also use the **DMEmailAdd**r and **DMEmailAddrEncrypted** variables in the URL.

The syntax for encrypting an email address is:

DMEmailAddr=#EventVar:EncryptedEMAILADDR#&DMEmailAddrEncrypted =True

where:

- **DMEmailAddr** is the variable used to specify an email address or event variable
- **#EventVar:EncryptedEMAILADDR#** is the event variable used to specify an encrypted email address
- **&DMEmailAddrEncrypted=true** or **&DMEmailAddrEncrypted=false** indicates whether the address is encrypted

The following examples show URLs with encrypted and unencrypted passwords. The encryption presented in these examples applies only to messages triggered by List Generator and does not apply to any other type of message sent by DREAMmail.

- Encrypted:

  http://MyWebServer/
  MyPreferenceCenter?DMEmailAddr=#EventVar:EncryptedEMAILADDR#&DME
  mailAddrEncrypted=true

- Unencrypted:

  http://MyWebServer/
  MyPreferenceCenter?DMEmailAddr=#EventVar:EmailAddr#&DMEmailAddrEncry
  pted=false or http://MyWebServer/
  MyPreferenceCenter?DMEmailAddr=#EventVar:EmailAddr#

Note: Event variables used in notification triggered messages are case-sensitive. Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.

Tracking Unsubscribes by Message Through a Preference Center

DREAMmail lets you track unsubscribes by message by including a message ID in the unsubscribe link in an email message. To enable tracking through your preference center, you must modify the preference center forms or mini-forms that you use to create the Login and Profile pages of your preference center, republish the preference center forms or mini-forms, and then activate this feature in DREAMmail each time you create a message.

Note: A Login page is used only in preference centers that have been created by using preference center forms; a preference center created by using a mini-form does not include a Login page.

Please see the List Generator guide for a detailed description of how to track unsubscribes through a preference center.

Building Preference Centers Using Mini-Forms

After you configure List Generator and create your HTML templates, you can use mini-forms to build preference centers.

To build a preference center using mini-forms:

1. Create an HTML template for each page that you plan to use in your preference center.
2. Go to **Client Setup** > **List Generator Form Manager**.
3. Select **Mini-Form** from the **Create New** drop-down menu and click **Add**.
4. Configure the settings for the mini-form.

   If you edit an existing preference center, some settings cannot be changed.
5. Set up the preference center forms for the HTML pages that you want to use in your preference center:
   - Profile update
   - Notification page
6. If necessary, override any profile field names specified in the mini-forms that were incorrectly mapped when you uploaded the HTML template.
7. Save the preference center.
8. Test and publish the preference center.

Configuring a Preference Center Using Mini-Forms

To use mini-forms to create a preference center, you must first configure the preference center.

To configure a preference center that is based on mini-forms:

1. Go to **Client Setup** > **List Generator Form Manager**.
2. Select **Mini-Form** from the **Create New** drop-down menu and click **Add**.
3. Enter a name in the **Mini-Form Name** field.

   Once you save this form, you cannot change the name.

4. Enter a DNS Setting if you do not want to use the default DNS setting.
5. Enter the name of a folder in which the files that comprise the preference center will be located. (The folder is a directory in List Generator.)

   Note: The name of the folder must be unique in the domain in which the mini-form is created. You cannot use the same folder name for other preference center forms or mini-forms in the same domain.

6. Enter the name of a file that will contain the preference center. The name of the file and its parent folder are included in the URL of the preference center (for example, **http://company.net/sales_mf_subs/mini-form.htm**).
7. Click **Next**.

Creating the Profile Page Using preference center forms or Mini-Forms

The Profile page is an HTML page you can create as part of a List Generator center using either standard forms or mini-forms. The Profile page allows users to enter and submit personal preference data that DREAMmail updates in the DREAMmail database. You can create only one Profile page per preference center.

Note: Before you can create the Profile page in List Generator Form Manager, you must configure a preference center and create HTML templates.

To create the Profile page using preference center forms or mini-forms:

1. Enter or browse in the **HTML Template File Name** field the name of the HTML template that you created for this page.

   For examples of HTML templates, see the List Generator Guide.

2. Click **Upload**.

   List Generator automatically maps the HTML attributes in the template to profile fields and mailing lists in DREAMmail that have the same names. You can validate that these fields are correctly mapped (see step 4).

3. In the **Profile Page – Profile Fields Selection** section, confirm that **ProfileForm** is displayed in the **Form** drop-down list.

   If it is not displayed, select it from the drop-down list.

4. If necessary, override any incorrect mappings.

5. Choose any event variables that you want to use in notification triggered messages in List Generator.

   Note: Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.

   Select the **Event Var** checkboxes next to each field that you want to use as an event variable.

6. In the **Profile Page – Password Change Fields Selection** section, override any incorrect mappings.

   The **Password Change Fields Selection** section is displayed only for password-protected preference centers.

   Note: To implement a notification triggered message when a user creates a new password, select the **Event Var** checkbox for **New Password**.

7. In the **Mailing Lists Selection** section, validate that the correct **HTML Form List Name** is mapped to each mailing list.

   If necessary, override the profile field names of any incorrect mappings.

8. In the **Mailing Lists Selection** section, enter a clear and meaningful name in the **Display Name in Notification Email** column.

   This is the list name that is displayed in notification triggered messages in place of the list name used internally in DREAMmail.

9. Click **Save**.
10. Click **Next** to continue to the System-generated Password Change page.

Creating the Notification Page Using Mini-Forms

The Notification page is an HTML page you can create as part of a preference center using either standard forms or mini-forms.

This page enables you to specify notification text that is displayed to the subscriber when events occur in the preference center (for example, when a subscriber successfully updates a profile). You can also specify individual notification triggered messages to be sent by DREAMmail in response to these events.

To create the Notification Page using a mini-form:

1. Choose either the **Use Template** or **Use Redirection URLs** radio button:
   - **Use Template** – Enables you to enter the text of messages that are displayed to subscribers to indicate the success or failure of events in the preference center.
   - **Use Redirection URLs** – Enables you to create links to HTML pages where subscribers are redirected in response to actions taken in the preference center. You create two HTML pages: one that indicates the successful completion of the event and one that indicates failure.
2. If you choose the **Use Template** radio button, choose an HTML template and update the text:

- Enter or browse for the name of an HTML template in the H**TML Template File Name** and click **Upload**. (For examples of HTML templates, see the List Generator Guide.)
- Replace the default notification messages in the **Notification Text** section with your own text or keep the default text.

Note: If you include HTML code in the notification text, the content must be correctly tagged with both opening and closing HTML tags.

3. If you choose the **Use Redirection URLs** radio button enter both of the URLs of the pages that contain success and failure messages.
4. Select the tab that corresponds to the type of notification triggered message in the **Notification Triggered Email Messages** section.

   Use the **Site Name**, **Campaign Name**, and **Message Name** drop-down menus to find a message that you created previously.
5. Decide whether to prevent subscribers from receiving two profile updated messages when they create a profile and subsequently update their profile data on the Profile page:
   - If you do **not** enable this field, when a subscriber enters an email address in the Profile page, a **new profile** message is triggered even if the subscriber has not entered any other profile or subscription information. When the subscriber enters additional information in the Profile page, a **profile updated** message is also triggered.
   - If you enable this field, new subscribers receive only the profile updated triggered message and not the **new profile** triggered message.
6. Click **Finish** to save changes and return to the List Generator Form Manager.

The next step in the process of building a preference center is testing and publishing the mini-forms.

Tracking Unsubscribes by Message Through a Preference Center

DREAMmail lets you track unsubscribes by message by including a message ID in the unsubscribe link in an email message. To enable tracking through your preference center, you must modify the preference center forms or mini-forms that you use to create the Login and Profile pages of your preference center, republish the preference center forms or mini-forms, and then activate this feature in DREAMmail each time you create a message.

Note: A Login page is used only in preference centers that have been created by using preference center forms; a preference center created by using a mini-form does not include a Login page.

The List Generator guide provides detailed descriptions on how to track unsubscribes through a preference center.

Testing Preference Center Forms and Mini-Forms

Before you publish the preference center forms or mini-forms of a preference center, be sure to test the HTML pages to confirm that they function as you intended. For example, enter profile information in to the preference center and verify that the information is added to the intended mailing list.

To test preference center forms and mini-forms:

1. Go to **Client Setup** > **List Generator Form Manager**.
2. Click next to the preference center form or mini-form that you want to test.
3. Click **Test**.

   If you are testing a mini-form, List Generator displays the name of an HTML file that you can download and test. If you are testing a preference center, List Generator displays a link to a test version of the preference center (for example, **http://company.net/Test/sales_pc_subs/prefcenter.aspx**)

Important: When you edit a mini-form or preference center form that was previously published, you must re-publish the mini-form or preference center form in order for subscribers and potential subscribers to view the updates. If you do not re-publish, your updates are saved in DREAMmail, but they do not appear in the “live” preference center.

Publishing Preference Center Forms and Mini-Forms

After you test preference center forms or mini-forms for a preference center, you can publish them. When you publish standard forms, List Generator provides you with a URL linking to the preference center, which is hosted by Epsilon. When you publish mini-forms, List Generator displays the name of the HTML file that contains the mini-form, which you download. It is your responsibility to incorporate the URL or HTML file into your website.

To publish preference center forms or mini-forms:

1. Go to **Client Setup** > **List Generator Form Manager**.
2. Click next to the preference center or mini-form that you want to publish.
3. Click **Publish**.

   If you are publishing a mini-form, List Generator displays the name of an HTML file that you can download into your environment. If you are publishing a preference center, List Generator displays a link to the final version of the preference center, which is hosted by Epsilon (for example, **http://company.net/sales_pc_subs/prefcenter.aspx**).

Important: When you edit a mini-form or preference center form that was previously published, you must re-publish the mini-form or preference center form in order for subscribers and potential subscribers to view the updates. If you do not re-publish, your updates will be saved in DREAMmail, but they will not appear in the “live” preference center.

P3P Privacy Policies

This section includes the following topics:

About Setting Privacy Policies in DREAMmail

DREAMmail enables you to make your sites compliant with Platform for Privacy Preferences (P3P,), a privacy standard developed by the World Wide Web Consortium. Compliance with P3P ensures that DREAMmail cookies that are served by your site are not blocked by P3P-enabled browsers.

Creating and Editing Web Domains

You can create a new web domain or edit an existing one. In both cases, you configure the web domain to specify the cookie expiry and P3P policies for the domain.

To add a web domain:

1. Go to **Client Setup** > **Web Domains**.
2. Click **Add**.
3. Configure the web domain.

To edit a web domain:

1. Go to **Client Setup** > **Web Domains**.
2. Click the name of the web domain in the **Domain Name** column that you want to edit.
3. Configure the web domain.

Configuring Web Domains

Configuring a web domain consists of specifying the P3P policies for the domain and the expiration setting of cookies served by the site. By default, only DREAMmail administrators can configure web domains. However, if the **Create/Modify/Delete Web Domains** user privilege has been enabled for a standard user, he or she can define P3P policies and set cookie expiry settings for a web domain.

To configure a web domain:

1. Go to **Client Setup** > **Web Domains**.
2. Click **Add** or click the name of the web domain that you want to edit in the **Domain Name** list.
3. Enter a name for the domain that you want to declare in the **Web Domain** field or verify that the name of the web domain that you are editing is correct.

   Note: The name of the web domain must match the domain in the Redirector URL.
4. Specify when cookies expire in the web domain.
5. Enter your full privacy policy into the **P3P Full Policy text** box.
6. Enter your compact privacy policy into the **P3P Compact Policy** text box.
7. Click **Submit**.

Note: DREAMmail does not validate the P3P full or compact policies that you include in a web domain.

Making Sites P3P-compliant

To ensure that the sites that you create under a client are P3P-compliant:

1. Create a P3P full policy and a P3P compact policy for all of the web domains that you have registered on Epsilon 's DNS.
2. In the P3P full policy and your site's overall privacy policy, provide a URL for opting-out of the DREAMmail response-tracking cookie or a link to a location where the opt-out link resides.
3. On your website, include a link to the site’s overall privacy policy, which should be written in plain, easily readable language.
4. At the client level configure your web domains.
5. For each web domain, include P3P policies.
6. Select a web domain for each of your sites. (The web domain should match your Redirector URL.)

Opting-out of the DREAMmail Cookie

Subscribers can opt-out of receiving the DREAMmail response-tracking cookie that contains personally-identifiable information. If a subscriber opts-out, then the member ID is no longer used for any response-tracking for this subscriber and no personally-identifiable information is collected for the subscriber. To opt-out, the subscriber clicks the site's opt-out URL, which is located in the P3P full policy or in the client's plain-language privacy policy.

Note: The opt-out procedure must be performed for all browser versions on all of the computers that the subscriber uses.

When a subscriber opts-out, the subscriber's cookie is set to **OPT_OUT** and no more personally identifiable data is collected. (The subscriber's browser must accept cookies in order to be able to set the DREAMmail cookie to **OPT_OUT**.) If the subscriber manually deletes this cookie, he or she must carry out the opt-out procedure again.

Note: Opting out of the DREAMmail cookie is not equivalent to choosing not to set cookies when you configure the cookie expiry for a web domain.

User Accounts

This section includes the following topics:

- About User Accounts on page 53
- Using User Manager on page 53
- Creating User Accounts on page 54

About User Accounts

User accounts enable DREAMmail users to access data stored in DREAMmail and to perform specific tasks. The amount of data that you can access and the number tasks that you can perform depends on the privileges set for their user accounts and the type of user account created.

A user account consists of three parts:

- **User name** – Consists of some combination of a user's first and last name. For example, John Smith's user name can be jsmith or smithj. A user name must be unique within a server farm.
- **Password** – Consists of a combination of numbers and letters that a user must enter in order to access DREAMmail. You must follow specific rules when you create a password.
- **User privileges** – Determines the features of DREAMmail that users can view and use. Disabling individual privileges directly affects the components and features displayed in DREAMmail. For example, for security purposes you can disable the **Access to email address data** privilege to restrict a user from viewing the email addresses of subscribers in the DREAMmail application and in DREAMmail reports. If a user has access to multiple sites, his or her privileges are the same for every site.

Using User Manager

If you have the appropriate user privileges, you can use the User Manager to create and manage DREAMmail user accounts. The amount of data that DREAMmail users can access and the number of tasks that users can perform depends upon the privileges that are set for them in their user accounts.

Use Campaign Manager to perform the following procedures:

- Creating user accounts
- Editing user accounts

Creating User Accounts

User accounts enable DREAMmail users to access data stored in DREAMmail and to perform specific tasks.

To create user accounts:

1. Go to **Tools** > **User Manager**.
2. Click **Add**.
3. Enter a combination of the user's first and last names in the **User Name** field.

   A user name must be unique within a server. Contact your Epsilon representative for more information about what server you use to access DREAMmail.
4. Enter the user's email address in the **Email Address** field.
5. Enter the password that you want to assign to the user in the **Password** field.
6. Enter the user's password again in the **Password Confirm** field.
7. Select the type of user account that you want to create from the **User Type** list.
8. Only channel administrators can designate a user type. If you are not a channel administrator, proceed to the next step.
9. Click **Next**.
10. Select the clients to which you want the user to have access from the **Available Clients** list.
11. Select the sites to which you want the user to have access from the **Available Sites** list.
12. Click **Add**.
13. Specify the privileges that you want to assign to the user in the **User Privilege Information** dialog box.
14. Click **Save**.

MANAGING MAILING LISTS

This unit of the guide includes the following sections:

Subscriber Manager

This section includes information on using the Subscriber Manager.

Using Subscriber Manager

The Subscriber Manager enables you to make changes to individual subscriber records. You can change information such as address, bounce back count, and profile information at both the site and client levels. You can also add and remove subscribers from existing mailing lists.

Using this tool, you can locate and update subscriber records in any list of any site in any client that you currently manage (although you can search only one client at a time). You can also update the records of subscribers who are not included in a mailing list.

Using the Subscriber Manager consists of the following steps:

1. Search subscriber records on the basis of a single profile field at the client level or site level (for example, **LastName is Anderson**).

   Searching Subscriber Records on page 56 provides additional information.

2. Select an individual subscriber record from the records that were returned by the search.

   Selecting a Subscriber Record on page 57 provides additional information.

3. Make changes to the subscriber's record and list membership.

   Changing Subscriber Information on page 57 provides additional information.

Searching Subscriber Records

You search subscriber records on the basis of a single profile field at the client level or site level (for example, **LastName is Anderson**). You can specify the fields from the subscriber's record that you want to be displayed when the search results are displayed.

To find subscriber records:

1. Go to **Mailing Lists** > **Subscriber Manager**.

   If Subscriber Manager is not displayed in the DREAMmail menu, your user privileges are not configured to grant you access. Contact your DREAMmail administrator.

2. Click the client-level and site-level profile fields that you want to view in the subscriber's record by clicking the fields in the **Hide** list box. (Press the **Ctrl** key as you click to make multiple selections.)

3. Click the right arrow to move your selections to the **Show list** box.

   Profile fields such as **MemberID** and **EmailAddr** are automatically included in the subscriber record.

4. Use the **Profile Field** drop-down list to choose the profile field that you want to use for searching subscriber records.

   Site-level profile fields are preceded by the name of the site and a colon character (for example, **Region7:cartype**). Client-level profile fields are displayed at the beginning of the list. Site-level profile fields appear after the client-level fields.

5. Use the **Operator** drop-down list to select an operator to compare the profile field to the value that you specify in the next step (for example, **EmailAddr contains @aol**).
6. Enter a value into the **Value** field to serve as the search criterion.
7. Click **Next**.

   DREAMmail conducts a case-insensitive search and displays the first 500 subscriber records that meet the search criterion in the Client Members window. The results of the search might take a long time to display if your search matches a large number of client-level and site-level profile fields. To ensure a fast response, narrow your search criteria.

Selecting a Subscriber Record

The **Client Members** window displays the first 500 subscriber records of the current client that match the search criteria that you defined when you searched for subscribers. The search results may include subscribers who are not subscribed to some of the sites that you have access to. In that case, the table cells that display data for those sites' profile fields are empty.

When you select a subscriber from the search results in the Client Members window, all of the profile fields that are at the client and site levels for the subscriber record are displayed, whether or not you selected them when you set the search criteria.

To select a subscriber record:

- Click the email address of the subscriber that you want to update.

  DREAMmail displays the Client Profile Fields window.

Changing Subscriber Information

This window enables you to change information in the subscriber record that you selected in the Client Members window. This window consists of the following three tabs:

- **Client Profile Fields** – Enables you to change client profile fields
- **Site Profile Fields** – Enables you to change site profile fields
- **List Membership** – Enables you to add and remove subscribers from mailing lists

Mailing List Manager

This section includes the following topics:

- About Mailing Lists on page 58
- Using Mailing List Manager on page 58

About Mailing Lists

A mailing list is a group of subscribers to whom you send email messages during a campaign. You set up mailing lists so that you can send messages to a group of subscribers at the same time.

Mailing lists are comprised of subscriber email addresses that link to subscriber information that is stored in the DREAMmail database. This information includes items such as first name, last name, gender, and so on. DREAMmail stores this subscriber information in a unique way that enables you to share the information with all of the sites set up in a client. You can also restrict certain information to only one site in a client.

To set up a mailing list, you must first create the list and then add subscribers to that list.

Using Mailing List Manager

Use Mailing List Manager to create and manage mailing lists. Creating a mailing list is part of the multi-step process of deploying a campaign.

Use Mailing List Manager to perform the following procedures:

- Creating Mailing Lists on page 59
- Creating Test Mailing Lists on page 59
- Methods for Adding Subscribers to Mailing Lists on page 61
- Editing Subscribers in Mailing Lists on page 61
- Changing the Status of a Mailing List on page 63
- Making a Mailing List Permanent on page 63
- Viewing the history of a mailing list
- Splitting Mailing Lists on page 60
- Merging Mailing Lists on page 60
- Deleting Mailing Lists on page 61

Creating Mailing Lists

To create mailing lists:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click **Add**.
3. Type a name for the mailing list in the **Mailing List Name** field.
4. Enter a brief explanation of the list's function in the **Description** field.
5. Specify the users who you want to have access to the list in the **Mailing List User** field.
6. Select the type of mailing list that you want to create.
7. Specify the properties that you want to enable for this mailing list.

   Specifying Properties for Mailing Lists on page 62 provides additional information.

8. Click **Save**.

Creating Test Mailing Lists

To create test mailing lists:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list from which you want to create a test list.
3. Select **Test List**.
4. Enter the number of addresses that you want to remove from the selected mailing list in the **Remove email address** field.
5. Enter a name for the new test list in the **Place into New Test List** field.
6. Click **Create Test List**.
7. Wait for the email notification from DREAMmail to verify that the test list is created.
8. Send a message to the test list.

   Sending Messages Immediately on page 85 provides additional information on sending messages.

Note: You can also test messages by using message caps and groups to send test messages. Composing Test Messages on page 98 provides additional information.

Splitting Mailing Lists

You can split a large mailing list into multiple lists to create new, smaller mailing lists. When you split a mailing list, your original list remains intact; that is, no subscribers are deleted from the original list. Splitting a mailing list is useful if you want to create a small subset of a mailing list to be used as a test list.

To split mailing lists:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list that you want to split.
3. Select **A/B Split Lists**.
4. Select the number of lists that you want to create from the original mailing list.
5. Specify whether you want DREAMmail to split the list by a specific number or a percentage.
6. Click **Next**.
7. Enter a name for each new list in the **List Name** field (optional).
8. Change the size or percentage of the original list's members assigned to each new list (optional).
9. Click **Create Lists**.
10. Wait for DREAMmail to send a notification message when the split is complete. After you receive this message, you can use the new lists in a campaign.

Merging Mailing Lists

When you merge two mailing lists, DREAMmail automatically removes duplicate email addresses by using the subscriber record that has the most current profile field information.

To merge mailing lists:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list that you want to merge.
3. Select **Merge Lists**.
4. Select the list from which you want to export subscribers in the **Merge From** list box.
5. Select the list to which you want to add the subscribers in the **Merge Into** list box.
6. Click **Empty list following a successful merge** if you want to delete the subscribers in the list that you selected in the Merge From list box.
7. Click **Merge**.

Note: You cannot add subscribers to a mailing list marked Read Only. To change the status of a list, you must modify the list's properties. **Specifying Properties for Mailing Lists on page 62** provides additional information.

Deleting Mailing Lists

You must have access to a mailing list to be able to delete it. Once a message has been sent to a mailing list, you cannot delete the mailing list.

To delete mailing lists:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list that you want to delete.
3. Select **Delete**.
4. Click **OK**.

Methods for Adding Subscribers to Mailing Lists

You can add subscribers to mailing lists by doing one of the following:

- Import subscribers using the FTP Import Manager. Using FTP Import Manager on page 65 provides additional information.
- Import subscribers using the Web-based import feature.
- Add subscribers to the mailing list one at a time.
- Use List Generator to automatically add subscribers to a mailing list directly from your website. List Generator on page 32 provides additional information.
- Create XML requests in DREAMmailConnect to add subscribers to mailing lists. For more information, see the Programming Guide.
- Send your database to an Epsilon representative so that he or she can create the mailing list for you.

Editing Subscribers in Mailing Lists

You can edit the contents of an existing mailing list in order to create a new mailing list.

To edit subscribers in mailing lists:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list that you want to edit.
3. Select **Edit Members**.
4. Click **Filter List Members** if you want to apply a filter to the subscribers in the list
   - Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter. Using Filter Helper to Create Filters on page 150 and Creating Custom SQL Filters on page 150 provide additional information.
   - Click **Save** when you have finished creating the filter.

5. Select the **Count** radio button if you want to display the number of subscribers in the mailing list.

   Alternatively, you can email the number to the email address that you enter in the **Email Address** text box.

6. Select the **View** radio button if you want to display the individual subscriber records in the mailing list.
7. Click **Next**.
8. Click **Generate List**.

   You must enter a list name that currently does not exist, otherwise the list generation will fail.

9. Click **Save**.

Specifying Properties for Mailing Lists

You specify the properties for a mailing list when you create or edit a mailing list. The settings include the type of mailing list, the users who can access the list, and the following properties:

- **Shared with other sites in this client** – Enables all sites to have access to the mailing list. If you enable this setting, all sites can access subscriber email addresses in this mailing list as well as any other profile fields that you designate as client level.
- **Read-only** – Prevents the mailing list from being edited. When Read-only is enabled, users who can access this mailing list can view, merge, split, or filter the mailing list, but cannot add, delete, or edit subscribers.
- **Inactive** – Prevents users from sending messages to the mailing list. When a list is inactive, users cannot send messages to the mailing list. Inactive lists are displayed in the Inactive **List** tab of the Mailing List Manager.
- **List Generator accessible** – Enables the List Generator utility to update the mailing list automatically. If you are not using the List Generator feature, do not select this property.
- **Permanent List** – Prevents DREAMmail from automatically inactivating mailing lists.

Making a Mailing List Permanent

DREAMmail automatically deactivates a mailing list if specific criteria are met. To prevent this from happening, you can declare a mailing list that has an active status to be "permanent."

To make a mailing list permanent:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list that you want to make permanent. The mailing list must be active in order to make it permanent.
3. Select **Properties**.
4. Select **Permanent** in the **Mailing List Properties** section.
5. Click **Save**.

Changing the Status of a Mailing List

You can set the status of one or more mailing lists to active or inactive at any time.

Making a List Inactive

There are several ways of making a list inactive:

1. Go to **Mailing Lists** > **Mailing List Manager**.
2. Select one or more mailing lists that you want to make inactive.
3. Click the **Make Inactive** button.

or

1. Click next to the mailing list whose status you want to change.
2. Select **Make List Inactive**.

or

1. Click next to the mailing list whose status you want to change.
2. Select **Properties**.
3. Select **Inactive** in the **Mailing List Properties** section.
4. Click **Save**.

Making a List Active

To make a list active:

1. Click the **Inactive Lists** tab.
2. Click next to the mailing list whose status you want to change.
3. Select **Make List Active**.

FTP Manager

This section includes the following topics:

- Using FTP Import Manager on page 65
- Creating FTP Import Jobs on page 65

Using FTP Import Manager

Use FTP Import Manager to create and manage recurring FTP import jobs used to add or remove subscribers from mailing lists. About Mailing Lists on page 58 provides additional information on mailing lists.

To import subscribers into an existing list using the FTP Import Manager:

1. Create an import job.
2. Use an FTP application to upload the file that contains a list of subscribers to your FTP directory on the DREAMmail FTP server.

   Contact your DREAMmail administrator to obtain a user account on the DREAMmail FTP server. Creating User Accounts on page 54 provides additional information on creating user accounts.

Creating FTP Import Jobs

To create an FTP import job:

1. Go to **Mailing Lists** > **FTP Import Manager**.
2. Click **Add**.
3. Enter a name and description in the **Import Job Name** form.
4. Specify whether you want to add subscribers to an existing mailing list or remove subscribers from an existing client, site or mailing list in the **Import Action Type** form.

   When you select **Subscription (List)**, a **Clear and replace existing list** checkbox is displayed along with an **Available Lists** drop-down list. You can choose a list from the **Available Lists** drop-down list. When you have selected a list, click **Add** the list gets added in the **List(s) selected** box.

   If you mark the **Clear and replace existing list** checkbox, when the import job is run, and a file is imported, the destination list is cleared before the new file is added to replace it. In case multiple lists are selected for import, and the checkbox is marked, all the lists will be cleared on import of the new file.

5. Select a hygiene rule in the **Hygiene Rule Selection** form if you want to perform data hygiene on the mailing list.

   About Data Hygiene on page 154 provides additional information.

6. Enter the name of the file in to the **File Details** form that you want to import.

   Note: The source file must adhere to certain import rules.

7. Enter the name of a suppression file into the **File Details** form if you want to purge names from the source file.
8. Specify the character used to delimit fields in the import file in the **File Details** form.
9. Enter the email addresses to which you want DREAMmail to send a notification message when the FTP import is complete in the **Import Confirmation Emails** form.
10. Click **Next**.
11. Map the fields in the heading row of the import file to the fields in the mailing list in the **File Import Field Mapping** form.
12. Click **Save**.

Note: To complete the import process, you must FTP the file that contains the list of subscribers to the DREAMmail FTP server. The name of this file must be the same as the name you specify in the import job. DREAMmail processes the job automatically.

MANAGING DREAMMAIL EMAIL ADDRESSES

This unit of the guide includes the following sections:

About DREAMmail Email Addresses

You create DREAMmail email addresses and use them in your messages so that subscribers can respond to the messages and interact with the content of the messages. You can assign an action to many of the addresses so that when a response is sent to the address a specific action is performed.

For example, you can include an invitation in your message to receive your company's new online newsletter. When the reader clicks the link to request the newsletter, a request is sent to the Subscription address associated with the link and the reader is automatically added to the relevant mailing list.

The DREAMmail email addresses consist of:

- From address
- Reply To address
- Subscription address
- Unsubscription address
- Closed Loop Confirmation address
- Triggered Message address

The From address field is the only required email address. The type of email campaign that you create determines the optional addresses that are appropriate for you to use. The email addresses that you create are accessible only by the site in which you create them.

Before you create DREAMmail email addresses, ensure that your site is configured with a domain name.

Using Address Manager

Use Address Manager to create and manage the DREAMmail email addresses that are used in campaigns and messages. Creating DREAMmail email addresses is part of the multi-step process of deploying a campaign. Before you can create the addresses, you must first set up a mailing list on the site in which you are creating the campaign.

Use Address Manager to perform the following procedures:

- Creating From, Subscription, Unsubscription, and Triggered Addresses.
- Creating Closed Loop Confirmation Addresses. **Creating Closed Loop Confirmation Addresses on page 70** provides additional information.
- Creating Reply To Addresses. **Creating Reply To Addresses on page 74** provides additional information.

You can also use Address Manager to edit and delete DREAMmail email addresses.

Creating Closed Loop Confirmation Addresses

To create closed loop confirmation addresses:

1. Go to **Addresses** > **Address Manager**.
2. Click **Add**.
3. In the **Address Type** section, select **Standard DREAMmail Address** for standard and triggered messages or **Deployment from 3rd Party Application** for messages that are part of an Ensemble campaign.
4. In the **Address Category** section, select **Closed Loop Confirmation Address**.

   Note: You must create a From address before you can create any other type of addresses.
5. Enter an email address for the selected address type. Enter only the section of the address that precedes the domain name.
6. Enter in the **Display Name** field the name that you want to be displayed in the message that you send to the subscriber. Do not use apostrophes in the name.

   Note: You can personalize the Display Name by including profile fields. Enclose each profile field with exactly two hash marks (**#**). If DREAMmail cannot find the profile fields in the DREAMmail database, the message is not sent and Message Manager displays a delivery status of **Error** for the message.
7. Enter a brief description of the email address in the **Description** field (optional).

   Note: Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.
8. Click **Save**.

Creating DREAMmail Email Addresses

You create DREAMmail email addresses so that subscribers can respond to your messages and interact with the content in the messages. You can create the following types of addresses:

- Creating From, Subscription, Unsubscription, and Triggered Addresses. Creating From, Subscription, Unsubscription, and Triggered Addresses on page 71 provides additional information.
- Creating Closed Loop Confirmation Addresses. Creating Closed Loop Confirmation Addresses on page 70 provides additional information.
- Creating Reply To Addresses. Creating Reply To Addresses on page 74 provides additional information.

Creating From, Subscription, Unsubscription, and Triggered Addresses

To create a From, Subscription, or Unsubscription address:

1. Go to **Addresses** > **Address Manager**.
2. Click **Add**.
3. In the **Address Type** section, select **Standard DREAMmail Address** for standard and triggered messages or **Deployment from 3rd Party Application** for messages that are part of an Ensemble campaign.
4. In the **Address Category** section, select **From Address**, **Subscription Address**, or **Unsubscription Address** in the **Address Type** field.

   Note: You must create a From address before you can create any other type of addresses.
5. Enter the email address that you want to specify for the selected address type. Enter only the section of the address that precedes the domain name. If there is no domain name displayed following this field, contact your Epsilon representative.
6. If you are creating a From address, enter in the **Display Name** field the name that you want to be displayed in the message that you send to the subscriber. Do not use apostrophes in the name.

   Note: You can personalize the Display Name by including profile fields. Enclose each profile field with exactly two hash marks (**#**). If DREAMmail cannot find the profile fields in the DREAMmail database, the message is not sent and Message Manager displays a delivery status of **Error** for the message.

   About Dynamically Personalizing Messages on page 124 provides additional information.

7. Enter in the **Description** field a brief description of the email address (optional).

   Note: Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.

8. Click **Next**.
9. Select the type of action that you want to assign to the email address:
   - If you assign Trigger Event Mailing as the action, select the campaign and message that contain the triggered message.
   - If you assign List Subscription or List Unsubscription as the action, select a mailing list.
10. Click **Add**.
11. For Subscription and Unsubscription addresses, select in the **Notification** section a From address and Reply address for the notification message.

    If you are creating a From address, you only have to select a Reply To address.

12. Enter in the **From Display Name** and **Reply-To Display Name** text boxes the names that you want to use in the notification message (optional).

    Note: Do not use apostrophes in the names.

13. If your site supports multiple languages, select the appropriate character set from the **Select Language** drop-down list.

    The character set specifies the encoding information that DREAMmail inserts into the message header. This encoding information enables the message to be displayed correctly in the subscriber's email application.

14. In the first **Subject** field of the **Notification** section, type a subject for the notification message when the action that you assigned in step 9 completes successfully.
15. In the first text box of the **Notification** section, enter the text that you want to be displayed as the body of the notification message:
    - To send a text-only notification message, enter the content for the message in the Text tab.
    - To send an HTML-formatted notification message, enter the content as well as the HTML code for the message in the HTML tab.
16. In the second **Subject** field of the **Notification** section, enter a subject for the notification message when the action that you assigned in step 9 does **not** complete successfully.
17. In the second text box of the **Notification** section, enter the text that you want to be displayed as the body of the notification message:
    - To send a text-only notification message, enter the content of the message in the Text tab.
    - To send an HTML-formatted notification message, enter the content as well as the HTML code of the message in the HTML tab.
18. Click **Save**.

To compose a Triggered Message address:

1. Go to **Addresses** > **Address Manager**.
2. Click **Add**.
3. In the **Address Type** section, select **Standard DREAMmail Address** for standard and triggered messages or **Deployment from 3rd Party Application** for messages that are part of an Ensemble campaign.
4. In the **Address Category** section, select **Triggered Message Address**.

   Note: You must create a From address before you can create any other type of addresses.
5. Enter the email address that you want to specify for the selected address type. Enter only the section of the address that precedes the domain name.
6. Enter in the **Description** field a brief description of the email address (optional).

   Note: Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.
7. Click **Next**.
8. Select **Triggered Event Mailing** from the **Type of Action** drop-down list.
9. Select the campaign that contains the triggered message.
10. Select the Triggered Message that you want DREAMmail to send when a subscriber replies to this address.
11. Click **Add**.
12. Click **Save**.

Creating Reply To Addresses

To create a Reply to Address:

1. Go to **Addresses** > **Address Manager**.
2. Click **Add**.
3. In the **Address Type** section, select **Standard DREAMmail Address** for standard and triggered messages or **Deployment from 3rd Party Application** for messages that are part of an Ensemble campaign.
4. In the **Address Category** section, select **Reply-To Address**.

   Note: You must create a From address before you can create any other type of addresses.
5. Enter an address in the **Email Address** field that you want to specify for the selected address type. Enter the entire email address including the domain name (for example, **company1@abcdomain.com**).
6. Enter in the **Display** Name field the name that you want to be displayed in the message that you send to the subscriber. Do not use apostrophes in the name.

   Note: You can personalize the Display Name by including profile fields. Enclose each profile field with exactly two hash marks (**#**). If DREAMmail cannot find the profile fields in the DREAMmail database, the message is not sent and Message Manager displays a delivery status of **Error** for the message.

   About Dynamically Personalizing Messages on page 124 provides additional information.
7. Enter in the **Description** field a brief description of the email address (optional).

   Note: Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.
8. Click **Save**.

MANAGING MESSAGES

This unit of the guide includes the following sections:

About Messages

Messages are emails that you send as part of the process of deploying a campaign. **Deploying Campaigns on page 3** provides additional information. A message consists of a subject line and a body that contains the content of the message. Content can include text, images, URL links to ecommerce or content website, web forms, file attachments, and so on. The format of a message can be text, HTML, or HTML used in legacy AOL messages. A message is sometimes referred to as a “mailing.”

Use Message Manager to specify the type of message that you want to create:

- Standard
- Notification Triggered
- Recurring Triggered
- Direct Deployment.
- Standard Recurring

Using Message Manager on page 80 and **Standard, Standard Recurring, and Direct Deployment Messages on page 91** provide additional information.

Using the Quicksend Message Wizard

You can use the Quicksend Message wizard to quickly create DREAMmail messages in a single five-step process.

If your DREAMmail administrator has not set up your user account with the needed privileges, some of the DREAMmail features described in the steps below might not be available to you. For example, to create an SQL filter, your Create/Modify/Delete SQL Filters privilege must be enabled.

Step 1: Choose Campaign

To choose a campaign:

1. Go to **Messages** > **Message Wizard**.

   The Message Wizard is also displayed when you log in to DREAMmail.

2. Do one of the following:
   - Select **Existing Campaign** and select a campaign from the drop-down list to choose an existing campaign.
   - Select **New Campaign** and enter the name of the campaign.
3. Click **Next**.

Step 2: Choose Mailing List

To choose a mailing list:

1. Do one of the following:
   - Select the **Existing List** radio button and select a list
   - Select the **New List** radio button and enter a name
2. If you want to import subscribers into the list that you choose, click **Import Data**. (You can use only the web-based method of importing data.)
3. If you want to further target subscribers who will receive the message, select **Filter List Members** and do one of the following:
   - Select the **Use Filter Helper** radio button to create a filter. Using Filter Helper to Create Filters on page 150 provides additional information.
   - Select the **Use SQL Filter** radio button to create a custom SQL filter. Creating Custom SQL Filters on page 150 provides additional information.
   - Click **Save** when you have finished creating the filter.
4. Click **Next**.

Step 3: Choose a From Address

To choose a From Address:

1. Do one of the following:
   - Select the **Existing From Address** radio button and select an address.

     If you chose an existing campaign at the beginning of the Message Wizard process, the campaign's default From address, Display name, and associated actions are displayed.
   - Select the **New From Address** radio button, enter a name and a Display name for the address, and assign an action to the address by either selecting the **Unsubscribe from list** radio button and selecting an associated list from the drop-down list, or by selecting the **Unsubscribe from sites** action.
2. Click **Next**.

Step 4: Compose the Message

To compose the message:

1. Enter a **Message Name** and **Subject Line** for the message.
2. Click the tabs that correspond to the formats in which you want to compose the message (Text / AOL / HTML) and enter content for the message. You can personalize the content by entering references to profile fields and content segments.

   Note: You can use the HTML Editor to create and edit HTML messages.
3. Verify the individual options for the message in the **Settings** section according to your campaign needs:
   - Autosense
   - Redo Autosense
   - Track HTML open rate
   - Track URLs

   Note: Messages created by this wizard set the DREAMmail cookie on a subscriber's computer when the subscriber clicks on a tracked URL in the message.
4. Click **Convert to AOL** if you want to convert text that you entered in the **Text** tab into legacy AOL format.
5. Click **Word Wrap** to wrap text in the message.
6. Click **Personalize** if you want to insert references to profile fields into the subject line or body of the message.
7. Click **Preview** if you want to view how the message will look when sent.
8. Click **Next**.

Step 5: Preview, Proof, and Send the Message

To preview, proof, and send the message:

1. Click the **Proof** button to use DREAMmail's proofing process.

   Sending Messages for Proofing on page 88 provides additional information.

2. Click the **Send** button to send the message.

   In the **Mailing Schedule Setting** dialog box, you can save the message and specify when and if you want to send it.

Using Message Manager

Use Message Manager to **create** and **manage** the messages you want to send to subscribers as part of a campaign. You can carry out basic message management tasks such as creating, editing, deleting, and archiving messages. You can also specify the type of message that you want to create and apply a template to it. Once you have created the message, you can send the message to a list of recipients to be proofed and approved.

Note: Creating a message in DREAMmail is part of the multi-step process of deploying a campaign. Before you can create a message, you must first set up a mailing list, DREAMmail addresses, and a campaign on the site from which the message is being sent.

When you click  you will be able to Preview the various formats of the message. A screen with the three message format tabs (Text, AOL and HTML) is displayed, where you can preview the message.

Message Manager procedures include:

- Creating messages – **Creating Messages on page 81** provides detailed information.
- Using templates to create messages – **Using Templates to Create Messages on page 81** provides detailed information.
- Manually archiving messages – **Manually Archiving Messages on page 84** provides detailed information.
- Arming, opening, and closing triggered messages – **Arming, Opening, and Closing Triggered Messages on page 84** provides detailed information.
- Deleting messages – **Deleting Messages on page 83** provides detailed information.
- Duplicating messages – **Duplicating Messages on page 82** provides detailed information.
- Editing messages – **Editing Messages on page 82** provides detailed information.
- Monitoring messages – **Monitoring Messages on page 83** provides detailed information.
- Pausing and resuming messages – **Pausing and Resuming Messages on page 83** provides detailed information.
- Terminating messages – **Terminating Messages on page 84** provides detailed information.
- Sending messages – **Sending Messages on page 85** provides detailed information.
- Sending messages immediately – **Sending Messages Immediately on page 85** provides detailed information.
- Specifying the Send Rate of Messages – **Specifying the Send Rate of Messages on page 86** provides detailed information.
- Scheduling messages to be sent – **Scheduling Messages to be Sent on page 86** provides detailed information.
- Viewing the estimated number of subscribers – **Viewing the Estimated Number of Subscribers on page 87** provides detailed information.

- Approving and proofing messages – **Approving and Proofing Messages on page 87** provides detailed information.
- Sending messages for proofing – **Sending Messages for Proofing on page 88** provides detailed information.
- Sending messages for approval – **Sending Messages for Approval on page 88** provides detailed information.
- Checking the proofing status of a message – **Checking the Proofing Status of a Message on page 90** provides detailed information.

Creating Messages

Creating a message consists of designating a campaign, message type, and possibly a template for the message. **About Campaigns on page 118** and **About Messages on page 76** provide additional information. You create a message in Message Manager before you start composing the content of the message in Message Composer.

To create a message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list in which you want to create the message.

   Messages can be created only in campaigns that have not completed
3. Select the type of message you want to create in the **Create New** drop-down list.
4. Click **Add**.
5. Compose the message.

   Composing Messages on page 91 provides additional information.

Using Templates to Create Messages

In addition to creating templates, you can use Template Manager to create messages.

To create a message using Template Manager:

1. Go to **Messages** > **Template Manager**.
2. Click next to the name of the template that you want to use for creating a message.
3. Click **Create from Template**.
4. Select a campaign and type for the message.
5. Click **Next**.

6. Specify content for each template variable if the selected template includes variables.
7. Compose the message.

   Composing Messages on page 91 provides additional information.

Editing Messages

You can edit a message before sending it. Once a message has been sent you cannot edit it.

Note: You can edit a triggered message only if its status is **Composing**. **Triggered Messages on page 95** and **Arming, Opening, and Closing Triggered Messages on page 84** provide additional information.

To edit messages:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message you want to edit.
3. Click next to the message.
4. Select **Edit**.
5. Edit the information in the message.
6. Click **Save**.
7. Click **Update** to update the message.
8. Click **Cancel** if you want to cancel the message.

Duplicating Messages

You can duplicate a message to reuse the text or properties from one message to another message.

To duplicate messages:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message you want to duplicate.
3. Click next to the message.
4. Select **Duplicate**.
5. Enter a new name in the **Duplicated Message Name** field.
6. Click **Next**.

Deleting Messages

You can delete messages only if they have not been sent.

Note: You can delete a triggered message only if its status is **Composing**. Triggered Messages on page 95 and Arming, Opening, and Closing Triggered Messages on page 84 provide additional information.

To delete messages:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message you want to delete.
3. Click next to the message.
4. Select **Delete**.
5. Click **OK**.

Monitoring Messages

To obtain up-to-the-minute details about your campaign, you can monitor a message in the Active Tracking report or in Message Manager. About Campaigns on page 118, Active Tracking Report on page 210, and Using Message Manager on page 80 provide additional information.

To monitor the details of messages in Message Manager:

1. Go to **Messages** > **Message Manager**.
2. Do one of the following:
   - To view deployment status, click the **Status** tab.
   - To view delivery, click the **Delivery** tab.
   - To view response, click the **Response** tab.

Pausing and Resuming Messages

You can pause an outgoing message if you find an error in the message text or if there is a technical problem with the message. Pausing messages does not recall messages that have already been sent to subscribers. If a message has been paused, you can resume it.

To pause or resume a message:

1. Click next to the message that you want to pause or resume.
2. Select **Pause/Resume**.
3. Go to **Messages** > **Message Manager**.

4. Select a campaign from the **Messages for Campaign** drop-down list that contains the message that you want to pause or resume.
5. Click next to the message.
6. Select **Pause** or **Resume**.

Terminating Messages

You can terminate an outgoing message if you discover an error in the message text, or if there is a technical problem with the message. You cannot resume sending after a message has been terminated. If you want to temporarily stop a message, you can pause the message. Pausing and Resuming Messages on page 83 provides additional information.

To terminate a message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message that you want to terminate.
3. Click next to the message.
4. Select **Terminate**.

Manually Archiving Messages

DREAMmail automatically archives messages. If you are a Channel Administrator, you can also manually archive messages.

To manually archive a message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message you want to archive.
3. Click next to the message.
4. Click **Archive**.

Arming, Opening, and Closing Triggered Messages

When you arm, open, or close a triggered message, you set its status to Armed, Composing, and Closed, respectively. Triggered Messages on page 95 provides additional information. The status of a triggered message determines what actions you can perform on the message. For example, a triggered message must have an Armed status before it can be sent.

To arm, open, or close a triggered message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the triggered message you want to open or close.
3. Click  next to the triggered message.
4. Do one of the following:
    - Select **Arm** – The status of the message changes to Armed.
    - Select **Open** – The status of the message changes to Composing.
    - Select **Close** – The status of the message changes to Closed.

Sending Messages

Sending messages to subscribers is the next to last step in process of deploying a campaign. Deploying Campaigns on page 3 provides additional information. After you have composed and validated a message, you can send it to the mailing lists that you specify when you create the message. Composing Messages on page 91 and About Validating Messages on page 87 provide additional information. You can also send a Bcc (blind carbon copy) of the message to a designated inbox for archival and compliance purposes.

A campaign requires DREAMmail resources, both for sending messages and for handling subscriptions, unsubscriptions, and bounce backs. Keep your Epsilon representative informed of your plans for campaigns, particularly when launching large-scale campaigns or campaigns that include attachments. This communication enables your Epsilon representative to adjust DREAMmail resources and to monitor the sending of messages.

Sending Messages Immediately

Once a message has been sent, you cannot recall it; therefore, ensure that you validate messages before you send them to subscribers.

To send a message immediately:

1. Go to **Messages** > **Message Manager**.
2. Select a campaign from the **Messages for Campaign** drop-down list.
3. Click  next to the message that you want to send.
4. Select **Send**.
5. Select **Now**.
6. Click **OK**.

    If there are no recency-frequency messages scheduled for deployment, the message is sent. If there are recency-frequency messages scheduled for deployment, the message may be blocked.

Specifying the Send Rate of Messages

You assign a send rate to a message to specify how rapidly DREAMmail sends the message.

To specify a send rate:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains message for which you want to specify a send rate.
3. Click next to the message.
4. Select **Send Rate**.
5. Select the number of messages that you want to send per hour.
6. Click **Save**.

Scheduling Messages to be Sent

Establish a schedule for sending messages to ensure that subscribers receive newsletters and offers at the same time each day or week. A deployment schedule also helps you to coordinate tasks before you send messages.

To schedule a message for deployment:

1. Go to **Messages** > **Message Manager**.
2. Specify a send rate for the message that you want to send.

   Specifying the Send Rate of Messages on page 86 provides additional information.

3. Select the campaign from the **Messages for Campaign** drop-down list that contains the message you want to schedule for sending.
4. Click next to the message.
5. Select **Send**.
6. Specify the date and time on which you want DREAMmail to send the message.

   The times that you specify are based the time zone of the server. Contact your Epsilon representative for information about the time zone in which your server is located.

7. Click **OK**.

   If there are no recency-frequency messages scheduled for deployment, the message is sent at the specified date and time.

   If there are recency-frequency messages scheduled for deployment, the message may be blocked.

Viewing the Estimated Number of Subscribers

To view the estimated number of subscribers that are scheduled to receive a message:

1. Go to **Messages** > **Message Manager**.
2. Select a campaign from the **Messages for Campaign** drop-down list that contains the message.
3. Click the **Delivery** tab.
4. Select the message for which to view the estimated number of subscribers scheduled to receive it.
5. Click the button and select **Count** to view the number of subscribers.
6. For messages with a status of "To be sent," a value of N/A appears in the Total, Pushed, and Delivered columns.
7. Click **N/A**.

   The total number of recipients dialog box is displayed.

8. Enter an email address.
9. Click **OK**.

   An email containing the count of subscribers is sent to the email address.

Approving and Proofing Messages

This section includes the following topics:

- About Validating Messages on page 87
- Sending Messages for Approval on page 88
- Sending Messages for Proofing on page 88
- Checking the Proofing Status of a Message on page 90

About Validating Messages

After you compose a message, validating it is the next step in the process of deploying a campaign. Validating messages in DREAMmail consists of proofing and approving processes that enables multiple people in your company to review and approve the message before you send it. Proofing Messages on page 133 and Approving Messages on page 136 provide additional information.

Sending a message to be proofed enables you to verify that the content in a message is correct and that there are no grammatical or technical problems with the message. For example, you can validate an HTML message checking its content and spelling and by ensuring that the message opens correctly in several different email applications.

When you are satisfied with a message, you can obtain formal approval from members of your company. This ensures that messages satisfy your email marketing goals and meet the objectives of your email campaign.

Sending Messages for Approval

Before you can send a message for approval, you must first create an approval list and configure the message for approval. Configuring Messages for Approval on page 136 provides additional information.

To send messages for approval:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message that you want to send for approval.
3. Click next to the message.
4. Select **Send for approval**.

Sending Messages for Proofing

You can send messages for proofing from the Message Manager, the Message Composer, or the Quicksend Message wizard. Proofing Messages on page 133, Using Message Manager on page 80, and Using the Quicksend Message Wizard on page 77 provide additional information. When you send a message for proofing, DREAMmail automatically adds a validation number to the beginning of your subject line. This number increases by one each time you proof the message. When you send the final version of your message to a standard mailing list, DREAMmail removes the validation number from the subject line.

The Proof Count column of Message Manager indicates how many times you have sent a message for proofing. This number increments each time you send the message for proofing.

To send messages for proofing:

1. Set up the email accounts and applications that you want to use to proof the message.

   Setting Up Email Accounts and Applications to Proof Messages on page 135 provide additional information.

2. Create a proofing list.
3. If you want to proof a message as you are composing the message in the Message Composer or the Message Wizard, click the **Proof** button.

4. If you want to proof messages that have already been created, select the checkbox next to each message in the Message Manager that you want to proof and click the **Proof** button.

   Note: If a message has no content, its checkbox cannot be selected.

   You can proof only messages that have a status of **To Be Sent** or **Composing**.

5. Do one of the following:
   - Click **Send the Proof Message to Proofing List(s)** and select the proofing lists to which you want to send the message.
   - Click **Send the Proof Message to Email Address(es)** and specify the email addresses (separated by commas) of the persons whom you want to proof the message.
6. Select the formats of the message.

   Note: If there is no content in the message for a specific format, you cannot select the format.
7. Select one of the following methods for dynamically personalizing the message during the proofing process:
   - **Personalize message using proof list profile data** – This method uses the profile data of the subscribers on the proofing lists.
   - **Personalize message using randomly sampled profiles from targeted list(s)** – This method uses profile data from actual subscribers whom the message targets. Enter the number of subscribers whose profile data is to be sampled in the **Sampled Profiles** text box up to a maximum of 50. (If you specify 10 profiles, and you select 2 formats for a single message, each person on the proofing list receives 20 messages to proof.)
8. Select the **Include Profile Field Table** checkbox to include profile data in the footer of your proof messages.
9. Click **Proof**.
10. Open the message in the email accounts that you created for proofing.
11. Use the proofing checklist to proof the message.
12. Make changes to the message, if necessary.

    If you or someone on the proofing list finds an error in the message, you can edit the message in Message Manager. Editing Messages on page 82 provides additional information.
13. Click **Save**.
14. Repeat Step 3 through Step 12 until you are satisfied with the message.

Note: Messages that you send for proofing are not displayed in reports.

Checking the Proofing Status of a Message

DREAMmail produces the Status/Error Report to display error messages. The report provides you with the following information:

- Error Code
- Type
- Name
- Format
- Detail Description

To check the proofing status of a message, do one of the following:

- In Message Manager, click  next to the message and click **Check Proofing Status**. Using Message Manager on page 80 provides additional information.
- In Message Composer, click the **Check Proof Status** button. Composing Messages on page 91 provides detailed information.

Composing Messages

Use Message Composer to compose or edit the content of your messages as well as specify their format and settings. If you are composing a new message you must first specify a campaign and type for the message in Message Manager.

Note: You can use the HTML Editor to create and edit HTML messages.

You can compose the following types of messages:

- Standard, standard recurring, and direct deployment messages – **Standard, Standard Recurring, and Direct Deployment Messages on page 91** provides additional information.
- Notification triggered and recurring triggered messages – **Triggered Messages on page 95** provides additional information.
- RTM messages – **Composing RTM Messages on page 101** provides additional information.
- Test messages – **Composing Test Messages on page 98** provides additional information.

Standard, Standard Recurring, and Direct Deployment Messages

Standard and standard recurring messages consist of a subject line and a body that contains the content of the message. Content can include text, images, URL links to ecommerce or content website, web forms, file attachments, and so on. The format of a message can be text, HTML, or HTML used in legacy AOL messages.

DREAMmail sends these types of messages to a mailing list when campaigns are deployed. You can compose test versions of these messages to send to a subset of the target audience. **Composing Test Messages on page 98** provides additional information.

A direct deployment message is similar to a standard message except that it is not sent to a mailing list, nor is it possible to target or filter the recipients of a direct deployment message. A direct deployment message is sent by DREAMmail as a part of an Ensemble campaign. (For information about using Ensemble with DREAMmail, see the Programming Guide.)

Composing Standard, Standard Recurring, and Direct Deployment Messages

To compose a standard, standard recurring, or direct deployment message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list in which you want to create the message.

3. Select **Standard Message**, **Standard Recurring Message**, or **Direct Deployment Message** from the **Create New** drop-down list as the type of message.

   About Messages on page 76 provides additional message type information.

   Note: If you select **Standard Message**, when you click and select Count. You will be able to view the size of a recipient list prior to a deployment.

4. Click **Add**.
5. Enter a name for the message in the **Name** field:
   - For standard messages, select a **Group** from the drop-down list, or click **New** to create a new group if you want to assign the message to a group.

     Creating Groups on page 94 provides detailed information on creating groups.

   - For standard messages, select either the **Everyone** that matches the criteria or the **No more than** radio button. If you select the latter, enter a number if you want to specify a message cap.
6. In the **'From' Address** drop-down list, select the address that you want to use as the From address.
   a. Select a From address only if you want to override the default From address specified for the campaign.
   b. If the From address that you want to use is not displayed in the drop-down list, you can create it.

   Enter a Display Name if you want to modify the way that the From address is displayed in the message.

7. For standard and standard recurring messages, click the **Mailing Lists** tab in the **Target** section if you want to include or exclude subscribers on available mailing lists for the message you are composing.
8. For standard and standard recurring messages, click the **Filter** tab of the **Target** section if you want to create a filter to use with the message. Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter. You can also specify a saved filter.

   About Filters on page 148, Using Filter Helper to Create Filters on page 150, and Creating Custom SQL Filters on page 150 provide additional information.

   Note: The filter that you specify is applied only to those subscribers who are included in the mailing list, message, or campaign that you select in the Mailing Lists and Prior Mailings tabs.

9. For standard and standard recurring messages, click the **Prior Mailings** tab of the **Target** section if you want to include or exclude subscribers who received previous messages.
10. For standard and standard recurring messages, click the **Recency/Frequency** tab in the **Target** section if you want to set the Recency and Frequency settings for the message you are composing.

11. Click **Insert** if you want to include any references to profile data, content segments, offer tables, subscribe address or unsubscribe address that you want to use for personalizing the subject or body of the message.

    Using Offer Tables in Messages on page 113 provides additional information on offer tables.

12. Click **Preview** to view how your message will actually be in Text / AOL / HTML formats.
13. For legacy AOL messages, you can either enter the HTML code and text in the AOL tab or you can enter text in the Text tab and then click **Text to AOL** to convert the text to legacy AOL format.
14. Click **Word Wrap** to ensure that your text wraps in the body of the message.
15. Click **Track URLs** to specify any URLs that you want to track.

    Updating Tracked URLs on page 115 provides detailed information.

16. Click **Attachments**, the Message File Attachment window displays. You can attach files to your message in this window.
17. Enter the text that you want displayed in the subject line of the message in the **Message Subject** field, including any references to dynamic personalization that you want to use.

    Inserting Dynamic Personalization References into Message Subject Lines on page 127 provides detailed information.

    Note: If you use dynamic personalization in the subject field of the message, do not enter text **after** a reference to a profile field, or content segment. Using Content Segments in Messages on page 104 provides additional information If you do so, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.)

18. Click the tab that corresponds to the format in which you want to compose the message and type the content of the message.

    For HTML-based messages, you can use the HTML Editor.

19. Verify the individual options for the message in the Settings section according to your campaign needs.
20. Click **Proof** if you want to send the message for proofing. Sending Messages for Proofing on page 88 provides additional information.
21. Click **Check Proof Status** if you want to test the message for errors. A Status/Error Report is displayed for the message. Checking the Proofing Status of a Message on page 90 provides detailed information.
22. Click **Save** to save the message.
23. Click **Update** to update the message.
24. Click **Cancel** if you want to cancel the message.

    After saving the message, you can check the message size of each message format.

Creating Filters to Target Messages

You can target a message by creating a new filter or applying a saved filter to the message. If you create a new filter in this way, you cannot save or reuse it. To save and reuse filters, you must create them in the Filter Manager. Using Filter Manager on page 149 provides additional information.

To create a filter to target messages:

1. Click **Messages** > **Message Manager**.
2. Compose a new message or access the message for which you want to specify a filter. Composing Messages on page 91 provides additional information.
3. Click the **Filter** tab of the **Target** section of the Message Composer.
4. Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter. Using Filter Helper to Create Filters on page 150 and Creating Custom SQL Filters on page 150 provides additional information.
5. Finish composing the message.

Creating Groups

To create groups:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign in which you want to create a group.

   About Campaigns on page 118 provides additional information.
3. Select **Standard Message**.

   Standard, Standard Recurring, and Direct Deployment Messages on page 91 provides additional information.
4. Click **Add**.

   The Message Composer displays.
5. Enter a name for the message in the **Name** field.
6. Click **New** next the **Group** field.
7. Enter a name for the group.
8. Click **OK**.
9. Compose the message.

   Composing Messages on page 91 provides additional information.

Checking the Proofing Status of a Message

DREAMmail produces the Status/Error Report to display error messages. The report provides you with the following information:

- Error Code
- Type
- Name
- Format
- Detail Description

To check the proofing status of a message, do one of the following:

- In Message Manager, click next to the message and click **Check Proofing Status**. Using Message Manager on page 80 provides additional information.
- In Message Composer, click the **Check Proof Status** button. Composing Messages on page 91 provides additional information.

Triggered Messages

A triggered message is a message that DREAMmail sends to one or more subscribers when a specified event occurs. For example, when a customer makes an online purchase, you can set up DREAMmail to send a confirmation message. There are two types of triggered messages: notification and recurring.

Triggered messages are similar to standard messages, except that triggered messages do not require you to specify a mailing list. You can compose triggered messages in the same formats as a standard message, apply the same settings, and include URLs and attachments in the message. You can also use dynamic personalization in triggered messages. Standard, Standard Recurring, and Direct Deployment Messages on page 91 and About Dynamically Personalizing Messages on page 124 provide additional information.

The status of triggered messages can be Armed, Closed, or Composing. If a triggered message is Armed, when a specified triggering event occurs, DREAMmail sends the message in response to one or more subscribers. When a triggered message has a Closed or Composing status, the message cannot be sent to subscribers.

DREAMmail can only archive triggered messages with a status of Closed or Armed.

- You cannot start, stop, pause, or abort triggered messages.
- You cannot use the automated proofing and approval processes with triggered messages. About Validating Messages on page 132 provides additional information.
- Reporting statistics for triggered messages cover the entire period for which the message is armed.

Composing Triggered Messages

Composing a triggered message is similar to composing a standard message. You specify a subject line, body (in one or more formats), and any personalization that you want to use. You can also enable message settings such as URL tracking, open-rate tracking, or autosensing. Triggered Messages on page 95, Standard, Standard Recurring, and Direct Deployment Messages on page 91, and About Dynamically Personalizing Messages on page 124 provide additional information.

To compose a triggered message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list in which you want to create the message.

   Note: You cannot create triggered messages in a campaign that has been configured to require approval.
3. Select the type of triggered message that you want to create from the **Create New** drop-down list.

   Note: If you are composing a triggered message for RTM or List Generator, you must specify Notification Triggered Message as the type. List Generator on page 32 provides additional information.
4. Click **Add**.
5. Enter a name for the message in the **Name** field.
6. If the message is a notification triggered message, select an item from the **Type** drop-down list. This feature enables Epsilon to report on your triggered messages on the basis of the type you specify. **Other** is the default value.
7. In the **From** address drop-down list, select the address that you want to use as the From address:

   a. Select a From address only if you want to override the default From address specified for the campaign.

   b. If the From address that you want to use is not displayed in the drop-down list, you can create it.

   c. Enter a Display Name if you want to modify the way that the From address is displayed in the message.
8. If you are creating an RTM message, select the **This is an RTM Message** checkbox and specify the RTM Settings for this message. Composing RTM Messages on page 101 provides additional information.

   Note: the **RTM Settings** section appears only if you selected **Notification Triggered Message** as the type of message.

9. Enter the text that you want displayed in the subject line of the message in the **Message Subject** field, including any references to dynamic personalization that you want to use. Inserting Dynamic Personalization References into Message Subject Lines on page 127 provides additional information.

   If you use dynamic personalization in the subject field of the message, do not enter text **after** a reference to a profile field, or content segment. If you do so, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.) Using Content Segments in Messages on page 104 provides additional information.

10. Click the tab that corresponds to the format in which you want to compose the message and type the content of the message:
    - For HTML-based messages, you must type the HTML code in addition to the content.
    - For legacy AOL messages, you can either enter the HTML code and text in the **AOL** tab or you can enter text in the Text tab and then click **Tools** > **Convert Text to Legacy AOL** to convert the text to legacy AOL format.

11. Click **Insert** if you want to include any references to profile fields, content segments, or offer tables that you want to use for personalizing the subject or body of this message. Using Offer Tables in Messages on page 113 provides additional information.

Note: The maximum allowable number of client profile fields for notification triggered messages is 512. If the number of profile fields for the client exceeds 512, the notification triggered message will time out and will not be deployed.

12. Click **Insert** > **Event Variables** if you want to personalize the message by including the event variables that you define in the XML request that triggers the message.

    For each event variable that you specify, click **Add to Subject or Add to Body** to specify where the event variable is to be inserted.

    Note: The event variables that you specify must match the naming used in the XML request that triggers this message. If you are creating a triggered message to be used by List Generator, there is a specific set of event variables that you must use. Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.

13. Click **Insert** > **Subscription address or Insert** > **Unsubscription address** if you want to insert a reference into the message to the Subscription or Unsubscription address that is specified for the campaign or message.

14. Track URLs in the message if you want to determine their click-through rate.

15. Verify the individual options for the message in the **Settings** section according to your campaign needs.

16. Click **Save**.

    After saving the message, you can check the message size of each message format.

17. In Message Manager, arm the triggered message.

Using Message Manager on page 80 and Arming, Opening, and Closing Triggered Messages on page 84 provide additional information.

Arming, Opening, and Closing Triggered Messages

When you arm, open, or close a triggered message, you set its status to Armed, Composing, and Closed, respectively. Triggered Messages on page 95 provides additional information. The status of a triggered message determines what actions you can perform on the message. For example, a triggered message must have an Armed status before it can be sent.

To arm, open, or close a triggered message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the triggered message you want to open or close.
3. Click  next to the triggered message.
4. Do one of the following:
   - Select **Arm** – The status of the message changes to **Armed**.
   - Select **Open** – The status of the message changes to **Composing**.
   - Select **Close** – The status of the message changes to **Closed**.

Composing Test Messages

You can test the reaction of your target audience to a message by sending a test version of the message to a subset of the target audience. You can subsequently analyze the response to the test message by using DREAMmail reports. You can also test your messages by creating a test list and sending messages to its subscribers.

Composing a test message is similar to composing a standard message; however, you usually apply a mailing cap to a test message, and make the message part of a mailing group. Creating Groups on page 94 provides additional information.

To compose a test message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list in which you want to create the message.
3. Select **Standard Message**.
4. Click **Add**.
5. Enter a name for the message in the **Name** field.
6. Create a new group for the test messages or assign the test message to an existing group by selecting a group from the drop-down list in the Message Composer.

Note: You assign test messages to groups to prevent subscribers from receiving multiple versions of the same test message. A subscriber can receive only one version of a message when the message is assigned to a group.

7. Select the **No more than** radio button and enter a number to specify a message cap.
8. In the **From** address drop-down list, select the address that you want to use as the From address:
   a. Select a From address only if you want to override the default From address specified for the campaign.
   b. If the From address that you want to use is not displayed in the drop-down list, you can create one.
   c. Enter a Display Name if you want to modify the way that the From address is displayed in the message.
9. Click the **Mailing Lists** tab in the **Target** section if you want to include or exclude subscribers on available mailing lists for the test message you are composing.
10. Click the **Filter** tab of the **Target** section if you want to create a filter to use with the message. Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter. You can also specify a saved filter.

    About Filters on page 148, Using Filter Helper to Create Filters on page 150, and Creating Custom SQL Filters on page 150 provide additional information.

    Note: The filter that you specify is applied only to those subscribers who are included in the mailing list, message, or campaign that you select in the Mailing Lists and Prior Mailings tabs.
11. Click the **Prior Mailings** tab of the **Target** section if you want to include or exclude subscribers who received previous messages.
12. Click the **Recency/Frequency** tab in the **Target** section if you want to set the Recency and Frequency settings for the message you are composing.
13. Enter the text that you want displayed in the subject line of the message in the **Message Subject** field, including any references to dynamic personalization that you want to use.

    Inserting Dynamic Personalization References into Message Subject Lines on page 127 provides additional information.

    If you use dynamic personalization in the subject field of the message, do not enter text after a reference to a profile field, or content segment. Using Content Segments in Messages on page 104 provides additional information. If you do so, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.)
14. Click the tab that corresponds to the format in which you want to compose the message and type the content of the message:
    - For HTML-based messages, you must enter the HTML code in addition to the content.

- For legacy AOL messages, you can either enter the HTML code and text in the **AOL** tab or you can enter text in the **Text** tab and then click **Tools** > **Convert Text to Legacy AOL** to convert the text to legacy AOL format.

15. Click **Insert** if you want to include any references to profile fields, content segments, or offer tables that you want to use for personalizing the subject or body of this message.

    Using Offer Tables in Messages on page 113 provides additional information.

16. Click **Insert** > **Subscription address or Insert** > **Unsubscription address** to insert into the message a reference to the Subscription or Unsubscription address that is specified for the campaign or message.
17. Click **Option** > **Track URLs** to specify any URLs that you want to track.
18. Verify the individual options for the message in the **Settings** section according to your campaign needs.
19. Click **Save** to save the message.

    After saving the message, you can check the message size of each message **format**.

20. Repeat the steps above for each version of the test message that you want to create, modifying the content accordingly for each version.
21. Send the test messages to the subset of subscribers.

    Sending Messages Immediately on page 141 provides additional information.

22. Use DREAMmail reports to monitor the results of each test message.

    Available Reports in DREAMmail on page 11 provides detailed DREAMmail report information.

23. Determine which test message generated the best response.
24. Remove the mailing cap and duplicate the message to create a final version of the message that generated the best results.

    Note: The final message must belong to the same mailing group as the test messages in order to avoid sending the final message to subscribers who received any of the test messages.

25. Send the final message.

Composing RTM Messages

The process of composing an RTM message in DREAMmail is very similar to composing a triggered notification message. **Triggered Messages on page 95** provides detailed information. The main difference is that when you compose the message, you select several RTM-related checkboxes to indicate that the message is used for RTM. You can create RTM messages only on sites that are configured to use RTM.

Note: As an alternative to using the DREAMmail application to compose an RTM message, you can use DREAMmailConnect to create the RTM message. For information, see the Real-Time Messaging Guide.

To compose an RTM message:

1. Click **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list in which you want to create the triggered message.

   Note: You cannot create triggered messages in a campaign that have been configured to require approval.
3. Select **Notification Triggered Message** from the **Create New** drop-down list.
4. Click **Add**.
5. Enter a name for the message in the **Name** field.
6. If you want to assign a type to the message, select an item from the **Type** drop-down list. This feature enables Epsilon to report on your triggered messages on the basis of the type you specify. **Other** is the default value.
7. In the **From** address drop-down list, select the address that you want to use as the From address:
   - Select a **From address** only if you want to override the default From address specified for the campaign.
   - If the From address that you want to use is not displayed in the drop-down list, you can create it. **Creating DREAMmail Email Addresses on page 71** provides detailed information.
   - Enter a **Display Name** if you want to modify the way that the From address is displayed in the message.
8. Select the **This is an RTM Message** checkbox in the **RTM Settings** section.
9. Select the **This RTM Message conforms with FTC transactional email specifications** checkbox in the **RTM Settings** section.

   When you select this checkbox, it signifies that you agree that the contents of your message is not in violation of the Federal Trade Commission's rules for transactional messages. For information about these rules, contact your Epsilon account manager.

   Note: If you do not select this checkbox, the RTM message cannot be sent.

10. Select the **This RTM Message will IGNORE the Site Unsubscribe Flag** checkbox if you want the RTM message to be sent without checking the DREAMmail database to see if the recipient has unsubscribed (optional).
11. Enter the text that you want displayed in the subject line of the message in the **Message Subject** field, including any references to dynamic personalization that you want to use.

    Inserting Dynamic Personalization References into Message Subject Lines on page 127 provides detailed information.

    If you use dynamic personalization in the subject field of the message, do not enter text **after** a reference to a profile field, or content segment. Using Content Segments in Messages on page 104 provides detailed information. If you do so, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.)
12. Click the tab that corresponds to the format in which you want to compose the message and type the content of the message:
    - For HTML-based messages, you must type the HTML code in addition to the content.
    - For legacy AOL messages, you can either enter the HTML code and text in the AOL tab or you can enter text in the Text tab and then click **Tools** > **Convert Text to Legacy AOL** to convert the text to legacy AOL format.
13. Click **Insert** if you want to include any references to profile fields, content segments, or offer tables that you want to use for personalizing the subject or body of this message.

    Using Offer Tables in Messages on page 113 provides additional information.
14. Click **Insert** > **Event Variables** if you want to personalize the message by including the event variables that you define in the XML request that triggers the message.

    For each event variable that you specify, click **Add to Subject or Add to Body** to specify where the event variable is to be inserted.

    Note: The event variables that you specify must match the naming used in the XML request that triggers this message. Event variables must not contain other event variables or tags for other event variables. Messages with this nesting syntax will result in errors.
15. Click **Insert** > **Subscription address or Insert** > **Unsubscription address** if you want to insert a reference into the message to the Subscription or Unsubscription address that is specified for the campaign or message.
16. If you have included profile fields in the message, click **Option** > **Default Personalization** to insert any default personalization that you want to display in lieu of the profile field in case the DREAMmail database is not available to personalize the profile field.
17. Track URLs in the message if you want to determine their click-through rate.

18. Verify the individual options for the message in the **Settings** section according to your campaign needs.
19. Click **Save**.
20. In Message Manager, arm the RTM message.

    Using Message Manager on page 80 and **Arming, Opening, and Closing Triggered Messages on page 84** provide additional information.

Note: To send the RTM message, you must issue a trigger request from the RTM API. For more information, see the Real-Time Messaging Guide.

Using Content Segments in Messages

A content segment is a unit of information that you can include in a message. Content segments can contain any type of information that you normally include in a message such as URLs, profile fields, references to other content segments, and in some cases, programming logic. Using content segments is a more sophisticated way of personalizing a message than inserting individual profile fields. **About Dynamically Personalizing Messages on page 124** provides additional information.

A content segment can be either static or dynamic. Static content segments contain a single block of editorial content that is included in all messages that reference the content segment. **Creating Static Content Segments on page 107** provides detailed information. Dynamic content segments consist of conditional and script content segments that can contain multiple blocks of editorial information, condition statements, or scripting. **Creating Conditional Content Segments on page 106** and **Creating Script Content Segments on page 105** provide additional information. Scripting determines the block that is to be inserted into messages that reference the content segment.

You create and submit content segments using either DREAMmail or DREAMmailConnect. DREAMmail automates the entire process, matching specific content with each subscriber in your list, based on their profiles. When the message is sent, DREAMmail inserts the appropriate content into the message to create personalized email messages.

The content segments that you create are stored in the DREAMmail database. You can create a content segment in the same formats in which you can create messages.

Using Content Manager

Use the Content Manager to create and manage content segments used for personalizing messages. **Using Content Segments in Messages on page 104** provides additional information.

To view dynamic content segments, click  and select **Preview**. A new browser window displays a preview table showing all versions of the dynamic content.

There are four kinds of content segments that you can create:

- Static content segments
- Multi-Format Static Content Segment
- Conditional content segments
- Script content segments

Creating Script Content Segments

To create a script content segment in DREAMmail:

1. Decide which profile fields that you want to use in the content segment.
2. Create an outline of what you want the script to do using a series of logical statements and the profile fields that you selected.
3. Rewrite the outline in the dynamic personalization scripting language. (For information, see the Advanced Messaging Guide.)
4. Click **Messages** > **Content Manager**.
5. Select **Script Content Segment** in the **Create** New drop-down list.
6. Click **Add**.
7. In the **Segment Name** field, type a name for the content segment.
8. Select a character set from the **Language** drop-down list.

   The character set helps DREAMmail to interpret message content. The default value is English (US-ASCII). If your content contains characters outside of the US-ASCII character set (extended ASCII or double-byte), you must specify the character set that you use. For more information, see the Programming Guide.
9. Enter the script into the **Content** section.

   The script must be in a CDATA section. Make sure that you:

   a. Include all tags and the URLs of any websites that you cite; URLs must begin with http:// or https://

   b. Include all necessary tags and position them correctly
10. Track URLs in the content segment if you want to determine their click-through rate.
11. Click **Save** in the Content Manager to save the content segment.

Creating Multi-Format Static Content Segments

To create a multi-format static content segment:

1. Click **Messages** > **Content Manager**.
2. Select **Multi-Format Static Content Segment** in the **Create New** drop-down list.
3. Click **Add**.
4. In the **Segment Name** field, type a name for the content segment.

5. Select a character set from the **Language** drop-down list.

   The character set helps DREAMmail to interpret message content. The default value is English (US-ASCII). If your content contains characters outside of the US-ASCII character set (extended ASCII or double-byte), you must specify the character set that you use. For more information, see the Programming Guide.

6. In the **Content** section, in the **Include** field, enter the content that you want to use in the content segment of your choice, Text, AOL or HTML:
   - You can type content, or cut and paste content from a different source.
   - You can enter content into the **Text** section and click **Convert to AOL**. The content gets converted to the legacy AOL format and is displayed in the **AOL** tab. Click **Word Wrap** to wrap text you have entered in the Text content tab.
   - You can include URLs.
   - You can create content segments in Text, AOL or HTML formats. After you have entered content, you can preview what the final output looks like by clicking **Preview**. A preview window is displayed with three tabs (Text, AOL and HTML). Click the tab in which you wish to view the final format.

   The guidelines that apply to message formats also apply to content segments. For information, see Message Formats.

7. Track URLs in the content segment if you want to determine their click-through rate.
8. Click **Save**.

Creating Conditional Content Segments

To create a conditional content segment:

1. Click **Messages** > **Content** Manager.
2. Select **Conditional Content Segment** in the **Create New** drop-down list.
3. Click **Add**.
4. In the **Segment Name** field, type a name for the content segment.
5. Select a character set from the **Language** drop-down list.

   The character set helps DREAMmail to interpret message content. The default value is English (US-ASCII). If your content contains characters outside of the US-ASCII character set (extended ASCII or double-byte), you must specify the character set that you use. For more information, see the Programming Guide.

6. Use the drop-down lists in the **Content** section to create a conditional statement.

   For example, **IF City contains New York**:

   a. Use the first drop-down list to select the profile field that you want to use as a condition.

   b. Use the second drop-down list to select an operator to compare the profile field against the text that you type in the next step.

   c. Use the third field to type the text that you want to use to complete the condition statement.

7. Click the tab in the **Include** text box that corresponds to the format in which you want to compose content that you want DREAMmail to send to those subscribers who meet the condition that you specified in the previous step:

   - You can type content, or cut and paste content from a different source.
   - You can include URLs.
   - If you want to create a content segment in AOL or HTML format, you must include the HTML tags as well as the text.
   - The guidelines that apply to message formats also apply to content segments.

8. Click **New Condition** and repeat the previous two steps to create another condition.

   You can create more than one condition statement to include subscribers who meet additional criteria or to include subscribers who do not meet any criteria specified in the condition statement.

   Note: The profile field that you select should be the same for all conditions in a specific content segment.

9. Click the tab in the **Default Content** section that corresponds to the format in which you want to compose content that you want DREAMmail to send to subscribers who do not meet any of the criteria specified in the condition statements.

10. Track URLs in the content segment if you want to determine their click-through rate.

11. Click **Save**.

Creating Static Content Segments

To create a static content segment:

1. Click **Messages** > **Content Manager**.
2. Select **Static Content Segment** in the **Create** New drop-down list.
3. Click **Add**.
4. In the **Segment Name** field, type a name for the content segment.

5. Select a character set from the **Language** drop-down list.

   The character set helps DREAMmail to interpret message content. The default value is English (US-ASCII). If your content contains characters outside of the US-ASCII character set (extended ASCII or double-byte), you must specify the character set that you use. For more information, see the Programming Guide.

6. In the **Include** field, enter the content that you want to use in the content segment:
   - You can type content, or cut and paste content from a different source.
   - You can include URLs.
   - If you want to create a content segment in AOL or HTML format, you must include the HTML tags as well as the text.

   The guidelines that apply to message formats also apply to content segments. For information, see Message Formats.

7. Track URLs in the content segment if you want to determine their click-through rate.
8. Click **Save**.

Using Templates in Messages

A template is a DREAMmail feature that you use to enter and store text, HTML, page layouts, and settings to be used as the basis for one or more messages. Using templates can be helpful if your messages have similar formatting or content. By using templates, you reduce the time it takes to create and send messages.

Using Template Manager

Use Template Manager to create and manage templates for your messages. You can use Template Manager to perform the following procedures:

- Create templates – Creating Templates on page 109 provides detailed information.
- Edit templates – Editing Templates on page 110 provides detailed information.
- Implement URL tracking in templates – Inserting Template Variables in Templates on page 111 provides detailed information.
- Create a message – Using Templates to Create Messages on page 111 provides detailed information.

Creating Templates

To create templates:

1. Go to **Messages** > **Template** Manager.
2. Click **Add**.
3. Enter a name for the template.
4. Enter the text that you want to be displayed in the subject line of the template in the **Message Subject** field, including any references to dynamic personalization that you want to use.

   Inserting Dynamic Personalization References into Message Subject Lines on page 127 provides detailed information.
5. Click the tab that corresponds to the format in which you want to compose the template message and type the text for the message.

   Note: Each message format has its own requirements and delivery rules.
6. Insert any references to dynamic personalization that you want to use in this template (optional).

   Inserting Dynamic Personalization References into Messages on page 126 provides additional information.
7. Insert any template variables that you want to use in this template (optional).

   Inserting Template Variables in Templates on page 111 provides detailed information.

8. Click **Insert** > **Subscription address or Insert** > **Unsubscription** address to insert into the template a reference to the Subscription or Unsubscription address (optional).
9. Specify the URLs that you want to track.

   Implementing URL Tracking in Templates on page 110 provides detailed information.

   DREAMmail enables you to automatically generate a label for each selected URL.
10. Select the options in the Settings section.
11. Click **Save**.

Editing Templates

When you edit a template, the changes are applied only to the messages that you create after you make the changes.

To edit templates:

1. Go to **Messages** > **Template Manager**.
2. Click next to the name of the campaign that you want to edit.
3. Select **Edit**.
4. Edit the information in the message.
5. Click **Save**.

Implementing URL Tracking in Templates

To implement URL tracking in templates:

1. Go to **Messages** > **Template Manager**.
2. Create a new template or access an existing template.

   Creating Templates on page 109 and Editing Templates on page 110 provide detailed information.
3. Enter the URLs that you want to track in the body of the template.
4. Click **Option** > **Track URLs** in the **Compose** section of the Template Composer.
5. Select the URLs that you want to track or select the **All** checkbox to select all of the URLs.
6. Click the **Generate** button if you want to automatically create a label for each selected URL.
7. Click **Save**.

Note: You can edit URL labels that have been generated by DREAMmail.

Inserting Template Variables in Templates

To insert template variables in templates:

1. Create a new template or access an existing template.

   Creating Templates on page 109 and Editing Templates on page 110 provide detailed information

2. Click **Insert** in the **Compose** section.
3. Click **Template Variables**.
4. Enter the text that you want to use as the variable.
5. Click **Add to body** or **Add to subject**.
6. Click **Save**.

Using Templates to Create Messages

In addition to creating templates, you can use Template Manager to create messages.

To create a message from Template Manager:

1. Go to **Messages** > **Template Manager**.
2. Click next to the name of the template that you want to use for creating a message.
3. Click **Create from Template**.
4. Select a campaign and type for the message.

   About Campaigns on page 118 and About Messages on page 76 provide additional information.

5. Click **Next**.
6. Specify content for each template variable if the selected template includes variables.
7. Compose the message.

   Composing Messages on page 91 provides additional information.

Creating Business Rules for Messages

This section provides details for creating business rules for messages.

Using Business Rule Manager

Use Business Rule Manager to create and manage the business rules that you want to use in conjunction with offer tables. Using Offer Tables in Messages on page 113 provides detailed information.

Creating Business Rules

To create business rules:

1. Go to **Messages** > **Business Rule Manager**.
2. Click **Add**.
3. In the **Name** field, type a name for the business rule.
4. In the **Description** field, type a description of the rule.
5. Select the types of data that you want to use as conditional expressions in the business rule from the **Profile Field** and **Profile Date Field** drop-down lists.
6. Click the **Add** button to the right of each drop-down list from which you selected data.
7. Use the drop-down lists and buttons in the **Expression Builder** section to rearrange and refine the syntax of the rule.

   As you create the rule, its syntax is displayed in the **Expression** section.

8. Click **Save**.

Using Offer Tables in Messages

An offer table consists of one-to-one associations between business rules and content segments. Like profile fields and content segments, you insert the offer table into a message to personalize its content. Using Content Segments in Messages on page 104 and About Dynamically Personalizing Messages on page 124 provide additional information.

If a business rule in the offer table matches a subscriber's profile data, DREAMmail includes the rule's associated content segment in the message. If there is no match, DREAMmail does not include a content segment. (Alternatively, if no match occurs, you have the option of inserting a default content segment in the message.)

Using Offer Table Manager

Use Offer Table Manager to create and manage the offer tables that you want to use for personalizing messages. Using Offer Tables in Messages on page 113 provides additional information.

Creating Offer Tables

To create offer tables:

1. Go to **Messages** > **Offer Table Manager**.
2. Click **Add**.
3. In the **Name** field, type a name for the offer table.

   Using Offer Tables in Messages on page 113 provides additional information.
4. In the **Description** field, type a description of the offer table.
5. To view an offer table, click **Preview**.

   A new browser window displays a preview table. The Business Rule and its expressions are displayed in the Offer Name row of the Preview Table.
6. In the **Matching** section, match a business rule with a content segment:
   - In the **If Business Rule is** drop-down list, select a business rule.
   - In the **Then** drop-down list, select a content segment.

   Using Content Segments in Messages on page 104 provides additional information.
7. To create additional matches between a business rule and content segment, for each new match click **Add Match** and repeat the previous step.
8. Specify a default content segment in the **Else Default Offer** drop-down list for the offer table (optional).

9. Specify the type of the offer table:
   - **Mutually Exclusive Offer** – The message will contain only the content segment that corresponds to the first business rule that applies to the subscriber.
   - **Inclusive Offer** – The message will contain the content segments that correspond to all of the business rules that apply to the subscriber. (The default content segment is not included in the message if any other content segment in the offer table has been included.)
10. Click **Save**.

Updating Tracked URLs

You can modify a tracked URL in a composing, armed, or sent message. Any tracked URLs within the message body or contained in content segments or offer tables referenced in the message can be updated. Tracked URLs can be modified for any message type, including standard, recurring, and triggered messages, however at least one message must be deployed before the URLs for a triggered message can be changed. A single URL can be updated as many as 5 times per month for each message.

Note: This functionality is available for messages created after the **DREAMmail 4.9.6 release**.

To update URLs in a message:

1. Go to **Messages** > **Message Manager**.
2. Click next to the name of the message you want to edit.
3. Click **Update URLs**.

   The Update URLs window displays any tracked URLs, along with the number of times the URL has been updated, whether the URL is located in your message body, an offer table, or nested within a content segment in your message, as well as the message format (AOL, Text, or HTML) containing the URL.

4. Modify the **URL**.
5. Create or modify its associated **URL label**.

   Note: If a URL label already exists, you must modify the URL label for any updated URL. This ensures both URLs can be tracked separately in reports.

6. Click **Test** to verify the updated URL is accessing the new destination.
7. Click **Save**.

   Note: Once updated, the new URL displays in the properties for the message. The URL does not change within the message, content segment or offer table itself.

MANAGING CAMPAIGNS

This unit of the guide includes the following sections:

- **About Campaigns**
- **Deploying Campaigns**
- **Using Campaign Manager**

About Campaigns

DREAMmail campaigns consist of messages that you send as part of a marketing effort to promote a product, company, service, newsletter, or website. **About Messages on page 76** provides additional information on messages. You can also create campaigns that consist of messages such as confirmations and notifications that are automatically sent in response to transactions on the web.

You use campaigns to organize your messages into logical groupings. When you create a campaign, the properties that you apply to the campaign are automatically applied to all the messages associated with that campaign.

Before deploying a campaign, decide how you want to group messages in each campaign. **Deploying Campaigns on page 3** provides additional information. Planning ahead in this way helps you to logically structure your campaigns and also enables you to make best use of DREAMmail reports in determining the effectiveness of messages in a specific campaign. **Available Reports in DREAMmail on page 11** provides additional information on available reports.

Deploying Campaigns

Deploying a campaign is a multi-step process that requires you to use several DREAMmail modules to set up, execute, and analyze the campaign. The steps below show how to carry out this process.

Note: Before you can create and deploy a campaign, a DREAMmail administrator has to create a client and site in which you create the campaign. Clients on page 19 and Sites on page 25 provide additional information.

To deploy campaigns:

1. Log in to DREAMmail.

   Logging in to DREAMmail on page 6 provides additional information.

2. Create a mailing list.

   Creating Mailing Lists on page 59 provides additional information.

   Depending on their business needs, many DREAMmail users perform this step only once. You can create one mailing list and use that same list for each email campaign.

   Note: If you are creating a campaign for RTM messages or direct deployment messages, you do not have to create a mailing list.

3. Create DREAMmail email addresses to manage the email campaign.

   Creating DREAMmail Email Addresses on page 71 provides additional information.

   Depending on their business needs, many DREAMmail users perform this step only once. Some users create DREAMmail email addresses and use those same addresses for each email campaign.

4. Create a campaign.

   Creating Campaigns on page 120 provides additional information.

5. Compose messages.

   Composing Messages on page 91 provides additional information.

6. Validate the messages.

   About Validating Messages on page 132 provides additional information.

7. Send the messages.

   Sending Messages on page 85 provides additional information.

8. Report on the results.

   Available Reports in DREAMmail on page 11 provides additional information.

Using Campaign Manager

Use the Campaign Manager to create and manage the campaigns that you want to deploy as part of your marketing effort. Creating a campaign is part of the multi-step process of deploying a campaign. Before you can create a campaign, you must first set up a mailing list and DREAMmail addresses on the site in which you are creating the campaign.

Any properties that you assign to campaigns are automatically assigned to all of the messages in that campaign. For example, you can specify a default From address that is used for all of the messages that you create in a campaign.

Use Campaign Manager to perform the following procedures:

- Create campaigns – Creating Campaigns on page 120 provides additional information.
- Edit campaigns – Editing Campaigns on page 121 provides additional information.
- Delete campaigns – Deleting Campaigns on page 122 provides additional information.
- Deactivate campaigns – Deactivating Campaigns on page 122 provides additional information.
- Reactivate campaigns – Reactivating Campaigns on page 122 provides additional information.

Creating Campaigns

When you create a campaign, the properties that you apply to the campaign are automatically applied to all of the messages associated with the campaign.

To add a new campaign:

1. Go to **Campaigns** > **Campaign Manager** and click **Add**.
2. Enter a name for the campaign in the **Campaign Name** field.
3. Enter the date on which you want the campaign to end.
4. If you want to send all messages in this campaign to a proofing list, select the list from the **Proof List** drop-down list (optional).
5. Select the **Messages in this campaign must be sent for approval** checkbox (optional).

   If you select this checkbox, DREAMmail sends the messages in this campaign to the approval list that you specify in the next step. Approving Messages on page 136 provides additional information. If you want to send messages for approval, enable this option now. You cannot enable this option after you create and save the campaign.
6. If you enabled the checkbox in the previous step, select the approval mailing list to which you want to send all messages in this campaign or enter an email address into the **Publisher's: email address** field of the person you want to approve the message.

7. Select one of the following default addresses:
   - From address
   - Reply To address
   - If you do not select a Reply To address, replies are automatically sent to the From address. Epsilon recommends that you do not specify a *Reply To* address.
   - Subscription address
   - Unsubscription address

   The addresses that you specify are used as the default addresses in all of the messages associated with this campaign.

   Note: Select the Track unsubscribes from replies or Track unsubscribes from unsubscription address to track unsubscribes from this message in your Delivery and Response Report. For RTM messages the Track unsubscribes from replies option should NOT be checked.
8. Enter the text that you want to be displayed in the message footer (for text messages only).
9. If you are using the Profile Page feature, type the subject line and body of your profile update notification (optional).

   The Profile Page is a legacy DREAMmail feature.
10. Click **Save**.

Editing Campaigns

To edit a campaign:

1. Click **Campaigns** > **Campaign Manager**.
2. Click  next to the name of the campaign that you want to edit.
3. Select **Edit**.
4. Edit the properties that you want to change for the selected campaign.

   Note: You cannot change the name or approval status of the campaign.
5. Click **Save**.

Deleting Campaigns

When you delete a campaign, all reports associated with the campaign are also deleted. You can delete only those campaigns that do not contain any messages.

To delete campaigns:

1. Go to **Campaigns** > **Campaign Manager**.
2. Click next to the campaign that you want to delete.
3. Select **Delete**.
4. Click **OK**.

Reactivating Campaigns

When you reactivate a campaign, the campaign will be listed under the Active tab of the Campaign Manager. You can deactivate any campaign at any time.

To reactivate campaigns:

1. Go to **Campaigns** > **Campaign Manager**.
2. Select the checkbox next to the campaign that you want to deactivate.
3. Select **Re-activate**.
4. Click **OK**.

Deactivating Campaigns

When you deactivate a campaign, the campaign will be listed under the Inactive tab of the Campaign Manager. You can access any deactivated campaigns, as well as reactivate them.

To deactivate campaigns:

1. Go to **Campaigns** > **Campaign Manager**.
2. Select the checkbox next to the campaign that you want to deactivate.
3. Select **Inactivate**.
4. Click **OK**.

PERSONALIZING MESSAGES

This unit of the guide includes the following sections:

- **About Dynamically Personalizing Messages**
- **Examples of How to Personalize Messages**
- **Inserting Dynamic Personalization References into Messages**
- **Inserting Dynamic Personalization References into Message Subject Lines**
- **Using Content Manager**
- **About Personalizing Messages with Flash Content**

About Dynamically Personalizing Messages

Messages can be static or dynamic. A static message contains the same content for every subscriber; that is, every subscriber receives exactly the same message. A dynamic message is a message that contains content that changes partially or completely based on information about each subscriber. Personalized messages usually generate a higher response than static messages. When subscribers receive messages that are relevant to their interests, they are less likely to delete these messages, or unsubscribe from a mailing list.

Dynamic personalization is a method of personalizing email messages based on subscriber information that is stored in the DREAMmail database. You create personalized messages by inserting references to subscriber information that is stored in the DREAMmail database. You can insert these references in a message and subject line when you compose the message in Message Manager. There are three types of references: profile fields, content segments, and offer tables. **Using Content Segments in Messages on page 104** and **Using Offer Tables in Messages on page 113** provide additional information.

Before sending a message, DREAMmail automatically replaces any references in the message and message subject line with the corresponding data or content from the DREAMmail database.

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Before sending a message, DREAMmail automatically replaces any references in the message and message subject line with the corresponding data or content from the DREAMmail database.

Examples of How to Personalize Messages

The following examples show how you can use dynamic personalization to target specific customers:

- **Personalize offers based on geographic location** – Use city, state, or country information to:
  - Market product lines that vary by region
  - Direct a customer to a specific outlet
  - Test offers on a regional basis
- **Personalize offers based on demographic information** – Use demographic information to:
  - Market product lines that vary by age or gender
  - Send specialized offers based on special occasions, such as anniversaries or birthdays
  - send offers based on family status
- **Combine multiple messages in the same message** – Use dynamic personalization to assemble multiple content clips within the same message, based on subscriber preferences. This enables you to:
  - Build a newsletter unique to each subscriber’s preferences
  - Combine several relevant offers in a single message
  - Help reduce list fatigue and lower the cost of sending messages
- **Add personalized or relevant URLs to your messages** – In addition to personalized content, include URLs to specific pages on your website in your message. This enables you to:
  - Direct customers to the purchase point on your website
  - Direct customers to a personalized web page

Inserting Dynamic Personalization References into Messages

To personalize a message (or message template), you insert a reference to either a profile field, content segment, or offer table. When you send the message, DREAMmail replaces the reference with the corresponding data.

For information about inserting references into messages using DREAMmailConnect, see the Programming Guide.

To insert a dynamic personalization reference into a message:

1. Access the Message Manager if you are personalizing a message; access the Template Manager if you are personalizing a message template.

   Using Message Manager on page 80 and Using Template Manager on page 109 provide additional information.

2. Compose a new message/template or access an existing message/template that you want to personalize.

   Composing Messages on page 91, Creating Templates on page 109, Editing Messages on page 82, and Editing Templates on page 110 provide additional information.

3. Click the location in the body of the message where you want to insert the reference or select the text that you want to replace with the reference.
4. Click **Insert** in the **Compose** section of the Message Composer.
5. Click **Profile data**, **Content segment**, or **Offer Table**.
6. Select the profile data, content segment, or offer table that you want to insert.
7. Click **Add to body**.

   DREAMmail inserts a reference to the item; for example, **#CONTENT:offer_fall05#**.

8. Verify that the location of the reference in the message is correct.
9. Click **Save**.

Inserting Dynamic Personalization References into Message Subject Lines

To personalize the subject line of a message (or message template), you insert a reference to a profile field or content segment. When you send the message, DREAMmail replaces the reference with the corresponding data. Using Content Segments in Messages on page 104 and Using Templates in Messages on page 109 provide additional information.

For information about inserting references into the subject of a message using DREAMmailConnect, see the Programming Guide.

To insert a dynamic personalization reference into a message subject line:

1. Access the Message Manager if you are personalizing a message; access the Template Manager if you are personalizing a message template.

   Using Message Manager on page 80 and Using Template Manager on page 109 provide additional information.

2. Compose a new message/template or access an existing message/template that you want to personalize.

   Composing Messages on page 91, Creating Templates on page 109, Editing Messages on page 82, and Editing Templates on page 110 provide additional information.

3. Click the location in the **Message Subject** text box where you want to insert the reference or select the text that you want to replace with the reference.
4. Click **Insert** in the Compose section of the Message Composer.
5. Click **Profile data** or **Content segment**.

   Note: You cannot include an offer table in the subject line of a message.

6. Select the profile data or content segment that you want to insert.
7. Click **Add to subject**.

   DREAMmail inserts a reference to the item; for example, **#City#**.

8. Verify that the location of the reference in the subject line is correct.
9. Click **Save**.

Using Content Manager

Use Content Manager to create and manage content segments you can use for personalizing messages.

To view dynamic content segments, click and select Preview. A new browser window displays a preview table showing all versions of the dynamic content.

There are four kinds of content segments that you can create:

- Static content segments – **Creating Static Content Segments on page 107** provides additional information.
- Multi-Format Static Content Segment – **Creating Multi-Format Static Content Segments on page 105** provides additional information.
- Conditional content segments – **Creating Conditional Content Segments on page 106** provides additional information.
- Script content segments – **Creating Script Content Segments on page 105** provides additional information.

About Personalizing Messages with Flash Content

You can personalize messages that contain Flash and other rich media, but not the actual Flash or rich media content. You can, however, design a Flash movie that takes advantage of the personalization within the HTML message.

Although over 95% of Internet users have the Flash player installed on their computer, many email applications either do not support the use of this player, or, based on security settings, disable its use. Therefore, your Flash-enabled messages must account for the fact that not all users can experience the Flash content, and must display instead a meaningful static HTML version.

To insert Flash in messages, you create an HTML message that detects whether a subscriber's email application can display Flash, and if so, the Flash part of the message is inserted. If the email application cannot display Flash, only the standard part of the HTML file is displayed.

Note: The Advanced Messaging Guide provides additional information about detecting Flash support and inserting Flash into message.

VALIDATING MESSAGES

This unit of the guide includes the following sections:

About Validating Messages

After you compose a message, validating it is the next step in process of deploying a campaign. **Deploying Campaigns on page 3** provides additional information. Validating messages in DREAMmail consists of proofing and approving processes that enables multiple people in your company to review and approve the message before you send it. **Proofing Messages on page 133** and **Approving Messages on page 136** provide additional information.

Sending a message to be proofed enables you to verify that the content in a message is correct and that there are no grammatical or technical problems with the message. **Sending Messages for Proofing on page 88** provides additional information. For example, you can validate an HTML message checking its content and spelling and by ensuring that the message opens correctly in several different email applications.

When you are satisfied with a message, you can obtain formal approval from members of your company. **Sending Messages for Approval on page 88** provides detailed information. This ensures that messages satisfy your email marketing goals and meet the objectives of your email campaign.

Proofing Messages

The proofing process enables you to check for technical, grammatical, spelling, or content errors in your message. For example, technical errors can occur in messages that are composed in multiple formats or in messages that contain hypertext references to images on a website. You can submit multiple messages in multiple formats for simultaneous proofing. You can also personalize the messages, using either the profile data from subscribers on the proofing lists, or random profile data from subscribers whom the message targets.

Note: Any occurrence of the #EmailAddr# reference in a proofing message is replaced with the email address of the recipient of the proofing message to avoid sending unintended messages to subscribers.)

To ensure that there are no technical errors with your message, set up several different email accounts in different email applications. Open the same message in each account to ensure that the message is displayed correctly. Setting Up Email Accounts and Applications to Proof Messages on page 135 provides detailed information.

To ensure that there are no grammatical, spelling, or content errors, set up a proofing list. A proofing list is a mailing list that consists of a group of individuals within your company who are responsible for reviewing messages before they are sent.

Epsilon also recommends verifying the setup of the message. Review the message in Message Manager to ensure that personalization is correct, that the appropriate mailing lists are selected, and that links to graphics and websites are working. Using Message Manager on page 80 provides additional information.

Sending Messages for Proofing

You can send messages for proofing from the Message Manager, the Message Composer, or the Quicksend Message wizard. Using the Quicksend Message Wizard on page 77 and Composing Messages on page 91 provide additional information. When you send a message for proofing, DREAMmail automatically adds a validation number to the beginning of your subject line. This number increases by one each time you proof the message. When you send the final version of your message to a standard mailing list, DREAMmail removes the validation number from the subject line.

The Proof Count column of Message Manager indicates how many times you have sent a message for proofing. This number increments each time you send the message for proofing.

To send messages for proofing:

1. Set up the email accounts and applications that you want to use to proof the message.

   Setting Up Email Accounts and Applications to Proof Messages on page 135 provide additional information.

2. Create a proofing list.

3. If you want to proof a message as you are composing the message in the Message Composer or the Message Wizard, click the **Proof** button.
4. If you want to proof messages that have already been created, select the checkbox next to each message in the Message Manager that you want to proof and click the **Proof** button.

   Note: If a message has no content, its checkbox cannot be selected. You can proof only messages that have a status of **To Be Sent** or **Composing**.

   Using Message Manager on page 80 provides additional information.
5. Do one of the following:
   - Click **Send the Proof Message to Proofing List(s)** and select the proofing lists to which you want to send the message.
   - Click **Send the Proof Message to Email Address(es)** and specify the email addresses (separated by commas) of the persons whom you want to proof the message.
6. Select the formats of the message.

   Note: If there is no content in the message for a specific format, you cannot select the format.
7. Select one of the following methods for dynamically personalizing the message during the proofing process:
   - **Personalize message using proof list profile data** – This method uses the profile data of the subscribers on the proofing lists.
   - **Personalize message using randomly sampled profiles from targeted list(s)** – This method uses profile data from actual subscribers whom the message targets. Enter the number of subscribers whose profile data is to be sampled in the **Sampled Profiles** text box up to a maximum of 50. (If you specify 10 profiles, and you select 2 formats for a single message, each person on the proofing list receives 20 messages to proof.)
8. Select the **Include Profile Field Table** checkbox to include profile data in the footer of your proof messages.
9. Click **Proof**.
10. Open the message in the email accounts that you created for proofing.
11. Use the proofing checklist to proof the message.
12. Make changes to the message, if necessary. If you or someone on the proofing list finds an error in the message, you can edit the message in Message Manager.

    Editing Messages on page 82 provides additional information.
13. Click **Save**.
14. Repeat Step 3 through Step 12 until you are satisfied with the message.

Note: Messages that you send for proofing are not displayed in reports.

Checking the Proofing Status of a Message

DREAMmail produces the Status/Error Report to display error messages. The report provides you with the following information:

- Error Code
- Type
- Name
- Format
- Detail Description

To check the proofing status of a message, do one of the following:

- In Message Manager, click next to the message and click **Check Proofing Status**.
- In Message Composer, click the **Check Proof Status** button.

Note: Using Message Manager on page 80 and Composing Messages on page 91 provide additional information.

Setting Up Email Accounts and Applications to Proof Messages

To proof a message for technical errors, you must be able to view the message using different email applications. Epsilon recommends that you set up email accounts to proof messages using the following email applications:

- Microsoft Outlook
- Netscape Messenger
- Hotmail
- Yahoo
- AOL 6.0 or later
- Legacy AOL

Send messages that you want to proof to each of the accounts that you create in these applications.

Note: Messages created in the legacy AOL format (AOL 5.0 or earlier) can be sent to non-AOL accounts for proofing.

Approving Messages

The approval process enables you to obtain feedback and approval from members of your company before you send a message out. In the approval process, individuals review the message before it is sent to a specified mailing list. About Mailing Lists on page 58 provides additional information on mailing lists.

Reviewers are subscribers to an approval mailing list who provide feedback about the content and formatting of a message. During the approval process, the message is sent to a small group of reviewers. Reviewers can accept or reject the message by clicking links that are included in the message. You can check the results of the approval process, after which the message can be sent by any user who has privileges to send messages.

Sending Messages for Approval

Before you can send a message for approval, you must first create an approval list and configure the message for approval.

To send messages for approval:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message that you want to send for approval.
3. Click next to the message.
4. Select **Send for approval**.

Configuring Messages for Approval

The message that you send for approval must be associated with a campaign for which message approval is enabled. To enable message approval, enable the **Messages in this campaign must be sent for approval** setting when you create a campaign.

Checking the Approval Response of a Message

To check the approval response of a message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message for which you want to view the approval response.

   Note: In order to view the approval response of a message, the **Messages in this campaign must be sent for approval** setting must be enabled in the campaign.
3. Click next to the message.
4. Select **View approval response**.

5. Check the response of each viewer:
   - A yellow dot indicates the reviewer has not responded.
   - A green check mark indicates the reviewer has accepted the message.
   - A red X indicates the reviewer has rejected the message.
6. Click **Deploy** when you are satisfied with the message.

Sending Messages

This unit of the guide includes the following sections:

- **About Sending Messages**
- **Sending Messages Immediately**
- **Scheduling Messages to be Sent**
- **Specifying the Send Rate of Messages**
- **Terminating Messages**
- **Viewing the Estimated Number of Subscribers**

About Sending Messages

Sending messages to subscribers is the next to last step in the process of deploying a campaign. **Deploying Campaigns on page 3** provides the complete list of steps for deploying a campaign. After you have composed and validated a message, you can send it to the mailing lists that you specify when you create the message. You can also send a Bcc (blind carbon copy) of the message to a designated inbox for archival and compliance purposes.

A campaign requires DREAMmail resources, both for sending messages and for handling subscriptions, unsubscriptions, and bounce backs. Keep your Epsilon representative informed of your plans for campaigns, particularly when launching large-scale campaigns or campaigns that include attachments. This communication enables your Epsilon representative to adjust DREAMmail resources and to monitor the sending of messages.

Sending Messages Immediately

Once a message has been sent, you cannot recall it; therefore, ensure that you validate messages before you send them to subscribers. About Validating Messages on page 87 provides additional information.

To send a message immediately:

1. Go to **Messages** > **Message Manager**.
2. Select a campaign from the **Messages for Campaign** drop-down list.
3. Click next to the message that you want to send.
4. Select **Send**.
5. Select **Now**.
6. Click **OK**.

   If there are no recency-frequency messages scheduled for deployment, the message is sent.

   If there are recency-frequency messages scheduled for deployment, the message may be blocked.

Scheduling Messages to be Sent

Establish a schedule for sending messages to ensure that subscribers receive newsletters and offers at the same time each day or week. A deployment schedule also helps you to coordinate tasks before you send messages.

To schedule a message for deployment:

1. Go to **Messages** > **Message Manager**.
2. Specify a send rate for the message that you want to send.

   Specifying the Send Rate of Messages on page 86 provides additional information.

3. Select the campaign from the **Messages for Campaign** drop-down list that contains the message you want to schedule for sending.
4. Click next to the message.
5. Select **Send**.
6. Specify the date and time on which you want DREAMmail to send the message.

   The times that you specify are based the time zone of the server. Contact your Epsilon representative for information about the time zone in which your server is located.

7. Click **OK**.

   If there are no recency-frequency messages scheduled for deployment, the message is sent at the specified date and time.

   If there are recency-frequency messages scheduled for deployment, the message may be blocked.

Specifying the Send Rate of Messages

You assign a send rate to a message to specify how rapidly DREAMmail sends the message.

To specify a send rate:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains message for which you want to specify a send rate.
3. Click next to the message.
4. Select **Send Rate**.
5. Select the number of messages that you want to send per hour.
6. Click **Save**.

Pausing and Resuming Messages

You can pause an outgoing message if you find an error in the message text or if there is a technical problem with the message. Pausing messages does not recall messages that have already been sent to subscribers. If a message has been paused, you can resume it.

To pause or resume a message:

1. Click next to the message that you want to pause or resume
2. Select **Pause/Resume**.

or

1. Go to **Messages** > **Message Manager**.
2. Select a campaign from the **Messages for Campaign** drop-down list that contains the message that you want to pause or resume.
3. Click next to the message.
4. Select **Pause** or **Resume**.

Terminating Messages

You can terminate an outgoing message if you discover an error in the message text, or if there is a technical problem with the message. You cannot resume sending after a message has been terminated. If you want to temporarily stop a message, you can pause the message. Pausing and Resuming Messages on page 83 provides additional information.

To terminate a message:

1. Go to **Messages** > **Message Manager**.
2. Select the campaign from the **Messages for Campaign** drop-down list that contains the message that you want to terminate.
3. Click next to the message.
4. Select **Terminate**.

Viewing the Estimated Number of Subscribers

To view the estimated number of subscribers that are scheduled to receive a message:

1. Go to **Messages** > **Message Manager**.
2. Select a campaign from the **Messages for Campaign** drop-down list that contains the message.
3. Click the **Delivery** tab.
4. Select the message for which to view the estimated number of subscribers scheduled to receive it.
5. Click the button and select **Count** to view the number of subscribers.
6. For messages with a status of “To be sent,” a value of N/A appears in the Total, Pushed, and Delivered columns.
7. Click on **N/A**.

   The total number of recipients dialog box is displayed.

8. Enter an email address.
9. Click **OK**.

   An email containing the count of subscribers is sent to the email address.

MANAGING FILTERS

This unit of the guide includes the following sections:

About Filters

A filter is a series of conditional expressions concatenated by Boolean AND and OR operators. You use filters to do the following tasks:

- Select a group of subscribers from a mailing list based on a set of conditions that you specify. **Creating Filters to Edit Mailing Lists on page 152** provides additional information.
- Select a group of subscribers and target messages to those subscribers based on criteria specified in the filter. **Creating Filters to Target Messages on page 94** provides additional information.

To save and reuse a filter with multiple messages or mailing lists, you must create the filter in the Filter Manager. You can create and apply filters to messages and mailing lists in Message Manager and Mailing List Manager, respectively, but you cannot save these filters. **Using Message Manager on page 80** and **Mailing List Manager on page 58** provide additional information.

Using Filter Manager

Use the Filter Manager to create and save filters that you can use to select subscribers based on certain criteria, such as city of residence. You can apply a saved filter to messages for targeting or to mailing lists to search for subscribers.

Note: You can create filters in Message Manager and Mailing List Manager but you cannot save and reuse these filters. In order to save and reuse a filter, you must create it in Filter Manager.

Use the Filter Manager to:

- Create and save filters in the Filter Manager – **Creating and Saving Filters in the Filter Manager on page 149** provides additional information.
- Edit filters – **Editing Filters on page 149** provides additional information.

Creating and Saving Filters in the Filter Manager

Filter Manager enables you to create and save filters and to reuse these filters with new messages and mailing lists.

To create and save filters in the Filter Manager:

1. Go to **Filters** > **Filter Manager**.
2. Click **Add**.
3. Enter a name for the filter in the **Filter Name** field.
4. Enter a description of the filter in the **Filter Description** field.
5. Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter.

   Using Filter Helper to Create Filters on page 150 and **Creating Custom SQL Filters on page 150** provide additional information.
6. Click **Save**.

Note: You can apply a saved filter to messages for targeting or to a mailing list to search for subscribers.

Editing Filters

You can edit a saved filter if you want to use the filter with a different message.

To edit filters:

1. Go to **Filters** > **Filter Manager**.
2. Click next to the filter that you want to edit.
3. Select **Edit**.

4. Make the changes to the filter.
5. Click **Save**.

Using Filter Helper to Create Filters

Filter Helper enables you to create filters by using criteria from profile fields, date profile fields, and response data. You can access Filter Helper when you create or edit a filter in Filter Manager, search for subscribers using a filter in Mailing List Manager, or when you compose a message in Message Manager. Creating Filters to Edit Mailing Lists on page 152 provides additional information. However, you can save and re-use the filters that you create only if you create them in Filter Manager.

To create a filter using Filter Helper:

1. Access Filter Helper from Filter Manager, Message Manager, or Mailing List Manager.
2. Select the types of data that you want to use as conditional expressions in the filter from the following drop-down lists:
   - **Profile Field** – Select a field and specify an operator and value.
   - **Profile Date Field** – Select a relative or absolute date in the pop-up window.
   - **Saved Filter** – Select an existing filter.
   - **Response Data** – Select click-throughs, pass alongs, HTML open rate, or Spotlight data in the pop-up window.
3. Click the **Add** button to the right of each drop-down list from which you selected data.
4. Use the drop-down lists and buttons in the **Expression Builder** section to complete the syntax of the filter.
5. Click **Save** if you are using the Filter Manager or Mailing List Manager. If you are using Message Manager, continue composing the message.

Creating Custom SQL Filters

You can create a custom SQL filter when you create or edit a filter, search for subscribers using a filter in Mailing List Manager, or when you compose a message in Message Manager. Creating Filters to Edit Mailing Lists on page 152 provides additional information. However, you can save and re-use the SQL filters that you create only if you create them in Filter Manager.

To create custom SQL filters, you use profile fields to construct an SQL WHERE clause. The WHERE clause cannot consist of any other type of subscriber data, such as response data.

To create a custom SQL filter:

1. Go to **Filters** > **Filter Manager**.
2. Click **Add**.
3. Select **Use SQL Filter**.
4. Decide which profile fields you want to use to create the custom SQL filter.
5. Enter the SQL WHERE clause in the **Where** field using the selected profile fields to complete the clause.
6. Click **Save**.

Note: DREAMmail displays the Use SQL Filter feature only if your user privileges allow you access to the feature.

Creating Filters to Target Messages

You can target a message by creating a new filter or applying a saved filter to the message. If you create a new filter in this way, you cannot save or reuse it. To save and reuse filters, you must create them in the Filter Manager.

To create a filter to target messages:

1. Click **Messages** > **Message Manager**.
2. Compose a new message or access the message for which you want to specify a filter.

   Composing Messages on page 91 and Editing Messages on page 82 provide additional information.

3. Click the **Filter** tab of the **Target** section of the Message Composer.
4. Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter.

   Using Filter Helper to Create Filters on page 150 and Creating Custom SQL Filters on page 150 provide additional information.

5. Finish composing the message.

Creating Filters to Edit Mailing Lists

When you edit a mailing list, you can search for subscribers in the list by creating a new filter or by applying a saved filter. If you create a new filter in this way, you cannot save or reuse it. To save and reuse filters, you must create them in the Filter Manager.

To create a new filter to search for subscribers:

1. Click **Mailing Lists** > **Mailing List Manager**.
2. Click next to the mailing list that you want to search for subscribers.
3. Select **Edit Members**.
4. Click **Filter List Members**.
5. Select the **Use Filter Helper** radio button to create a filter or select the **Use SQL Filter** radio button to create a custom SQL filter.

   Using Filter Helper to Create Filters on page 150 and Creating Custom SQL Filters on page 150 provide additional information.
6. Click **Save** when you have entered all of the criteria for the filter.
7. Select the **Count** radio button if you want to display the number of subscribers in the output created by the filter.

   Alternatively, you can email the number to the email address that you enter in the **Email Address** text box.
8. Select the **View** radio button if you want to view or edit individual subscriber records generated by the filter.

   Editing Subscribers in Mailing Lists on page 61 provides additional information.
9. Click **Next**.
10. If you want to generate a new list, click **Generate List** and enter a list name that is not being used currently.

Managing Hygiene Rules

This unit of the guide includes the following sections:

About Data Hygiene

Data hygiene is a process of file and record validation that enables you to improve the quality of subscriber data in a source file prior to using FTP to import the file in to a mailing list. **Creating FTP Import Jobs on page 65** and **About Mailing Lists on page 58** provide additional information. Data hygiene results in maximizing the number of valid email addresses in the mailing list and minimizing bounce backs. You perform data hygiene by creating hygiene rules that consist of criteria that you select to:

- Correct common syntactical errors in email addresses
- Remove duplicate email addresses
- Reject records with an invalid format or an invalid email address
- Format the date and time field
- Purge specific email addresses from the import job
- Reject import files whose format does not match the definition of the import job

Creating Hygiene Rules on page 155 provides additional information. After you have created and saved a rule, you can apply it to subscriber data that you are importing as a recurring FTP import or as a one-time FTP import (that you create using DREAMmailConnect).

Note: The List Hygiene Tool is stand-alone tool that enables you to perform data hygiene on subscriber records before importing them into a mailing list in DREAMmail. It is a separate process from creating hygiene rules, which you perform in the DREAMmail application as part of the FTP import process.

Using Hygiene Rules Manager

Use the Hygiene Rules Manager to create and manage data hygiene rules that you can use to improve the quality of subscriber data in your mailing lists.

The Hygiene Rules Manager enables you to:

- Create hygiene rules – Creating Hygiene Rules on page 155 provides additional information.
- Edit hygiene rules – Editing Hygiene Rules on page 158 provides additional information.
- Delete hygiene rules – Deleting Hygiene Rules on page 159 provides additional information.

Creating Hygiene Rules

To perform data hygiene on subscriber data that you are importing, you must define a hygiene rule.

To create hygiene rules:

1. Go to **Hygiene Rules** > **Hygiene Rules Manager**.
2. Click **Add**.
3. In the **Rule Name** field, type a name for the hygiene rule.
4. In the **Description** field, type a description of the rule.
5. Select **Client-Level** or **Site-Level** to indicate the level at which the rule will be available to users.

   Note: Names of rules defined at the client-level are accessible by all sites under the client; rules defined at the site-level are accessible only to users of the site.
6. In the **Hygiene Rule Criteria** form, select the hygiene criteria that you want to include in the rule.

   Selecting Criteria for Hygiene Rules on page 156 provides additional information.

   Note: The **Reject Records with Invalid Email Address** criterion is selected by default and cannot be de-selected.
7. Click **Save**.

Note: Note: You cannot use data hygiene rules for web imports, ODBC imports, or data that is uploaded through List Generator. About List Generator on page 32 provides additional information.

Selecting Criteria for Hygiene Rules

When you create a hygiene rule, you select the criteria that you want to include in the rule. Criteria for hygiene rules consist of:

- **Correct Root Domain** – This criterion corrects common misspellings of root domains that appear in an email address (for example, **.comm** becomes **.com**).
- **Correct Common Domain** – This criterion corrects email addresses that cite an incorrect top-level domain (for example, .edu, .com, and so forth) for commonly used domains. This criterion applies only to the domains listed in the table below:

Incorrect domain	Corrected domain
aol.edu	aol.com
aol.org	aol.com
hotmail.edu	hotmail.com
hotmail.org	hotmail.com
yahoo.edu	yahoo.com
yahoo.org	yahoo.com

- **Correct Structural Errors** – This criterion performs the following structural corrections in email addresses:
    a. Removes all spaces including leading, trailing, and embedded spaces.
    b. Replaces consecutive special characters such as periods (.) and 'at' signs (@) with a single instance of the special character (for example, @@ becomes @).

       Note: If the user selects the **Allow multiple Consecutive Periods (..) in Email Address** criterion, consecutive periods are not corrected in the data file.
    c. Specific characters are removed from the start and end of email addresses:
        - 'at' sign (@)
        - period (.)
        - hyphen or minus sign (-)
        - comma (,)
        - less-than and greater-than signs (< and >)
        - number/pound sign (#)
        - dollar sign ($)
        - percent sign (%)
        - caret (^)
        - ampersand (&)
        - asterisk (*)

- backslash (\)
- slash (/)
- open and close parentheses ()
- plus sign (+)

d. A period (.) is inserted before any common top-level-domain that does not already have a period preceding it (for example, **edu** becomes **.edu**). Top-level-domains include, **com**, **net**, **org**, **edu**, and **ca**.

e. All occurrences of .@ (a period followed by an 'at' sign) and @. (an 'at' sign followed by a period) are replaced with a single 'at' sign (@).

f. All occurrences of !@ (an exclamation mark followed by an 'at' sign) and @! (an 'at' sign followed by an exclamation mark) are replaced with a single 'at' sign (@).

g. If no period is found in the domain-name portion of the email address, the default top-level-domain specified by the user is appended. (See **Default Top Level Domain Name** below.)

h. Display names are removed from email addresses.

- **Default Top Level Domain Name** – This criterion enables you to specify a top-level domain name that is appended to email addresses that do not have a period in the domain-name portion of the address. You can enter up to 32 characters.
- **Allow Multiple Consecutive Periods (..) in Email Address** – Enabling this criterion allows multiple periods to appear in email addresses.
- **Correct Errors in Popular Email Domains** – This criterion corrects common misspellings of popular domains due to extra, incorrect, missing, transposed, or appended characters. For example, the following misspellings would be changed to **hotmail.com**:
  - hottmail.com
  - hormail.com
  - hotail.com
  - htomail.com
  - hotmail.com.fr

  To import domain names that differ in spelling from popular domains but which are valid domain names (for example, apl.com, hoymail.com, yahoo.com.hk, and so forth), a configurable exception list is maintained by DREAMmail.

- **Reject Records with Invalid Email Address** – This criterion rejects records that do not comply with the RFC 822 standard, which defines the format of electronic mail message headers. This criterion also rejects records that do not comply with AOL requirements for valid email addresses. This criterion is automatically selected for the hygiene rule and cannot be changed.
- **Reject Records with Invalid Top Level Domain** – This criterion rejects records with email addresses whose top-level-domains are not in DREAMmail's list of valid top-level-domains.

- **Reject Duplicate Email Address** – This criterion removes duplicate instances of the same email address (case-sensitivity of email addresses is disregarded). The de-duplication process occurs after the correction and rejection rules have been applied. The first instance of the record is kept and subsequent records with identical email addresses are discarded and are written to the Rejected file.
- **Format Date Field** – This criterion converts the date and time field into the format required by DREAMmail: **yyyy-mm-dd hh:mm:ssPM**

  hh represents hours based on a 12-hour clock. **PM** can be replaced by **AM**. If a time is not included in the source file, **00:00:00** is automatically appended to the record.
- **Date Format in Source File** – This criterion indicates the format of the date and time field as it exists in the incoming source file. If the format of the date and time field for an individual record does not match the format that you specify for this criterion, the record is rejected.

Note: In addition to the criteria above, you can also specify a suppression file for purging individual records from the source file that you are importing into a mailing list. **Creating FTP Import Jobs on page 65** provides additional information.

Editing Hygiene Rules

To edit hygiene rules:

1. Go to **Hygiene Rules** > **Hygiene Rules Manager**.
2. Click next to the rule that you want to edit.
3. Select **Edit**.
4. Edit the information for the rule.

   Note: When editing a rule, you cannot change its name or the level (client or site) at which the rule is available to users.
5. Click **Save**.

Deleting Hygiene Rules

To delete hygiene rules:

1. Click **Hygiene Rules** > **Hygiene Rules Manager**.
2. Select the checkbox next to the rule that you want to delete.

   If you want to delete all rules, click **Select All**.

3. Click **Delete**.

Note: When you delete a hygiene rule, all import jobs that use the rule will no longer be able to access it.

Enabling Hygiene Rules

To be able to create hygiene rules or view the criteria of a hygiene rule, you must have a DREAMmail administrator enable this feature for your user account. If you do not see the Hygiene Rules menu item in the main DREAMmail menu, ask your administrator to enable this feature.

Note: Any DREAMmail user can select a hygiene rule when defining an FTP import job, regardless of whether the hygiene rules feature has been enabled for the user.

REPORTS

This unit of the guide includes the following sections:

Using Reports

This section includes the following topics:

Why Use DREAMmail Reports?

Using the DREAMmail reports to capture and analyze data about the messages you have sent to subscribers is the final step of deploying a campaign. Available Reports in DREAMmail on page 163 provides detailed information on available reports and Deploying Campaigns on page 3 provides detailed steps on deploying campaigns. DREAMmail reporting enables you to assess the overall efficiency of your campaigns and plan for future campaigns. By analyzing your reports regularly you can study subscriber response to past campaigns and anticipate responses to future campaigns.

Specifically, DREAMmail reports can help you:

- Effectively target segments of your clientele based on prior campaign data
- Update mailing lists by identifying undeliverable addresses
- Create new mailing lists on the basis of subscribers' purchases
- Better understand your customers

Example of Using a DREAMmail Report

If you notice in the Delivery and Response report that a specific message in a campaign generated a significant number of purchases, you might decide to send a related offer to the email addresses of subscribers who made a purchase after receiving the original message. Delivery and Response on page 165 provides detailed information.

To do this, drill down on the Purchases metric at the message level. DREAMmail displays the email addresses of the subscribers who made a purchase in response to the original message. Click **Generate List** to create a new mailing list of these email addresses that you can use to target a new offer.

Accessing DREAMmail Reports

When you access the Reports module, DREAMmail launches a new browser window to display the reports. You access the individual reports in the new browser window by clicking their titles in the Reports menu.

When you access most DREAMmail reports, the client and site of the report match the client and site that were active when you accessed the Reports module. The exceptions are the Delivery and Response and RTM reports, which enable you to specify a different client and site when you define the scope of the report.

Important: If you use Internet Explorer 6.0 to access DREAMmail, you must set the security level of the browser to Medium or lower. If you set the security level to High, you will not be able to access DREAMmail. See the Internet Explorer 6.0 documentation for instructions on how to set the security level.

Available Reports in DREAMmail

You can use the following reports to analyze and summarize data about the messages that you send to subscribers:

- **Delivery and Response** – DREAMmail's main reporting tool for analyzing key campaign metrics from the client level to the email level as well as on the basis of domain. Delivery and Response on page 165 provides detailed information.
- **RTM Reporting** – The reporting tool for Real-Time Messaging; similar to the Delivery and Response report. RTM Reporting on page 188 provides detailed information.
- **Delivery Monitoring** – Reports on how delivered messages are handled by recipients' Internet Service Providers. Delivery Monitoring on page 205 provides detailed information.
- **Active Tracking** – Monitors the deployment of messages and the immediate response rate. The data in this report is refreshed every 15 seconds. Active Tracking Report on page 210 provides detailed information.
- **Response Curve** – Displays a graphical representation of the response rate to individual or all messages in a campaign. Response Curve Report on page 212 provides detailed information.
- **Message Layout Report** – Analyzes the click-through rate of tracked URLs according to the placement of the URLs in a message. Message Layout Report on page 214 provides detailed information.
- **List Reporting** – Reports that provide analysis of mailing lists in terms of size, performance, subscription and unsubscription rates, and import history. List Reporting on page 216 provides detailed information.

- **Customer Reports** – Reports that quantify customer activity, helping you to develop new mailing lists based upon frequency, recency, and monetary value. Customer Reports on page 227 provides detailed information.
- **Exports** – Tools that enable you to export and download report data. Exports on page 238 provides detailed information.

Printing, Exporting, Generating Lists, and Other Tasks

You can perform the following functions in DREAMmail reports by clicking the icons shown below. These icons are located in the upper right corner of DREAMmail reports.

Icon	Function
	Generates a new mailing list.
	**Help**: displays a context-sensitive help page for the report.
	**Print**: in Data view, displays a full-page view of the current data that you can print from your browser; in Graph view, displays a full-page view of the current graph.
	**Download/export**: exports the content of the report to My Data. Ad Hoc Exports on page 242 and My Data on page 238 provide additional information.
	**Zoom**: in Data view displays a full-page view of the current data; in Graph view it displays a full-page view of the current graph.

When the function of an icon is not relevant to a specific page in DREAMmail reports, the icon does not appear or is grayed out to indicate that it is inactive. For example, when you access the Customize view, the Print, Download, and Zoom icon are inactive.

Delivery and Response

This report is the main campaign analysis tool in DREAMmail. You use it to obtain delivery, response, and Spotlight data for campaigns that have been deployed. This highly customizable report allows you to create up to 14 queries or versions of the report that are known as report views. Each report view lets you specify the metrics, display format, scope, and time span that you want to include in the report. You can generate new mailing lists from the email addresses of subscribers that are displayed in a report view by drilling down to the email-address level of the report.

The three views of this report are Customize, Data, and Graph. You customize the report by specifying its scope and metrics in the Customize view. You display the report output in a tabular format in Data view or as a graph in Graph view.

Using the Report

To use the Delivery and Response report:

1. Go to **Reports** > **Reports** > **Delivery and Response**.

   The Selected View of the report is displayed. If you want to use a different report view or create a new one, access My Views.

   Response on page 175 and My Views on page 181 provide additional information.

2. Specify the report view's scope and metrics in Customize view.
3. Click the Data and Graph tabs to display report data in tabular and graphical formats, respectively.
4. View, print, or export report data.

   Printing, Exporting, Generating Lists, and Other Tasks on page 164 provides additional information.

5. Generate a new mailing list in Data view if you plan to target subscribers in the report with a new message.

Customizing the Report

You can:

- Set the scope
- Select metrics

Setting the Scope of the Report

To set the scope of the report:

1. Click the **Customize** tab.
2. Click the **Scope** expansion control (the plus sign).
3. Select **All** or an individual client name from the **Client** drop-down list.

   If you select an individual client, the **Site** drop-down list box changes to show the sites that belong to that client.

   Note: You can only select All if you have access to multiple clients in DREAMmail.
4. Select **All** or an individual site from the **Site** drop-down list.

   If you select an individual site, the **Campaign** drop-down list box changes to show the campaigns that are part of the selected site.

   Note: You can only select **All** if you have access to multiple sites in one client.
5. Select **All** or an individual campaign from the **Campaign** drop-down list.

   If you select an individual campaign, the **Mailing Group** and **Message** drop-down lists change to show the messages and mailing groups that are part of the selected campaign. About Messages on page 76 and Creating Groups on page 94 provide additional information.
6. If there are mailing groups in the campaign, select **All** or an individual mailing group from the **Mailing** Groups drop-down list.

   If there are no mailing groups, the only available option is **None**.

   If you select a mailing group, the **Messages** drop-down lists changes to show the messages that are part of the selected mailing group.
7. Select **All** or an individual message from the **Messages** drop-down list.
8. Hide data at the campaign, site, or client level that you want to exclude from the report.
9. Click **Save**.

   The Data view is displayed.

Selecting Metrics

To select metrics:

1. Click the **Customize** tab.
2. Click the expansion control (the plus sign) next to the category of metrics that you want to select (for example, **Delivery**, **Response**, and so forth).
3. Select the checkboxes of the metrics that you want to include in the report view.

   Any metric that you select will be displayed in the Data view and can also be displayed in the Graph view.
4. In the **Display Options** section, use the selector arrows to arrange the metrics in the order in which you want to display them in the Data view.
5. Click **Save**.

Displaying Data in the Data View

When displaying data in the Data view, you can:

- Set the time span value
- Group and subgroup data
- Expand groupings
- Drill down on a grouping
- Drill down on a subgrouping
- Drill down on a value of a metric
- Sort data
- Generate mailing lists

Setting the Time Span Value

Use the Time span drop-down list in the Data view to specify the time period during which you want summarize data. The default time span is the past 365 days.

After you have selected a value in the Time span drop-down list, use the date range selector to scroll through report data on the basis of time period.

To set the time span:

1. Click the **Time span** drop-down list in **Data** view and select one of the time periods:
   - **Past 365 days** – All messages sent in the past 365 days (default setting).
   - **Day** – All messages sent on today's date.
   - **Week** – All messages sent from the beginning of the current week (starting Sunday) to today's date.
   - **Month** – All messages sent from the beginning of the current calendar month to today's date.
   - **Quarter** – All messages sent from the beginning of the current calendar quarter to today's date.
   - **Year** – All messages sent from the beginning of the calendar year through today's date.
   - **Custom** – All messages sent during the date range that you specify in the Start and End fields. The maximum date range you can specify is 365 days.
2. If you select Custom, enter dates into the **Start** and **End** text boxes.
3. Click **Go**.

   The date range you specify is displayed at the top of the report view and data in the report is recalculated

Grouping and Subgrouping Data

Use the Group-by drop-down list to change the grouping and subgrouping of the report view. The drop-down list displays all of the available groupings and subgroupings that you can select in the current scope.

To specify the grouping and subgrouping for a specific scope:

1. In the Data view, select a group/subgroup option from the Group-by drop-down list (for example, **Client**: **Site**).
2. Click **Go**.

   The report view regroups the report data according to the grouping and subgrouping options that you selected.

Note: Grouping and subgrouping settings are not saved. Each time you access a report view, the default grouping and subgrouping are used.

Expanding Groupings

Click the expansion control (the plus/minus sign in the first column of the Data view) to expand an individual grouping to display its subgroupings in the rows below the grouping.

For example, if you expand a campaign, DREAMmail displays the messages, lists, calendar quarters, months, message formats, or URLs that comprise the campaign's subgrouping.

Note: Expanding a grouping is not equivalent to drilling down on a grouping. When you drill down, you click the grouping itself and this results in a change of scope or date range.

Drilling Down on a Grouping

In the Data view, click the specific grouping on which you wish to drill down.

Drilling Down on a Subgrouping

To drill down on a subgrouping:

1. Click the expansion control to the left of the first column heading,

   or

   Click the expansion control (the plus/minus sign) to the left of the grouping of the subgrouping on which you want to drill down.

2. Click the subgrouping.

Drilling Down on a Value of a Metric

To drill down on a value or a metric:

- In Data view, click the value of the metric on which you wish to drill-down.

  You can drill-down on any numeric value that is displayed in blue font (and is underlined when you place the cursor over it). You can drill-down to access information about the value at the summary-level and email-address levels of the report.

Sorting Data

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking on any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

1. Click the heading of the column that you want to sort.

   DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.

2. Click the triangle to toggle between the ascending and descending order.

   If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Generating Mailing Lists

You can generate new mailing lists from reports that display data at the email level, such as the Delivery and Response and RFM reports and at the transaction level in the RTM report.

To generate a new email list:

1. Drill-down on a value of the metric for which you want to get a more detailed level of reporting.
2. Click **Generate** List when you access the email level or transaction level of the report.
3. Enter a name for the new list into the **List Name** text box.
4. Click **Done**.

   DREAMmail creates a new mailing list that consists of the email addresses that were displayed after you drilled down. You can access the new mailing list in the Mailing Lists module.

   Note: In the Delivery and Response and RTM reports, the Generate List button is available if the scope of the report is Site or lower. If you access an email address-level report that has a Client scope, the Generate List button is not available.

Displaying Data in the Graph View

To display data in the Graph view:

1. Click the **Customize** tab.
2. Enter a name and description of the report, set the scope of the report, and specify the metrics to be included in the report.
3. Click **Save**.

   The output of the report is displayed in Data view.

4. Click the **Graph** tab.

   Initially no graph is shown. To display the graph, you must select the metrics that you want to include and specify the graph format.

5. Select the **Line** or **Bar** option button to determine the format of the graph.
6. Select the **Number**, **Percentage**, or **Currency** option button to determine the types of metrics that you want to graph.
7. Select the required metrics in the **Available** list box and click the right arrow to move your selection(s) to the **Selected** list box.
8. Select a time span from the **Time span** drop-down list if you do not want to use the default value of the past 365 days.
9. Click **Go**.

Exporting Report Data

You can export tabular data and graphs from DREAMmail reports and save the export file to your computer. This type of exporting, which you do on an as-needed basis, consists of two steps:

1. Click to generate an export file that DREAMmail saves in My Data. When the export file has been saved, DREAMmail sends you an email message that informs you the report is ready to be downloaded from My Data.
2. After the file has been saved, in My Data click the export file name to save the file to your computer.

You can specify the format (PDF, HTML, Excel, and Delimited) of the exported file. The PDF, HTML, and Excel formats are limited in the amount of rows they can display. Use the CSV and Delimited formats for data sets that have a large amount of rows.

For Delivery and Response and RTM reports, the data in the exported file is determined by the scope, grouping and subgrouping, and sorting of the report.

Exporting Tabular Data

To export tabular data:

1. Click , which is located in the upper right corner of the report.
2. Specify the export options in the Export Report section.
3. Click **Save**.

   DREAMmail exports the report as a Zip file to My Data.

4. To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Exporting Graphs

To export graphs:

1. Click , which is located in the upper right corner of the report.
2. Enter a file name for the exported file.
3. Click **Save**.

   DREAMmail exports the graph as a JPEG image in a Zip file to My Data.

4. To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Definitions of Metrics

Note: If the DREAMmail administrator does not set cookies for a client, the way in which data is recorded for certain metrics for the sites under the client will be affected. Similarly, when DREAMmail subscribers opt out of the DREAMmail response-tracking cookie, certain metrics in DREAMmail are also affected.

Delivery

The table below defines the delivery metrics:

Metric	Definition
Start date/time	The date and time at which DREAMmail pushed the first message to the first subscriber. The time is determined by the time zone of the DREAMmail server.
End date/time<Delivery and Response>	The date and time at which DREAMmail finished sending the message to the last recipient. The time is determined by the time zone of the DREAMmail server.
Pushed<Delivery and Response>	The number of email addresses to which DREAMmail attempted to send a message, determined by the number of member IDs queued.
Total delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered the message. **Calculation**: [Member IDs queued – (Total bounced + Delivery errors + Invalids)]
Total delivered %<Delivery and Response>	The proportion of pushed messages that were successfully delivered. **Calculation**: [(Total delivered / Pushed) * 100]

Metric	Definition
HTML delivered<Delivery and Response>	The number of HTML-capable email addresses to which DREAMmail successfully delivered HTML content. **Calculation**: [HTML-capable member IDs queued – (Total bounced + Delivery errors + Invalids)]
HTML delivered %<Delivery and Response>	The proportion of HTML messages delivered out of the total delivered. **Calculation**: [(HTML delivered / Total delivered) * 100]
Text delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered text content. **Calculation**: [Text-enabled member IDs queued – (Total bounced + Delivery errors + Invalids)]
Text delivered%<Delivery and Response>	The proportion of text messages delivered out of the total delivered. **Calculation**: [(Text delivered / Total delivered) * 100]
AOL delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered AOL content. **Calculation**: [AOL-enabled member IDs queued – (Total bounced + Delivery errors + Invalids)]
AOL delivered%<Delivery and Response>	The proportion of AOL messages delivered out of the total messages delivered. **Calculation**: [(AOL delivered / Total delivered) * 100]
Autosense delivered<Delivery and Response>	The number of unknown email addresses to which DREAMmail successfully delivered an autosense message. **Calculation**: [Format-unknown member IDs queued – (Total bounced + Delivery errors + Invalids)]
Autosense delivered%<Delivery and Response>	The proportion of autosense messages delivered out of the total messages delivered. **Calculation**: [(Autosense delivered / Total delivered) * 100]
Not delivered<Delivery and Response>	The number of messages that were not delivered due to bounce backs, delivery errors, and invalid email addresses. **Calculation**: Total bounced + Delivery errors + Invalids

Metric	Definition
Not delivered%<Delivery and Response>	The proportion of messages that were sent but could not be successfully delivered. **Calculation**: [(Not delivered / Pushed) * 100]
Total bounced<Delivery and Response>	The number of pushed messages that resulted in a bounce back. **Calculation**: Total number of bounce backs, regardless of type.
Total bounced%<Delivery and Response>	The proportion of messages sent that resulted in any type of bounce back. **Calculation**: [(Total bounced / Pushed) * 100]
Hard bounced<Delivery and Response>	The number of messages sent that resulted in a hard bounce back. **Calculation**: Number of hard bounce backs
Hard bounced%<Delivery and Response>	The proportion of messages sent that resulted in a hard bounce back. **Calculation**: [(Hard bounced / Pushed) * 100]
Soft bounced<Delivery and Response>	The number of messages sent that resulted in a soft bounce back. **Calculation**: Number of soft bounce backs
Soft bounced%<Delivery and Response>	The proportion of messages sent that resulted in a soft bounce back. **Calculation**: [(Soft bounced / Pushed) * 100]
Invalid<Delivery and Response>	The number of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: Number of invalid addresses.
Invalid%<Delivery and Response>	The proportion of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: [(Invalid / Pushed) * 100]
Delivery errors<Delivery and Response>	The number of messages that could not be delivered because of an internal system error. **Calculation**: Number of delivery errors.

Metric	Definition
Delivery errors<Delivery and Response>	The proportion of messages that could not be delivered because of an internal system error. **Calculation**: [(Delivery errors / Pushed) * 100]

Response

The table below defines the Response metrics:

Metric	Definition
HTML opened<Delivery and Response>	The number of unique subscribers who opened HTML-format messages (including messages previewed in Microsoft Outlook as well as autosense messages opened in an HTML-capable email application). Note: At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she opens the same HTML-format message more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
HTML opened%<Delivery and Response>	The proportion of HTML-format messages opened by subscribers. **Calculation**: [(HTML opened /(HTML delivered + Autosense delivered)) * 100]
AOL HTML opened<Delivery and Response>	The number of unique subscribers who opened AOL HTML format messages (including autosense messages opened in an HTML-capable AOL email application). Note: At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she opens the same AOL HTML-format message more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
AOL HTML opened%<Delivery and Response>	The proportion of AOL HTML-format messages opened by subscribers. **Calculation**: [(AOL HTML opened / AOL delivered) * 100]

Metric	Definition
Unique clicks<Delivery and Response>	The number of unique subscribers who clicked through on at least one link in a message. Note: At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she clicked on more than one link. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
Unique clicks%<Delivery and Response>	The proportion of unique subscribers who clicked through on at least one link in a message (sometimes referred to as "click-through rate"). **Calculation**: [(Unique clicks / Total delivered) * 100]
Pass along recipients<Delivery and Response>	The number of recipients who clicked through on a message after it was forwarded to them. Note: If multiple subscribers forward the same message to a single recipient, the recipient is counted each time.
Pass along referrers<Delivery and Response>	The number of unique subscribers who passed a message along (sometimes referred to as "evangelists" or "passers"). Note: At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she passes message along more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
Total clicks<Delivery and Response>	The total number of click-throughs for all message formats. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Total clicks %	Total clicks%<Delivery and Response> The proportion of all click-throughs to all delivered messages. **Calculation**: [(Total clicks / Total delivered) * 100]
HTML clicks<Delivery and Response>	The total number of click-throughs for HTML-format messages. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)

Metric	Definition
HTML clicks%<Delivery and Response>	The proportion of all click-throughs in HTML-format messages to all delivered HTML-format messages. **Calculation**: [(HTML clicks / HTML delivered) * 100]
Text clicks<Delivery and Response>	The total number of click-throughs for text-format messages. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Text clicks%<Delivery and Response>	The proportion of all click-throughs in text-format messages to all delivered text-format messages. **Calculation**: [(Text clicks / Text delivered) * 100]
AOL clicks<Delivery and Response>	The total number of click-throughs for all types of AOL messages. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
AOL clicks%<Delivery and Response>	The proportion of all click-throughs in AOL-format messages to all delivered AOL-format messages. **Calculation**: [(AOL clicks / AOL delivered) * 100]
AOL HTML clicks<Delivery and Response>	The total number of click-throughs for AOL HTML-format messages. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
AOL legacy clicks<Delivery and Response>	The total number of click-throughs for legacy AOL-format messages. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Autosense clicks<Delivery and Response>	The total number of click-throughs for autosense-format messages. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)

Metric	Definition
Autosense clicks%<Delivery and Response>	The proportion of all click-throughs in autosense-format messages to all delivered autosense-format messages. **Calculation**: [(Autosense clicks / Autosense delivered) * 100]
Total Unsubscriptions<Delivery and Response>	Number of recipients of a message who performed an unsubscription from the message.
Total Unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription. **Calculated as**: (Total unsubscriptions / Delivered) * 100
Reply unsubscriptions<Delivery and Response>	Number of recipients of the message who performed an unsubscription by replying to the message.
Reply unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription by replying to the message. **Calculated as**: (Reply unsubscriptions / Delivered) * 100
Pref. Center unsubscriptions<Delivery and Response>	Number of recipients of the message who performed an unsubscription through a preference center.
Pref. Center unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription through a preference center. **Calculated as**: (Pref. Center unsubscriptions / Delivered) * 100
Unsub Address unsubscriptions<Delivery and Response>	Number of recipients of a message who performed an unsubscription through the Unsubscription address.
Unsub Address unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription through the Unsubscription address. **Calculated as**: (Unsub Address unsubscriptions / Delivered) * 100

Spotlight Purchases

The table below defines the Spotlight purchases metrics:

Metric	Definition
Purchases<Delivery and Response>	The total number of transactions tracked by Spotlight where type = sale (multiple transactions from one purchaser are counted individually). Note: Orders that originate from the same person with the same order ID, but include different Spotlight categories or sub-categories (for example, Shoes and Socks), are considered as part of the same purchase.
Number of items<Delivery and Response>	The sum of the Quantity as reported from the Spotlight tag.
Purchasers<Delivery and Response>	The number of unique subscribers who made a purchase. At the message level, this number represents unique recipients; that is, a recipient is counted only once, even if he or she made more than one purchase after opening a specific message. However, at the campaign level (or higher) a subscriber might be counted more than once.
Average no. of items<Delivery and Response>	Average number of items purchased in each purchase transaction. **Calculation**: [No. of items / Purchases]
Purchasers %<Delivery and Response>	The proportion of subscribers who performed a purchase to all subscribers who received the message. Note: This metric is displayed as "Response Rate" in the Data tab. **Calculation**: [(Purchasers / Total delivered) * 100]
Value of items<Delivery and Response>	The total value of all purchases associated with the message (where the type of the Spotlight tag = sale).
Purchase conversion<Delivery and Response>	The proportion of subscribers who clicked a link in a message and then made a purchase. **Calculation**: [(Purchasers / Unique clicks) * 100]

Metric	Definition
Average value<Delivery and Response>	The average value of all orders associated with the message. **Calculation**: [Value of items / Purchases]

Spotlight Events

The table below defines the Spotlight events metrics:

Metric	Definition
Responses<Delivery and Response>	The number of events recorded on Spotlight-tagged web pages. **Calculation**: Number of Spotlight transactions where type = count for the message for the standard report and for the transaction for the RTM report. (Multiple transactions from one person are counted individually.)
Responders<Delivery and Response>	The number of subscribers who encountered a Spotlight counter tag. Note: At the campaign level or higher, this number is the sum of the message-level counts within the applicable scope.
Responders %<Delivery and Response>	The proportion of subscribers who performed a specific activity tracked by Spotlight to all subscribers who received the message. Note: This metric is displayed as "Response Rate" in the Data tab. **Calculation**: [(Responders / Total delivered) * 100]
Event conversion<Delivery and Response>	Proportion of users who clicked a link that converted to a count event. **Calculation**: [(Responders / Unique clicks) * 100]

About the Selected View

The Selected View is a report view that is displayed when you access the Delivery and Response or RTM report. In My Views, the Selected View is always indicated by an asterisk in the first column. You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View and remains so until you specify a different report view as the Selected View. Delivery and Response on page 165 and RTM Reporting on page 188 provide additional information.

To change the Selected View:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Select the radio button of the report view that you want to make the new Selected View.
3. Click the **Default** button.

My Views

My Views is a library in which you can store up to 14 report views for each report. When you access My Views, DREAMmail displays a table that contains:

- The Selected View (indicated by an asterisk in the first column)
- The system default report view (entitled “default”)
- All the report views that you have created and saved

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View.

Creating a Report View

When you create a report view, the system default report view is used as the template.

To create a report view:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Click **Create**.

   The Customize view is displayed.

3. In the Customize view, enter a name and description for the report view.

   Note: You cannot use any of the following characters as part of the report view name: * | / . ? " > < :

4. Select a default time span.

5. Change the scope of the report (for example, client, site, campaign) if you do not want to use the default scope settings.
6. Use the **Hide** text boxes to exclude specific messages, campaigns, sites, or clients from the report output.
7. Add or remove metrics if you do not wish to use the default set of metrics from Delivery, Response, Spotlight purchases, and Spotlight events.
8. Click **Save**.

You can now access the new report view from My Views.

Note: You can also create a report view by accessing the system default report view, entering a name, making the changes and clicking Save as new.

Deleting a Report View

You can delete any report view except the system default report view and the Selected View.

To delete a report view:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Select the option button of the report view that you want to delete.
3. Click **Delete**.

   DREAMmail prompts you to confirm the deletion.

4. Click **Delete**.

Customizing a Report View

You can customize a report view by specifying the scope and metrics in the Customize view and by setting options in the Data view (for example, grouping and subgrouping data, and so forth). Changes made in the Customize view are saved after you exit the report. Options set in the Data view are **not** saved.

Sorting Data in a Report View

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking on any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

1. Click the heading of the column that you want to sort.

   DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.

2. Click the triangle to toggle between the ascending and descending order.

   If you want to sort by date in the Delivery and Response report, select the **Start date/ time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Specifying the Selected View

You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

To specify the Selected View:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Select the radio button of the report view that you want to make the Selected View.
3. Click the **Default** button.

Domain Performance

Use this report to obtain delivery and response data that is based on domain. For example, you can find out how many messages were sent to the ABC domain and how many messages bounced. You can display data for up to 100 domains.

Using the Report

To use the report:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **Domain Performance**.
2. Select a client name from the **Client** drop-down list.
3. Select **All** or an individual site from the **Site** drop-down list.

   Note: You can select All only if you have access to multiple sites in the specified client.

4. Select **All** or an individual campaign from the **Campaign** drop-down list.
5. Select **All** or an individual message from the **Messages** drop-down list.
6. Select the number of domains you want to display from the **Top** drop-down list.
7. Select the metric on which the report is to be based from the **Top On** drop-down list.
8. Click **Go**.

Definitions of Metrics

Note: Note: If the DREAMmail administrator does not set cookies for a client, certain metrics for the sites under the client will be affected. Similarly, when DREAMmail subscribers opt out of the DREAMmail response-tracking cookie, certain metrics in DREAMmail are also affected.

Delivery

The table below defines the delivery metrics for the Domain Performance report:

Metric	Definition
Pushed<Delivery and Response>	The number of email addresses to which DREAMmail attempted to send a message, determined by the number of member IDs queued.
Not delivered%<Delivery and Response>	The proportion of messages that were sent but could not be successfully delivered. **Calculation**: [(Not delivered / Pushed) * 100]
Hard bounced%<Delivery and Response>	The proportion of messages sent that resulted in a hard bounce back. **Calculation**: [(Hard bounced / Pushed) * 100]
Invalid%<Delivery and Response>	The proportion of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: [(Invalid / Pushed) * 100]
Total delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered the message. **Calculation**: [Member IDs queued – (Total bounced + Delivery errors + Invalids)]

Metric	Definition
Total bounced<Delivery and Response>	The number of pushed messages that resulted in a bounce back. **Calculation**: Total number of bounce backs, regardless of type.
Soft bounced<Delivery and Response>	The number of messages sent that resulted in a soft bounce back. **Calculation**: Number of soft bounce backs.
Delivery errors<Delivery and Response>	The number of messages that could not be delivered because of an internal system error. **Calculation**: Number of delivery errors.
Total delivered %<Delivery and Response>	The proportion of pushed messages that were successfully delivered. **Calculation**: [(Total delivered / Pushed) * 100]
Total bounced%<Delivery and Response>	The proportion of messages sent that resulted in any type of bounce back. **Calculation**: [(Total bounced / Pushed) * 100]
Soft bounced%<Delivery and Response>	The proportion of messages sent that resulted in a soft bounce back. **Calculation**: [(Soft bounced / Pushed) * 100]
Delivery errors<Delivery and Response>	The proportion of messages that could not be delivered because of an internal system error. **Calculation**: [(Delivery errors / Pushed) * 100]
Not delivered<Delivery and Response>	The number of messages that were not delivered due to bounce backs, delivery errors, and invalid email addresses. **Calculation**: Total bounced + Delivery errors + Invalids
Hard bounced<Delivery and Response>	The number of messages sent that resulted in a hard bounce back. **Calculation**: Number of hard bounce backs.

Metric	Definition
Invalid<Delivery and Response>	The number of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: Number of invalid addresses.

Response

The table below defines the response metrics for the Domain Performance report:

Metric	Definition
HTML opened<Delivery and Response>	The number of unique subscribers who opened HTML-format messages (including messages previewed in Microsoft Outlook as well as autosense messages opened in an HTML-capable email application). Note: At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she opens the same HTML-format message more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
HTML opened%<Delivery and Response>	The proportion of HTML-format messages opened by subscribers. **Calculation**: [(HTML opened /(HTML delivered + Autosense delivered)) * 100]
Total clicks<Delivery and Response>	The total number of click-throughs for all message formats. Note: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Total clicks%<Delivery and Response>	The proportion of all click-throughs to all delivered messages. **Calculation**: [(Total clicks / Total delivered) * 100]

Spotlight Purchases

The table below defines the Spotlight purchases metrics for the Domain Performance report:

Metric	Definition
Value of items<Delivery and Response>	The total value of all purchases associated with the message (where the type of the Spotlight tag = sale).
Spotlight Purchases % <Domain Performance - Delivery and Response>	The proportion of purchases to delivered messages. **Calculation**: [(Purchases / Delivered) * 100]
Spotlight Purchases<Domain Performance>	The total number of transactions tracked by Spotlight where type = sale (multiple transactions from one purchaser are counted individually). Note: Note: Orders that originate from the same person with the same order ID, but include different Spotlight categories or sub-categories (for example, Shoes and Socks), are considered as part of the same purchase. For the RTM report, this is the total number of Spotlight purchases record for the transactions.

Spotlight Events

The table below defines the Spotlight events metrics for the Domain Performance report:

Metric	Definition
Spotlight Responses<Domain Performance>	The number of events recorded on Spotlight-tagged web pages. **Calculation**: Number of Spotlight transactions where type = count at the message-level for the standard report and at the transaction-level for the RTM report. (Multiple transactions from one person are counted individually.)
Spotlight Responses %<Domain Performance>	Proportion of users who clicked a link that converted to a count event. **Calculation**: [(Responders / Unique clicks) * 100]

RTM Reporting

This report is the main campaign analysis tool in DREAMmail for Real-Time Messaging (RTM). About Campaigns on page 118 provides additional information. You use it to obtain delivery, response, and Spotlight data for campaigns that consist of RTM messages. Like the Delivery and Response report, this highly customizable report allows you to create up to 14 queries or versions of the report that are known as report views. Each report view lets you specify the metrics, display format, time span and scope, that you want to include in the report. You can generate new mailing lists from the email addresses that are displayed in a report view by drilling down to the transaction level of the report.

Because an RTM message can be sent to the same email address multiple times), data in RTM reports can be analyzed down to the transaction level; that is, the RTM report can show how many times a single message has been sent to an individual address. Consequently, duplicate email addresses are not removed from RTM reports.

The two views of this report are Customize and Data. You customize the report by specifying its scope and metrics in the Customize tab. You display the report output in a tabular format in Data view.

Using the Report

To use the report:

1. Go to **Reports** > **Reports** > **RTM Reporting**.

   The Selected View of the report is displayed. If you want to use a different report view or create a new one, access My Views.

   About the Selected View on page 202 and My Views on page 202 provide additional information.

2. Specify the report view's scope and metrics in Customize view.
3. Click the Data view to display report data in a tabular format.

   Note: There is no Graph view in the RTM report.

4. View, print, or export report data.

   Printing, Exporting, Generating Lists, and Other Tasks on page 164 provides additional information.

5. Generate a new mailing list in Data view if you plan to target subscribers in the report with a new message.

Customizing the Report

You can:

- Set the scope
- Select metrics

Setting the Scope

To set the scope:

1. Click the **Customize** tab.
2. Click the **Scope** expansion control (the plus sign).
3. Select **All** or an individual client name from the **Client** drop-down list.

   If you select an individual client, the **Site** drop-down list box changes to show the sites that belong to that client.

   Note: You can only select **All** if you have access to multiple clients in DREAMmail.
4. Select **All** or an individual site from the Site drop-down list.

   If you select an individual site, the **Campaign** drop-down list box changes to show the campaigns that are part of the selected site.

   Note: You can only select **All** if you have access to multiple sites in one client.
5. Hide data at the campaign, site, or client level that you want to exclude from the report.
6. Click **Save**.

   The Data view is displayed.

Selecting Metrics

To select metrics:

1. Click the **Customize** tab.
2. Click the expansion control (the plus sign) next to the category of metrics that you want to select (for example, **Delivery**, **Response**, and so forth).
3. Select the checkboxes of the metrics that you want to include in the report view.

   Any metric that you select will be displayed in the Data view.
4. In the **Display Options** section, use the selector arrows to arrange the metrics in the order in which you want to display them in the Data view.
5. Click **Save**.

Displaying Data in Data view

When displaying data in the Data view, you can:

- Group and subgroup data
- Expand groups
- Drilling down on a value of a metric
- Drilling down on a subgrouping
- Drilling down on a value of a metric

Grouping and Subgrouping Data

Use the Group-by drop-down list to change the grouping and subgrouping of the report view. The drop-down list displays all of the available groupings and subgroupings that you can select in the current scope.

To specify the grouping and subgrouping for a specific scope:

1. In the Data view, select a group/subgroup option from the Group-by drop-down list (for example, **Client: Site**).
2. Click **Go**.

The report view regroups the report data according to the grouping and subgrouping options that you selected.

Note: Grouping and subgrouping settings are not saved. Each time you access a report view, the default grouping and subgrouping are used.

Expanding Groupings

Click the expansion control (the plus/minus sign in the first column of the Data view) to expand an individual grouping to display its subgroupings in the rows below the grouping.

For example, if you expand a campaign, DREAMmail displays the messages, lists, calendar quarters, months, message formats, or URLs that comprise the campaign's subgrouping.

Note: Expanding a grouping is not equivalent to drilling down on a grouping. When you drill down, you click the grouping itself and this results in a change of scope or date range.

Drilling Down on a Value of a Metric

In the Data view, click the specific grouping on which you wish to drill down.

Drilling Down on a Subgrouping

To drill down on a subgrouping:

1. Click the expansion control to the left of the first column heading,

   or

1. Click the expansion control (the plus/minus sign) to the left of the grouping of the subgrouping on which you need to drill down.
2. Click the subgrouping.

Drilling Down on a Value of a Metric

In Data view, click the value of the metric on which you want to drill-down.

You can drill-down on any numeric value that is displayed in blue font (and is underlined when you place the cursor over it). You can drill-down to access information about the value at the summary-level and email-address levels of the report.

Generating Mailing Lists

You can generate new mailing lists from reports that display data at the email level, such as the Delivery and Response and RFM reports and at the transaction level in the RTM report.

To generate a new email list:

1. Drill-down on a value of the metric for which you want to get a more detailed level of reporting.
2. Click the **Generate List** button when you access the email level or transaction level of the report.
3. Enter a name for the new list into the **List Name** text box.
4. Click **Done**.

   DREAMmail creates a mailing new list that consists of the email addresses that were displayed after you drilled down. You can access the new mailing list in the Mailing Lists module.

Note: In the Delivery and Response and RTM reports, the Generate List button is available if the scope of the report is Site or lower. If you access an email address-level report that has a Client scope, the Generate List button is not available.

Sorting Data

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking on any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

1. Click the heading of the column that you want to sort.

   DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.

2. Click the triangle to toggle between the ascending and descending order.

If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Exporting Report Data

You can export tabular data and graphs from DREAMmail reports and save the export file to your computer. This type of exporting, which you do on an as-needed basis, consists of two steps:

- Click  to generate an export file that DREAMmail saves in My Data. When the export file has been saved, DREAMmail sends you an email message that informs you the report is ready to be downloaded from My Data.
- After the file has been saved, in My Data click the export file name to save the file to your computer.

You can specify the format (PDF, HTML, Excel, and Delimited) of the exported file. The PDF, HTML, and Excel formats are limited in the amount of rows they can display. Use the CSV and Delimited formats for data sets that have a large amount of rows.

For Delivery and Response and RTM reports, the data in the exported file is determined by the scope, grouping and subgrouping, and sorting of the report.

Exporting Tabular Data

To export tabular data:

1. Click , which is located in the upper right corner of the report.
2. Specify the export options in the **Export Report** section.
3. Click **Save**.

   DREAMmail exports the report as a Zip file to My Data.

4. To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Exporting Graphs

To export graphs:

1. Click , which is located in the upper right corner of the report.
2. Enter a file name for the exported file.
3. Click **Save**.

   DREAMmail exports the graph as a JPEG image in a Zip file to My Data.

4. To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Definitions of Metrics

Note: If the DREAMmail administrator does not set cookies for a client, the way in which data is recorded for certain metrics for the sites under the client will be affected. Similarly, when DREAMmail subscribers opt out of the DREAMmail response-tracking cookie, certain metrics in DREAMmail are also affected.

Delivery

FTM Reporting delivery metrics are defined below:

Metric	Definition
Start date/time<RTM Reporting>	The date and time the first transaction was sent. The time is determined by the time zone of the DREAMmail server.
End date/time<RTM Reporting>	The date and time of the last transaction. The time is determined by the time zone of the DREAMmail server. Note: Even though the RTM Delivery and Response report does not include dropped transactions, this date is updated for these transactions.

Metric	Definition
Triggered<RTM Reporting>	The sum of the RTM transactions that were sent and RTM transactions that were not sent due to the suppression of recipients' email addresses in the DREAMmail database. **Calculation**: (Pushed + Total Suppressed)
Pushed<RTM Reporting>	The number of RTM transactions at the scope specified in the report. (This metric differs from the Triggered metric, which consists of RTM transactions that were delivered plus RTM transactions that were not delivered due to the suppression of recipients' email addresses.)
Pushed%<RTM Reporting>	The proportion of RTM transactions. **Calculation**: [(Pushed / Triggered) * 100]
Total delivered<RTM Reporting>	The number of times that an RTM message was delivered.
Total delivered %<RTM Reporting>	The proportion of RTM transactions that were successfully delivered. **Calculation**: [(Total delivered / Pushed) * 100]
HTML delivered<RTM Reporting>	The number of times that an HTML-formatted RTM transaction was delivered.
HTML delivered %<RTM Reporting>	The proportion of HTML-formatted RTM transactions that were delivered. **Calculation**: [(HTML delivered / Total delivered) * 100]
Text delivered<RTM Reporting>	The number of times that a text-formatted RTM message was delivered.
Text delivered%<RTM Reporting>	The proportion of text-formatted transactions that were successfully delivered. **Calculation**: [(Text delivered / Total delivered) * 100]
AOL delivered	AOL delivered<RTM Reporting> The number of times that an AOL-formatted RTM message was delivered.
AOL delivered%	AOL delivered%<RTM Reporting> The proportion of AOL-formatted RTM transactions that were delivered. **Calculation**: [(AOL delivered / Total delivered) * 100

Metric	Definition
Autosense delivered<RTM Reporting>	The number of times that an autosense RTM transaction was delivered.
Autosense delivered%<RTM Reporting>	The proportion of autosense RTM transactions that were delivered. **Calculation**: [(Autosense delivered / Total delivered) * 100]
Not delivered<RTM Reporting>	The number of RTM transactions that could not be delivered. **Calculation**: (Total bounced + Delivery errors + Invalid) Note: This metric does not include transactions that were suppressed because of site unsubscription, deferral timeout, and addresses identified as invalid in the DREAMmail database. These metrics are represented by the Total suppressed metric. They are also included in the Not Delivered report in the RTM Export Manager.
Not delivered%<RTM Reporting>	The proportion of RTM transactions that could not be delivered. **Calculation**: [(Not delivered / Pushed) * 100]
Total bounced<RTM Reporting>	The number of times that RTM transactions bounced (hard or soft).
Total bounced%<RTM Reporting>	The proportion of RTM transactions that resulted in any type of bounce back. **Calculation**: [(Total bounced / Pushed) * 100]
Hard bounced<RTM Reporting>	The number of times that an RTM transaction resulted in a hard bounce.
Hard bounced%<RTM Reporting>	The proportion of RTM transactions that resulted in a hard bounce back. **Calculation**: [(Hard bounced / Pushed) * 100]
Soft bounced<RTM Reporting>	The number of times that RTM transactions resulted in a soft bounce.
Soft bounced%<RTM Reporting>	The proportion of RTM transactions that resulted in a soft bounce back. **Calculation**: [(Soft bounced / Pushed) * 100]

Metric	Definition
Invalid<RTM Reporting>	The number of times that RTM transactions could not be delivered because the email address was incomplete or syntactically invalid.
Invalid%<RTM Reporting>	The proportion of RTM transactions that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: [(Invalid / Pushed) * 100]
Delivery errors<RTM Reporting>	The number of RTM transactions that could not be delivered because of an internal system error.
Delivery errors %<RTM Reporting>.	The proportion of RTM transactions that could not be delivered due to delivery errors. **Calculation**: [(Delivery errors / Pushed) * 100]
Total suppressed<RTM Reporting>	The number of RTM transactions that could not be delivered due to the suppression of recipients' email addresses in the DREAMmail database. **Calculation**: (Unsubscribed + Flagged invalid + Deferral passed time + Other reason)
Total suppressed%<RTM Reporting>	The proportion of RTM transactions that could not be delivered due to the suppression of recipients' email addresses in the DREAMmail database. **Calculation**: [(Total suppressed / Delivery errors) * 100]
Unsubscribed<RTM Reporting>	The number of RTM transactions that were not delivered due to recipients having unsubscribed from the DREAMmail site or client that is sending the message.
Unsubscribed%<RTM Reporting>	The proportion of transactions that were not delivered due to recipients having unsubscribed from the DREAMmail site or client that is sending the message. **Calculation**: [(Unsubscribed / Delivery errors) * 100]
Flagged invalid<RTM Reporting>	The number of RTM transactions that were not delivered due to the email addresses of the recipients being identified as invalid in the DREAMmail database.

Metric	Definition
Flagged invalid<RTM Reporting>	The proportion of RTM transactions that were not delivered due to the email addresses of the recipients being identified as invalid in the DREAMmail database. **Calculation**: [(Flagged invalid / Delivery errors) * 100]
Deferral passed time<RTM Reporting>	The number of RTM transactions that were not delivered due to the RTM message not being sent because the XML message request had specified not to send the message after the waiting period had passed.
Deferral passed time%<RTM Reporting>	The proportion of RTM transactions that were not delivered due to the RTM message not being sent because the XML message request had specified not to send the message after the waiting period had passed. **Calculation**: [(Deferral passed time / Delivery errors) * 100]
Deferral passed time%<RTM Reporting>	The proportion of RTM transactions that were not delivered due to the RTM message not being sent because the XML message request had specified not to send the message after the waiting period had passed. **Calculation**: [(Deferral passed time / Delivery errors) * 100]
Other reason<RTM Reporting>	The number of RTM transactions that could not be delivered due to reasons other than the suppression of the message, unsubscription of the subscriber, invalid message, or expiration of the deferral time.
Other reason%<RTM Reporting>	The proportion of transactions that could not be delivered due to reasons other than the suppression of the message, unsubscription of the subscriber, invalid message, and expiration of the deferral time. **Calculation**: [(Other reason / Delivery errors) * 100]

Response

FTM Reporting response metrics are defined below:

Metric	Definition
HTML opened<RTM Reporting>	The number of HTML messages opened, or autosensed messages opened in an HTML-enabled email application. Note: This is de-duplicated by email address at the transaction level, not the message level. This is not deduced for any subscribers that have opted out of receiving the response tracking cookie.
HTML opened%<RTM Reporting>	The proportion of HTML-format transactions opened. **Calculation**: (HTML opened / HTML delivered) * 100
AOL HTML opened<RTM Reporting>	The number of times that an AOL HTML-format message was opened (including autosense messages opened in an HTML-capable AOL email application). Note: This metric is de-duplicated by email address at the transaction level not at the message level. This metric is not de-duplicated for any subscribers that have opted out of receiving the response tracking cookie.
AOL HTML opened%<RTM Reporting>	The proportion of HTML-format transactions that were opened. **Calculation**: (HTML opened / HTML delivered) * 100
Unique clicks<RTM Reporting>	The number of recipients who clicked at least one tracked link in a transaction. Note: This is not deduced for any subscribers that have opted out of receiving the response tracking cookie.
Unique clicks%<RTM Reporting>	The proportion of recipients who clicked a tracked link (sometimes referred to as "click-through rate"). **Calculation**: (Unique clicks / HTML delivered) * 100
Pass along recipients<RTM Reporting>	Number of pass alongs recorded for the transaction.
Pass along referrers<RTM Reporting>	The number of recipients that passed along the transaction at least once.

Metric	Definition
Total clicks<RTM Reporting>	The total number of click-throughs for all message formats.
Total clicks %<RTM Reporting>	The proportion of all click-throughs to all delivered transactions. **Calculation**: (Total clicks / Total delivered) * 100
HTML clicks<RTM Reporting>	The total number of click-throughs for HTML-format transactions.
HTML clicks %<RTM Reporting>	The proportion of click-throughs in HTML-format transactions to delivered HTML-format transactions. **Calculation**: (HTML clicks / HTML delivered) * 100
Text clicks<RTM Reporting>	The total number of click-throughs for text-format transactions.
Text clicks %<RTM Reporting>	The proportion of click-throughs in text-format transactions to delivered text-format transactions. **Calculation**: [(Text clicks / Text delivered) * 100]
AOL clicks<RTM Reporting>	The number of AOL click-throughs.
AOL clicks %<RTM Reporting>	The proportion of AOL click-throughs to delivered AOL-format transactions. **Calculation**: (AOL clicks / AOL delivered) * 100
AOL HTML clicks<RTM Reporting>	The number of AOL HTML click-throughs.
AOL legacy clicks<RTM Reporting>	The number of legacy AOL click-throughs.
Autosense clicks<RTM Reporting>	The number of click-throughs for autosense-format transactions.
Autosense clicks %<RTM Reporting>	The proportion of click-throughs in autosense-format transactions to delivered autosense-format transactions. **Calculation**: (Autosense clicks / Autosense delivered) * 100

Spotlight Purchases

FTM Reporting spotlight purchases metrics are defined below:

Metric	Definition
Purchases	Purchases<RTM Reporting> The number of individuals who encountered a Spotlight tag where type = sale. This metric is calculated at the transaction level. Note: Note: At the message level or higher, this number is the sum of the transaction-level counts within the applicable scope. Orders that originate from the same person with the same order ID, but include different Spotlight categories or sub-categories (for example, Shoes and Socks), are considered as part of the same purchase.
Purchasers<RTM Reporting>	The number of unique subscribers who made a purchase. At the transaction level, this number represents unique recipients; that is, a recipient is counted only once, even if he or she made multiple purchases after opening a specific message one or more times. However, at the message level (or higher) a subscriber might be counted more than once.
Purchasers %<RTM Reporting>	The proportion of subscribers who made a purchase to all subscribers who received the message. Note: This metric is displayed as "Response Rate" in the Data tab. **Calculation**: [(Purchasers / Total delivered) * 100]
Purchase conversion<RTM Reporting>	The proportion of subscribers who clicked a link in a message and then made a purchase. **Calculation**: [(Purchasers / Unique clicks) * 100]
Number of items<RTM Reporting>	The total number of items purchased. Note: Multiple items purchased by one person are counted individually.
Average no. of items<RTM Reporting>	Average number of items purchased in a purchase that was tracked by Spotlight. **Calculation**: [No. of items / Purchases]
Value of items<RTM Reporting>	The total value of all purchases associated with the message (where the type of the Spotlight tag = sale).
Average value<RTM Reporting>	The average value of all orders associated with the transaction. **Calculation**: [Value of items / Purchases]

Spotlight Events

FTM Reporting spotlight events metrics are defined below:

Metric	Definition
Responses<RTM Reporting>	The number of events recorded on Spotlight-tagged web pages. **Calculation**: Number of Spotlight transactions where type = count for the message for the standard report and for the transaction for the RTM report. (Multiple transactions from one person are counted individually.)
Responders<RTM Reporting>	The number of individuals who encountered a Spotlight counter tag. This metric is calculated at the transaction level. Note: At the message level or higher, this number is the sum of the transaction-level counts within the applicable scope.
Responders %<RTM Reporting>	The proportion of subscribers who performed a specific activity tracked by Spotlight to all subscribers who received the message. **Calculation**: [(Responders / Total delivered) * 100]
Event conversion<RTM Reporting>	Proportion of users who clicked a link that converted to a Spotlight counter event. **Calculation**: [(Responders / Unique clicks) * 100]

About the Selected View

The Selected View is a report view that is displayed when you access the Delivery and Response or RTM report. In My Views, the Selected View is always indicated by an asterisk in the first column. You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View and remains so until you specify a different report view as the Selected View. **Delivery and Response on page 165** and **RTM Reporting on page 188** provide additional information.

To change the Selected View:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Select the radio button of the report view that you want to make the new Selected View.
3. Click the **Default** button.

My Views

My Views is a library in which you can store up to 14 report views for each report. When you access My Views, DREAMmail displays a table that contains:

- The Selected View (indicated by an asterisk in the first column)
- The system default report view (entitled “default”)
- All the report views that you have created and saved

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View.

Creating a Report View

When you create a report view, the system default report view is used as the template.

To create a report view:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Click **Create**.

   The Customize view is displayed.

3. In the Customize view, enter a name and description for the report view.

   Note: You cannot use any of the following characters as part of the report view name: * | / . ? " > < :

4. Select a default time span.

5. Change the scope of the report (for example, client, site, campaign) if you do not want to use the default scope settings.
6. Use the **Hide** text boxes to exclude specific messages, campaigns, sites, or clients from the report output.
7. Add or remove metrics if you do not wish to use the default set of metrics from Delivery, Response, Spotlight purchases, and Spotlight events.
8. Click **Save**.

You can now access the new report view from My Views.

Note: You can also create a report view by accessing the system default report view, entering a name, making the changes and clicking Save as new.

Deleting a Report View

You can delete any report view except the system default report view and the Selected View. About the Selected View on page 202 provides additional information.

To delete a report view:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Select the option button of the report view that you want to delete.
3. Click **Delete**.

   DREAMmail prompts you to confirm the deletion.

4. Click **Delete**.

Customizing a Report View

You can customize a report view by specifying the scope and metrics in the Customize view and by setting options in the Data view (for example, grouping and subgrouping data, and so forth). Changes made in the Customize view are saved after you exit the report. Options set in the Data view are **not** saved.

Sorting Data in a Report View

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking on any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report. To sort data within a column:

1. Click the heading of the column that you want to sort.

   DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.

2. Click the triangle to toggle between the ascending and descending order.

   If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Specifying the Selected View

You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

To specify the selected view:

1. Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2. Select the radio button of the report view that you want to make the Selected View.
3. Click the **Default** button.

Delivery Monitoring

Use this report to find out how standard DREAMmail messages are handled when they are delivered to their recipients. The report indicates if a message has been placed in a recipient's inbox or junk mail folder, or if the message has been blocked entirely.

The spam-filtering policies of a recipient's Internet service provider (ISP) determine the way in which the delivery of a message is handled. The information in this report helps you to determine what impact the spam-filtering policies of individual ISPs has on your email messages.

You can set the scope of this report to display data for an individual message, or for multiple messages aggregated at the campaign, site, or client level. At the campaign level, you can display the Internet Service Providers (ISPs) to which a message has been sent by clicking on individual messages in the report. Then you can click on individual ISPs to display the addresses in the ISP to which the message has been sent.

This report has two views:

- **Data** – Displays the report in a tabular format. The scope that you set in the Customize view determines what data is displayed.
- **Customize** – Enables you to set the scope of the report to all or individual clients, a site, a campaign, or an individual message.

How Data is Collected

When a message is sent by DREAMmail, a copy of the message is sent to a set of seed email addresses that Epsilon has created among the most popular ISPs for the sole purpose of analyzing the delivery of messages. Each time a message is sent, DREAMmail monitors the inboxes and junk mail folders of each seed address to determine how each ISP handled the message.

Note: DREAMmail does not monitor the inboxes and junk mail folders of actual DREAMmail subscribers.

Setting the Scope of the Report

To set the scope of the report:

1. Go to **Reports** > **Reports** > **Delivery Monitoring**.
2. Click the **Customize** tab.
3. Select an individual client or all clients that you have access to on the current DREAMmail server from the **Client** drop-down list.
4. Select an individual site or all sites within the current client from the **Site** drop-down list.

5. Select an individual campaign or all campaigns within the current site from the **Campaign** drop-down list.
6. Select an individual message or all messages within the current campaign from the **Message** drop-down list.
7. Click **Go**.

Setting the Time Span of the Report

Use the Time span drop-down list in the Data view to specify the time period during which you want summarize data. The default time span is the past 365 days.

After you have selected a value in the Time span drop-down list, use the date range selector to scroll through report data on the basis of time period.

To set the time span:

1. Click the **Time span** drop-down list in Data view and select one of the time periods:
   - **Past 365 days** – All messages sent in the past 365 days (default setting).
   - **Day** – All messages sent on today’s date.
   - **Week** – All messages sent from the beginning of the current week (starting Sunday) to today’s date.
   - **Month** – All messages sent from the beginning of the current calendar month to today’s date.
   - **Quarter** – All messages sent from the beginning of the current calendar quarter to today’s date.
   - **Year** – All messages sent from the beginning of the calendar year through today’s date.
   - **Custom** – All messages sent during the date range that you specify in the Start and End fields. The maximum date range you can specify is 365 days.
2. If you select **Custom**, enter dates into the **Start** and **End** text boxes, and click **Go**.

   The date range you specify is displayed at the top of the report view and data in the report is recalculated.

To move between time periods:

1. Click the **Previous** icon (left arrow) to go back one time span.
2. Click the **Next** icon (right arrow) to go forward one time span.
3. Click the **End** icon (right arrow and bar button) to go to the present time.

Note: When the time period is set to Past 365 days, the right arrows become inactive.

Definitions of Metrics

Metrics at the farm, client, site, campaign, and message scopes are defined below:

Metric	Definition
Client<Delivery Monitoring>	The names of the clients on a specific DREAMmail farm.
Bulk %<Delivery Monitoring>	The percentage of messages delivered to a recipient's junk mail folder. This metric can be calculated at the site, client, and farm levels. **Calculation**: (Bulk / (Delivered + Bulk + Missing)) * 100 where, at the site, client, or farm level: • Bulk = messages delivered to a recipient's junk mail folder. • Delivered = messages delivered to a recipient's inbox. • Missing = messages that were not delivered to a recipient's inbox or junk mail folder.
ISP	The name of the Internet Service Provider to which the specified message was delivered. When you drill down on a specific ISP, the email-address level of this report is displayed. Note: This metric is displayed only when you drill down on a message at the Campaign level.
Site<Delivery Monitoring>	The names of sites in a specific client.
Missing %	The percentage of messages that were not delivered to a recipient's inbox or junk mail folder. This metric can be calculated at the site, client, and farm levels. **Calculation**: (Missing / (Delivered + Bulk + Missing)) * 100 where, at the site, client, or farm level: • Bulk = messages delivered to a recipient's junk mail folder. • Delivered = messages delivered to a recipient's inbox. • Missing = messages that were not delivered to a recipient's inbox or junk mail folder.
Status<Delivery Monitoring>	Final destination of the delivered message. Possible values: • Inbox • Bulk • Missing
Campaign<Delivery Monitoring>	The names of the campaigns in a specific site.

Metric	Definition
Duplicates<Delivery Monitoring>	Duplicates can occur if a user pauses, edits a message, and then resumes sending the message during a campaign. At the email-address level of the report, this metric is calculated as the number of times a message is delivered to a specific address minus one. For example, if a message is delivered to an email address three times, the value of the Duplicates metric would be two. At the campaign, site, client, or farm level, this metric is calculated as the sum of all duplicates for all email addresses within the scope. For example, suppose a mailing entitled Spring2005 is sent to two email addresses and the first address has two duplicates and the second address has three duplicates. In this case, the Duplicates metric would be five.
Email Address<Delivery Monitoring Report>	Email address to which the message was sent.
Message<Delivery Monitoring>	The subject lines of messages in a specific campaign.
First Seen<Delivery Monitoring>	At the site, client, or farm level this metric represents the date and time when all of the messages within the scope were first seen in the inboxes of the seed addresses. At the campaign level, this metric applies to individual messages and represents the first time at which a message in the campaign was seen in the inboxes of the seed addresses. At the email-address level of this report, this metric indicates when a specific message was first seen in the inboxes of the seed addresses.
Region <Delivery Monitoring>	You can view deliverability by Region. Click a region in the Region column to drill down and view reporting by domain. You will see the report displaying the ISP associated to the region. When viewing this report you will also be able to see the aggregate total of all the seed lists selected and deployed to.

Metric	Definition
Inbox %<Delivery Monitoring>	The percentage of messages delivered to a recipient's inbox. This metric can be calculated at the site, client, and farm levels. **Calculation**: (Delivered / (Delivered + Bulk + Missing)) * 100 where, at the site, client, or farm level: • Bulk = messages delivered to a recipient's junk mail folder. • Delivered = messages delivered to a recipient's inbox. • Missing = messages that were not delivered to a recipient's inbox or junk mail folder.
Most Recent<Delivery Monitoring>	At the site, client, or farm level this metric represents the date and time when all of the messages within the scope were first seen in the inboxes of the seed addresses. At the campaign level, this metric applies to individual messages. It represents the time at which a specific message was first seen in the inboxes of the seed addresses.

Active Tracking Report

Use this report to monitor the deployment and immediate response rates to individual messages. Because the message-tracking data in this report is refreshed every 15 seconds, you can monitor the progress of a message as soon as it is deployed. The report also provides you with an immediate, high-level view of responses to the message.

The report displays the 15 most recently sent messages per campaign. This includes messages that have been deployed to proofing and approval lists. If a campaign has more than 15 messages, the report includes a row labeled Others that totals the data for all non-displayed messages.

Using the Report

To use the report:

1. Go to **Reports** > **Reports** > **Active Tracking**.
2. Select a campaign from the **Tracking report for campaign** drop-down list.
3. Click **Go**.

Definition of Metrics

Metrics at the farm, client, site, campaign, and message scopes are defined below:

Metric	Definition
Message<Active Tracking Report>	The names of messages in a specific campaign. The 15 most recently sent messages are displayed in addition to a row labeled Others that totals the data for all other non-displayed messages.
Clicks<Active Tracking Report>	The number of click-throughs that resulted from the message.
Value of items<Active Tracking Report>	The total monetary amount of purchases recorded by Spotlight.
Pushed<Active Tracking Report>	The number of email addresses to which DREAMmail attempted to send the message, determined by the number of member IDs queued.
Pass along recipients<Active Tracking Report>	The number of unique recipients who clicked through on the message after it was forwarded to them.
Delivered<Active Tracking Report>	The number of email addresses to which DREAMmail successfully sent the message.
Responses<Active Tracking Report>	The number of events recorded on Spotlight-tagged web pages.
Not delivered<Active Tracking Report>	The number of email addresses to which DREAMmail could not send the message.

Metric	Definition
Purchases<Active Tracking Report>	The number of Spotlight purchases.

Response Curve Report

Use this report to display a time-based, graphical representation of the response rate to individual or all messages in a campaign (including messages that have been deployed to proofing and approval lists). The report enables you to determine the peak response period and when the majority of responses have been received, up to two weeks after the message is sent. You specify the time period over which data is analyzed and you select the types of data to be included in the report such as number of click-throughs, pass along recipients, and purchases.

There are three views of this report:

- **Customize** – Enables you to specify the response data to be displayed in the Data and Graph views.
- **Data** – Displays the report metrics in a tabular format. The metrics displayed are determined by the options that you select in the Customize view.
- **Graph** – Displays a graphical representation of the report metrics that you select in the Customize view. This data is graphed on the X axis in hourly increments over the time interval that you specify in the **Interval** drop-down list. You can change the data that is displayed by selecting different metrics in the **Metrics** list box.

Displaying the Report in a Graphical Format

To display the report in a graphical format:

1. Go to **Reports** > **Reports** > **Response Curve**.
2. In the **Customize** view, set the following options:
   - Campaign
   - Message
   - Interval
   - Date
   - Metrics
   - View As
   - Format
3. Click **Go**.

   The Graph view of the report is displayed.
4. In Graph view, select the metrics in the **Metrics** list box that you want to display (for example, **Clicks**, **Purchases**, and so forth).

   You can select multiple metrics by pressing the CTRL key as you click each item in the **Metrics** list box.
5. Click **Go**.

Displaying the Report in a Tabular Format

To display the report in a tabular format:

1. Follow the instructions in **Displaying the Report in a Graphical Format on page 212**.
2. Click the **Data** tab to display the metrics of the report in a tabular view.

Definitions of Metrics

Data view metric definitions are defined below:

Metric	Definition
Interval<Data View in Response Curve>	The hourly increments over which data for an individual message or a campaign is analyzed. Each hourly increment is labeled in relation to the time that the message or messages were sent (for example, Day 6 Hour 10). This metric is included in the report only when you set the Date option to Relative in the Customize view. Note: If you specify a campaign as the scope of this report (by selecting All in the Message drop-down list), the data for each hourly increment is the sum of the data for all of the messages in the campaign during the specified hour.
Value of items<Response curve>	The value of Spotlight purchases attributed to this message.
HTML opened<Response Curve Report>	The number of unique messages in an HTML format that were opened (includes the autosense messages that were opened in an HTML-capable email application).
Pass along recipients<Response Curve>	The number of unique recipients who clicked through on the message after it was forwarded to them. Pass along recipients by message type are also displayed.
Clicks<Response Report Curve>	The total number of click-throughs. (Click-throughs by message type are also displayed.)
Responses<Response Curve>	The number of event recorded on Spotlight-tagged web pages.
Purchases<Response Curve>	The total number of Spotlight purchases.

Message Layout Report

Use this report for analyzing and refining the layout of a message to optimize consumer impact. This report analyzes the click-through rates of tracked URLs based upon their placement in the content of a message. The report displays the content of the message and color-codes each tracked URL in the content according to how often the URL is clicked.

There are two views of this report:

- **Customize** – Enables you to specify the message to be displayed in the report.
- **Data** – Displays the text of the message and metrics that summarize the number of delivered messages, click-throughs, and the proportion of subscribers that clicked on at least one link in the message.

Using the Report

To use the report:

1. Go to **Reports** > **Reports** > **Message Layout Report**.
2. In the Customize view, select a campaign and a message from the **Campaign** and **Message** drop-down lists.
3. Click **Go**.
4. Choose the message format that you would like to view by clicking the appropriate button:
   - View AOL
   - View text
   - View HTML

   A **Display Options** window appears and DREAMmail displays the message and color-codes the URLs in the message. You can also choose report metrics from the Select Metrics drop down list. The various options are as follows:

   - ClickThrough
   - Unique Clicks
   - % Unique Clicks of Delivered
   - % Unique Clicks of Unique Opens
   - % Unique Clicks of all Unique Message Clicks

Definitions of Metrics

Customize View

Customize view metric definitions are defined below:

Metric	Definition
Campaign<Message Layout Report>	A drop-down list of campaigns.
Message<Message Layout Report>	A drop-down list of individual messages within the campaign selected from the Campaign drop-down list.

Data View

Data view metric definitions are defined below:

Metric	Definition
Format<Message Layout Report>	The format of the message (Text, AOL, or HTML).
Delivered<Message Layout Report>	The number of email addresses to which DREAMmail has successfully delivered the message.

Data view click metric definitions are defined below:

Metric	Definition
No. of clicks<Message Layout Report>	The number of click-throughs for the message.
Response<Message Layout Report>	This field contains two metrics: • The number of unique subscribers who clicked on a link in the message • The proportion of subscribers who clicked on at least one link in the message
% Unique Clicks of Unique Opens <Message Layout Report>	This is Unique Clicks as a percentage of the unique number of emails opened.

List Reporting

List reporting consists of a group of five reports that provide detailed information about mailing lists in DREAMmail:

- **List Subscription Report** – Provides counts of subscription and unsubscription requests for all mailing lists in a given site. List Subscription Report on page 217 provides detailed information.
- **Import History Report** – Provides a history of the transactions of recurring import jobs for a specific site and a list of import transactions for all mailing lists on the site. Import History Report on page 219 provides detailed information.
- **List Mailing History Report** – Enables you to view all messages that have been sent to subscribers of a given list. Mailing History Report on page 221 provides detailed information.
- **List Churn Report** – Provides data on a list's growth and decline in size over time because of subscriptions and unsubscriptions. List Churn Report on page 222 provides detailed information.
- **List Status Report** – Summarizes list characteristics such as size, the date of the most recent import, the date of the most recent message sent to the list, and the number of subscribers who will receive each message format. List Status Report on page 224 provides detailed information.

List Subscription Report

Use this report to obtain the number of subscription and unsubscription requests made to mailing lists for a specific site. About Mailing Lists on page 58 and About Sites on page 25 provide additional information. Subscriptions occur when a subscriber asks to be added to one or more mailing lists. Unsubscriptions occur when a subscriber asks to be removed from a mailing list by sending email to an Unsubscription address in a message or by making an unsubscribe request in a preference center.

The List Subscription report categorizes subscription and unsubscription requests by list and the source of the transaction request: email or preference center. Knowing where the majority of subscription requests originates for a mailing list can assist you in refining your overall campaign strategy. The report also displays the total number of unsubscription requests at the site and client levels.

There are two views of this report:

- **Data** – Displays report data in a tabular format. The time period summarized in the report defaults to the life of the list. You can click on the values of specific metrics in the Data view to access the List Subscriptions Details Report. List Subscription Details Report on page 218 provides detailed information.
- **Graph** – Displays report data in a graphical format. You can customize the graph to include metrics for subscriptions or unsubscriptions, or both.

Customizing the Content of the Graph view

To customize the content of the Graph view:

1. Go to **Reports** > **Reports** > **List Reporting** > **List Subscription**.
2. In Graph view, select the **Subscriptions**, **Unsubscriptions**, or **Both (as separate bars)** option button.
3. Select the **Email requests**, **Preference center**, or **Both** option buttons.
4. Click **Go**.

Definitions of Metrics

List Subscription metric definitions are defined below:

Metric	Definition
List<List Subscription>	Active and inactive lists are displayed.
Subscriptions<Email List Subscription>	Number of subscription requests made to the list by email.

Metric	Definition
Unsubscriptions (list-level)<Email List Subscription>	Number of unsubscription requests made to the list by messages sent to an Unsubscription email address in a message.
Unsubscriptions (client-level and site-level)<Preference Center List Subscription>	The total number of client-level and site-level unsubscriptions that came from a preference center. These numbers are displayed at the bottom of the Preference center Unsubscriptions column.
Subscriptions<Preference Center List Subscription>	Number of subscription requests made to the list that came from a preference center.
Unsubscriptions (list-level)<Preference Center List Subscription>	Number of unsubscription requests made to the list that came from a preference center.
Unsubscriptions (client-level and site-level)<Preference Center List Subscription>	The total number of client-level and site-level unsubscriptions that came from a preference center. These numbers are displayed at the bottom of the Preference center Unsubscriptions column.

List Subscription Details Report

This report displays the email-addresses of people who made subscription and unsubscription requests. You access this report by clicking the values of specific metrics in the Data view of the List Subscription report.

Definitions of Metrics

List Subscription Details report metric definitions are defined below:

Metric	Definition
Email Address<List Subscription Details Report>	The subscriber’s email address.
Method<List Subscription Details Report>	The source of the subscription or unsubscription request: email or preference center.
Source<List Subscription Details Report>	The email address from which the subscription or unsubscription request came. This field is displayed only if the request came from an email address.
Transaction date<List Subscription Details Report>	The date and time that the list member subscribed or unsubscribed.

Import History Report

Use this report to summarize all activity for a specific mailing list and to describe all of the FTP jobs for a specific site. About Mailing Lists on page 58 and Creating FTP Import Jobs on page 65 provide additional information.

There are two types of Import History report:

- **Import History by list** – Shows all of the import transactions that were completed for a specific list. This report provides the number of records that were processed and the import method (automated FTP, one-time FTP, interactive upload, or ODBC) used to import the records through the DREAMmail user interface. The report does not show any import activities that are in progress.
- **Import History by job** – Provides all of the active FTP jobs for a specific site. The report includes the job name, the number of times that the job has been run, and the date and time of the job that was last run. This report does not associate the import job with the corresponding list names.

Viewing All Import Transactions for a Specific Mailing List

To view all import transactions for a specific mailing list:

1. Go to **Reports** > **Reports** > **List reporting** > **Import History**.

   The List view is displayed.

2. Select a mailing list from the drop-down list.
3. Click **Go**.

Viewing All FTP Jobs for a Specific Site

To view all FTP jobs for a specific site:

1. Go to **Reports** > **Reports** > **List reporting** > **Import History**.
2. Click the **Jobs** tab.

Definitions of Metrics

Import History report metric definitions are defined below.

List Tab Metrics

Metric	**Definition**
Started<List View of the Import History Report>	The date and time that the import request started.
Finished<List View of Import History>	The date and time that the import finished (or stopped in the case of failure).
Method<List Tab Import History>	The method of import (automated FTP, one-time FTP, interactive upload, or ODBC) and job name (for automated and one-time FTP).
Source<List View of the Import History Report>	The number of records that were in the source import file, regardless of whether they were imported.
Rejected<List Tab Import History>	Total number of records in the source file that could not be properly parsed (according to the import definition) or which have email addresses that do not conform to the RFC822 standard for email addresses.
Imported<List View in Import History>	Total number of records that were imported minus rejects.

Job Tab Metrics

Metric	**Definition**
Job<Job View of the Import History>	The name of the import job.
Date last run <Job View of the Import History Report>	The ending date and time of the most recent import for this job.
No. of times run<Job View of the Import History>	The number of times that this import job has run since it was created.

Mailing History Report

Use this report to view the list of all messages that have been sent to subscribers of a specific mailing list, including messages that have been sent to proofing and approval lists. The report provides the list size at the time that each message was sent and the proportion of subscribers on the list that received the message.

Messages that are in the process of being sent are not included in this report.

Using this Report

To use this report:

1. Go to **Reports** > **Reports** > **List reporting** > **Mailing History**.
2. Select an email list from the drop-down list.
3. Click **Go**.

Definitions of Metrics

Mailing History report metric definitions are defined below.

Metric	**Definition**
Started<Mailing History>	The date and time that DREAMmail started sending the message.
Campaign<Mailing History>	The name of the campaign to which the message belongs.
Message<Mailing History>	The name of the message.
Recipients from this list<Mailing History>	The number of subscribers on this list to whom the message was pushed.

List Churn Report

Use this report to measure the growth or decline in size of a mailing list over time because of subscriptions and unsubscriptions. About Mailing Lists on page 58 provides additional information. The List Churn report provides a list's total size, subscription and unsubscription requests, and the number and proportion of list subscribers to whom email can be sent. The Data and Graph views of this report display metrics in a tabular and graphical format, respectively. The date range for this report defaults to 365 days but you can set your own date range.

Each row of the List Churn report consists of a weekly summary of the list within the date range that you set. For example, if you use the default date range of 365 days, the report displays up to 52 rows of data — a row for each week.

Using the Report

To use this report:

1. Go to **Reports** > **Reports** > **List Reporting** > **List Churn**.
2. To display data in a tabular format, click the **Data** tab.
3. To display data in a graphical format, click the **Graph** tab.
4. Select an email list from the drop-down list.
5. Enter a date range using the **Start date** and **End date** text boxes if you do not want to use the default date range of 365 days.
6. Click **Go**.

Note: Any changes you make in the Data view automatically carry over to the Graph view and vice versa.

Definitions of Metrics

List Churn report metric definitions are defined below.

Metric	Definition
Date<List Churn>	The date and time of the weekly report snapshot of the list data. The report displays all weekly snapshots that fall in the date range that you set. The snapshot is taken on Sundays.
Mailable list size<List Churn>	The total number of active, addressable email addresses that were on the list at the time of the report snapshot. This is the number of member IDs on the list minus any addresses that were list-unsubscribed, site-unsubscribed, invalid, or unconfirmed (in accordance with the active closed loop confirmation policy settings) at the time of the report snapshot.

Metric	Definition
List size<List Churn>	The number of email addresses that were on the list at the time of the report snapshot. This is the number of member IDs on the list minus any addresses that were list-unsubscribed, but which were still in the list tables at the time of the report snapshot.
Proportion mailable<List Churn>	The proportion of subscribers on the list to whom mail could be sent at the time of the report snapshot. **Calculation**: [(Mailable List Size / List Size)*100]
Subscriptions<List Churn>	The total number of subscriptions to the list during the week that the report snapshot summarizes. This is the number of member IDs that were added to this list during the week.
Unsubscriptions<List Churn>	The total number of unsubscriptions from the list during the week that the report snapshot summarizes. This is the number of member IDs that were removed from this list during the week.

List Status Report

The List Status report provides data about all active mailing lists for a specific site. **About Mailing Lists on page 58** provides additional information. This data includes the:

- Size of each list in the current site
- Number of subscribers in each list to whom mail can be sent
- Number of subscribers in each list to whom mail cannot be sent
- Number of subscribers in each list who will receive a message in a specific format (that is, Text, AOL, or HTML)
- Date of the last import into the list
- Date of the last message sent to subscribers in the list

Exporting Lists in this Report

You can export the subscriber records of any list in the report to My Data. **My Data on page 238** provides additional information.

Note: If you click in the upper right part of the view, you export the high-level List Status report data as it is displayed in the Data view. To export lists in this report:

To export lists in this report:

1. Go to **Reports** > **Reports** > **List Reporting** > **List** Status.
2. Click next the list that you want to export.

   The **Export List** panel is displayed.
3. Enter a file name in the **File** name text box.

   The name you enter will be displayed in the My Data component when the export process is completed.
4. Choose **CSV**, **Tab**, **Pipe**, or **Double pipe** to delimit the values in the exported list.
5. Click **Save**.

   You can access the exported list in My Data.

Definitions of Metrics

List Status report metric definitions are defined below.

Metric	Definition
List<List Status Report>	The name of the mailing list.
Total Mailable<List Status Report>	The total number of email addresses in the list to which mail can be sent. This is the number of member IDs on the list, minus any addresses that have been identified as list-unsubscribed, site-unsubscribed, invalid (including the Suppressed count), or unconfirmed.
Date last imported<List Status Report>	The ending date and time of the most recent import for this list, including batch imports. Subscription and unsubscription activity that originates from preference centers or Subscription and Unsubscription addresses in DREAMmail is not included.
Site unsub<List Status Report>	The number of email addresses on the list that have been unsubscribed from the current site. This is the number of member IDs on the list where the Site Unsubscribe field = 1 in the DREAMmail database.
Date last mailed<List Status Report>	The date and time of the most recent message that was sent to this list where Status in the Message Manager equals Finished.
Invalid<List Status Report>	The number of email addresses that are on the list that are identified as invalid or suppressed for the current site. This is the number of member IDs on the list where the Valid field = 0 in the DREAMmail database. Note: The Mailing List Manager in DREAMmail also displays the Invalid metric. However, unlike the Invalid metric in the List Status report, which includes only suppressed and invalid email addresses, the Invalid metric in the Mailing List Manager includes invalid, suppressed, and email addresses that have been unsubscribed from a site.
Size<List Status Report>	The number of email addresses on this list. This is the number of member IDs on this list minus any addresses that are list-unsubscribed, but which are still in the list tables.
Unconfirmed<List Status Report>	The number of email addresses on the list that have not provided sufficient confirmation to meet the requirements of the current active CLC policy and settings. These email addresses will not receive a message from the current site.

Metric	Definition
Text, AOL, HTML, Unknown<Mailable List Status>	The number of active, addressable email addresses on the list to which a message can be sent, categorized by the message format associated with the email address. This is the number of member IDs on this list minus any addresses that are list-unsubscribed, site-unsubscribed, invalid (including the Suppressed count), or unconfirmed.
Total Unmailable<List Status Report>	The total number of email addresses in the list to which email cannot be sent. This is the number of member IDs on the list that cannot be mailed to because they have been identified as site-unsubscribed, invalid (including the Suppressed count), or unconfirmed.

Customer Reports

Customer reports consist of the:

- **Most Active Customers (MAC) report** – The MAC report provides data regarding the frequency of customer activity such as click-throughs and purchases tracked by Spotlight. The report also identifies the customers who spent the most money in a given period of time. Most Active Customers Report on page 227 provides detailed information.
- **Recency, frequency, and monetary value (RFM) reports** – The RFM reports tell you how recently and frequently customers made purchases and how much they spent on the purchases. The RFM reports also track the recency and frequency of transactions by subscribers that do not result in a purchase. RFM Reports on page 229 provides detailed information.

Most Active Customers Report

The Most Active Customers (MAC) report provides the email addresses of customers who, for a specified time period during a campaign, performed the most transactions. This report enables you to generate new mailing lists of these customers. You use the Customize view of this report to specify the type, scope, and time period of the report. The Data view displays the output of the report.

There are three types of MAC reports that provide data at the site, campaign, or message level:

- **Most Frequent Clicking Customers** – A list of the customers who clicked most frequently on links.
- **Most Frequent Purchasers** – A list of the customers who purchased most frequently. The report enables you to generate a new mailing list on the basis of Spotlight category and sub-category.
- **Highest Value Purchasers** – A list of the customers who spent the most money after opening a message. The report enables you to generate a new mailing list on the basis of Spotlight category and sub-category.

Using this Report

To use this report:

1. Go to **Reports** > **Reports** > **Customer Reports** > **Most Active**.

   The **Customize** view is displayed by default.

2. Use the **Campaigns** and **Messages** drop-down lists to set the report at one of the following scopes:
   - **Site** – Select All in the Campaigns and Messages drop-down lists.
   - **Campaign** – Select a campaign from the Campaigns drop-down list and select All in the Messages drop-down list.
   - **Message** – Select a campaign from the Campaigns drop-down list and a message from the Messages drop-down list.
3. Use the option buttons and text boxes in the **Period** section to specify the time period for the report.
4. Use the **Categories** and **Subcategories** drop-down lists if you want to select a category and a sub-category in Spotlight.

   Note: These drop-down lists are available only if you select Number of purchases or Value of items in the Criteria section.

5. In the text box of the **Criteria** section, enter the number of customer records that you want displayed in the report.
6. Use the option buttons in the **Criteria** section to choose the type of Most Active Customers report:
   - Clicks
   - Number of purchases
   - Value of items
7. Click **Go**.

   The output is displayed in Data view.

Definitions of Metrics

Most Active Customers report metric definitions are defined below.

Metric	Definition
Email address<Most Active Customers Report>	The email address of a most frequent clicker, most frequent purchaser, or highest value purchaser, depending on the option you selected in the Criteria section of the Customize view.
Clicks<Most Active Customers Report>	Number of click-through transactions recorded for the Email Address within the scope and date range of the report. Note: Multiple clicks from one person on the same message or even the same link are counted independently. Clicks from people to whom the message was passed are not counted.
No. of purchases<Most Active Customers Report>	Number of purchases recorded by Spotlight for the Email Address within the scope and time period of the report.
Value of items<Most Active Customers Report>	Total value of purchases recorded for the Email Address within the scope and time period of the report.

RFM Reports

The five RFM reports enable you to determine the ability of subscribers of a specific site to generate purchases and conduct transactions that do not result in purchases (such as visiting a specific web page or filling out an online form). To track purchases and non-purchase transactions, you must use Spotlight tags on your website.

The reports provide data regarding:

- **Recency** – How recently customers made purchases or transactions
- **Frequency** – How often customers make purchases or transactions
- **Monetary value** – The monetary amount of customers’ purchases

With the exception of the RFM Purchase Value report, the data that is displayed for each month in the five RFM reports is based upon the transactions made during the 12 months that precede the current month. (The RFM Purchase Value report shows data for individual months and does not include activity during the previous 12 months.)

You can click on the values of specific metrics in each report to access the drill-down level of the report. At this level, you can generate a new mailing list that consists of the email addresses of subscribers displayed in the report.

How Data is Calculated in RFM Reports

When you run an RFM report for a specific site, it summarizes data for the previous 12 months. It does this by taking a snapshot of the site's recency, frequency, and monetary data as of the first day of each month during the 12-month period. In this way, all transactions during the 12 months are captured. For example, if you run the RFM Purchase Recency report on December 16, 2005, its data will be based upon transactions that were made between December 1, 2004 and November 30, 2005. Transactions in December 2005 are not be included in the report.

Note: The RFM Purchase Value report does not summarize data for the previous 12 months. It shows data for individual months.

Example

The following example, based on the RFM Purchase Multi-buyer report, helps to explain how data is calculated in the RFM reports.

You run the report on March 14, 2005, which means that the data in the report covers the previous 12 months (March 1, 2004 through February 28, 2005). As of March 2005, you have made three purchases in the past 12 months, all in February 2005. Your purchase of three items in February causes the RFM Purchase Multi-buyer report to increment the value for February under the column that is labeled "3" by 1 (for example, from 18 to 19) to indicate that another customer has made exactly three purchases in the 12 months previous to March 2005. When you drill down on the value (in this case, 19), the report displays the email addresses of all customers who have made exactly three purchases in the preceding 12 months. The report also indicates the months in which the purchases were made.

You run the report again a month later, in April 2005. You made another purchase in March 2005, which, brings the total of your purchases for the previous 12 months to four. At this point the value for February in the 3 column report remains at 19. However, the report increments the value in the 4+ column by 1 to indicate that another customer has made four (or more) purchases previous to April 2005. If you drill down on the value for March in the 4+ column, the report displays two rows of data that indicate your purchases for the months of:

- February 2005 (three purchases)
- March 2005 (one purchase)

Using the RFM Reports

To use the RFM reports:

1. Go to **Reports** > **Reports** > **Customer Reports** > **RFM Report**.
2. Click the tab of the RFM report that you want to run (for example, **Purchase Value**).

RFM Multi-Responders Report

Use this report to group the subscribers of a specific site based on the number of transactions they made on the site in the previous 12 months that did not result in a purchase. About Sites on page 25 provides additional information. Examples of this type of transaction include entering information into an online form and visiting specific pages in a website. Spotlight tags are used to track this type of transaction.

Definitions of Metrics

RFM Multi-Responders report metric definitions are defined below.

Metric	Definition
Date<RFM Multi-Responders Report>	One of the 12 months previous to the report snapshot.
Customers<RFM Multi-Responders>	The number of member IDs in the site member table that are not identified as invalid as of the date of the report snapshot.
Single<RFM Multi-Responders>	The number of subscribers to the site who made one and only one Spotlight counter transaction on the site in the 12 months previous to the report snapshot.
2<RFM Multi-Responders>	The number of subscribers to the site who made two and only two Spotlight counter transactions on the site in the 12 months previous to the report snapshot.
3<RFM Multi-Responders>	The number of subscribers to the site who made three and only three Spotlight counter transactions on the site in the 12 months previous to the report snapshot.
4+<RFM Multi-Responders>	The number of subscribers to the site who made four or more Spotlight counter transactions on the site in the 12 months previous to the report snapshot.

RFM Purchase Multi-Buyer Report

Use this report to group the subscribers of a specific site on the basis of the number of purchases they made on the site in the previous 12 months. About Sites on page 25 provides additional information. The numeric column headings (that is, Single, 2, 3, and 4+) indicate the number of purchases that the subscribers made during the preceding 12-month period. Spotlight tags are used to track this type of transaction.

Definitions of Metrics

RFM Purchase Multi-Buyer report metric definitions are defined below.

Metric	Definition
Date<RFM Purchase Multi-Buyer>	One of the 12 months previous to the report snapshot.
Customers<RFM Purchase Multi-Buyer>	The number of member IDs in the site member table that are not identified as invalid as of the date of the report snapshot.
Single<RFM Purchase Multi-Buyer>	The number of subscribers to the site who made one and only one purchase from the site in the 12 months previous to the report snapshot.
2<RFM Purchase Multi-Buyer>	The number of subscribers to the site who made two and only two purchases from the site in the 12 months previous to the report snapshot.
3<RFM Purchase Multi-Buyer>	The number of subscribers to the site who made three and only three purchases from the site in the 12 months previous to the report snapshot.
4+<RFM Purchase Multi-Buyer>	The number of subscribers to the site who made four or more purchases from the site in the 12 months previous to the report snapshot.

RFM Purchase Recency Report

Use this report to group the subscribers of a specific site on the basis of when they made their most recent purchase. About Sites on page 25 provides additional information. The report includes only the subscribers who have made a purchase from the site in the six months previous to when the report was run. The report also includes the number of subscribers who did not make a purchase in the 12 months previous to the report. Spotlight tags are used to track this type of transaction.

The columns in the report represent time periods during which the most recent purchase took place, relative to when the report was run. For example, data in the 31-60 Days column represents the customers who made purchases that occurred 31 to 60 days before the date on which the report was run.

Definitions of Metrics

RFM Purchase Recency report metric definitions are defined below.

Metric	Definition
Date<RFM Purchase Recency>	One of the 12 months previous to the report snapshot.
Customers<RFM Purchase Recency>	The number of member IDs in the site member table that are not identified as invalid as of the date of the report snapshot.
0-30 Days<RFM Purchase Recency Report>	The number of subscribers whose most recent purchase from the site occurred 0 to 30 days before the report snapshot.
31-60 Days<RFM Purchase Recency>	The number of members whose most recent purchase from the site occurred 31 to 60 days previous to the report snapshot.
61-90 Days<RFM Purchase Recency>	The number of members whose most recent purchase from the site occurred 61 to 90 days previous to the report snapshot.
91-120 Days<RFM Purchase Recency>	The number of members whose most recent purchase from the site occurred 91 to 120 days previous to the report snapshot.
Non-buyer<RFM Purchase Recency>	The number of members who made no purchases from the site in the preceding 12 months.

RFM Purchase Value Report

Use this report to obtain the number of customers whose total expenditures fall into the price ranges that are displayed as column headings in the report. (These price ranges are denominated in the currency that was set up for you in DREAMmail.) The report also provides the average amount spent by customers who made one or more purchases during an individual month. For example, the **10-24** column displays the number of customers who made purchases that had a total value between $10 and $24.99. Spotlight tags are used to track this type of transaction.

Definitions of Metrics

RFM Purchase Value report metric definitions are defined below.

Metric	Definition
Date<RFM Purchase Value>	One of the 12 months previous to the report snapshot.
Customers<RFM Purchase Value>	The number of member IDs in the site member table that are identified as active as of the date of the report snapshot.
0<RFM Purchase Value>	The number of subscribers to the site who did not make purchases in that month.
1-9<RFM Purchase Value>	The number of subscribers to the site who made purchases in that month and whose purchases totaled more than $0 and less than $10.00.
10-24<RFM Purchase Value>	The number of subscribers to the site who made purchases in that month and whose purchases totaled more than $10.00 and less than $24.99.
25-49<RFM Purchase Value>	The number of subscribers to the site who made purchases from the site in that month and whose purchases totaled more than $25 and less than $49.99.
50-99<RFM Purchase Value>	The number of subscribers to the site who made purchases from the site in that month and whose purchases totaled more than $50 and less than $99.99.
100+<RFM Purchase Value>	The number of subscribers to the site who had made purchases from the site in that month and whose purchases totaled more than $100.00.
Avg. Value<RFM Purchase Value>	The total value of purchases recorded by Spotlight for the site, divided by the number of subscribers to the site who made one or more purchases during the month.

RFM Response Recency Report

Use this report to group the subscribers of a specific site on the basis of when they made their most recent non-purchase transaction that was tracked by Spotlight. This report includes only the subscribers who have made a transaction at the site in the preceding six months (excluding the current month). The report also includes the number of non-responders in the previous 12 months. Spotlight tags are used to track this type of transaction. About Sites on page 25 provides additional information on sites.

The time-based columns in the report represent time periods during which the transactions took place. For example, data in the **31-60 Days** column represents the subscribers who made transactions that occurred 31 to 60 days before you ran the report.

Definitions of Metrics

RFM Response Recency report metric definitions are defined below.

Metric	Definition
Date<RFM Response Recency>	One of the 12 months previous to the report snapshot.
Customers<RFM Response Recency>	The number of member IDs in the site member table that are not identified as invalid as of the date of the report snapshot.
0-30 Days<RFM Response Recency Report>	The number of subscribers whose most recent Spotlight counter transaction occurred 0 to 30 days before the report snapshot.
31-60 Days<RFM Response Recency>	The number of members whose most recent Spotlight counter transaction occurred 31 to 60 days previous to the report snapshot.
61-90 Days<RFM Response Recency>	The number of members whose most recent Spotlight counter transaction occurred 61 to 90 days previous to the report snapshot.
91-120 Days<RFM Response Recency>	The number of members whose most recent Spotlight counter transaction occurred 91 to 120 days previous to the report snapshot.
Non-responder<RFM Response Recency>	The number of subscribers who made no Spotlight counter transactions on the site in the preceding 12 months.

RFM Drill-down Reports

The RFM drill-down reports provide recency, frequency, and monetary data at the email-address level. Each row in the drill-down report displays the email address of subscribers and information relating to the value of the metric on which you drilled down in the RFM report. If a customer generated multiple transactions, then the customer's email address and associated data appear in the report multiple times.

You can access these reports by drilling down on the values of any metric in the RFM report except Customers, Date, Non-buyer, Non-responder, and Avg. Value. The time period of the drill-down report is based on the month and transaction range of the value on which you drilled down.

Note: For users whose DREAMmail user privileges do not allow them access to reports that contain email addresses, the drill-down reports display the subscribers' member IDs instead of their email addresses. There is a drill-down report for each of the five RFM reports.

Definitions of Metrics

RFM Response Recency report metric definitions are defined below.

Metric	Definition
Last transaction date<RFM Purchase Recency Drill-down Report>	The date of the customer's most recent purchase.
Last transaction date<RFM Response Recency Drill-Down Report>	The date of the customer's most recent Spotlight counter transaction.
Month<RFM Multi-Responders Drill-Down Report>	The month in which the customer made responses.
Month<RFM Purchase Multi-buyer Drill-down Report>	The month in which the customer made purchases.
Month<RFM Purchase Value Drill-down Report>	The month in which the customer made the purchase.
Most recent event within<RFM Response Recency Drill-Down Report>	The range of days before the report snapshot during which the customer made his or her most recent Spotlight counter transaction.
Most recent purchase within<RFM Purchase Recency Drill-down Report>	The range of days before the report snapshot during which the customer made his or her most recent purchase.
Number of events<RFM Multi-Responders Drill-Down Report>	The number of Spotlight counter transactions that the customer made for a specific month.

Metric	Definition
Number of Purchases<RFM Purchase Multi-buyer Drill-down Report>	The number of purchases that the customer made for a specific month.
Purchase value<RFM Purchase Value Drill-down Report>	The value of the purchase made by the customer.
Transaction Date<RFM Purchase Value Drill-down Report>	The date on which the customer made the purchase.

Exports

This section includes the following topics:

My Data

The My Data component is file space allocated to every DREAMmail user on the DREAMmail server. My Data is a repository for data that you export from DREAMmail reports on an ad hoc basis. Ad Hoc Exports on page 242 provides additional information. In addition to exported report data, you can also export campaigns and mailing lists to My Data. Export Campaign on page 240 and List Status Report on page 224 provide additional information.

Once a file has been exported to My Data, you can download the saved file to a local or network directory. Files in My Data are stored in a zip format. When you unzip the file, it is saved in the format in which you originally exported the report data (for example, PDF, HTML, Excel, or delimited).

When you download a file from My Data that has been created as part of a recurring export job, DREAMmail appends the time and date stamp that appears in the **Last Modified** column to the downloaded file. Appending the date ensures the uniqueness of the file name.

Note: DREAMmail purges export files in My Data after seven days.

Accessing Exported data from My Data

To access exported data from My Data:

1. Go to **Reports** > **Reports** > **Exports** > **My Data**.
2. Click the name of the file that you want to download.

   Note: Ensure that the **Status** column is set to **Finished** before downloading the file.
3. Click **Save** in the **File Download** dialog box.
4. When prompted, type a file name and click **Save**.

Export Manager

Use this report to schedule recurring exports to a client's FTP site on the DREAMmail FTP server. You specify the type of report and profile data that you want to be included in the export report along with the start date of the export report. **Types of Reports in Export Manager on page 243** lists the types of reports available in Export Manager. Export Manager uses the same FTP server that is used by the FTP Import Manager, so you do not need additional new FTP credentials. **Using FTP Import Manager on page 65** provides additional information. Export files are stored on the FTP server in the Report Exports subfolder.

Note: The FTP feature must be enabled in your DREAMmail user privileges before you can use Export Manager. FTP usage must also be enabled at the site level. **Creating User Accounts on page 54** and **Configuring Sites on page 26** provide additional information.

Creating Export Jobs

To create export jobs:

1. Go to **Reports** > **Reports** > **Exports** > **Export Manager**.
2. Click **Create**.
3. Type a name and description for the job.

   Types of Reports in Export Manager on page 243 provides additional information.

4. Specify the type of report you want to export.
5. Use the **Export scope** drop-down list to indicate the scope of the export report.

   Note: Select **Client** to include data for all of the client's sites; select **Site** to include data only for the site.

6. Enter the file name of the export.

   This is the name of the file that will appear in the Report Exports folder on the FTP site.

   Note: This file name is used every time a report is exported for this job. The file is overwritten each time the report is exported.

7. Select the export format from the **Format** drop-down list.

   Export Formats on page 243 provides additional information.

8. Select the **Zip** radio button if you want to compress the file.

   Note: Compressing a file reduces the time required to send the file to the FTP site.

9. Enter the email address of the person to be notified when the job is complete.

   If you enter an invalid email address, DREAMmail displays an error message.

10. Click **Add** to enter email address, and then click **Next**.

    Note: You can enter multiple email addresses.

11. Select the profile fields that you want to include in the export file from the **Available** list and move them to the **Selected** list.

    By default, the email address profile field is included in the export file. Depending on the type of data that you specify, other profile fields will be included by default as well. You can also include user-created profile fields in the export file.

12. Use the **Frequency** option buttons to specify how frequently you want this report to be generated.

    Frequency of Reports in Export Manager on page 244 provides additional information.

13. Enter a date in the **Start date** field.

    Note: This is the starting date for running the report — not for generating the data in the report. The start date cannot be on Saturday or Sunday.

14. Enter a time in the **Start time** field.

15. Enter a number of days in the **Expire** in field to specify a limit to the number of days that the job should run.

16. Click **Save**.

    DREAMmail displays a confirmation indicating the date and time at which the next report will be exported.

17. Click **Go**.

Export Campaign

Use this report to export data regarding individual messages or all messages in a campaign. This data is exported to My Data. My Data on page 238 provides additional information.

Exporting Data from a Campaign

To export data from a campaign:

1. Go to **Reports** > **Reports** > **Exports** > **Export Campaign**.
2. Select the campaign that contains the message or messages that you want to export from the **Campaign** list box.
3. Select the message from the **Campaign** list box that you want to export.
4. Select the metrics in the **Export details** section that you want to include in the export.

5. Enter a name in the **Report Name** text box.
6. Click **Save**.

   The report name is displayed in My Data. **My Data on page 238** provides additional information.

7. When the status for the report is Finished, click the report to view its contents.

Note: If RTM is enabled, TransactionID will be included for all Campaign Exports.

Definitions of Metrics

RFM Response Recency report metric definitions are defined below.

Metric	Definition
Clicks<Export Campaign>	Email address, message name, URL, date and time of click, and Hit From (that is, the format of the message in which the click-through occurred).
Spotlight<Export Campaign>	A post-click analysis tool that enables you to measure a subscriber's response to specific sections of a website by tracking that subscriber's activity. In order for Spotlight to track activities, you insert a Spotlight tag into the sections, or pages, of the website where you want to track activity.
Pass along recipients<Export Campaign>	Email address, message name, URL, date and time of the pass along, and HitFrom (that is, the format of the message that was clicked).
Soft bounced<Export Campaign>	Email address, message name, date and time of bounce, and message format.
Invalid<Export Campaign>	Email address, message name (from which the invalid address came), date and time that the message became invalid, and message format.
Hard bounced<Export Campaign>	Email address, message name, date and time of bounce, and message format.
Delivery Errors<Export Campaign>	Email address, message name, date and time of error, and format of the message that was not delivered.
Opened<Export Campaign>	Email address, message name, date and time that the message was opened.
Unsubscribed<Export Campaign>	The number of emails that were not delivered due to recipients having unsubscribed from the DREAMmail site or client that is sending the message.

Ad Hoc Exports

You can export tabular data and graphs from DREAMmail reports and save the export file to your computer. This type of exporting, which you do on an as-needed basis, consists of two steps:

- Click to generate an export file that DREAMmail saves in My Data. **My Data on page 238** provides additional information. When the export file has been saved, DREAMmail sends you an email message that informs you the report is ready to be downloaded from My Data.
- After the file has been saved, in My Data click the export file name to save the file to your computer.

You can specify the format (PDF, HTML, Excel, and Delimited) of the exported file. The PDF, HTML, and Excel formats are limited in the amount of rows they can display. Use the CSV and Delimited formats for data sets that have a large amount of rows.

For Delivery and Response and RTM reports, the data in the exported file is determined by the scope, grouping and subgrouping, and sorting of the report. **Delivery and Response on page 165** and **RTM Reporting on page 188** provide additional information.

Exporting Tabular Data

To export tabular data:

1. Click , which is located in the upper right corner of the report.
2. Specify the export options in the **Export Report** section.
3. Click **Save**.

   DREAMmail exports the report as a Zip file to My Data. **My Data on page 238** provides additional information.

4. To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Exporting Graphs

To export graphs:

1. Click , which is located in the upper right corner of the report.
2. Enter a file name for the exported file.
3. Click **Save**.

   DREAMmail exports the graph as a JPEG image in a Zip file to My Data. **My Data on page 238** provides additional information.

4. To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Export Formats

When report data is exported, its values must be separated, or delimited by a special character. You can specify one of the following formats to delimit the data in an export file:

- CSV (comma separated values)
- Tab
- Pipe (that is, a vertical line)
- Double pipe (a double vertical line)

Types of Reports in Export Manager

There are different types of reports that you can export with Export Manager. Export Manager on page 239 provides additional information. These reports are available at both client and site level and contain the following data: client, site, date, and profile fields.

The reports include data for the last 24 hours. However, if the report is run on Monday, it includes data from Friday, Saturday and Sunday.

The different types of export reports consist of:

- Profile changes
- Invalid addresses
- Email address change
- Subscriptions
- Unsubscriptions
- Bounce backs
- Clicks
- HTML opens
- Spotlight transactions

Frequency of Reports in Export Manager

You can select one of the following frequencies to determine how often the reports are exported in the Export Manager:

- **Daily** – Runs once a day Monday through Friday. The report data is based on activity during the 24-hour period after the last daily report run, except on Mondays when the report includes data for the previous 72 hours.
- **Weekly** – Runs every seven days, starting on the date specified in the Start Date text box. The start date cannot be a Sunday or Saturday. The report data is based on activity during the previous seven days.
- **Every 4 Weeks** – Runs every four weeks starting on the date specified in the Start Date text box. The start date cannot be a Saturday or Sunday. The report data is based on activity during the previous four weeks.

About Exports

The Exports components in DREAMmail reports enable you to export data and retrieve data from DREAMmail reports. The Export components consist of the following:

- **My Data** – A repository for data that was exported form DREAMmail reports on an ad hoc basis.
- **Export Manager and RTM Export Manager** – Tools that enable you to schedule recurring report exports for automatic download to the DREAMmail FTP server.
- **Export Campaign** – A tool for exporting data from campaigns and individual messages.

RTM Export Manager

Use this report to schedule daily exports to a client's FTP site on the DREAMmail FTP server. You specify the type of report and profile data that you want to include in the export report. Types of Reports in RTM Export Manager on page 246 provides additional information. RTM Export Manager uses the same FTP server as FTP Import Manager, so you do not need additional FTP credentials. Using FTP Import Manager on page 65 provides additional information. Export files are stored on the FTP server in the RTM Exports subfolder.

Note: The FTP feature must be enabled in your DREAMmail user privileges before you can use RTM Export Manager. FTP usage must also be enabled at the site level. Creating User Accounts on page 54 and Configuring Sites on page 26 provide additional information.

Creating RTM Export Jobs

To create RTM export jobs:

1. Go to **Reports** > **Reports** > **Exports** > **RTM Export Manager**.
2. Click **Create**.
3. Enter the job name and description.
4. Specify the type of report that you want to export.

   Types of Reports in RTM Export Manager on page 246 provides additional information.

5. Select the scope of the export report from the **Export scope** drop-down list.

   Note: Select **Client** to include data for all of the client's sites; select Site to include data only for the site.

6. Enter the file name of the export.

   Note: The filename displayed in the RTMExports folder is the name concatenated with the date and time the export was run, in the format name_yyyymmddTtimestamp. For example: RTMExport_20030912T164545678.

7. Select the export format from the **Format** drop-down list.

   Export Formats on page 243 provides additional information.

8. Select the **Zip** radio button if you want to compress the file.

   Note: Compressing a file reduces the time required to send the file to the FTP site.

9. If you want to send a confirmation email, enter the email address and click **Add**.

   Note: You can send the email to multiple addresses.

10. Click **Next**.
11. Select the profile fields from the **Available** list box that you want to include in the export file and click the right arrow to move them to the **Selected** list box.

    By default, the email address profile field is included in the export file. Depending on the type of data that you specify, other profile fields will be included by default as well. You can also include user-created profile fields in the export file.

12. Enter a date in the **Start date** field.

    Note: This is the starting date for running the report — not for generating the data in the report. The start date cannot be on Saturday or Sunday.

13. Enter a time in the **Start** time field.
14. Enter a number of days in the **Expire in** field to specify a limit to the number of days that the job should run.
15. Click **Save**.

    DREAMmail displays a confirmation indicating the date and time at which the next report will be exported.

16. Click **Go**.

Types of Reports in RTM Export Manager

There are different types of reports that you can export with RTM Export Manager. **RTM Export Manager on page 244** provides additional information. These reports are available at both client and site level and contain the following data: client, site, date, and profile fields.

The reports include data for the last 24 hours. However, if the report is run on Monday, it includes data from Friday, Saturday and Sunday.

The different types of RTM export reports consist of:

- Delivered
- Not Delivered
- Clicks
- HTML opens
- Spotlight Transactions

ADMINISTRATIVE REPORTS

This unit of the guide includes the following sections:

- **What Are Administrative Reports?**

What Are Administrative Reports?

The following two reports are used by DREAMmail administrators to monitor message activity:

- **Active Mailings report** – Shows all messages that are currently being sent by a specific site, client, or DREAMmail server and indicates which messages are being blocked. Active Mailings Reports on page 248 provides additional information.
- **Server Counters report** – Shows how many messages were queued and delivered for a specific server. Server Counters Report on page 248 provides additional information.

These reports are not part of DREAMmail's Reports module and standard DREAMmail users cannot access them. Available Reports in DREAMmail on page 11 provides additional information on available reports.

Active Mailings Reports

The Active Mailings reports display all of the messages that are currently being deployed in a specific site, client, or server. These reports also display the names of any blocked messages and the names of the messages that are blocking other messages.

Note: These reports are available only to DREAMmail administrators. Standard DREAMmail users cannot access these reports.

To use this report:

1. Go to **Admin Reports**.
2. Choose the type of Active Mailings report: **Site**, **Client**, or **Server**.

Server Counters Report

This report shows how many messages were queued and delivered by the pumpers for a specific server.

Note: This report is available only to internal Epsilon administrators.

To use this report:

- Go to **Admin Reports** > **Server Counters**.

Fields

The table below defines the fields in this report:

Field	Definition
Start Time - Server Counters Report (Queue Engine Counters)	The date (yyyy/mm/dd) and time that DREAMmail opened a connection to the queue engine.
Messages from Queue Engine	The number of messages from the queue engine that are sent through the pumper.
Messages Queued	The total number of messages queued in the engine. This number should equal the total of the Messages from Queue Engine column.
Messages Delivered to SMTP	The number of messages actually pushed by the pumper to SMTP. This number should equal the Messages from Queue Engine + Messages at Startup.
Flo Pumper	The IP address of the pumper.
Messages at Startup	Messages in queue when you start DREAMmail. When you stop DREAMmail, any data that is being processed is copied to a file that is then read on startup.
Start Time - Server Counters Report (Pumper Counters)	The date (yyyy/mm/dd) and time that DREAMmail opened a connection to the pumper.