Email Marketing with DREAMmail

September 2010

Epsilon Learning
Delivering Your Knowledge

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Introduction to DREAMmail Classroom Training

Course Overview

This 1-day classroom training covers the most common DREAMmail tasks for performing email marketing activities, including loading subscriber data into DREAMmail, composing, verifying and deploying email messages, and analyzing the effectiveness of messages.

Course Objectives

Upon completion of this training course, you will be able to:

- Create and populate subscriber mailing lists.
- Create addresses for use in your emails.
- Create, proof, and deploy email marketing messages.
- Define specific target audiences for your messages.
- Personalize your message content.
- Analyze the effectiveness of your messages.

Intended Audience

This course is designed for users who will:

- Create and send marketing emails.
- Upload and utilize customer segments and lists.
- Analyze post message deployment.

Those users who will not perform these functions may be better served by other training. Additional training is available for these and other topics via the DREAMmail online courses.

Prerequisite Knowledge

To fully benefit from this course, you should:

- Be familiar with basic web navigation and how to complete web page forms.
- Understand your organization's business goals and intended uses for DREAMmail.
- Be familiar with your current email marketing processes. This includes an understanding of where and how you currently collect and maintain subscriber data.

Additional Resources

In addition to your classroom training, DREAMmail offers several resources for additional information and assistance on the product.

DREAMmail Online Help System

Click on the **Help** button at the top of your screen for immediate access to information within the DREAMmail application.

The Epsilon Interactive Learning Center

The Epsilon Interactive Learning Center contains information and resources available to you regarding the DREAMmail product. To access this site, go to: http://**learn.epsiloninteractive.com** and use your email address to logon**.** Available resources include:

- **Online Courses**
  Corresponding online training is available for a variety of DREAMmail topics. To access, click on **Find Training** in the left navigation menu of the Epsilon Interactive Learning Center and then click the **DREAMmail** button.

- **Skill Builders**
  Recorded webinar sessions on various DREAMmail topics are also available via the Epsilon Interactive Learning Center. These recorded sessions can be accessed at any time from any location with internet access. To access a recording, click on **Find Training** in the left navigation menu of the Epsilon Interactive Learning Center and then click the **DREAMmail** button.

- **User Guides**
  Epsilon Interactive has developed extensive user documentation regarding DREAMmail. Each of these documents is designed to address different areas of the DREAMmail product. You can access the DREAMmail User Guides by clicking **Browse Resources** in the left navigation menu of the Epsilon Interactive Learning Center and then clicking the **DREAMmail** button and clicking on the appropriate user guide.

Unit 1: Getting Started in DREAMmail

Overview

Understanding core concepts regarding email marketing and email messages makes DREAMmail easier to understand. This unit presents some general information regarding emails and email marketing along with an overview of DREAMmail functions and features.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Identify key elements of an email message.
- Identify key features of DREAMmail.
- Define the steps required to send an email message.

Key Terms

Action Button: The orange icon beside each object in DREAMmail that displays the item's action menu when clicked.

Action Menu: A pop-up menu of activities that can be performed on an object, such as edit or delete.

Campaign: A logical grouping of one or more email messages sent to the subscribers of a mailing list.

Client: A collection of sites that share common properties.

DREAMmail Menu: The main navigation area in DREAMmail.

Email Marketing: Direct marketing to customers via email.

Mailing lists: The list of subscribers to whom email messages are sent.

Marketer: An individual who promotes a product or service with the ultimate goal of selling it.

Newsletter: An email message that contains primarily editorial content.

Promotional Offer: An email message that advertises a product or service.

Publisher: An individual who produces ad-sponsored editorial content.

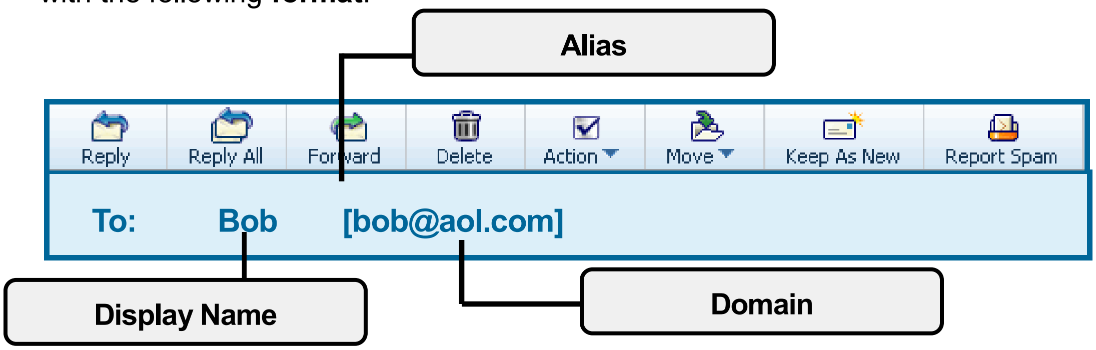
Site: The groups within a client organization that represent separate lines of business, such as brands or regions.

Subdomain: A third level domain that is part of a larger domain.

Subscribers: The individuals assigned to one or more mailing lists who receive email marketing messages.

Email Messages

To ensure delivery to the appropriate address, email addresses must comply with the following **format**:



Email Marketing Messages

The various **elements** of an email marketing message are outlined below.

Note: Subdomains direct traffic to and from DREAMmail but messages appear to be coming from your organization.

Introduction to Email Marketing

The ability to market via email has been shown to help companies keep ahead of the competition by increasing response rates, lowering costs and building longer, stronger and more profitable customer relationships, thereby improving ROI.
To create relevant email marketing communications that build relationships and maximize ROI, marketers will increasingly need to create targeted, relevant email communications centered on scenario-based segmentation and the sequencing of messaging to customers.

Types of Email Marketing Messages

The basic **types** of email marketing messages differ in terms of the purpose, intended audience and frequency with which they are sent.

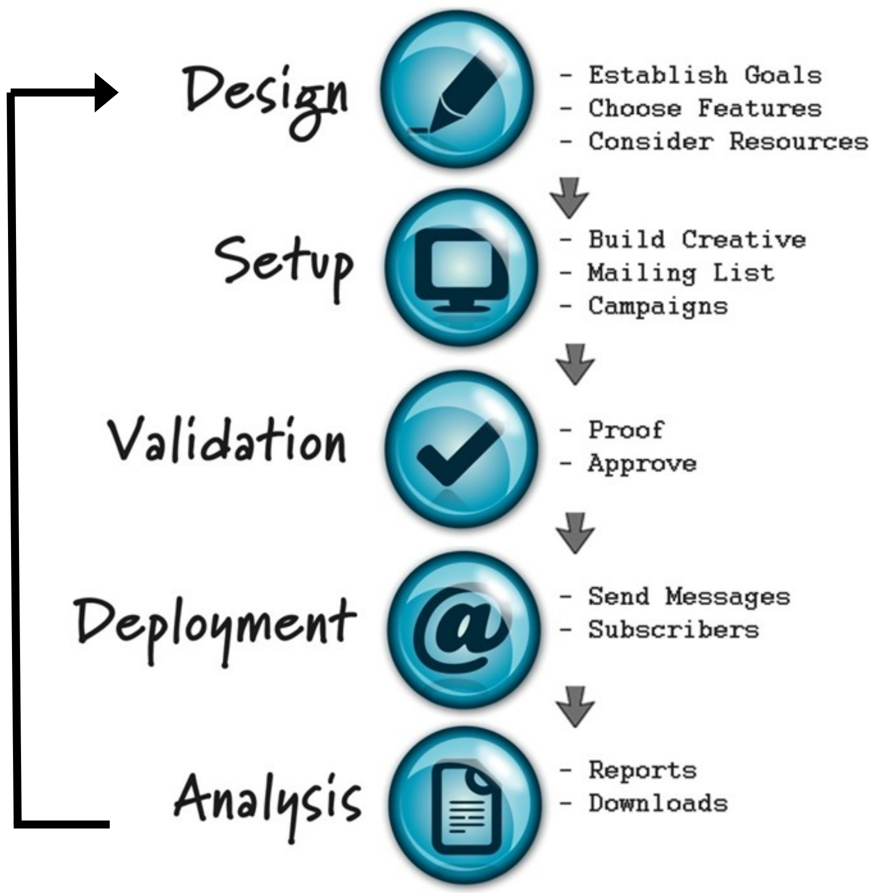
Type	Purpose	Audience	Frequency
Newsletter	The generation of indirect advertising revenue from ads within the newsletter and from greater traffic to your ad-sponsored website.	Subscribers visit your website to choose which newsletters they want to receive.	Sent on a regular, published schedule.
Promotional	The generation of revenue from direct sales of the promoted product or service through online purchase or by driving traffic to your website, call center or retail store.	Subscribers are signed up as part of the purchase or product inquiry process.	Irregular - Not all customers receive all offers.
Operational	A message to recipients concerning operational or informational notifications, e.g. web site maintenance, product enhancements, etc.	All subscribers will receive this message when sent.	Sent only as needed.
Transactional	A triggered message that results from a specific action, e.g. subscriber makes a purchase or an order has been shipped.	Any recipient making the action, regardless of subscription status.	Occurs only as a result of a subscriber action.
Service	A message to recipients providing a service, e.g. a bank statement.	All subscribers will receive this message when sent regardless of subscription status.	Sent only as needed.

Introduction to DREAMmail

DREAMmail is a web-based email marketing application that helps marketers and publishers more effectively target, time, deliver and analyze the effectiveness of their email campaigns.

Basic Process Flow

Below are the five **phases** of an email campaign deployment and the high-level tasks that must be completed as part of each phase.



DREAMmail Features and Benefits

DREAMmail is designed to help marketers and publishers better manage their data, target and deploy messages, and examine the results of their efforts.

Data Management

- Permission-based subscriber lists.
- Targeted mailing lists based on demographics, interests, response or transactions.
- Integration of existing customer data.
- Ability to manage multiple sites or lists.
- Hosted mini-forms and Preference Centers.

Message Targeting

- Sophisticated segmentation of subscriber data allowing targeted offers to recipients.
- Customized content for each subscriber.

Deployment

- High-volume message deployment capabilities.
- Messages automatically delivered in the appropriate format per subscriber.
- Integrated processes for message verification and authorization.
- Automated processing of subscriber replies.
- Control over send rate and recency/frequency of receipt.
- Full XML API to automate common tasks.

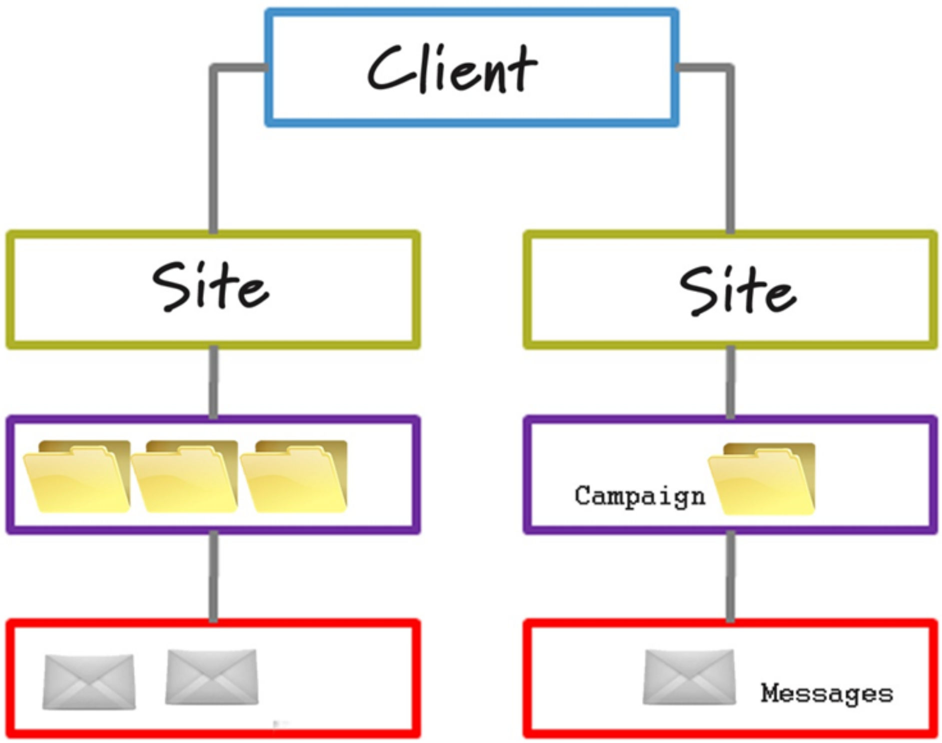
Reporting

- Real time campaign results.
- Bench mark data available.
- Customizable data views.
- Select and drilldown capabilities to view granular data.
- Data range options to view performance over time.
- Graph functionality for presentations.
- Managed library for customized views.
- List generation for future targeting based on response data.
- DREAMmail spotlight capability to view revenue generated by message.
- Complete data export tools designed to further evaluate message response and conversion or synch with offline database.

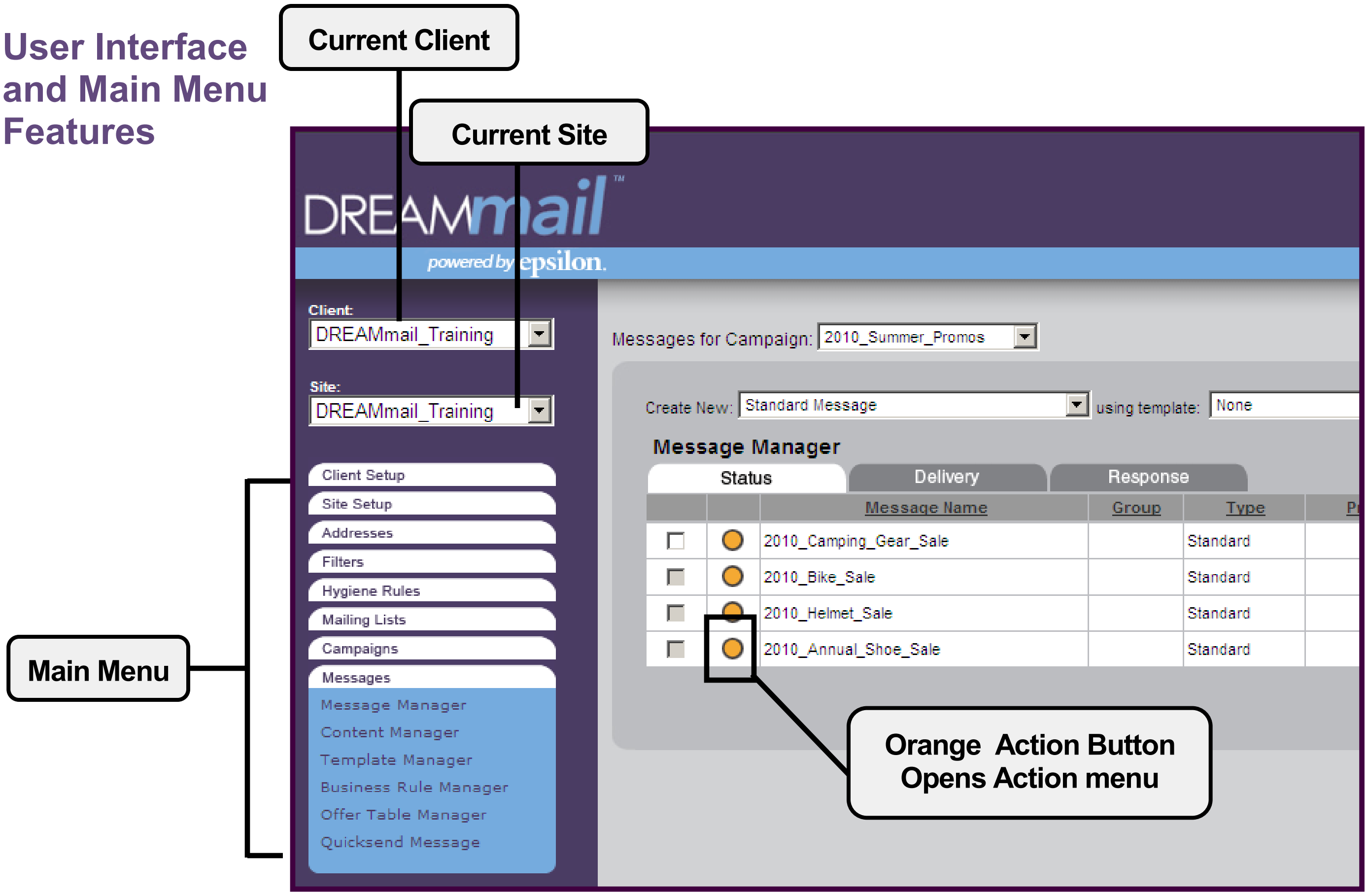
System Hierarchy

DREAMmail is arranged **hierarchically** to allow for ease in organizing and structuring your work.

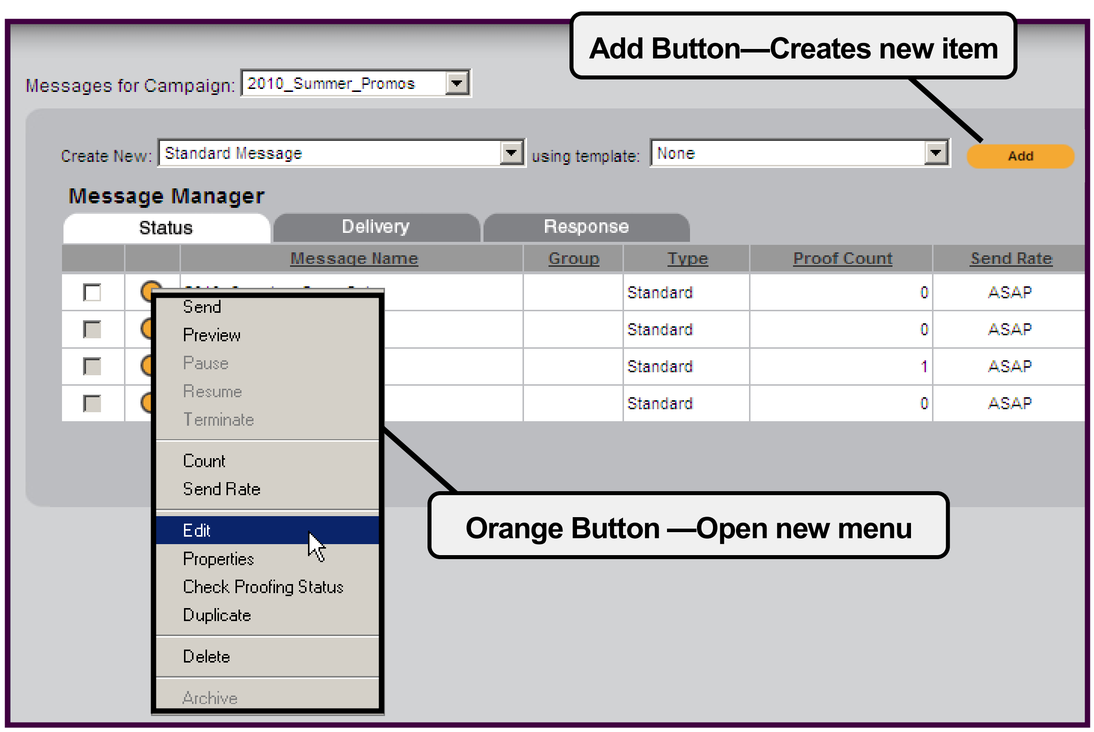
Example: A client can have multiple sites within DREAMmail. Each site can be associated with one or more marketing campaigns and one or more mailing lists. Subscribers may belong to one or more mailing lists and messages are sent to subscribers using one or more of these lists. The following figure displays the relationship of each component in DREAMmail.



User Interface and Main Menu Features



Navigating Through DREAMmail



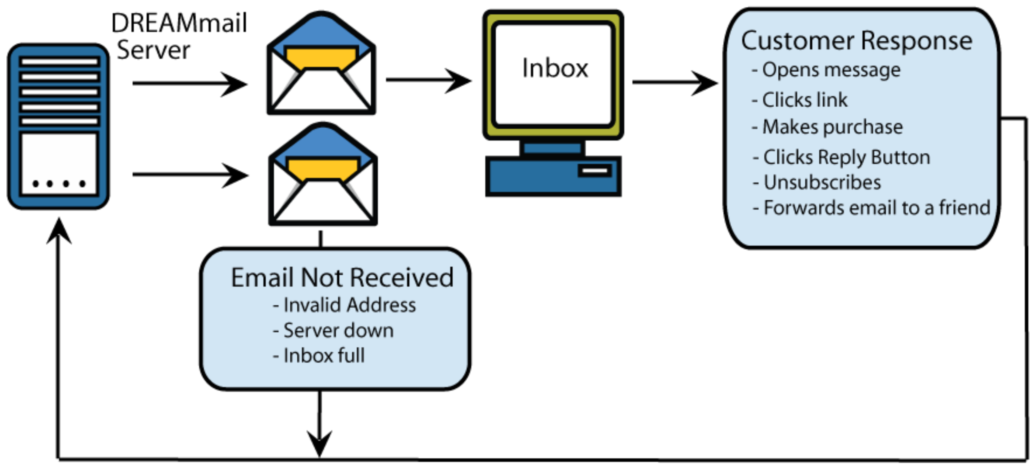
Main Menu Features

The DREAMmail menu expands and collapses when you click on the top-level items, such as Campaigns, Messages, or Reports.

When you click on a sub-menu item, such as Mailing List Manager, the selected item is displayed in the workspace.

Types of Recipient Responses

DREAMmail tracks the **responses** of the recipients of your message. Some responses are recorded in the form of activities that occur on the web, while others are based on activities associated with the email itself.



Action	Web-based Responses
HTML Open	Subscribers open an HTML-format message
Click-through	Subscribers click on a link in the message
Purchase	Subscribers click on a link in the message and complete a purchase

Action	Email-based Responses
Bounce backs	An email cannot be sent to a subscriber
Subscriber replies	Subscribers click the Reply button in their email and type messages
Unsubscribes	Subscriber clicks link to unsubscribe from a mailing list
Pass Along	Subscriber forwards email to a friend who also opens message

Note: There are two types of **bounce backs**—hard and soft. **Hard** bounce backs occur when a message will never be received, e.g. the address no longer exists. **Soft** bounce backs occur when the address exists but is unable to receive mail, e.g. the mailbox is full.

Summary

- Most email marketing takes the form of either promotional ads or newsletters.
- There are 5 phases of campaign deployment in DREAMmail, including the Set Up, Production, Validation, Deployment and Analysis phases.
- DREAMmail is a web-based application that allows you to manage and track your email marketing activities.
- DREAMmail is ordered hierarchically – Client > Site > Campaign > Message > Mailing List.
- DREAMmail features allow you to create and populate mailing lists; create, proof, and deploy messages; as well as to analyze the results of your efforts.
- DREAMmail can track both web-based responses, e.g. opens and click throughs, and email-based responses such as bounce backs.

Need More Information?

For additional information regarding emails, email marketing or DREAMmail's functions and features, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 2: Understanding Subscriber Data

Overview

The key to successful email marketing is knowing your subscribers and being able to access relevant data regarding them. This unit outlines how subscriber data is collected, stored and updated in DREAMmail.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Identify common subscriber profile fields.
- Describe how DREAMmail stores subscriber data.
- Describe how subscriber data is updated in DREAMmail.

Key Terms

Demographics: The characteristics of human populations (e.g. age, gender or income) used to identify various markets.

HTML Capability: When the subscriber opens an HTML-format message, this action is recorded in DREAMmail. The subscriber's record is then flagged as HTML capable.

List Unsubscription: The process of removing a subscriber from a specific mailing list.

Preference Center: A web page that allows new subscribers to join and existing subscribers to update their subscriptions and profiles.

Profile Data: Information collected from a subscriber. This can include demographic or geographic information and/or interests.

Site Unsubscription: The process of removing a subscriber from all mailing lists for a specific site.

Target: The process of using information regarding subscribers, e.g. gender or interest, to further segment a mailing list.

Unsubscribe: The process of being removed from a mailing list(s).

Subscriber Data

Depending on the needs of your organization, the level and complexity of the information you collect on your **subscribers** can range from a simple email address to very detailed information on your subscriber's interests, preferences and purchasing patterns. Either way, DREAMmail can assist you in organizing and utilizing your subscriber data.

Profile Fields

Any data that you collect on your subscribers can be used to populate your mailing lists. DREAMmail stores subscriber data in **profile fields**. Each profile field holds a segment of the subscriber data. The profile fields are part of the subscriber record and can be shared across lists or even sites.

Commonly used subscriber profile fields include:

1. Email Address
2. First Name
3. Last Name
4. HTML capability
5. Last date of purchase
6. Promotional code

Note: A number of profile fields are available with the standard DREAMmail product. Additional profile fields can be added, if needed.

Example: Below is a sample table containing subscriber profile data.

Email Address	First Name	Last Name	Favorite Sport	Shoe Size
jane@aol.com	Jane	Smith	Basketball	7
bob@gmail.com	Bob	Jones	Football	11
matt@yahoo.com	Matt	James	Skiing	12.5
juan@aol.com	Juan	Cruz	Golf	13

Collecting Subscriber Data

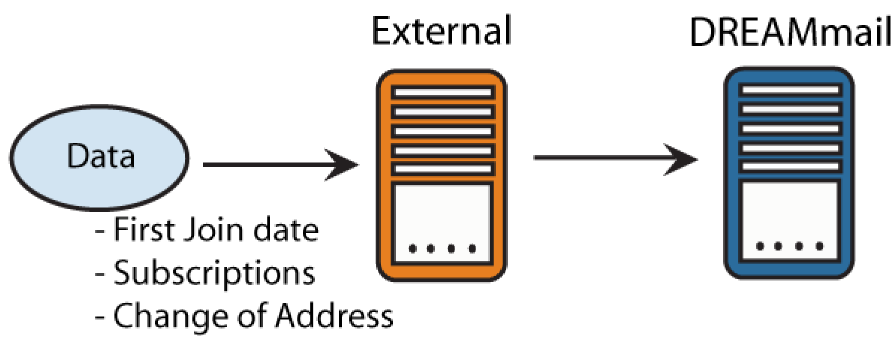
There are several ways to obtain **new subscriber data** for a mailing list, including:

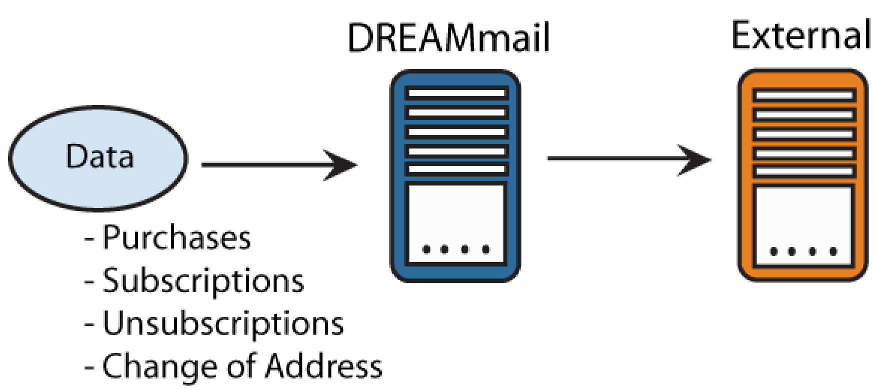
- Collecting data on new subscribers via your Preference Center.
- Purchasing a mailing list from a vendor.
- Receiving new subscriptions from forwarded emails.
- Collecting data during product registration.

There is no real limit to the number and type of information you can request. Common sense would suggest that you collect only the information that would be considered “reasonable” by your subscribers. Not asking for the right information could limit your ability to **target** your email messages, however asking too much could limit the number who subscribe.

Housing Your Subscriber Data Outside of DREAMmail

You can house and update your subscriber data in DREAMmail or you can do so in an **external database**. If you use an external database, you can import your subscriber information into DREAMmail as needed. Existing subscriber records may be overwritten with new information. Records changed in DREAMmail will need to be synched up with your external database.





Note: If using an external database, be sure to synch up your data by exporting it from DREAMmail into your own database and then importing the data back into DREAMmail.

Ensuring Your Data is Usable

In DREAMmail, all profile data is tied to the subscriber's email address. Therefore, at a minimum, the email address must be collected and must be valid for the record to be useable.

To be valid, an address must be in the **standard** email address format:

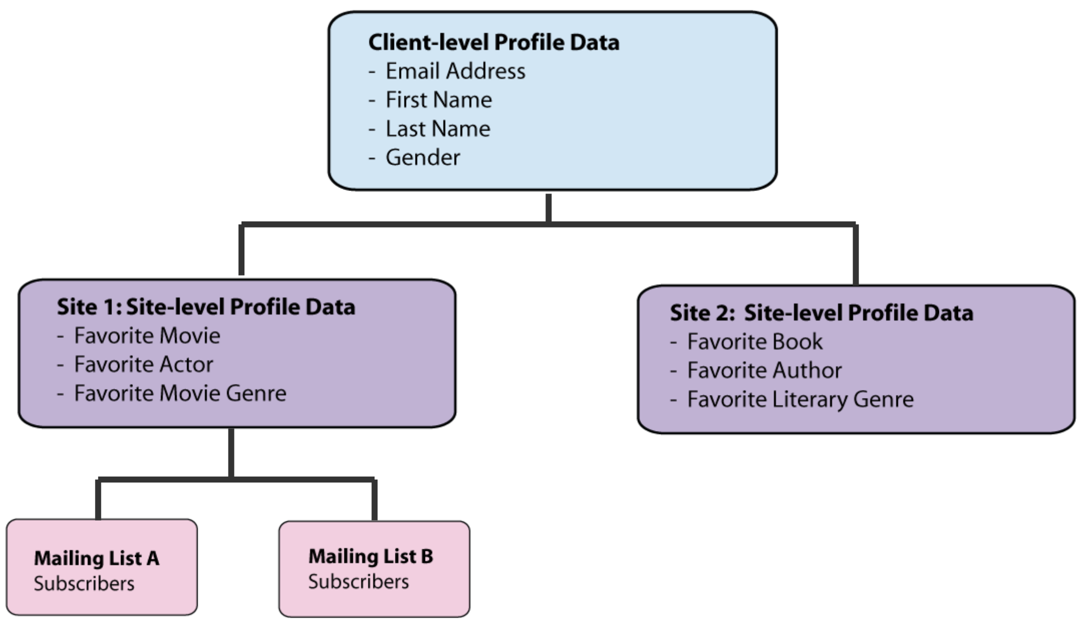
Alias@Domain.Root Domain
e.g. bob@hotmail.com

When subscriber data is added, DREAMmail verifies that each subscriber email address conforms to the above format. If an address is incomplete or malformed, DREAMmail cannot add the record.

Storing Subscriber Data

When **mailing lists** are populated with new subscriber data, DREAMmail breaks up the information into three types of data and stores it hierarchically:

1. **Client-level profile data** – Data that is not likely to change, e.g. gender.
2. **Site-level profile data** – Data specific to a site, e.g. favorite movie.
3. **List-level data** – Mailing list membership.



Updating Subscriber Data

When an **update** to subscriber data is received, it will be processed differently depending on the type and level of data.

Data Type and Level	Result of Updating the Data
Client-level	New subscriber data will overwrite existing data.
Site-level	Only the data specific to that site will be updated, along with any client-level updates. The data on other sites will not be changed.
List-level	List membership is modified via subscriptions and unsubscriptions for all sites.

Note: When you import profile data to update a mailing list, all other lists that share the same profile fields will also be updated.

Subscriptions and Unsubscriptions

You can add or remove **subscribers** from DREAMmail at the following levels:

Level	Description	Subscription	Unsubscription
Client	All sites within the client	X	
Site	All mailing lists within the site	X	X
List	Just specific mailing lists with the site	X	X

Best Practices for Subscriber Data

Validate email addresses at the point of collection. The best way to ensure that you get the correct email address is to verify it when it is obtained from the subscriber. If the email address is incomplete or malformed, you can request the subscriber fix it before proceeding.

Update your database with corrections and rejections. If Epsilon imports your subscriber data when your account is set up, you will receive a list of the corrections and rejections performed. Use this information to update your external database.

Summary

- Subscriber data can be stored in DREAMmail or in an external database and imported into DREAMmail, as needed.
- Subscriber data is stored in DREAMmail in profile fields and must be in a readable, i.e. valid, format.
- Profile field information can be stored at either the client or site level.
- Email address is the only mandatory profile field in DREAMmail.
- Unsubscriptions can occur at either the mailing list or site level.
- Additional profile fields can be added at either level upon request.

Need More Information?

For additional information regarding subscriber data management, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 3: Creating Your Mailing List

Overview

Messages are sent to the subscribers on your mailing lists. This unit introduces the process of creating mailing lists and provides some key information regarding the types of mailing lists you can create in DREAMmail.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Identify the different types of mailing lists and how each is used.
- Create a new mailing list.

Key Terms

Approval List: A mailing list comprised of the individuals in your organization who provide final authorization to deploy a message to your subscribers.

Filter: The application of a condition, e.g. male, such that only specific members of a mailing list receive the message.

List Generator: A feature that allows subscriptions and unsubscriptions to be recorded from a website or form.

Mailing List: A group of subscribers to whom you send email messages.

Permanent List: A mailing list that will not be archived after 60 days of inactivity.

Profile Data: Information collected from a subscriber. This can include demographic or geographic information and/or interests.

Proof List: A mailing list comprised of the individuals in your organization to whom you send draft versions of your messages to verify that the message is set up properly and contains the correct content.

Proof and Approval List: A mailing list used for both the verification and final sign off processes.

Publisher: The individual within your organization who is responsible for providing final approval of a message before it can be deployed.

Standard List: A mailing list that contains a set of subscribers to whom you send messages.

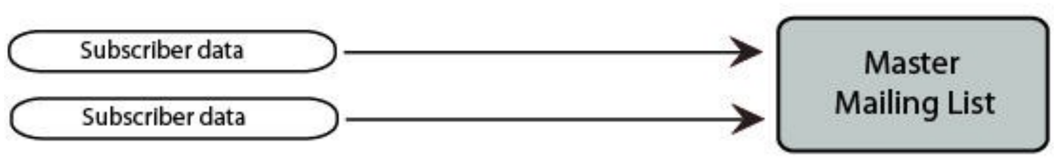
Suppression List: A mailing list containing individuals to whom a mailing should not be sent.

Mailing List Setup Options

How you choose to create and use your **mailing lists** in DREAMmail depends on the needs of your business.

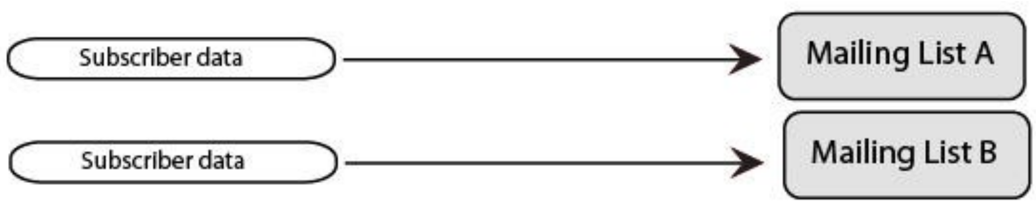
A. Maintaining a Master Mailing List in DREAMmail

- The entire mailing list can be sent to all subscribers.
- The list can be **filtered** and a message sent to a segment of the list, e.g. females only.
- All subscriptions and unsubscriptions are processed to this list.



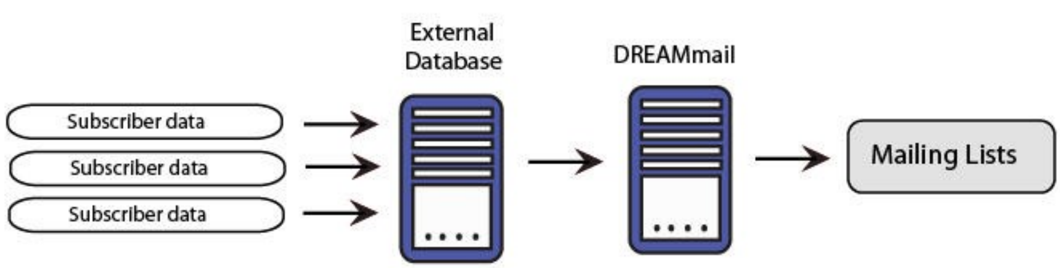
B. Maintaining Multiple Mailing Lists in DREAMmail

- Separate mailing lists serve different subscriber populations.
- Each list can be filtered and a message sent to a segment of the list.
- Subscriptions and unsubscriptions are processed to each list separately.



C. Importing a New Mailing List from an External Database

- Subscriber data is maintained and filtered in an external database and imported into a new list in DREAMmail for each new message.
- The subscriber information can be overwritten each time you import a list.
- Subscriptions and unsubscriptions may be processed in DREAMmail, the external database, or both databases and must be synched.
- Lists can be segmented prior to import into DREAMmail or after import.



DREAMmail's Mailing List Manager

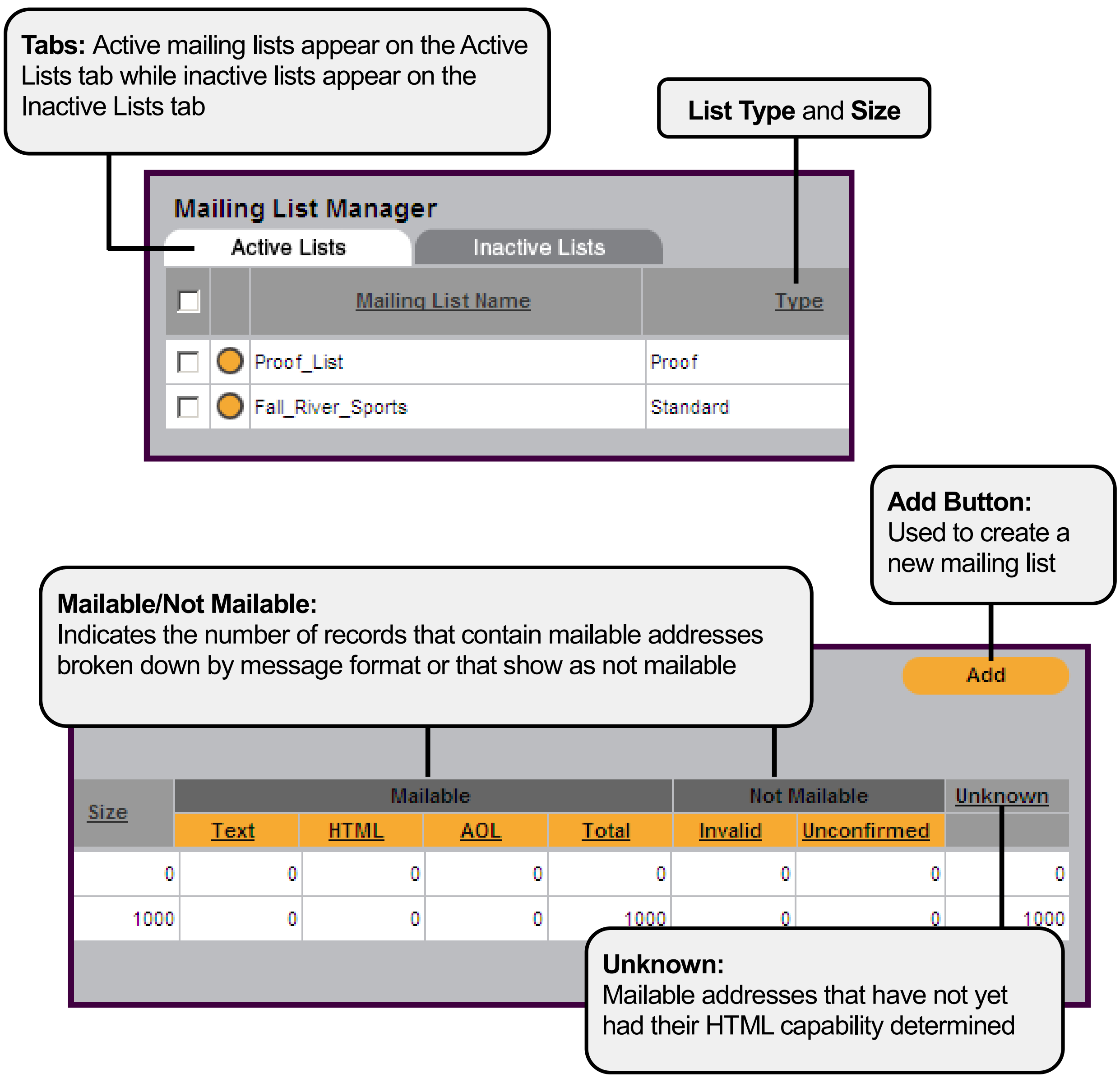
Key Features

The Mailing List Manager allows you to:

- Create new mailing lists.
- Delete mailing lists that have not been used.
- Make inactive any mailing list that is no longer being used.
- Edit the membership of any mailing list.

User Interface

DREAMmail's Mailing List Manager displays all active and inactive mailing lists. You can work with an existing list or create a new mailing list.



Types of Mailing Lists

You can create different **types** of mailing lists in DREAMmail depending on your needs. If you do create multiple mailing lists, it is best to adopt a naming convention up front to reduce any confusion regarding your lists.

Type	Email Status	Used to:
Standard List	Final format	Send emails to subscriber recipients
Proof List	Draft format	Send emails to individuals within your organization who verify the accuracy of the message's content, along with message functionality, before it is deployed
Approval List	Final Draft format	Send emails to individuals within your organization who provide final approval of the message before it is deployed
Proof and Approval List	Draft or Final Draft format	Send emails to individuals within your organization who are responsible for both validating and approving the message before it is deployed
Suppression List	Final format	Prevent individuals on the list from receiving a mailing

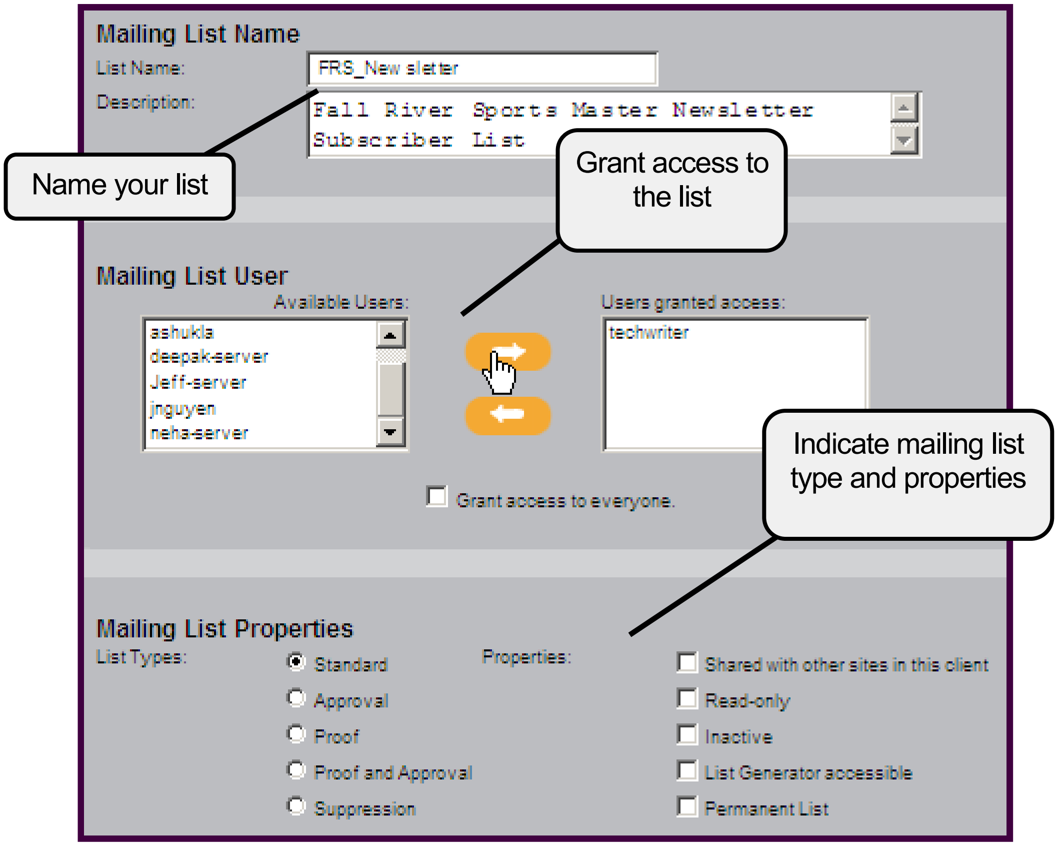
Note: A Proof list can contain up to 40 email addresses.

Mailing List Properties

Mailing lists can be associated with different properties.

Property	Used to:
List Access	Grant access to view and edit the list to all users of the site or to just specific users
List Sharing	Make the list available to other sites for the client
Read Only	Prevent the list from being edited
Active/Inactive	Modify the status of the list—active lists can be made inactive and vice versa
List Generator Accessible	Enable the **List Generator** function to update the mailing list automatically
Permanent	Designate a list as permanent so it will not be archived by DREAMmail after 60 days of inactivity

How to Create a Mailing List



Tip: As with all names in DREAMmail, do not use spaces or special characters in your mailing list names.

Step	Action
1.	Click **Mailing Lists > Mailing List Manager**.
2.	Click **Add**. The Mailing List creation screen appears.
3.	Enter a **name** for the mailing list in the List Name field.
4.	Enter a **description** for the mailing list in the Description field.
5.	Grant access to the appropriate users in the Mailing List User box. • Select users from the **Available Users** list and click the right arrow to move them to the Users Granted Access list. • Or click the **Grant Access to Everyone** checkbox.
6.	Select the **Type** of list you want to create in the List Types section.
7.	<u>Optional</u>: Select **List Properties**.
8.	Click **Save**.

Best Practices for Mailing Lists

Create a master mailing list in DREAMmail. You can export this list to synch up with your external database and then re-import the list into DREAMmail.

Create a proof list. It is always helpful to have another set of eyes review the message before it is sent to a large group of people.

Determine a consistent method for naming your mailing lists. If you will have more than one mailing list, establish a naming convention to assist you in quickly differentiating your lists.

Create a suppression list to prevent mailings from reaching unintended recipients. Some clients create suppression lists of their competitor's email addresses.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Tip: Be sure to append the name of anything you create with your initials!

Level 1: "I think I'm Ready"

Create a new proof mailing list for Fall River Sports for proofing the Fall River Sports Weekly Newsletter.

Level 2: "I'm Confident I can do This"

Fall River Sports has recently opened a new franchise, Fall River Sports New Zealand. All subscribers to this site will be housed in a separate mailing list. Create the appropriate mailing list or lists to house the subscribers and to allow the marketing team to proof the mailings for this new franchise prior to deployment. Everyone on the marketing team has DREAMmail access and will need to edit the mailing list or lists.

Level 3: "Bring it On!"

Fall River Sports has recently changed the proof and approval process for Fall River Sports. The entire marketing team is responsible for proofing the mailings, however, the Senior VP of Marketing is now responsible for approving specific messages prior to deployment. Although not every message will require approval, Fall River Sports wants to ensure that the approval of specific emails is tracked and that this mailing list is always available, if needed. Only you are responsible for editing these lists.

Summary

- Mailing lists are used to send messages to subscribers.
- You can create one or multiple mailing lists in DREAMmail, depending on the needs of your business.
- You can create different types of mailing lists in DREAMmail, including standard, proof, approval, proof and approval, and suppression lists.
- You can grant edit access to everyone or to just specific users.
- You can also grant specific properties to a mailing list, including making a list permanent, accessible via the List Generator or shared with other sites.

Need More Information?

For additional information regarding creating a mailing list, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 4: Populating Your Mailing List

Overview

There are several methods for adding subscribers to your mailing lists. This unit outlines the process for populating your mailing lists by manually adding subscribers to a list and importing files into DREAMmail containing subscriber data.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Manually add subscribers to a mailing list.
- Identify the appropriate file formats for importing subscriber data.
- Import subscribers into a mailing list.
- Create an FTP import job to automatically add subscribers to a list.

Key Terms

DMConnect: An XML program interface that automates many DREAMmail processes, e.g. importing new subscribers, by allowing external software applications to communicate directly with DREAMmail.

Delimiter: Special characters (e.g. a pipe or double pipe) that are added between each profile field and subscriber record to separate pieces of data.

FTP Import: Populating a mailing list by uploading a source file to a shared FTP site.

FTP Site: The location on the internet that houses the FTP folders for sharing files.

Import: Populating a mailing list with a source file containing subscriber data.

List Hygiene: A process in DREAMmail that corrects common errors in email addresses.

Manual Input: Populating a mailing list by manually adding subscribers to the list.

Source file: A text file that contains the subscriber data for importing into DREAMmail.

Text Qualifier: Special characters (usually quotes) that are added around the data to help distinguish the data from the delimiter. This is important when the character used as the delimiter might exist within the data itself.

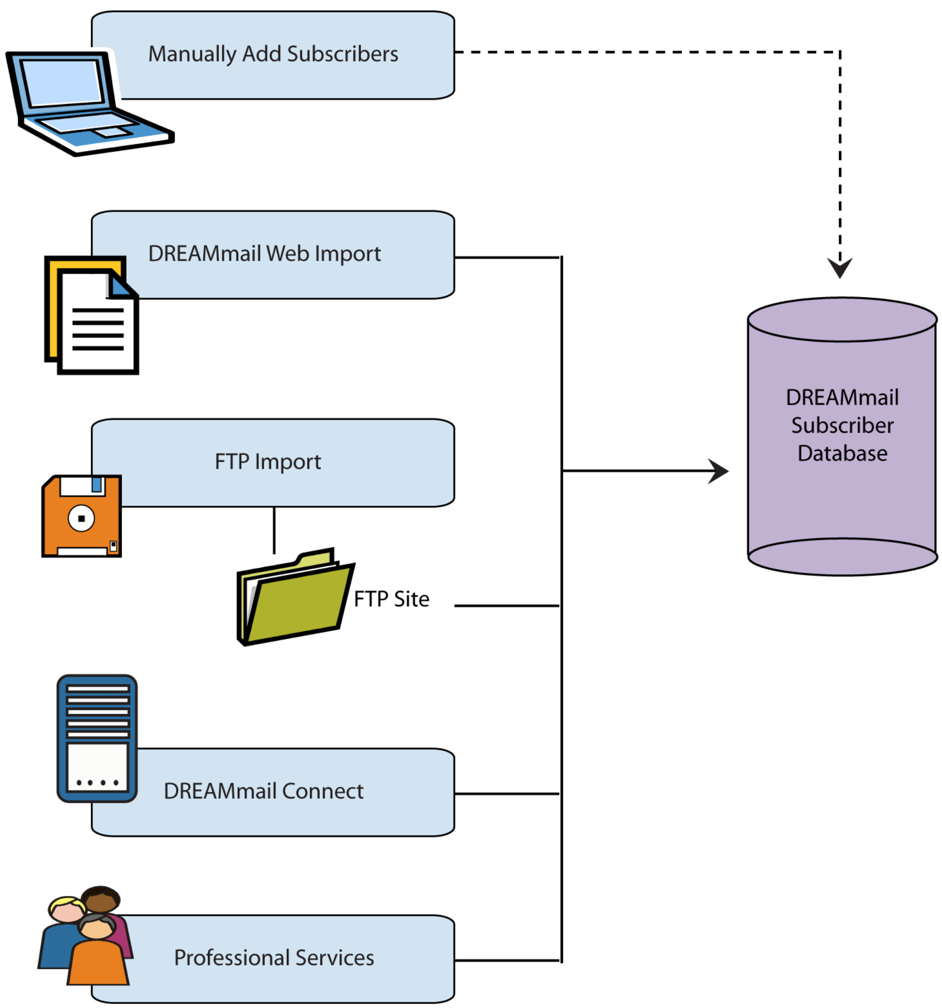
Web Import: Populating a list by uploading a source file into DREAMmail

Methods for Populating Mailing Lists

Once your mailing list is created, it must be **populated** with subscriber data. There are several ways to populate your mailing lists in DREAMmail, including:

1. **Manually inputting** subscribers to a list one at a time
2. **Importing** a source file from your computer directly into DREAMmail
3. Posting a source file to a secure **FTP site** for importing by DREAMmail
4. Programming **DMConnect** to automate the import process
5. Using Epsilon Professional Services to complete the import

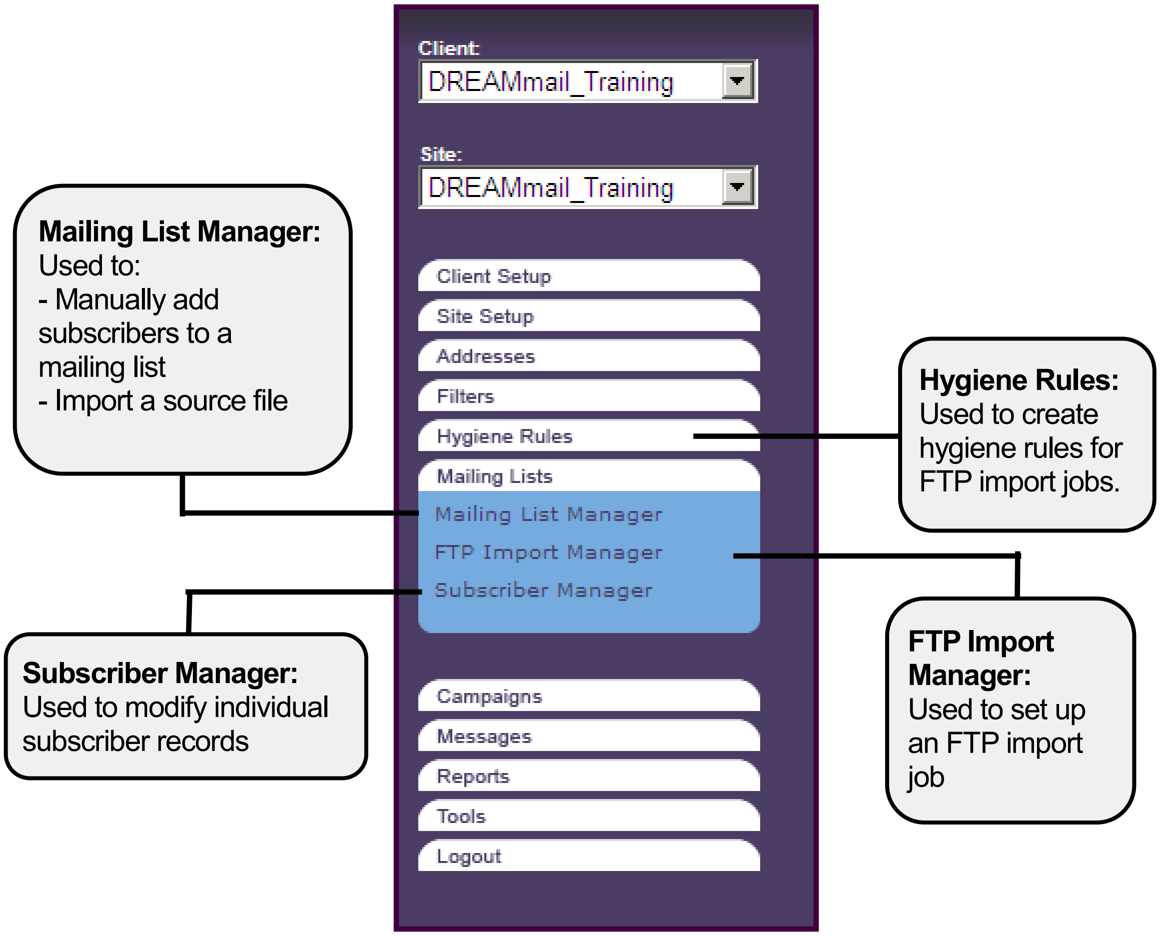
.



Information on securing DREAMmail Professional Services for your imports can be obtained from your Account Representative. Information on setting up DMConnect can be found in the DREAMmail Knowledge Base.

DREAMmail's Mailing Lists Submenus

From the DREAMmail main navigation menu, you can access the **Mailing List Manager** to manually add subscribers to a list or to import a source file. You can also access the FTP Import Manager to set up an FTP import job.

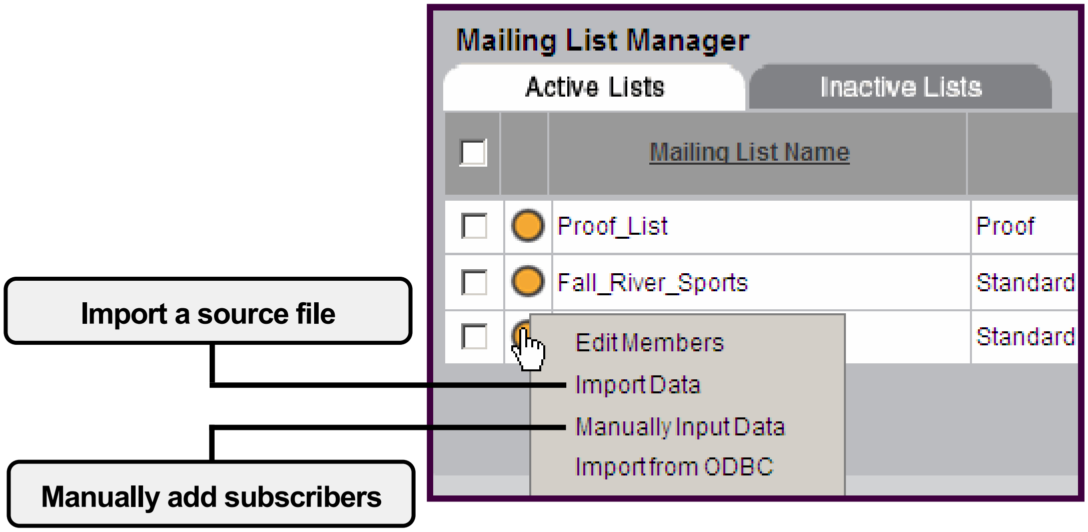


Note: Information regarding DREAMmail's Subscriber Manager is available in **Unit 6: Working with Subscriber Records** of this manual.

Populating Mailing Lists

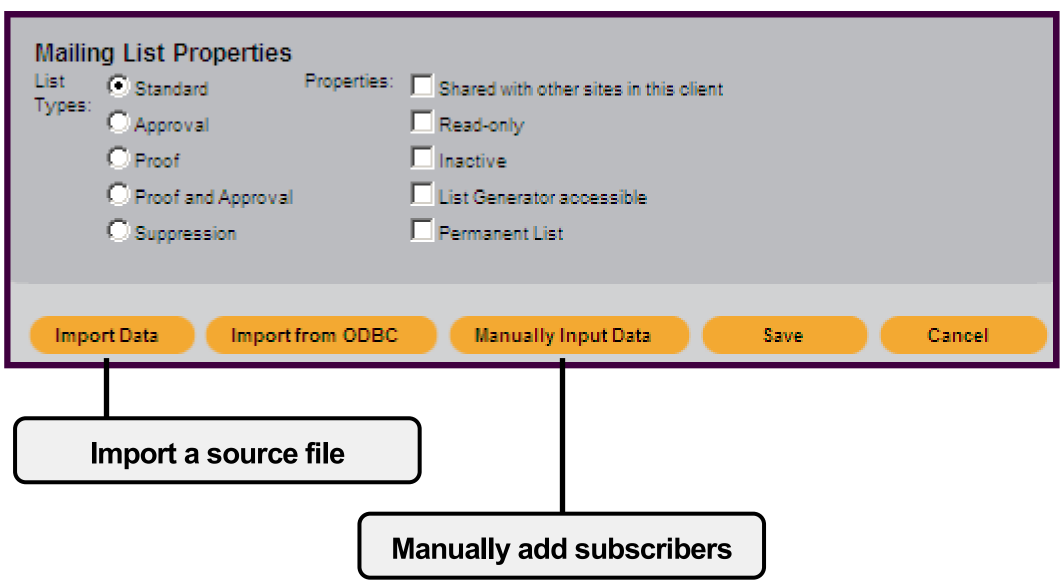
Populating an Existing Mailing List

Click the **orange action button** next to an existing mailing list to manually add subscribers to a list or to import a source file into the list.



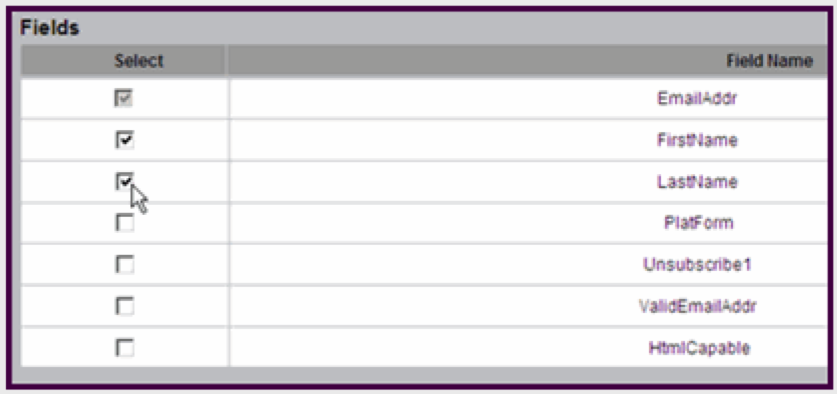
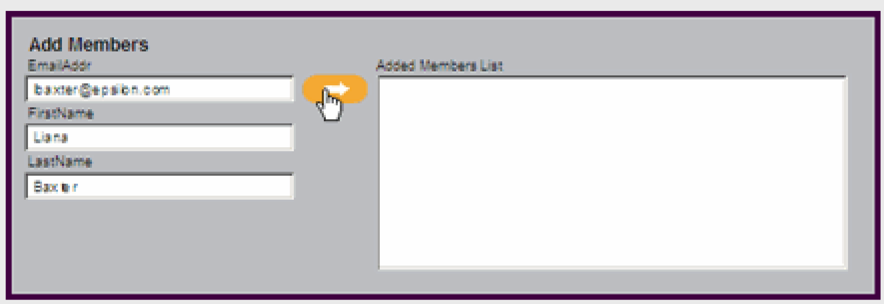
Populating a New Mailing List

You can populate a new mailing list when creating it by clicking the appropriate **button** to either manually populate the list or import subscribers.



How to Manually Populate a Mailing List

Tip: use this process to create your Proof and Approval mailing lists.

Step	Action
1.	Click **Mailing Lists > Mailing List Manager**.
2.	Click the **orange action button** in front of the mailing list you want to populate and select **Manually Input Data**.
3.	Optional: Click the Manually Input Data button when creating a new mailing list. (See process for creating a new mailing list in Unit 3)
4.	Select the **Field Names** you want to use for the mailing list by clicking the checkbox in front of the field. 
5.	Click **Next**.
6.	Enter the **information for the first subscriber** in the Add Members boxes as indicated by the field labels. 
7.	Click the **Right Arrow** to move the subscriber information for each subscriber to the Added Members List box.
8.	Click **Return to List Manager** when you have entered the information for all subscribers on the list.

Note: If you need additional profile fields added to DREAMmail, contact your System Administrator.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports New Zealand needs to be populated. The following individuals should be added to this new list:

- **jane@flo.delivery.com**
- **joe@flo.delivery.com**

HINT: If the site's member table already contains the email address, update the address and add it to the list.

Level 2: "I'm Confident I can do This"

Fall River Sports has recently added another franchise, Fall River Sports West Coast. Bob Jones, the CEO of Fall River Sports will need to approve all email marketing messages sent for this new franchise. Bob's email address is bob.jones@fallriversports.com. Edit access to this list is limited to just you. HINT: If the site's member table already contains this email address, update the address and add it to the list.

Level 3: "Bring it On!"

The proof list for Fall River Sports New Zealand needs updating. The following individuals should be added to this list:

- **mary@flo.delivery.com**
- **sid@flo.delivery.com**

Types of Imports

There are two types of **imports** you can conduct in DREAMmail:

1. DREAMmail Web imports
2. FTP imports

Importing Subscribers into a Mailing List

The **process** for importing files includes:

1. Establishing your source file format.
2. Importing the file into DREAMmail.
3. Mapping the fields of the file to the available profile fields in DREAMmail.

Supported File Formats

Regardless of which import method you use, your **source file** must be in a format that DREAMmail can process. The supported file formats include:

- Comma separated values (CSV) – with or without text qualifiers
- Pipe and Double Pipe delimited
- Tab delimited

Example: If your database contains the following subscriber:

Email Address	First Name	Last Name	Gender	State
matt@aol.com	Matt	Smith	M	NY

Your source file format will look like:

File Type	File Format
CSV	Email_Address,First_Name,Last_Name,Gender,State matt@aol.com,Matt,Smith,M,NY
CSV with text qualifiers	"Email_Address","First_Name","Last_Name","Gender","State" "matt@aol.com","Matt","Smith","M","NY"
Pipe	Email_Address|First_Name|Last_Name|Gender|State matt@aol.com|Matt|Smith|M|NY
Tab	Email_Address First_Name Last_Name Gender State matt@aol.com Matt Smith M NY
Double Pipe	Email_Address||First_Name||Last_Name||Gender||State matt@aol.com||Matt||Smith||M||NY

Tip: If your subscriber data contains commas, you should choose one of the last four file format options.

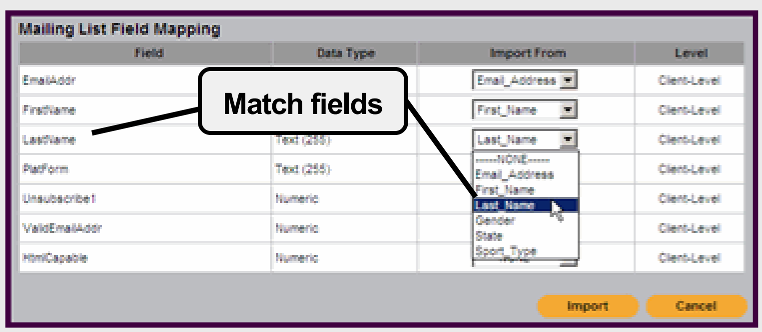
DREAMmail Web Import

DREAMmail's **web import** function allows you to import relatively large files directly into DREAMmail (10 MB maximum or roughly 100,000 subscriber records).

Requirements:

- A CSV formatted source file (or CSV with text qualifiers).
- The profile field names must appear as the first record in the file.
- Files cannot exceed 10 MB compressed.

How to Import Subscribers Using Web Import

Step	Action
1.	Click **Mailing Lists > Mailing List Manager**.
2.	Click the **orange action button** next to the existing mailing list you want to populate and click **Import Data**. <u>Optional</u>: Click the **Import Data** button at the bottom of the screen when creating a new mailing list.
3.	Click **Browse** in the Upload Database box.
4.	Click on the file you want to upload and click **Open**.
5.	Click **Next** when you have located the file. Uploading may take a few minutes to complete.
6.	Click the drop-down arrow in the **Import From** field and map the profile field from your source file to the appropriate profile field in DREAMmail. 
7.	Click **Import** when you have finished mapping your fields. Click **OK** to confirm your importing request has been processed.
8.	Click **Mailing List Manager** to refresh your screen. The number of records imported will show in the **Size** field for your mailing list.

Tip: Web import does not require you to map all of the fields in your source file into DREAMmail. You must import the subscriber's email address however.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports needs you to populate their new proof list. Populate the list you created in the prior unit (or create a new list now). Add the following marketing team members to this list:

- **jane@flo.delivery.com**
- **joe@flo.delivery.com**

Level 2: "I'm Confident I can do This"

Fall River Sports needs to create a new mailing list for the subscribers to the Fall River Sports Weekly Newsletter. For this mailing list, only the email address is needed. Using the source file provided in training, import this file into DREAMmail.

Level 3: "Bring it On!"

Fall River Sports has additional members who need to be imported into the Fall River Sports house file. Locate this mailing list (or another house mailing list you created earlier) and import the subscribers from the "FallRiver-sample_2.csv" file provided during training. All of the profile data will be used for this mailing list.

FTP Imports

The **FTP Import Manager** enables you to:

- Import source files of any size.
- Conduct hygiene on your data during the import process.
- Automate adding new subscribers to an existing mailing list.
- Automate removing subscribers from a mailing list.

Before this function can be used, a secure FTP site must be created and the function must be enabled in DREAMmail.

Note: If the FTP Import Manager **submenu** does not appear, contact your Account Representative to enable this function.

Conducting List Hygiene with FTP Imports

To be the most effective, your source files should be clear of any duplicate records and common syntax errors prior to importing them into DREAMmail. You can create your own **hygiene rules** in DREAMmail for cleaning your data as part of the FTP import process. This function must be enabled.

It is recommended that you perform data hygiene on your subscriber records **before** importing the data into DREAMmail. Some records that are malformed will be corrected by DREAMmail during a specific type of import process.

Malformed Email Address	Can be corrected to:
nancy23@aol.com.com	nancy23@aol.com
nancy23@aollllll.com	nancy23@aol.com
nancy23@aol.cob	nancy23@aol.com
nancy23@aol…com	nancy23@aol.com

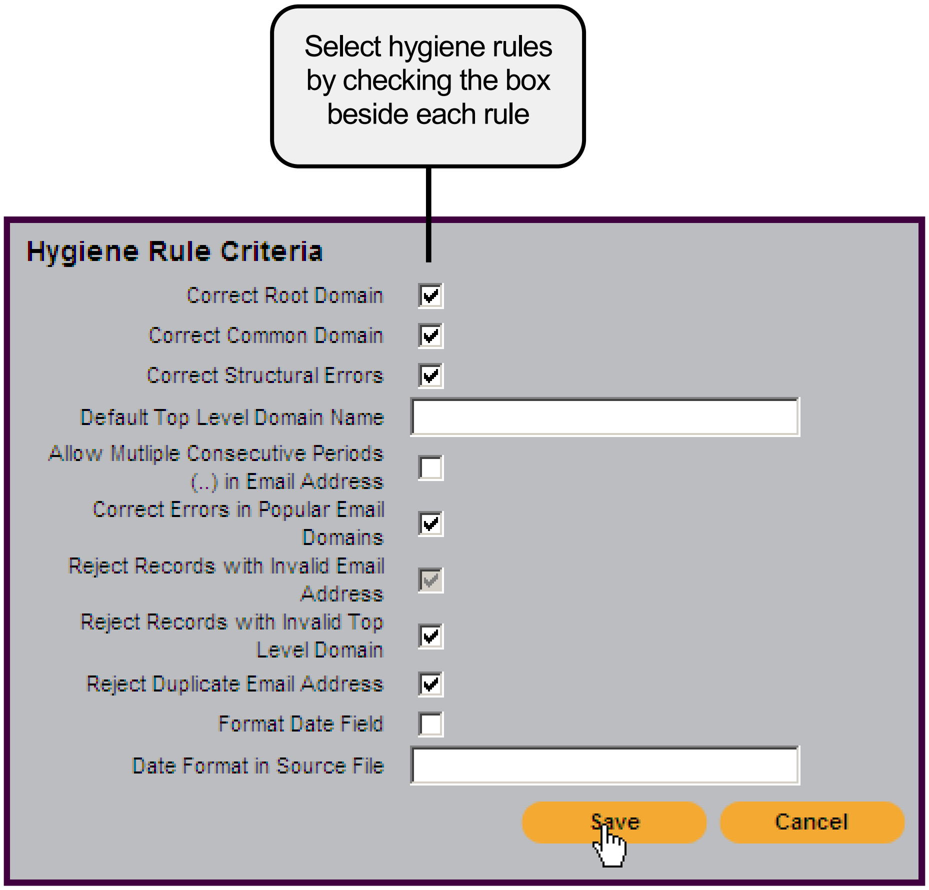
Epsilon offers services to validate and correct (where possible) your source files prior to import. Check with your Account Representative if you are interested in this service.

Hygiene Rules for FTP Imports

The following hygiene rules are available for use with FTP imports.

Hygiene Rule:	Action:	Example:
Correct Root Domain	Corrects common misspellings in the root domain	matt@aol.comm matt@aooll.com
Correct Common Domain	Corrects addresses with incorrect top level domains	matt@aol.org matt@aol.edu
Correct Structural Errors	Corrects common structural errors (removes spaces, multiple periods, and special characters)	matt@ aol.com Matt$aol.com
Default Top Level Domain Name	Allows you to specify a top-level domain for addresses lacking a period in the domain	matt@aol
Allow Multiple Consecutive Periods	Enables multiple periods (..)	
Correct Errors in Popular Domains	Corrects most misspellings of major domains	matt@hobmail.com matt@yhoo.com
Reject Records with Invalid Email Addresses	Rejects records that do not comply with RFC822 or AOL address requirements	matt.yahoo.com matt@
Reject Records with Invalid Top Level Domain	Rejects records where top level domain is not on the list of acceptable domains	matt@aol.com.usa
Reject Duplicate Records	Removes duplicate instances of the same address	
Format Data Field	Converts the date/time field format from the source field to the format for DREAMmail	
Date Format in Source File	Used to enter the format for the date in the source file	

How to Create a Hygiene Rule in DREAMmail



Tip: Remember, hygiene rules work only with FTP imports.

Step	Action
1.	Click **Hygiene Rules > Hygiene Rules Manager**.
2.	Click **Add**. The Hygiene Rule creation screen appears.
3.	Enter a **name** for your hygiene rule in the Rule Name box.
4.	Enter a **description** for your hygiene rule in the Description box.
5.	Click the radio button to indicate whether the hygiene rule applies at the **client-level** or **site-level**.
6.	Select the **applicable hygiene rules** for your job by clicking the checkboxes next to the rules.
7.	Click **Save**.

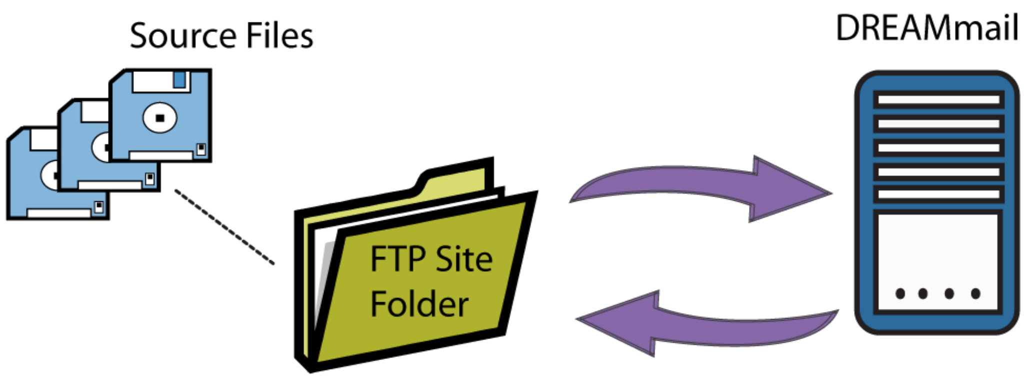
Understanding FTP Sites

An **FTP (File Transfer Protocol) site** is an internet site on which files can be posted for sharing between two organizations. FTP sites can be either **secured**, and therefore require a password to access, or **unsecured** and provide open access to anyone on the internet. DREAMmail sets up only secure FTP sites for posting subscriber data.

Note: To access the secure FTP site, you must use an approved software program, such as CuteFTP Pro or F-Secure SSH.

The FTP Import Process

Once a file is posted to the FTP site, DREAMmail senses its presence and immediately begins to **process** your import job.

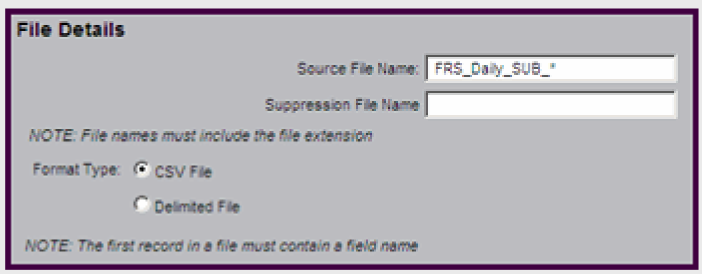


DREAMmail continually sweeps the site looking for new files that have been posted for processing. Files can be posted to the site at any time.

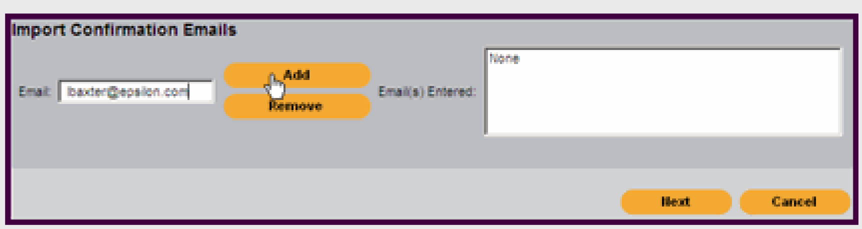
Note: The FTP import process is recommended for use with mailing lists that require frequent updates.

How to Create an FTP Import Job

Step	Action
1.	Click **Mailing Lists > FTP Import Manager**.
2.	Click **Add**. The FTP Import Job creation screen appears.
3.	Enter the **name** of your job in the Job Name field. Do not use spaces or special characters in your job name.
4.	Enter a **description** for the job in the Description field.
5.	Select the **Action Type** of the import job in the Import Action Type box.
6.	If **Subscription** or **Unsubscription** actions are selected, choose a mailing list from the drop down box and click **Add** to indicate the mailing list to which subscribers should be added or removed.
7.	<u>Optional</u>: Select the **Hygiene rules** in the Hygiene Rule box.
8.	Enter the **name** of your source file in the Source File Name box.



9.	<u>Optional</u>: Enter a **suppression file** in the Suppression File Name box. Note: Suppression works only if a hygiene rule has been applied.
10.	Indicate the **format** of your source file.
11.	Enter the **email address** of the person or persons to receive a confirmation email once the job has been run in the Import Confirmation Email box. Click **Add** to include this address to the Email(s) Entered box.

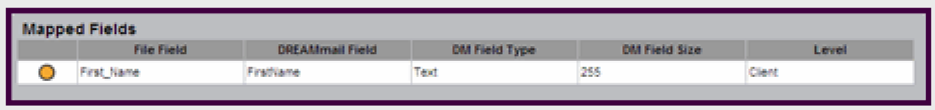
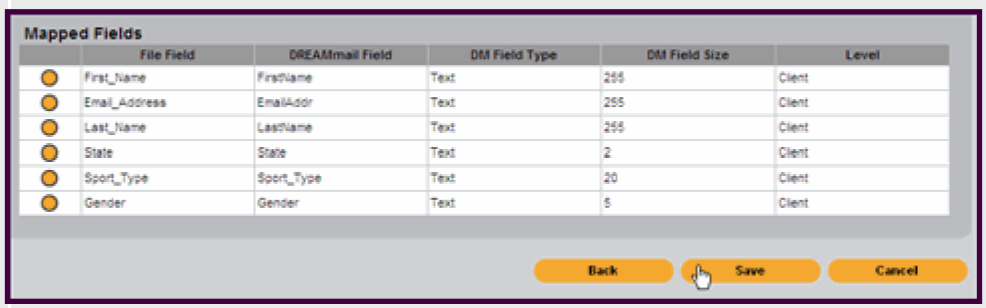


12.	Click **Next**. Continued on next page.

How to Create an FTP Import Job (cont.)

Tip: A header needs to exist in the source file, to be imported into DREAMmail or the entire job will fail.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13.</td><td>Enter the name of the profile field in the first column header row of your source file into the File Field Name box. This field is case sensitive.

</td></tr>
<tr><td>14.</td><td>Click the corresponding profile field name in the DREAMmail field box.</td></tr>
<tr><td>15.</td><td>Click Add. The information appears in the Mapped Fields box.

</td></tr>
<tr><td>16.</td><td>Click Save when you have mapped all of the fields from your source file to those in DREAMmail. Your FTP Import job will appear on the FTP Import Manager screen.

</td></tr>
</table>

Note: The FTP Import job must be created before you can load your source file to the FTP site.

Choosing the Right Import Method

File Considerations	Web Import	FTP Import	Epsilon Professional Services	DMConnect
CSV	●	●	⊝	○
Pipe or Tab Delimited	○	●	⊝	○
Double Pipe Delimited	○	●	●	○
XML	○	○	○	●
Zip Compression	●	●	●	○
Max File Size	10 MB	Unlimited	Unlimited	1 MB
Data Hygiene	Data must be cleaned prior to import	Can apply data hygiene during import	Provided with standard FTP import jobs	Can be programmed for one time FTP imports
Rejection Records	Rejections cannot be retrieved	Rejections and corrections can be retrieved	Rejections and corrections can be retrieved	○
Batch Unsubscriptions	○	●	●	●
Best Used for	Loading small, new lists	Large files, frequent updates to existing files	Initial data loads, complex segmentation	Real-time updates to existing files

Legend:

● Fully Supported ⊝ Supported but not preferred ○ Not Supported

Note: Use the CSV with text qualifiers format if commas exist within your subscriber data, e.g. a subscriber whose name is Jon Neely, Jr. DREAMmail will ignore the comma found within the quotation marks and the record will be processed.

Best Practices for Importing Subscribers

Choose the right import method for the task. Each import method is optimized for a specific task. Depending upon your needs, you may find that you need to use several techniques for different import scenarios.

Develop standards for your data team. Indicate the exact format of the file that you need when requesting data from your IT department. This will help to eliminate inconsistency in your data.

Use a header row. The first row of the file must contain field names indicating the data represented in each column. Field names cannot contain spaces or special characters. The field names in your file do not need to match the profile field names in DREAMmail, but they should be meaningful to you.

Format date fields properly. Date fields must be formatted as: YYYY-MM-DD. If you are already using another format, you can create a hygiene rule to have your date automatically reformatted to match this date format.

Use double-pipe delimited files where possible. Two consecutive pipe characters are much less likely to appear within your data than a comma, making this format the least prone to error. Some systems cannot export this format however, and the single pipe is the next best choice.

Compress your source file. To reduce upload time, compress a single source file in the zip format.

Consider the appropriate level and long-term usage before creating a new profile field. You cannot delete or move a profile field once created.

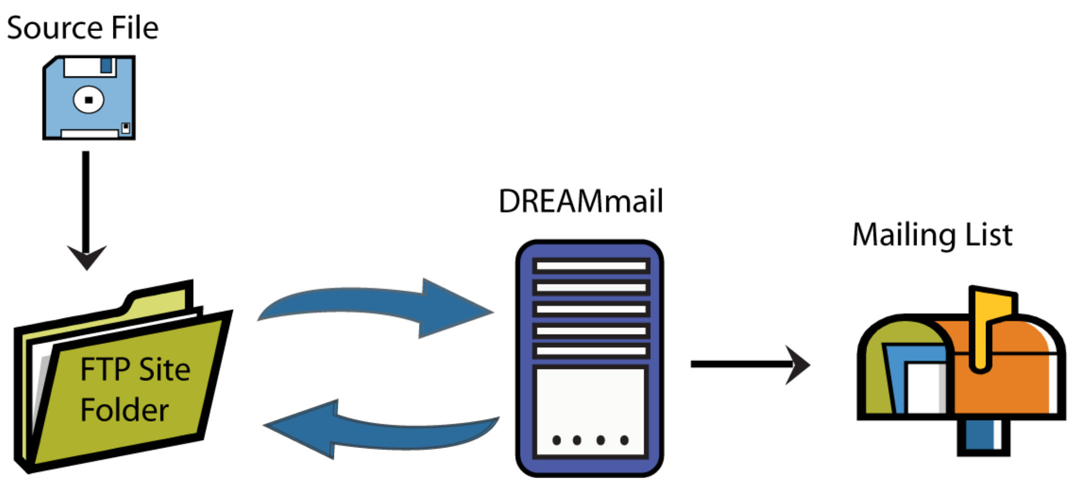
Populate new profile fields with a default value. When you create a new profile field, your existing subscribers records will not have any data in that field. To ensure consistent behavior, you may want to export your subscribers, add a default value for the new field to the records, and re-import them into DREAMmail.

If you anticipate collecting new profile data in the future, add the profile fields to DREAMmail now. This will allow for easier integration of this new information when it is collected. In the meantime, populate the field with a default value.

Automating Your Import Jobs

You can also use the FTP import process to **automate** updating your existing mailing lists in DREAMmail, including adding new subscriptions and/or removing unsubscriptions.

Note: This process works well for mailing lists that require frequent updates.



Requirements:
The requirements for using the FTP import process to create automatic updates to your mailing lists include:

- A source file containing the new subscriber additions or removals.
- A consistent naming convention for your source file.
- A header row must appear as the first record in the file.

How to Automatically Update a Mailing List Using FTP

The process for **setting up** an FTP import job to automatically update an existing mailing list is the same as for importing a file using the FTP process:

1. Create the mailing list.
2. Create the FTP Import job using a consistent source file name and a wildcard in the source file field in FTP Import Manager.
3. Indicate the mailing lists to be updated.
4. Post the source file to the FTP site.
5. Verify the list has been updated.

Naming Your Source File for Automatic Updates

You can use a **wildcard symbol (*)** in your source file name when setting up your FTP job. The wildcard allows you to post files that begin with the same file name, thereby allowing you to use "like" files without having to create a new FTP job for each import.

Using the wildcard in the source file name allows any file name with the same characters prior to the wildcard to be processed. DREAMmail ignores anything after the wildcard in the name.

Example: You can use a wildcard when posting files containing daily subscriptions to a mailing list. In the example below, the source file name in the FTP job is:

Source File Name = New_Subs_*

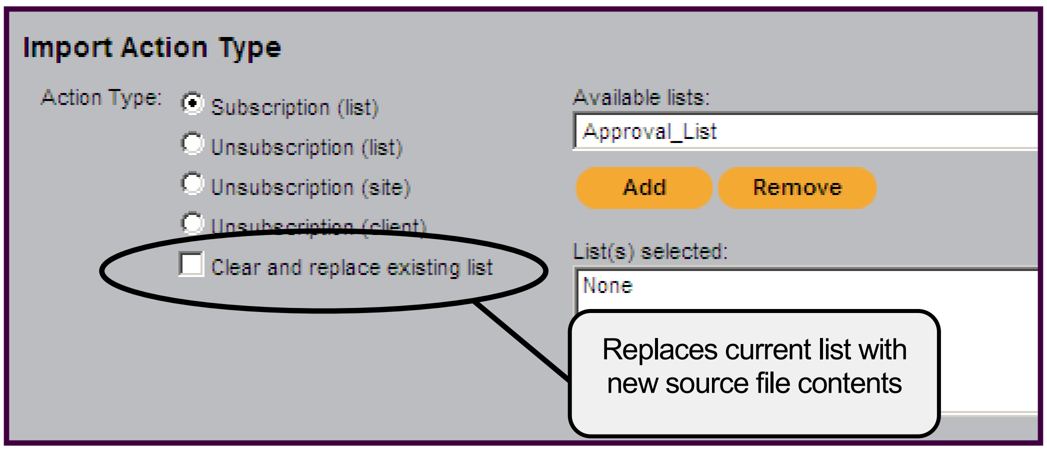
If you loaded the following files to the FTP site for importing, the import status upon completion would be:

File Name	Import Status
New_Subs_01012010 New_Subs_01022010 New_Subs_01022010_v2	Processed
New Daily Subscriptions	Not processed
New Subscriptions01012006	Not processed

Importing to the Same Mailing List

When you import a source file using the FTP import process to automatically update an existing mailing list with **new subscriptions**, you have the option to import to the same mailing list each time you post a source file. To do this, you must maintain a consistent name for your source file or use a wildcard in your source file name when creating the import job.

Note: This process is often used when subscriber data is being managed in an external database and a new list is imported for each deployment.



When selecting the **Clear and Replace** function, DREAMmail will overwrite the current mailing list with the new mailing list data. Existing subscriber records that do not appear in the new source file will no longer appear on the list.

Warning: Be careful not to select this option if you do not want the current list overwritten—you could lose important data.

Note: Subscribers must be given a way to unsubscribe from your mailing lists. When a subscriber record no longer appears on your list because it has been overwritten, the member must be unsubscribed at the site level. For additional information on how to unsubscribe at the site level, please refer to *Processing Unsubscriptions* in **Unit 7: Creating Addresses**.

Best Practices for Automatically Updating Your Mailing Lists Using FTP

Create a batch unsubscription job. Set up an FTP Import Job to process unsubscriptions that you have collected through your web site or call center. Post your unsubscriptions on a regular basis to the FTP site to ensure customers do not receive unwanted email.

Consider the interaction of all active FTP jobs. Be aware of the source file names that are already in use in other FTP Import Jobs when you set up a new job. If one job is looking for “book*.txt” and another job is set up to look for “book-subscribers.*”, DREAMmail will process both jobs when you upload the file “book-subscribers.txt” to the FTP site. To ensure expected results, use unique naming patterns.

Automate posting of updates. If you are housing subscriber data in an external database, consider writing a script to pull updated records from your database and posting them to the FTP site on a daily basis. This will ensure that your subscriber information within DREAMmail is always current.

Always use a Site-Level Unsubscription when mailing to lists that use the Clear and Replace function. Because prior mailing lists are overwritten, a particular subscriber record may no longer be on the list and would not be unsubscribed if List-Level Unsubscription is used.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

The marketing department at Fall River Sports would like you to import a very large file containing new subscribers. The file is named "New_Subs_Houselist" and is tab delimited and 12MB compressed. The file contains the list of subscribers for the Fall River Sports mailing list. This source file contains the following headers:

- Email Address
- Gender
- State

Level 2: "I'm Confident I can do This"

Fall River Sports would like their subscriptions automatically added to the Fall River Sports main mailing list. A file containing subscriptions will be available on a weekly basis and is called "Weekly_Subscriptions_XX-XX-XXXX" with the X's indicating the date the file was posted. The file will be delimited with double pipes and contains the following headers:

- Email Address
- Gender
- State
- First Name

Level 3: "Bring it On!"

Fall River Sports would like their subscriptions automatically added to the Fall River Sports main mailing list. A file containing subscriptions will be available on a weekly basis and is called "Weekly_Subscriptions_XX-XX-XXXX" with the X's indicating the date of the file. The file will be delimited with double pipes and contains the following profile fields:

- Email Address
- Gender
- State

However, Fall River Sports does not want to use the State profile field.

Summary

- There are several ways to populate a mailing list in DREAMmail, including manually adding subscribers to a mailing list, or via web or FTP import.
- Each method has certain requirements or limitations – be sure to select the right method for your situation.
- Specific source file formats are needed for the two types of imports.
- An FTP import job can be created to automatically process subscriptions and unsubscriptions from your mailing lists.
- You can import to the same mailing list over and over. DREAMmail will overwrite the prior list with the new list information. Be sure to use a site-level unsubscription with this process.

Need More Information?

For additional information regarding populating your mailing lists, access the online Help files in DREAMmail or search the Learning Center for online and/ or recorded sessions on this topic.

Unit 5: Managing Your Mailing Lists

Overview

DREAMmail provides several ways for you to modify your mailing lists, including deleting, merging, dividing and segmenting lists. DREAMmail also allows you to modify individual subscriber records at both the site and client levels, as well as to add to or remove individual subscribers from existing mailing lists.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Merge two mailing lists.
- Make a mailing list inactive.
- Count the number of subscribers in a mailing list.
- Generate a new mailing list by filtering an existing list.

Key Terms

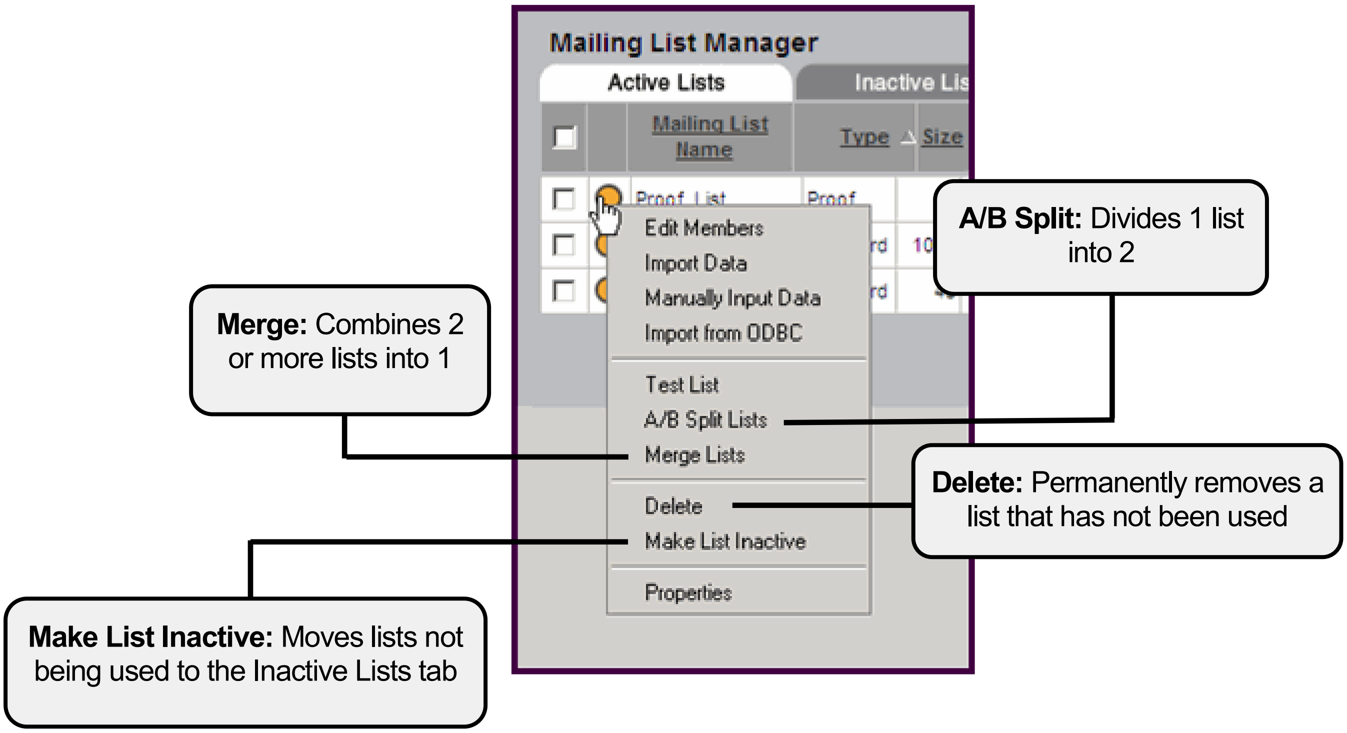
Demographics: The characteristics of human populations (as age, gender or income) used to identify markets.

Profile Data: Information about subscribers that define their demographic, geographic, interest or preference characteristics.

Working With Mailing Lists

There are many **actions** you can take to manage your mailing lists, including:

- Deleting a list that has never been used.
- Merging two or more mailing lists into one list.
- Dividing a large mailing list into smaller lists.
- Inactivating a list.



How to Delete Mailing Lists

You can only **delete** a mailing list from DREAMmail if it has never been used for a mailing. Once a list has been used for a message, you can only inactivate it.

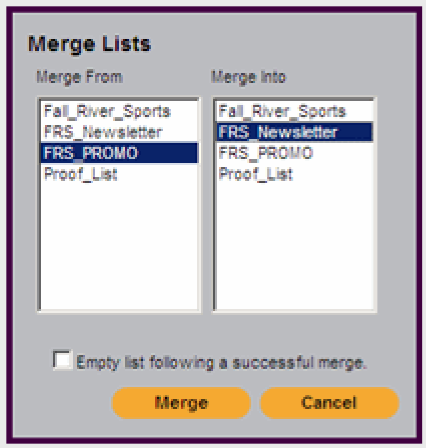
Tip: Once you delete a mailing list, it cannot be retrieved - it can only be recreated.

Step	Action
1.	Click **Mailing Lists > Mailing List Manager.**
2.	Click the **orange action button** for the list your want to delete.
3.	Click **Delete**.
4.	Click **OK**. The list will be removed.

How to Merge Mailing Lists

You can **merge** two or more mailing lists into one larger list. When merging, you can:

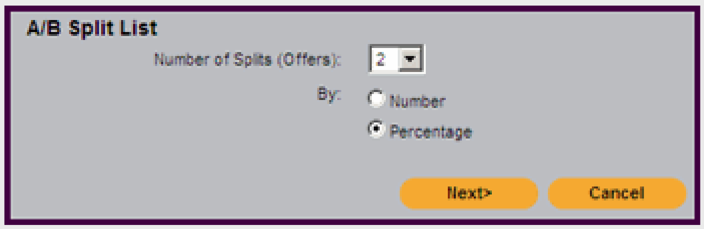
- Empty the list you are merging into another list.
- Keep the first list intact following the merge. In this case, subscribers in the first list will also appear in the second list.

Step	Action
1.	Click **Mailing Lists > Mailing List Manager.**
2.	Click the **orange action button** for the list your want to merge with another list.
3.	Click **Merge Lists**. The Merge List form displays. 
4.	Click the mailing list in the **Merge From** list that you want to merge into another list.
5.	Click the mailing list in the **Merge Into** list that you want to accept the Merge From mailing list.
6.	Optional: Click the **Empty list following a successful merge** check box if you want to empty the Merge From mailing list once the lists have merged.
7.	Click **Merge**.
8.	Click Mailing List Manager to **refresh** the screen.
9.	Review the **Size** field to verify that both lists show the appropriate number of subscribers following the merge.

Tip: Merged lists are automatically de-duplicated so subscribers will not show up trice on the same mailing list.

How to Divide Mailing Lists

At times, you may want to **divide** a large mailing list into smaller lists. When you divide a mailing list, DREAMmail randomly assigns subscribers to the new lists. You can divide lists based on a percentage or on the number of subscribers.

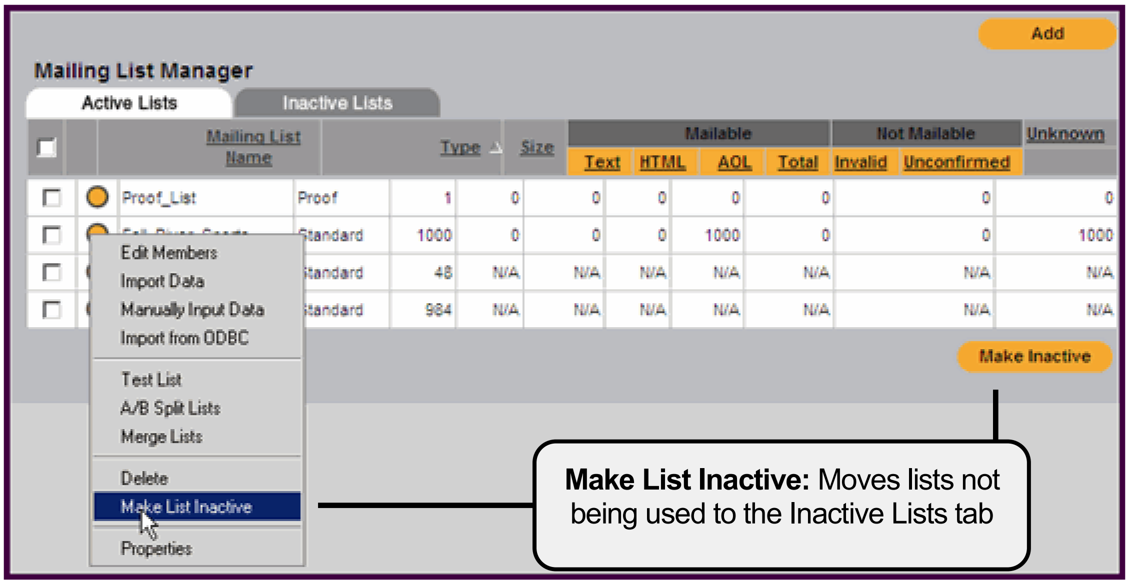
Step	Action
1.	Click **Mailing Lists > Mailing List Manager.**
2.	Click the **orange action button** for the list you want to divide into two or more lists.
3.	Click **A/B Split Lists**. The A/B Split List form displays.
4.	Enter the **number** of new lists you want to create. 
5.	Click the **Number** or **Percentage** radio button to indicate how the new lists should be created.
6.	Click **Next**. The A/B Split List form displays.
7.	Optional: **Rename** the new lists in the List Name field by typing over the system generated list names.
8.	Enter the **number or percentage** for each list in the List Size or List % fields. These must add up to the List Size Total or 100%.
9.	Click **Create Lists**.
10.	Click **OK**. You will receive an email notification when the list split is complete.
11.	Click Mailing List Manager to **refresh** the screen.
12.	**Verify** the new mailing lists appear on the screen and hold the correct number or percentage of subscribers.

How to Inactivate Mailing Lists

To assist you in organizing your work, mailing lists can be made **inactive** at any time. You can inactivate:

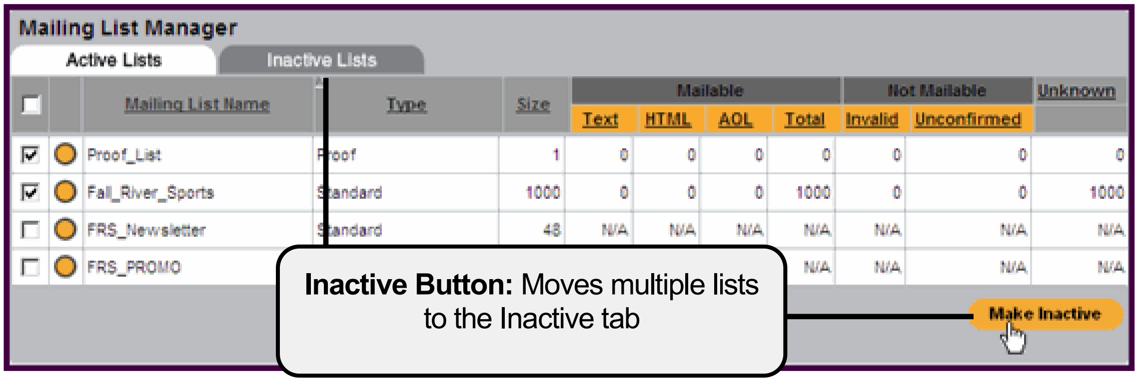
- A single mailing list.
- Several mailing lists at one time.

Inactivating a Single Mailing List



Step	Action
1.	Click **Mailing Lists > Mailing List Manager.**
2.	Click the **orange action button** for the list you want to make inactive. Or click the box to the left of the list and click on the orange Make Inactive button.
3.	Click **Make List Inactive**. The list should now appear on the **Inactive Lists** Tab.

Inactivating Multiple Mailing Lists



Step	Action
1.	Click **Mailing Lists > Mailing List Manager.**
2.	Click the **checkbox(es)** in front of the list(s) you want to make inactive.
3.	Click the **Make Inactive** button and **OK** to confirm the action. The list should now appear on the **Inactive Lists** Tab.

Note: To reactivate a mailing list, use the **Make Active** button on the Inactive Lists tab.

Archiving Mailing Lists

Inactive mailing lists are periodically **archived** in DREAMmail. Any mailing list that has been inactive for greater than 60 days can be archived. An archived list is put into long term storage in DREAMmail and is no longer accessible.

You can prevent a list from being archived by designating it as a **Permanent** list. Information on making a list permanent is located in the *Mailing Lists Properties* section of **Unit 3: Creating Your Mailing List**.

Best Practices for Working with Mailing Lists

Keep your workspace clean. Delete any mailing lists that were created in error and inactivate any lists that you are no longer using.

Develop a consistent naming convention for your mailing lists. This may include the date the list was imported or some demographic/characteristic of the subscriber population.

Only mark lists as Permanent if you plan to use them again at a much later date. Mailing lists marked Permanent will not be archived in DREAMmail, however, archiving is essential to improving system performance.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports is no longer using the current proof list. Remove this list from view.

Level 2: "I'm Confident I can do This"

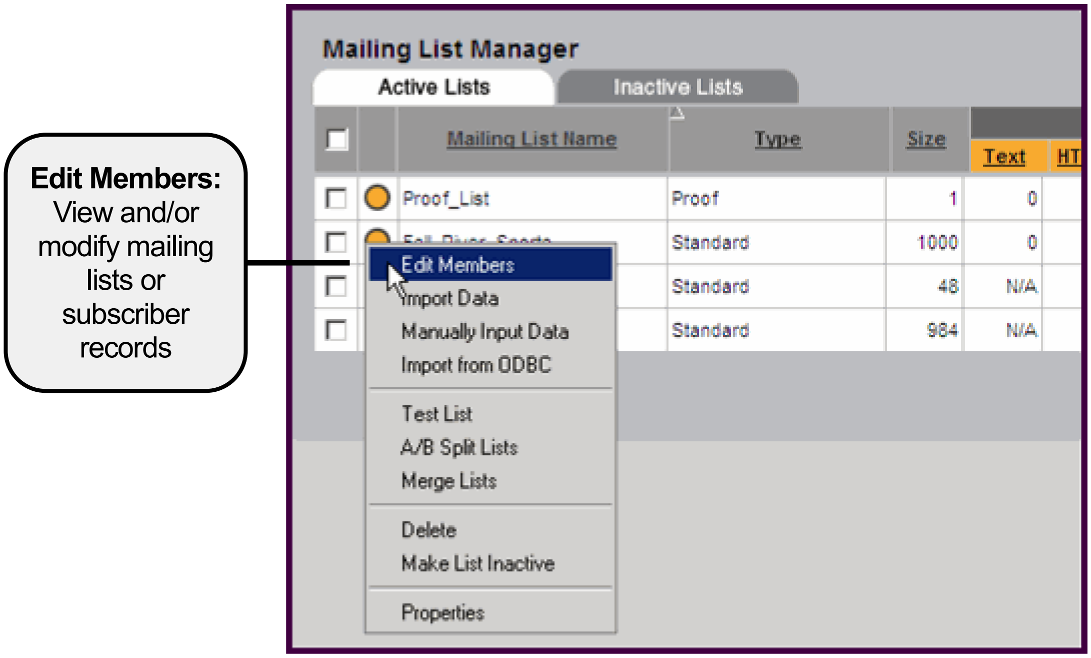
Fall River Sports would like to create one proof list that contains all of the proof lists you have created. The old proof lists will no longer be used. Create this new list.

Level 3: "Bring it On!"

Fall River Sports would like to create a new mailing list that contains all of the subscribers for all of the house lists that you have created in prior exercises. However, they would like to continue to use the other mailing lists, as needed. Create this new list.

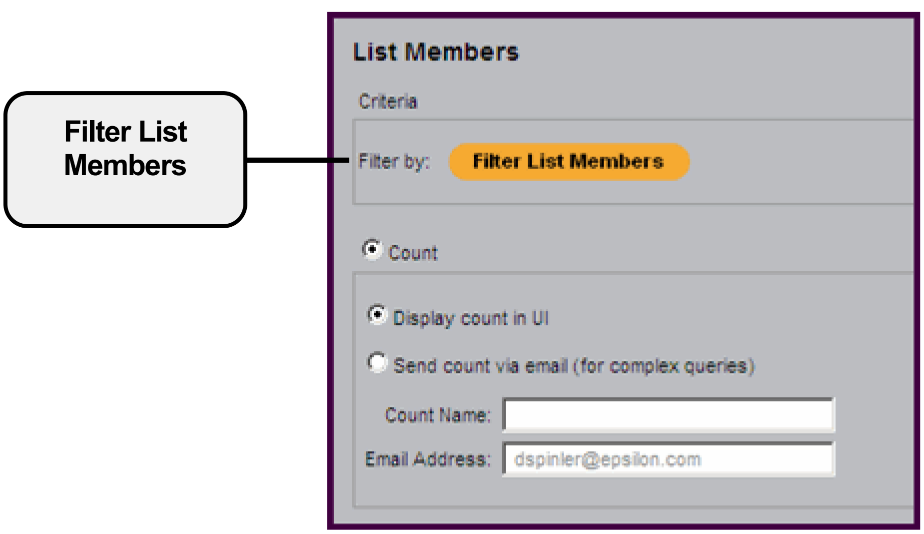
Viewing a Mailing List

The **Edit Members** function in Mailing List Manager allows you to view the members of a mailing list and generate new lists from existing mailing lists.



This function allows you to:

- Count the size of the mailing list.
- View a list of subscribers (maximum size = 500).
- Filter the members of the list to view only certain members of the list.
- Generate a new list from the members of an existing mailing list.



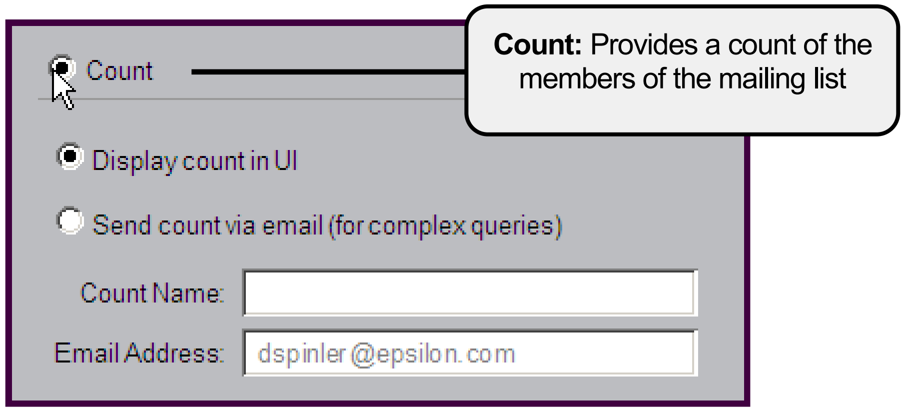
How to Count the Subscribers in Your Mailing List

There are 2 ways to **count** the subscribers in your mailing lists. You can count:

- All members of the mailing list.
- Just those targeted to receive a message.

The count of all subscribers in a mailing list includes those with both valid and invalid email addresses, so could be larger than the count of the intended recipients of the message.

Tip: The "Display Count in UI" radio button is no longer functional and cannot be used to access a mailing list count..

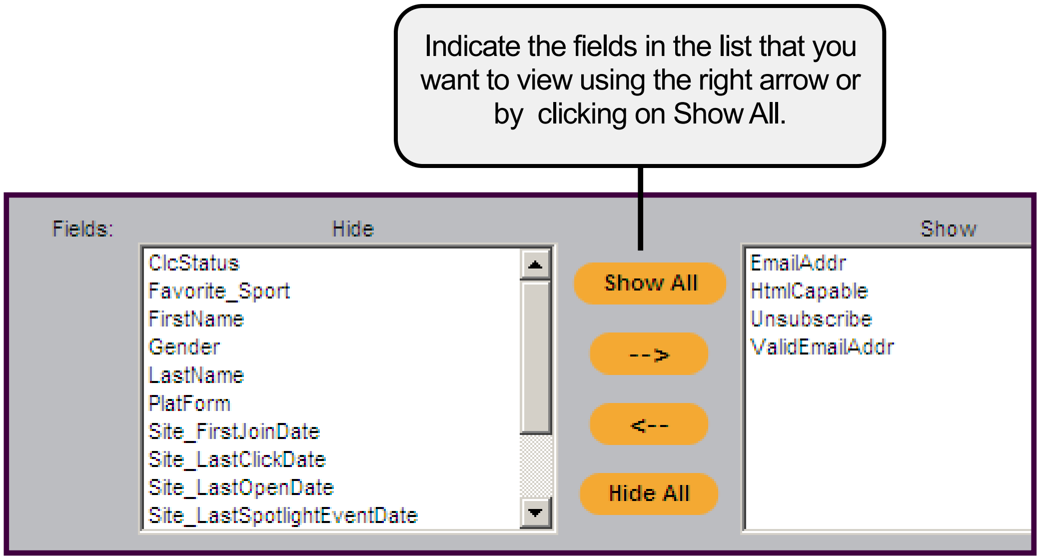


Note: For information on how to count just the targeted recipients of a messages, please refer to the *Counting the Size of Your Target Audience* section of **Unit 15: Targeting Your Message**.

Step	Action
1.	Click **Mailing Lists > Mailing List Manager.**
2.	Click the **orange action button** of the list for which you want to obtain a count.
3.	Click **Edit Members**. The List Members form will display.
4.	Verify the **Count** radio button is clicked.
5.	Click the **Send Count via email** radio button.
6.	Enter a name for the list count and the email address to which it should be sent.
7.	Click **Next** and **OK**. The count will be emailed to you.
8.	Click Mailing List Manager to exit the screen.

How to Verify Your Mailing List

Once you have populated a mailing list, you should **verify** that you have mapped the profile fields in your list to the correct profile fields in DREAMmail.

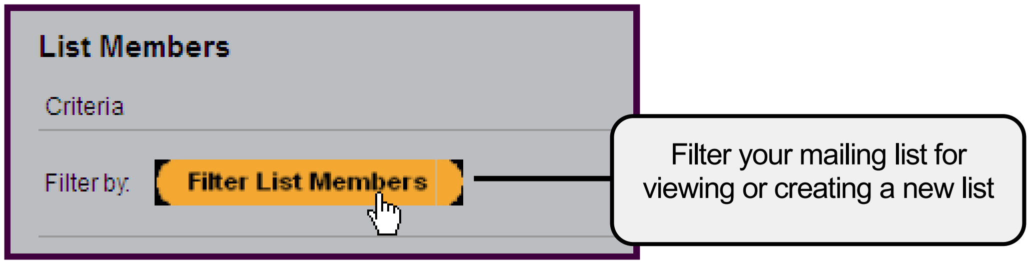


Step	Action
1.	Click M**ailing Lists > Mailing List Manager.**
2.	Click the **orange action button** of the list for which you want to verify.
3.	Click **Edit Members**. The List Members form will display.
4.	Click the **View** radio button.
5.	Click the **profile fields** in the **Hide** box that you want to verify.
6.	Click the **Right Arrow** to move the selected profile field to the **Show** box. Optional: Click the **Show All** button.
7.	Click **Next**. The List Members form will display.
8.	**Verify** that the profile fields in each record correspond to the correct profile field header in the list. If the correct profile data does not display under the correct header, you should delete the list and re-import it.

Filtering a Mailing List

You can also **filter** your mailing lists using any of your list profile fields. Once filtered, you can:

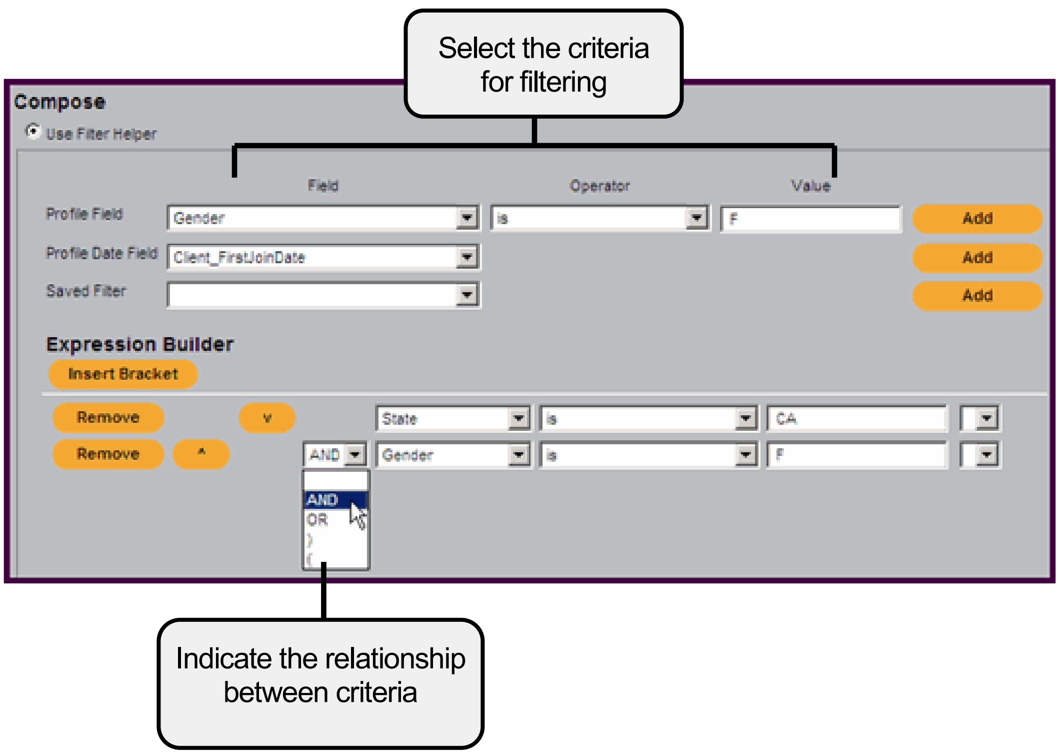
- View the filtered list.
- Generate a new mailing list



Using the Filter Helper

The **Filter Helper** can be used to view specific segments of your mailing lists. Using the Filter Helper, you can filter the list using:

- **Profile Fields**, e.g. gender, state of residence, age.
- **Profile Date Fields**, e.g. the date a subscriber joined a list.
- **Response Data**, e.g. how many times a subscriber clicked on a message.



Note: For more detailed information on using the Filter Helper, please refer to the *Using Filters to Target Messages* section of **Unit 13: Targeting Your Message** of this manual.

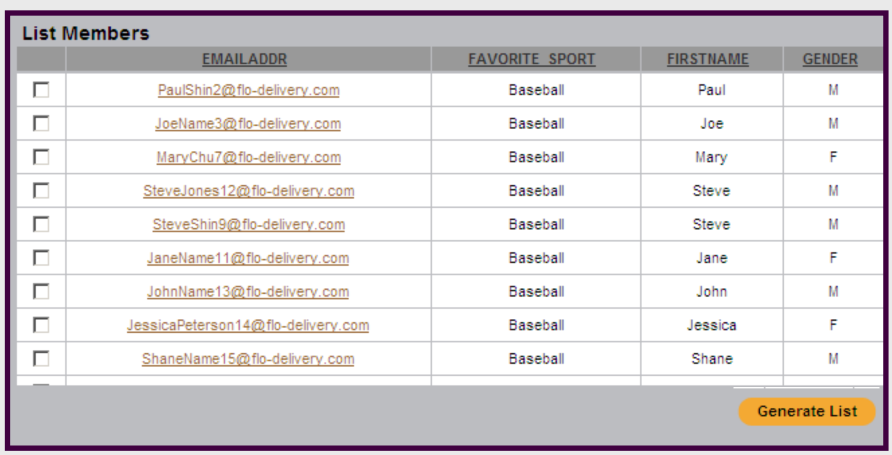
How to Filter a Mailing List

You can use the **Filter Helper** to view specific segments of your mailing lists.

Step	Action
1.	Click **Mailing Lists > Mailing List Manager**.
2.	Click on the **orange action button** next to the list you want to filter.
3.	Click **Edit Members**. The List Members form displays.
4.	Click the **Filter List Members** button. The Compose form displays.
5.	Using the drop down boxes, select the first **profile field** and **operator** in the Field and Operator columns that you need to segment your list. Note: If applicable, complete the Value column.
6.	Click **Add** when you have defined the first segment condition. The condition appears in the **Expression Builder** box.
7.	Optional: Continue to add other profile fields and operators to fulfill the conditions of your segmentation.
8.	If you have more than one condition, click the **AND** or the **OR** options in the drop down box between conditions to indicate the relationship of each condition to the other conditions.
9.	Click **Save**.
10.	Click the **View** radio button.
11.	Click the **profile fields** in the **Hide** box that you want to display.
12.	Click the **Right Arrow** to move the selected profile field to the **Show** box. Optional: Click the **Show All** button.
13.	Click **Next**. The List Members form appears and displays a listing of the records you requested.

How to Generate a New Mailing List

You can also filter your mailing list using any of your profile fields to generate a **new** mailing list. For example, you can create a new mailing list containing only females living in Maine who have made a purchase within the last 30 days.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click Mailing Lists > Mailing List Manager.</td></tr>
<tr><td>2.</td><td>Click on the orange action button next to the list you want to segment to create a new list.</td></tr>
<tr><td>3.</td><td>Click Edit Members. The List Members form displays.</td></tr>
<tr><td>4.</td><td>Click the Filter List Members button. The Filter Helper displays. Filter the list per your criteria for the new list. (See Filtering on prior page).</td></tr>
<tr><td>5.</td><td>Click Save. The List Members form displays.</td></tr>
<tr><td>6.</td><td>Click the View radio button.</td></tr>
<tr><td>7.</td><td>Click the profile fields in the Hide box that you want to verify.</td></tr>
<tr><td>8.</td><td>Click the Right Arrow to move the selected profile field to the Show box. <u>Optional</u>: Click the Show All button.</td></tr>
<tr><td>9.</td><td>Click Next. The List Members form appears and displays a listing of the records you filtered for this new list.</td></tr>
<tr><td>10.</td><td>Click Generate List to create a new mailing list and name the new list.

List Members
<table>
<tr><th></th><th>EMAILADDR</th><th>FAVORITE_SPORT</th><th>FIRSTNAME</th><th>GENDER</th></tr>
<tr><td></td><td>PaulShin2@flo-delivery.com</td><td>Baseball</td><td>Paul</td><td>M</td></tr>
<tr><td></td><td>JoeName3@flo-delivery.com</td><td>Baseball</td><td>Joe</td><td>M</td></tr>
<tr><td></td><td>MaryChu7@flo-delivery.com</td><td>Baseball</td><td>Mary</td><td>F</td></tr>
<tr><td></td><td>SteveJones12@flo-delivery.com</td><td>Baseball</td><td>Steve</td><td>M</td></tr>
<tr><td></td><td>SteveShin9@flo-delivery.com</td><td>Baseball</td><td>Steve</td><td>M</td></tr>
<tr><td></td><td>JaneName11@flo-delivery.com</td><td>Baseball</td><td>Jane</td><td>F</td></tr>
<tr><td></td><td>JohnName13@flo-delivery.com</td><td>Baseball</td><td>John</td><td>M</td></tr>
<tr><td></td><td>JessicaPeterson14@flo-delivery.com</td><td>Baseball</td><td>Jessica</td><td>F</td></tr>
<tr><td></td><td>ShaneName15@flo-delivery.com</td><td>Baseball</td><td>Shane</td><td>M</td></tr>
</table>
Generate List
Click OK when the notification message appears.</td></tr>
<tr><td>11.</td><td>Click Mailing List Manager to verify the new list was saved.</td></tr>
</table>

Best Practices for Verifying and Counting Your Mailing Lists

Verify your mailing lists after importing them into DREAMmail. This will increase the likelihood that your data is correct in your messages, especially if you are using profile data in the message.

Count subscribers at the message level rather than the mailing list level. Counting from the mailing list gives a count of all subscribers, both those with valid and invalid email addresses. Counting subscribers at the message level gives a count of just those subscribers who show valid email addresses and who should receive the message.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: I think I'm Ready to Try This!

Locate the main subscriber list for Fall River Sports. View the records for all subscribers on this mailing list.

Level 2: I am Confident I can do This!

Obtain a count of just the females living in New York who are part of the Fall River Sports main mailing list. How many subscribers (both valid and invalid) are on this list?

Level 3: Bring it on!

Locate all female subscribers at the domain "flo-delivery.com" for the Fall River Sports house list. Generate a new mailing list.

Summary

- You can take various actions to manage your mailing lists, including deleting, merging and dividing your lists.
- Mailing lists that are no longer being used can be made inactive.
- Mailing lists that have been inactive for greater than 60 days are periodically archived by DREAMmail.
- After importing your mailing list, view it to verify that the import was successful.
- A mailing list can be filtered for viewing or used to create a new mailing list.

Need More Information?

For additional information regarding managing your mailing lists, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 6: Working with Subscriber Records

Overview

Occasionally, you will need to access and modify a subscriber's record. You can modify subscriber profile fields and subscribe or unsubscribe members from various mailing lists.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Modify a profile field value in a subscriber record.
- Unsubscribe a member from all mailing lists.

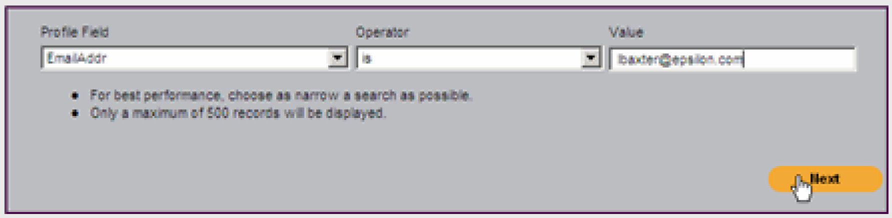
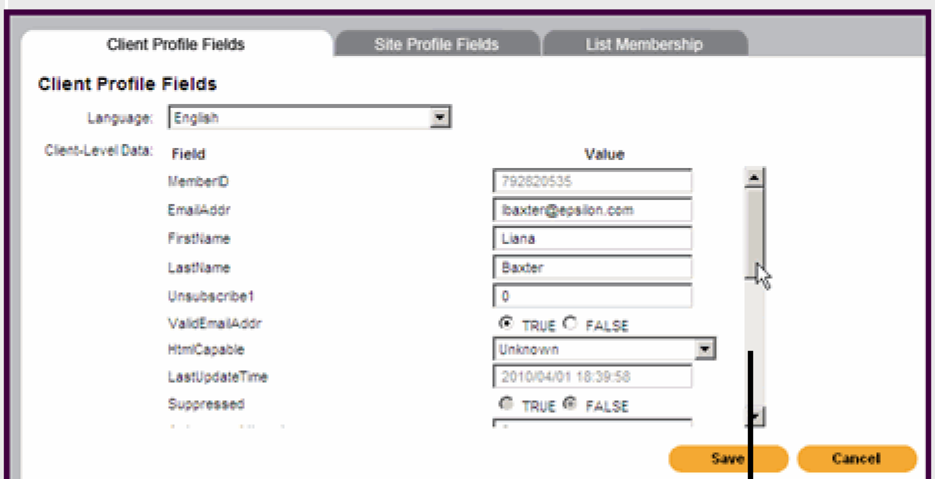
Key Terms

Subscriber Record: The record containing data collected on the customer, including email address, HTML capability, and any profile information.

Profile field: Information about a subscriber that defines demographic or geographic characteristics, or information regarding interests.

How to Locate a Subscriber Record

The **subscriber record** for each member contains all standard profile fields in DREAMmail along with any custom profile fields you have created.

Step	Action
1.	Click **Mailing Lists > Subscriber Manager**. The Find Customer Record screen displays.
2.	Select **EmailAddr** in the Profile field and enter the subscriber's email address in the Value field. 
3.	Click **Next**. The Client Members screen displays.
4.	Click on the **email address** for the subscriber. The Client Profile Fields form displays.  Scroll down to see the remainder of the profile fields in the subscriber record

Modifying Records

Should you need to access a **subscriber's record** to make modifications, you can:

- Modify or correct the subscriber's email address.
- Modify the data in any profile field.
- Subscribe and unsubscribe the member from a mailing list or from the site.

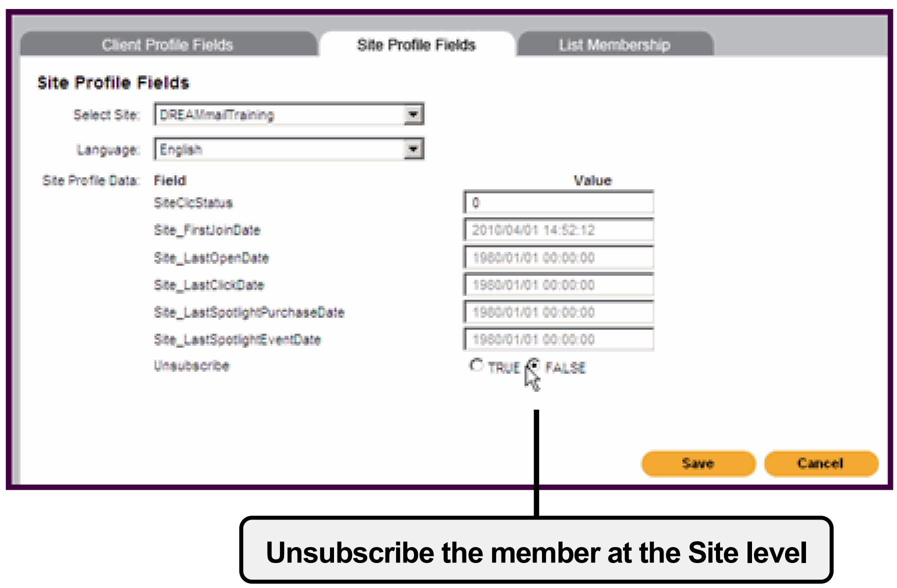
How to Unsubscribe Individual Customers

At times, you may need to subscribe or unsubscribe one of your customers in DREAMmail. You can use the **Subscriber Manager** to make these changes.

You can unsubscribe someone from:

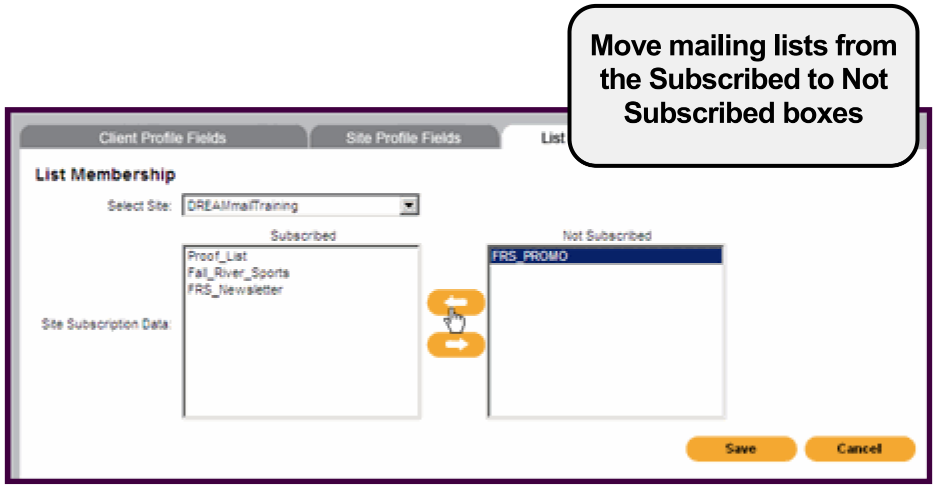
- All mailing lists for the site.
- Just specific mailing lists.

Unsubscribing a Customer at the Site Level



Step	Action
1.	**Locate** the subscriber record. (See prior page)
2.	Click the **Site Profile Fields** tab.
3.	Select the appropriate **Site** using the Select Site drop-down box.
4.	Click the **True** radio button for the **Unsubscribe** field.
5.	Click **Save**.

Unsubscribing a Customer from a Specific Mailing List



Tip: use this process for subscribers who do not wish to follow the normal unsubscription processes.

Step	Action
1.	**Locate** the subscriber record. (Refer to the Locating a Subscriber Record section on prior pages, if needed).
2.	Click the **List Membership** tab.
3.	Using the right arrow to move the mailing list from the **Subscribed** to the **Unsubscribed** box.
4.	Click **Save**.

Best Practices for Subscriber Records

Use the email address to search for subscriber records only if you are sure you have the current email address. Subscribers may be forwarding their email from one address to another, which means their current email address is not in the DREAMmail database. Try searching using other profile data, e.g. first and last name, postal address, etc.

Encourage your subscribers to follow the normal subscription and unsubscription processes. This will reduce the amount of work required on your part.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: I think I'm Ready to Try This!

Locate your subscriber record in DREAMmail and modify any of your profile fields except your email address.

Level 2: I am Confident I can do This!

Locate a subscriber record in DREAMmail and unsubscribe this person from a mailing list to which he or she is currently subscribed. Do not use your own subscriber record.

Level 3: Bring it on!

Locate the subscriber record for someone at the domain "flo-delivery.com." Select any record and unsubscribe this person from the Fall River Sports House List mailing list.

Summary

- The profile fields for individual subscriber records can be modified as needed.
- Individual subscriber records can be used to subscribe and unsubscribe customers from mailing lists.

Need More Information?

For additional information regarding working with subscriber records, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 7: Creating Addresses

Overview

In DREAMmail, addresses help to create and maintain the branding of your email program. Addresses also control both the inbound and outbound processing of email. In addition, DREAMmail addresses can be used to support your subscription and unsubscription processes via special links in your emails.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Identify the various actions that can be assigned to addresses.
- Create an address in DREAMmail.

Key Terms

Action: A property assigned to a DREAMmail email address that enables DREAMmail to perform a specific task when a subscriber sends an email to that address.

From Address: The email address that your messages come from when they appear in subscribers' inboxes.

Subdomain: A domain component that is part of a larger domain name.

Subscribe Address: An email address designed to automatically subscribe any email address that sends a message to it.

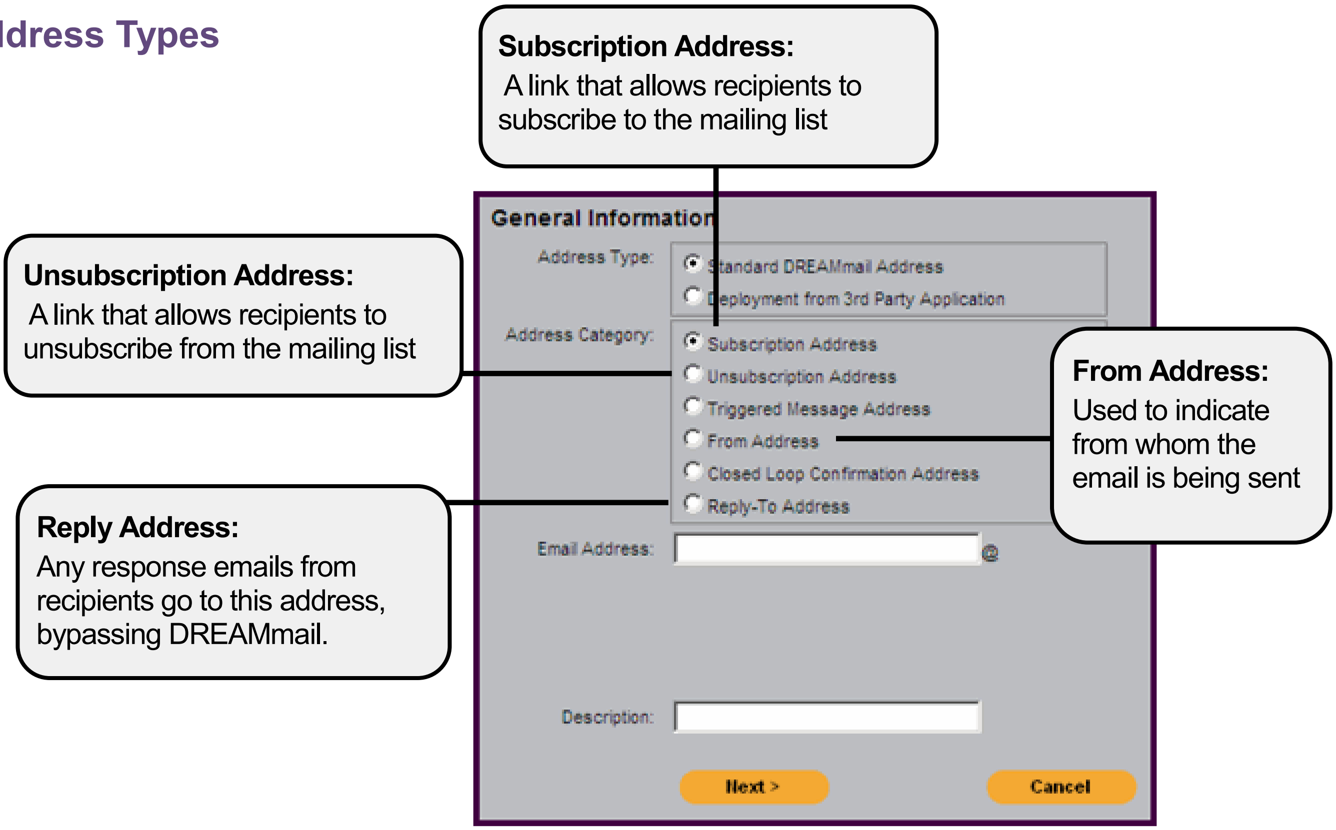
Unsubscribe Address: An email address designed to automatically unsubscribe any email address that sends a message to it.

About Addresses

DREAMmail **addresses**:

- Inform recipients from whom they are receiving an email message.
- Can be used to subscribe or unsubscribe recipients from mailing lists.
- Are used to direct emails to DREAMmail for automatic processing.

Address Types



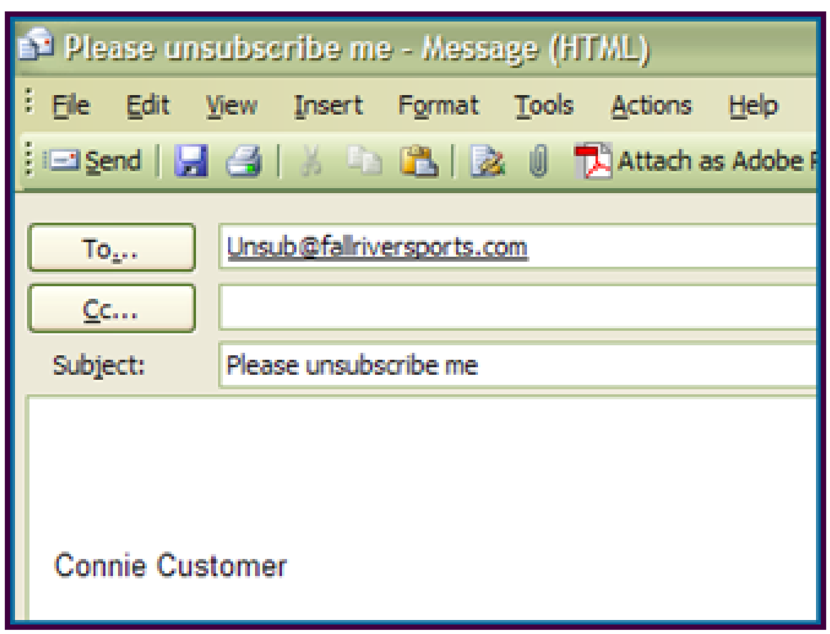
At a minimum, you must create a **From** address in DREAMmail. The From address must be created before any other addresses you will use. You can use the same addresses for each of your sites or you can create separate addresses for each site, campaign or message.

Note: When you create a **Reply** Address, you are redirecting traffic away from DREAMmail to a different address. Messages associated with this address are not tracked for reporting purposes.

Subscription and Unsubscription Addresses

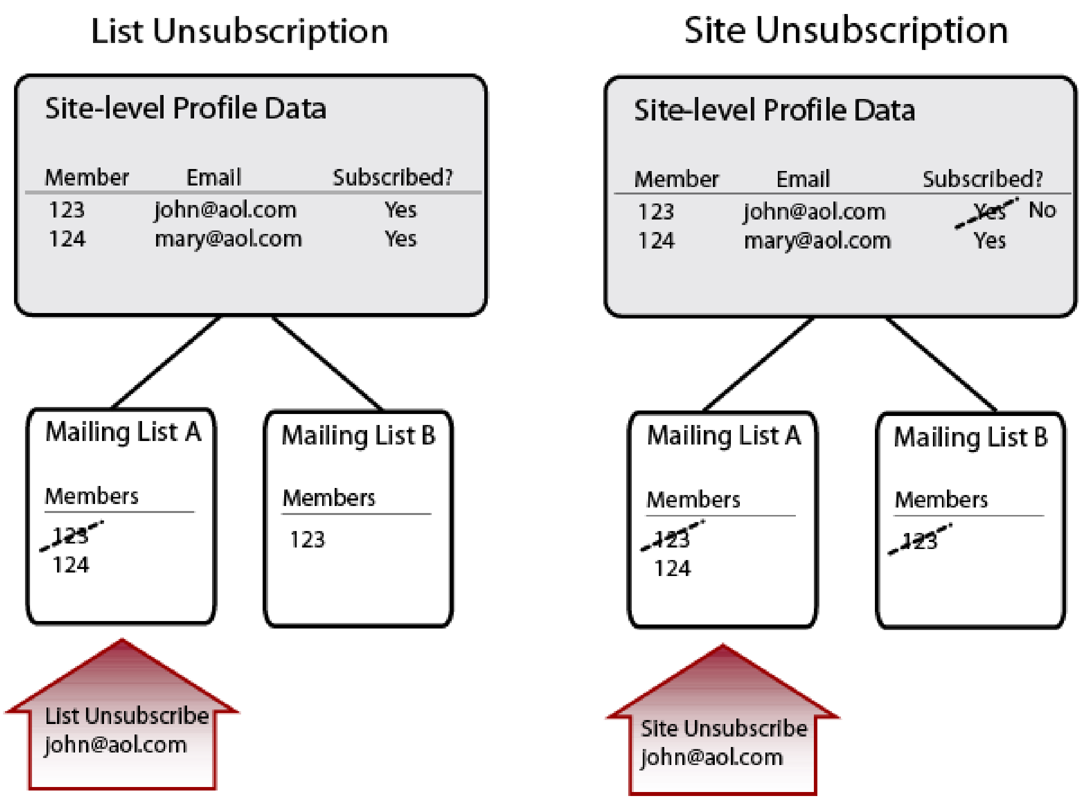
When a subscriber clicks on the **Subscription** or the **Unsubscription Address link** in a message, an email is sent to DREAMmail and the email address is automatically subscribed or unsubscribed to the mailing list or site, as appropriate.

When the link is clicked, an email opens to the address.



Processing Unsubscriptions

DREAMmail allows you to determine what happens when a user asks to be **unsubscribed**. You can remove the user from a specific mailing list or from all mailing lists within the site. The nature of your email marketing activities will determine which setup makes the most sense.



Type of Unsubscription Action	Removes Subscriber from:	Subscribe Flag:	Generally Used For:
List Unsubscription	The mailing list	Subscribed = Yes	Newsletter unsubscriptions
Site Unsubscription	All mailing lists for the site	Subscribed = No	Promotional ad unsubscriptions

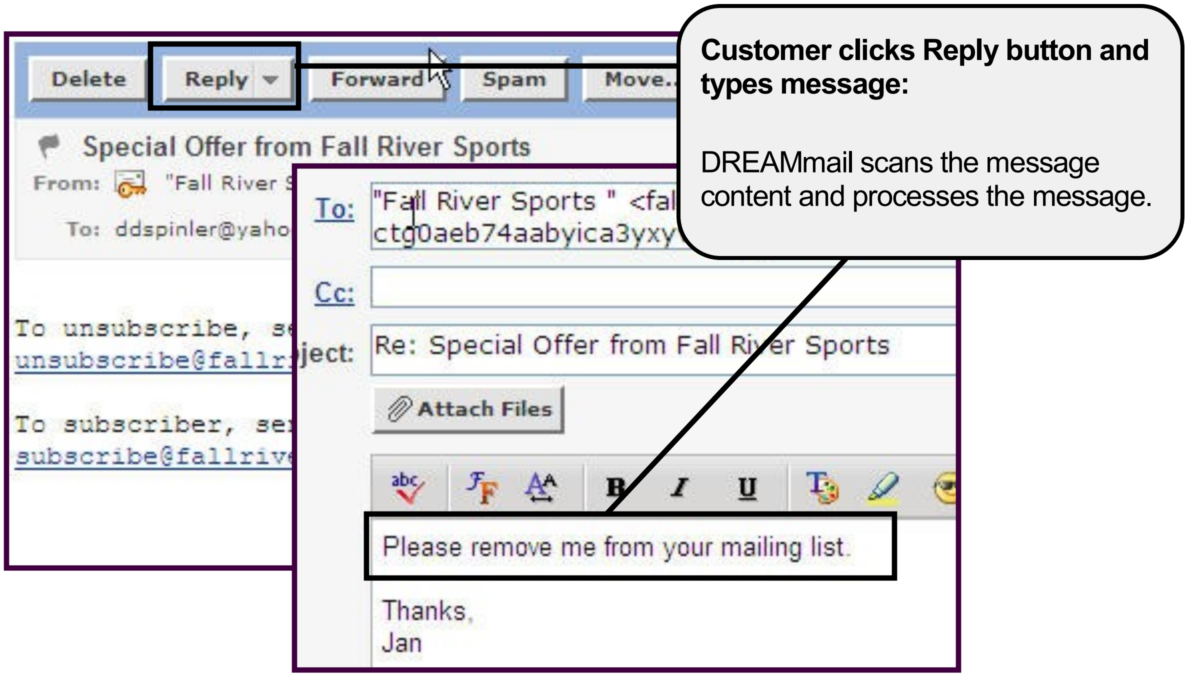
Best Practices for Processing Unsubscriptions

Use a LIST level subscription and unsubscription action for newsletters. This will add or remove users from the list associated with a specific newsletter but will allow them to continue to receive newsletters associated with other mailing lists. This will maximize your mailing list size and meets with customer expectations to continue to receive wanted newsletters.

Use a SITE subscription and unsubscription action for promotional offers. Direct marketers should use a site unsubscription to remove users from all lists. Generally, customers who have chosen to subscribe or unsubscribe for promotional offers either want to see all offers or no longer wish to see offers of any kind. This will also prevent accidental re-importing in the future.

Processing Emails Received via the Reply Button

If a different Reply address has not been indicated and a subscriber clicks the **Reply** button in a message, an email is sent to DREAMmail. DREAMmail automatically scans the message content and automatically processes many of these emails, as indicated below. Those that can not be automatically processed are forwarded to your organization.

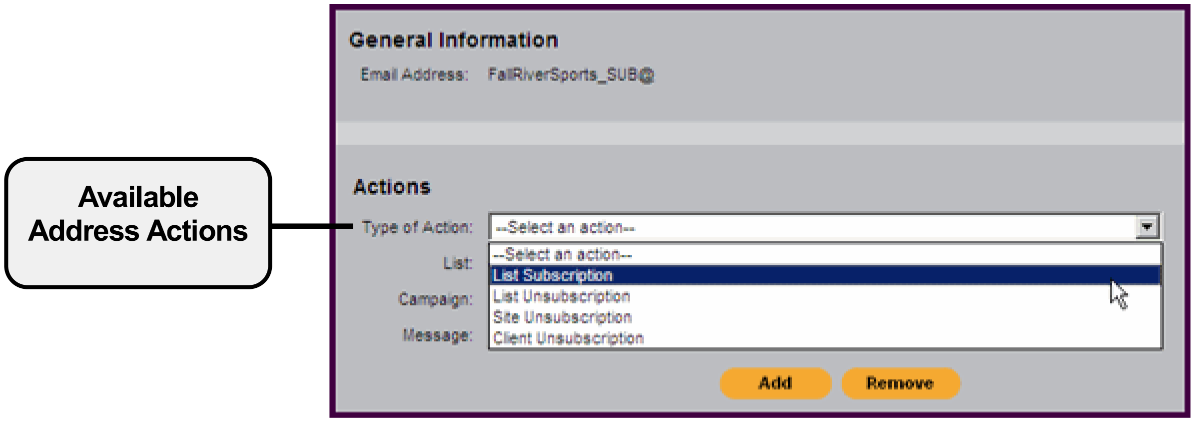


Message Content	Action Taken:
Virus or SPAM	Discarded
Auto-responses	Discarded
Bounce back	Recorded and discarded
Asks to be unsubscribed	Processed as an unsubscription
Requests address change	Address updated
All other responses	Message forwarded to client

Note: Be sure to assign an **Unsubscription action** to your **From** address. This allows DREAMmail to automatically process any messages where the subscriber clicks the Reply button to ask to be unsubscribed rather than using the Unsubscription address link.

Determining Address Actions

In order for an address to work, you must assign an **action** to indicate how the address is being used. The following actions can be assigned to DREAMmail email addresses:



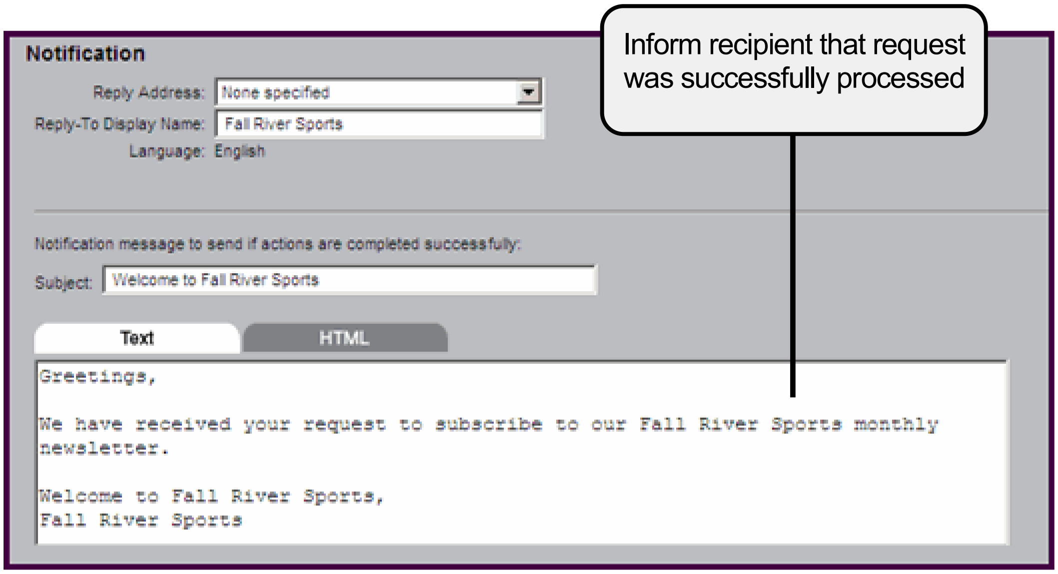
Action	Description	Used for...
List Subscription	Adds the sender's email address to the specified mailing list.	Subscription addresses
List Unsubscription	Removes the sender's email address from the specified mailing list.	- From addresses - Unsubscription addresses
Trigger Event Mailing	An email address, that when replied to, causes DREAMmail to automatically send a triggered message	Send product information or other automatic responses to subscribers
Site Unsubscription	Removes the sender's email address from all mailing lists within the site.	- From addresses - Unsubscription addresses
Client Unsubscription	Removes the sender's email address from all mailing lists for the client.	- From addresses - Unsubscription addresses

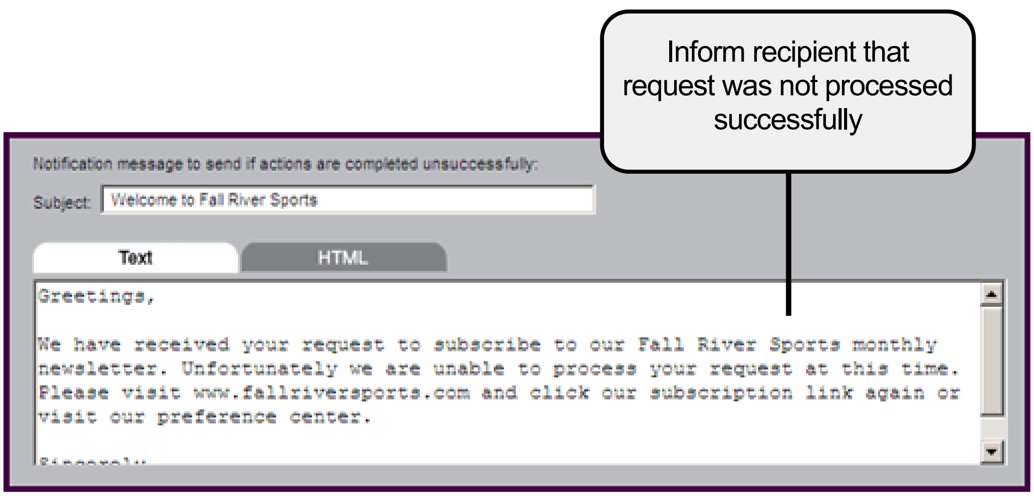
When you assign an action to an email address, you must also specify the appropriate mailing list, campaign, or message to which you want the action applied.

EXAMPLE: If you assign a List Subscription action, you must specify an existing mailing list to which you want a potential subscriber added.

Using Notification Messages

You have the option of creating a **notification message** when creating an address in DREAMmail. A notification message can be sent for either subscription or unsubscription requests to inform the sender whether his or her request was completed.





Note: An unsubscription request cannot be processed if the email recipient has forwarded the email to another address and is attempting to unsubscribe from that email address. DREAMmail has only the first address on record.

How to Create an Address

Tip: Your Address Type will always be Standard DREAMmail Address.

Step	Action
1.	Click **Addresses > Address Manager**. The Address Manager form displays.
2.	Click **Add**. The General Information Form displays.
3.	Select your **Address Type** and **Category**.
4.	Enter the **email address** for the address selected in the Email Address field.
5.	Enter the **display name** for the email address in the Display Name field. Note: Does not appear with all Address Categories.
6.	Enter a **description** of the address in the Description field.
7.	Click **Next**. The Actions Form displays.
8.	Click on the **Type of Action** drop down list and select the action required.
9.	Optional: If you choose a **List Subscription** or **List Unsubscription**, indicate the list to which subscribers should be added or removed.
10.	Click **Add**.
11.	Optional: Complete steps 12 through 15 if you want to create a **Notification Message**. Or skip to Step 16.
12.	Select the R**eply Address** and enter the **Reply-To-Display Name**.
13.	Optional: Indicate a **language** other than English for the notification message.
14.	Enter the **subject** of the notification message in the Subject field.
15.	**Insert the text or HTML code** that you want to display as the body of the notification message in the Text or HTML fields.
16.	Click **Save**. Click **OK** to confirm request has been submitted successfully.

Best Practices for Addresses

Use the Unsubscription action for the From address. Doing so will allow DREAMmail to automatically process any unsubscription requests from recipients who have chosen to use the Reply button and not the Unsubscription link.

Use the List Unsubscription action for newsletters. This allows recipients to continue to receive other newsletters sent from within the same site.

Use a Site Unsubscription action for promotional ads. Chances are, if the recipient no longer wants to receive messages for this campaign, they most likely do not wish to receive any message from you.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports needs to change the address to which new subscriptions are processed. All subscriptions for Fall River Sports will be processed via a new address link in the marketing messages being sent. New subscribers should be added to Fall River Sport's main house file. Create the appropriate address.

Level 2: "I'm Confident I can do This"

Fall River Sports needs to change the address to which new subscriptions and unsubscriptions are processed. All subscriptions and unsubscriptions will be processed via a new link in the marketing messages being sent. Subscriptions for this campaign will be added to Fall River Sport's main mailing list. Unsubscriptions will be handled at the Site level. Fall River Sports would like to send a notification for all unsubscriptions. Create a new subscription and an unsubscription address for this campaign.

Level 3: "Bring it On!"

Fall River Sports needs to change it's subscription and unsubscription process. All subscriptions and unsubscriptions will be processed via a link in the marketing messages being sent. All subscriptions will be processed to Fall River Sport's main mailing list and to another mailing list of your choice. The company has determined that recipients who wish to unsubscribe should not receive any additional messages from any of Fall River Sport's subsidiaries except confirmation that the request has been processed. Create both a new subscription and unsubscription address.

Summary

- Addresses in DREAMmail are used to facilitate both outbound and inbound email processing and can assist with subscription and unsubscription activities via links within the email message.
- Separate addresses can be created for each site, campaign or message, or the same addresses can be used across all messages within the site.
- The three most common types of addresses are the: From Address, Subscription Address, and Unsubscription Address.
- Although any number of addresses can be created in DREAMmail, only one address is required: the From address.
- A list-level unsubscription removes the subscriber's name from the mailing list and is often used for newsletter unsubscriptions.
- A site-level unsubscription sets the subscription flag for the subscriber record to unsubscribed and removes the subscriber from all mailing lists for the site. This is generally used for unsubscriptions to promotional ads.
- Using a Reply address will cause the automatic inbound processing of email by DREAMmail to cease and all emails will be forwarded to this address.
- DREAMmail automatically processes any emails received from the Subscription and Unsubscription address links.
- Messages received when the customer clicks the Reply button are also automatically processed, including requests to be unsubscribed or requests for an address change.
- Messages that cannot be automatically processed are forwarded to the client for attention.

Need More Information?

For additional information regarding addresses, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 8: Working with Campaigns

Overview

A campaign is a marketing effort launched by a company to promote a product, a service, a newsletter, or a website. Campaigns contain a logical grouping of email messages sent to the subscribers of a mailing list as part of an email marketing initiative.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Create a new campaign.
- Edit a campaign.
- Delete a campaign.
- Deactivate/Reactivate a campaign.

Key Terms

Campaign: A logical grouping of messages within a site.

Expiry Date: The last date that a message within a campaign can be sent.

Site: Individual groups within a client that are typically used to isolate business units or publications. Each site runs its own campaigns and can either have its own mailing lists or use shared mailing lists.

When to Create a New Campaign

Strategize your **campaign organization** before you create a new campaign.

- What is the content of your message? Organizing messages into campaigns allows you to easily compare the performance of one group of messages to another.
- Create a new campaign for each week or month if you need to understand how your activities are performing over time.
- Consider the types of reports you need, before you create campaigns. Reports summarize on a message-by-message basis and also on a campaign-by-campaign basis.

How Campaigns Are Used with Messages

Campaigns are used to **group** messages based on a:

- common product,
- theme,
- special offer, or
- other logical grouping.

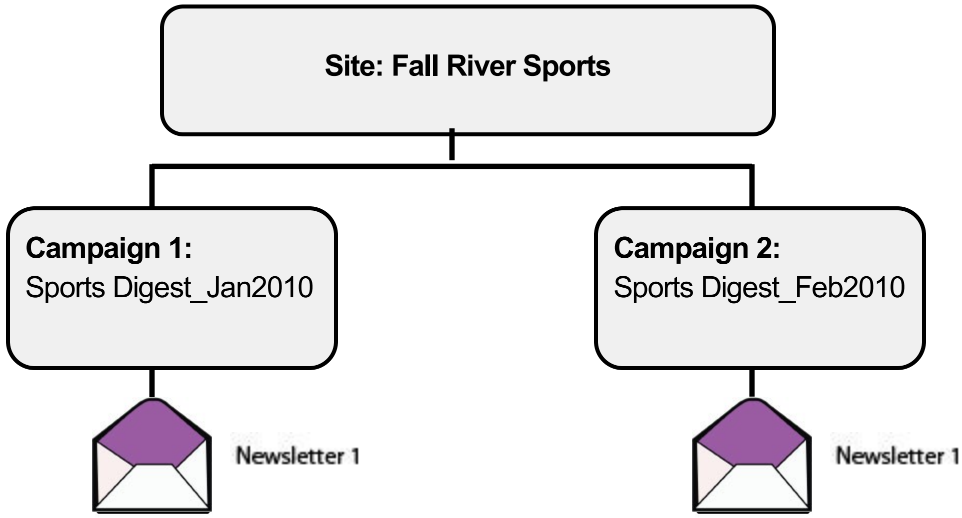
Because campaigns are composed of messages, any **properties** that you assign to campaigns are automatically assigned as a default to all of the messages in that campaign.

EXAMPLE: You can specify a default **From Address** that is used for all of the messages that you create in a campaign.

Note: You have the option of selecting a different From Address when editing a message within the campaign.

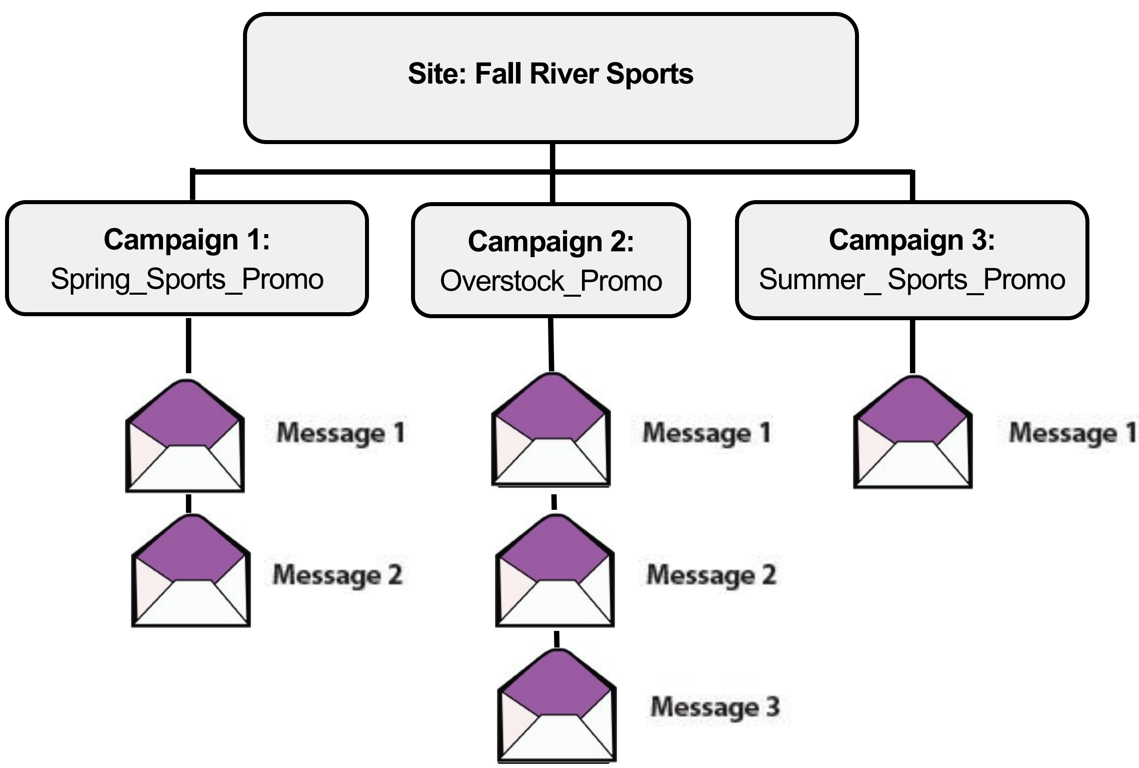
Example– Newsletter Campaign

Fall River Sports publishes a monthly sports digest. Each **newsletter** is a new message and campaign. In this way, responses to each newsletter can be tracked for reporting purposes.



Example– Promotional Campaign

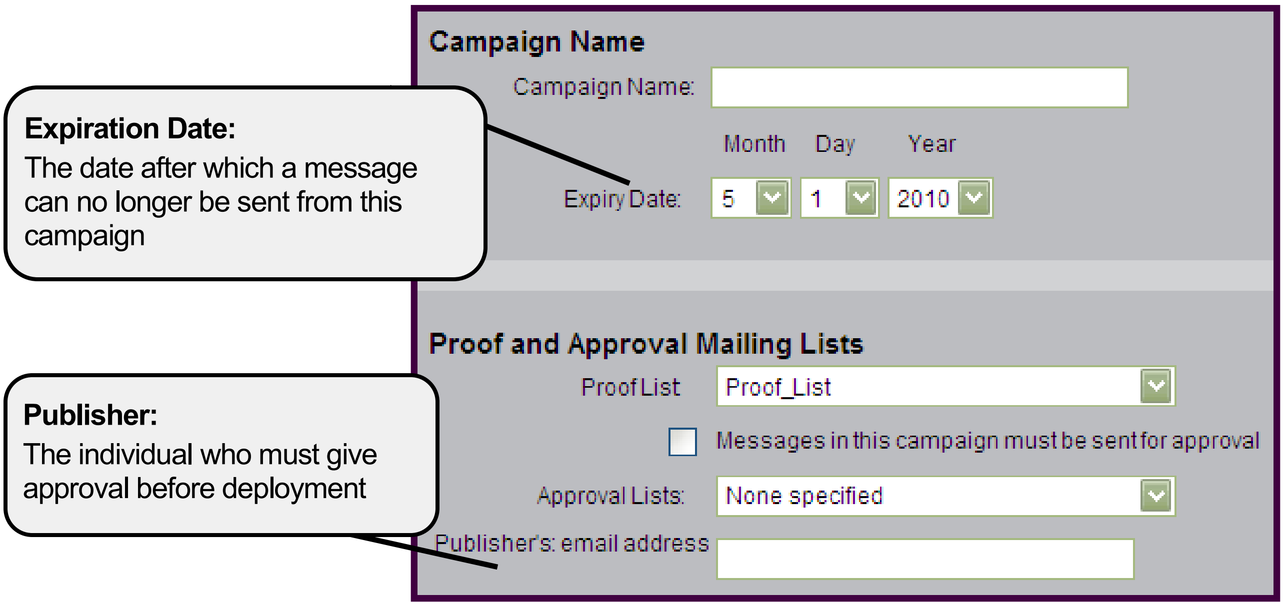
Fall River Sports has several **promotional** mailings they'd like to start. They anticipate they will want to know which promotion worked the best. In order to compare the promotions against one another in their reports, a separate campaign is set up for each promotion.



DREAMmail's Campaign Manager

Using the **Campaign Manager**, you can:

- Set the campaign expiration date.
- Identify the Proof list associated with the campaign.
- Indicate whether DREAMmail will be used to track the approvals for the campaign.



Campaign Expiry Date

The **Campaign Expiry Date** is set to prevent additional messages from being sent from the campaign once the campaign is over. The expiration date defaults to one month and can be extended, if needed, at any time.

Tracking Approvals in DREAMmail

DREAMmail allows you the option of tracking approvals for your messages. The person tasked with providing final approval of your message is designated as the **Publisher** of the message.

To track approvals:

1. Create an Approval mailing list.
2. Designate the Publisher's email address in the campaign.

Note: The Publisher must provide final approval of a message before it can be deployed. If the Publisher is not available, only your Account Manager can override this requirement.

Additional information regarding tracking approvals is available in the *Setting Up the Approval Tracking Process* section of **Unit 11: Proofing Your Emails**.

How to Create a Campaign

Before You Begin: Mailing Lists and DREAMmail email addresses must be set up prior to creating a campaign.

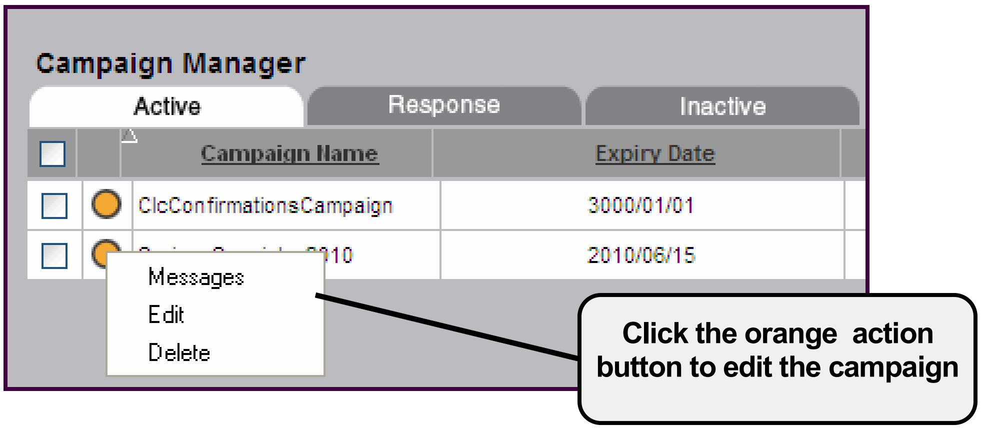
Step	Action
1.	Click **Campaigns** > **Campaign Manager**. The Campaign Manager form displays.
2.	Click **Add**.
3.	Complete the **Campaign Name** field with a name for the campaign. Campaign names cannot contain spaces or other special characters.
4.	Complete the **Expiry Date** field with the date on which you want the campaign to end.
5.	<u>Optional</u>: Select a proof list from the **Proof List** drop-down list.
6.	<u>Optional</u>: Select the **Messages in this campaign must be sent for approval** checkbox. If selected, you must also add an: **Approval List**. **Publisher's email address**. The person designated as Publisher gives final approval before the message can be sent.
7.	Select the default **From Address**.
8.	Verify the following checkbox is checked: **Track message unsubscribe requests from replies**.
9.	Select the default **Subscribe address**.
10.	Select the default **Unsubscribe address**.
11.	Verify the following checkbox is checked: **Track message unsubscribe requests from Unsub address**.
12.	Click **Save**. The new campaign appears on the Campaign Manager screen.

How to Edit a Campaign

A campaign can be **edited** after it has been created. Some properties of the campaign that can be edited include:

- Expiry date
- Proof and Approval mailing lists
- From Address
- Subscribe Address, etc.

You can <u>not</u> edit the name of the campaign or the approval status of the campaign.

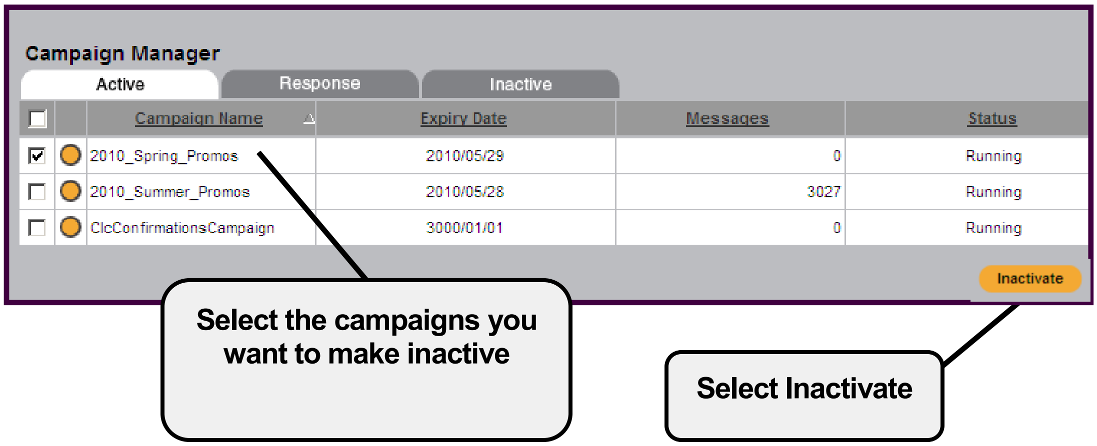


Step	Action
1.	Click **Campaigns > Campaign Manager**. The Campaign Manager form displays.
2.	Click the orange **Action button** next to the name of the campaign you want to edit.
3.	Click **Edit**.
4.	Edit the properties you want to change.
5.	Click **Save**.

How to Inactivate and Re-activate a Campaign

As you create campaigns over time, your workspace can become cluttered. **Inactivating** a campaign makes for a cleaner workspace.

Once inactive, DREAMmail prevents you from sending a new message from that campaign. Inactive campaigns can be re-activated, if needed.



Step	Action
1.	Click **Campaigns > Campaign Manager.**
2.	Checkmark the boxes for the campaigns that you want to make inactive.
3.	Click the **Inactivate** button and **OK** to confirm this action.
4.	Click OK on the notification message. The campaign should now appear on the **Inactive** Tab.

Note: To reactivate a campaign, use the **Re-activate** button on the Inactive tab.

Best Practices for Campaigns

It's not recommended to send all your messages from a single campaign. Having too many messages under a campaign makes it difficult to get reports on a desired message.

Make campaign names meaningful. Include dates for easy reference in forms and reports.

Leave the Reply-to Address set to "None." The Reply-to Address is an optional setting that is only used if you want all subscriber replies to go directly to you. Normally, subscriber replies go directly to DREAMmail and only those messages that require specialized attention are forwarded to you.

Do not use the Message Footer. The Message Footer, by default, references the subscribe and unsubscribe links that you have selected. However, you must manually reference these links in the AOL and HTML format messages. It is best to include the address links directly in the content of your message.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports wants to run an after-holiday sale on excess merchandise. The campaign will expire in one month. The messages in this campaign do not require approval prior to deployment. Create a campaign for this marketing initiative.

Level 2: "I'm Confident I can do This"

The marketing team at Fall River Sports would like to initiate a monthly newsletter for hockey fans and for football fans. Both newsletter require approval by Bob Jones, the CEO of Fall River Sports. Bob's email address is: bob.jones@fallriversports.com. Create the campaign(s) for the newsletters.

Level 3: "Bring it On!"

List some of the many ways in which campaigns can be organized for both promotional ads and newsletters.

Summary

- A campaign is a logical grouping of messages launched by a company to promote a product, a service, a newsletter, or a website.
- Organize your campaigns based on the content of your messages and whether you need to understand how your activities are performing over a specific time period.
- Consider the types of reports you need before creating campaigns.
- A campaign can be edited after it has been created. The Expiry Date, Proof and Approval Mailing Lists, From Address, and Subscribe Address, are examples of what can be edited. The campaign name and the approval status of the campaign can not be edited.
- Campaigns no longer being used can be deactivated. These campaigns can also be reactivated at a later date and used again if necessary.

Need More Information?

For additional information regarding addresses, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 9: Creating an Email Message

Overview

Creating a message in DREAMmail can be as simple as selecting the mailing list to which the message will be sent and entering a subject line and message body. This lesson introduces the process for creating a simple email marketing message.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Create a message in text, AOL legacy and HTML formats.
- Modify message settings.

Key Terms

AOL legacy format: A message format that contains limited HTML formatting tags used only by AOL version 5.0 and below.

Autosense: A message option that sends both a text and HTML message to new recipients to determine which message format can be read by their computers. Future messages are then sent in the appropriate format.

HTML format: A message body that contains HTML formatting tags. These tags define the visual layout of the message body, text styles, and can reference images.

Preference Center: Pre-populated, form-based HTML pages, generally located on your website, that enable subscribers to access and update personal profile data and preferences, as well as to subscribe and unsubscribe from mailing lists.

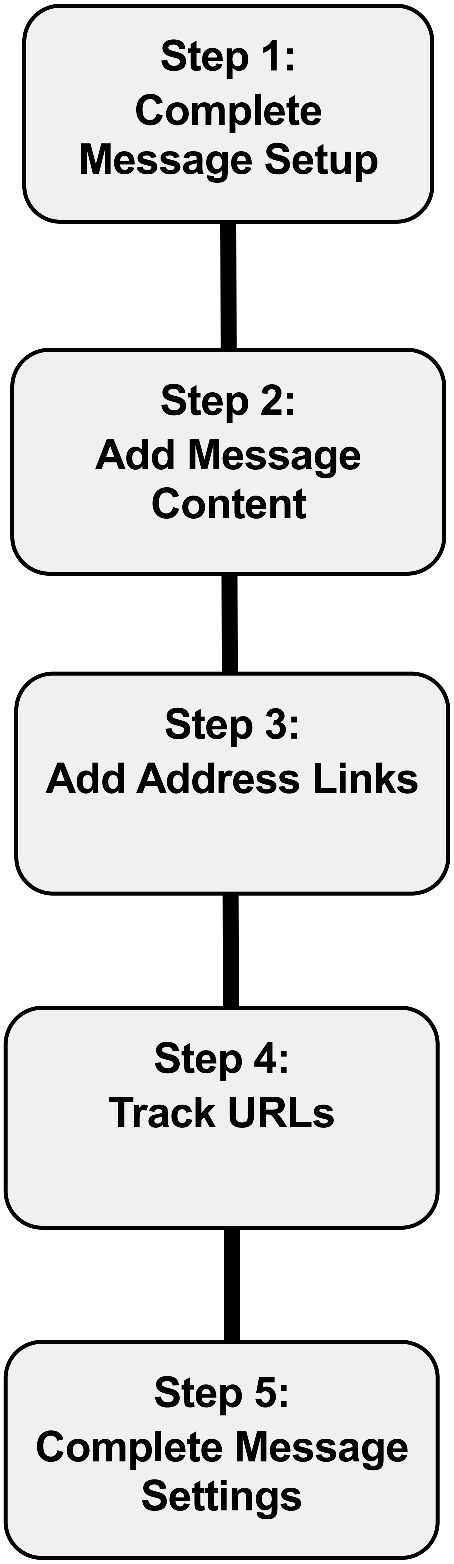
Redo Autosense: A process that sends both a text and HTML message to all subscribers (new and existing) who are flagged as text capable to determine which message format can be read by their computers. Future messages are then sent in this format.

Tracked Link: A URL in a message that has been modified to allow DREAMmail to record click-through activities.

Text format: A message format that contains only basic text. No images or formatting tags are supported.

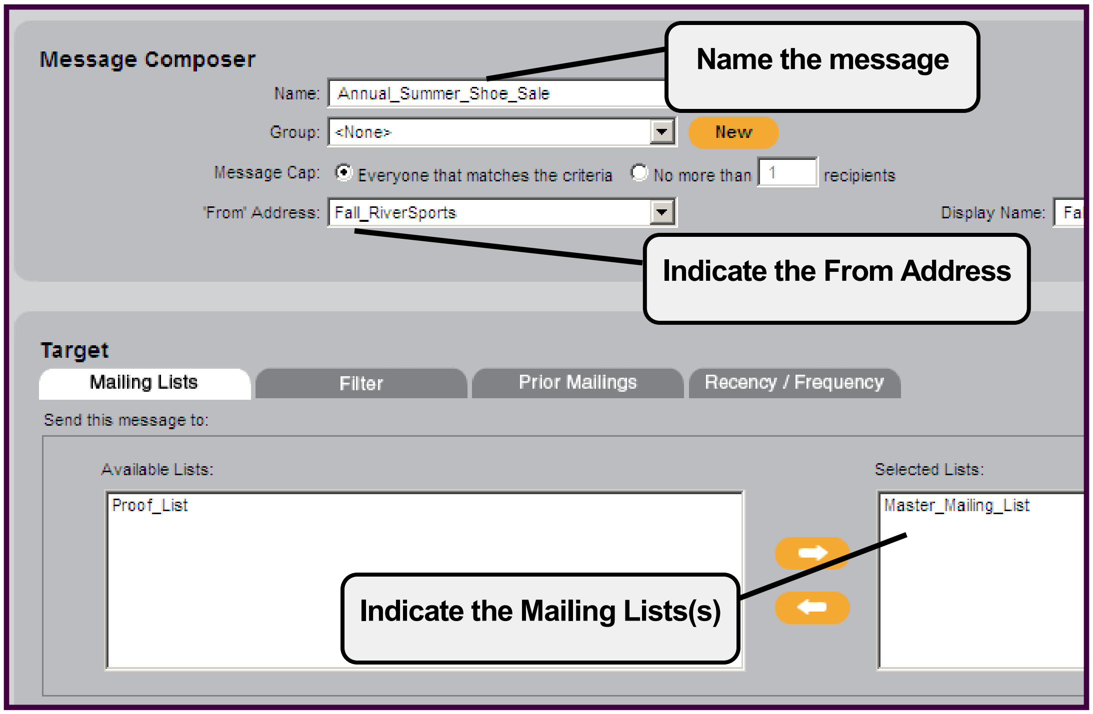
WYSIWYG: Pronounced “whizzy wig.” Stands for “What You See is What You Get.” In the HTML Editor, this functionality changes the HTML coding for any edits made to the HTML graphics and content, thereby simplifying the process of editing an HTML message.

Steps to Create an Email Marketing



Step 1: Complete Basic Message Setup

Basic **message setup** involves naming the message and indicating the From address and mailing list(s) to which the message will be sent.



Step	Action
1.	Click **Messages > Message Manager**.
2.	Select a **campaign** in the Messages for Campaign field.
3.	Click **Add**.
4.	Enter a **name** for the message. Do not use spaces or special characters in the message name.
5.	Select the **From** address, if different from the default From address.
6.	Select a **Standard mailing list** in the Available Lists box and click the right arrow to move it to the Selected Lists box.

Message Formats

Messages can be created in up to three **message formats**, including:

- Text only
- AOL Legacy
- HTML

Text Format AOL Format HTML Format

Text Only Format

The email message contains only basic text created using a simple text editor, such as Notepad. HTML imaging or formatting tags are not supported.

AOL Legacy Format

Limited HTML formatting tags are used in the AOL legacy format message. This format is supported by AOL version 5.0 and below. This format is used by approximately 2-3% of the total AOL population.

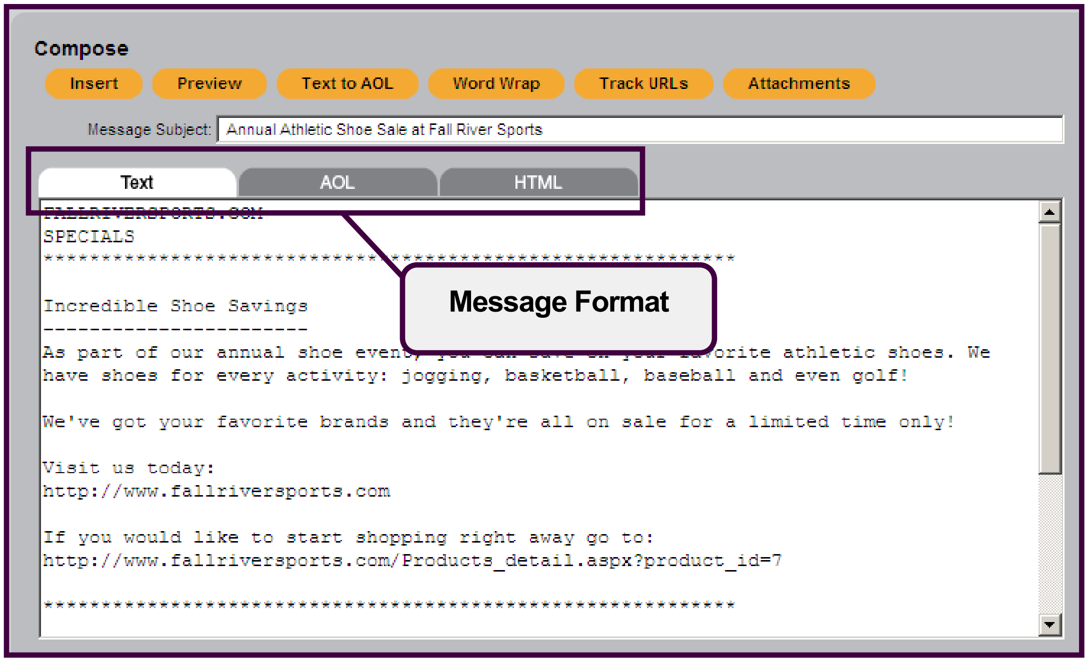
HTML Format

Full HTML image and formatting tags are supported by the HTML format message. This format is viewed by subscribers with ISPs who support HTML, including anyone with AOL version 6.0 and above. This format is used by approximately 80% of subscribers.

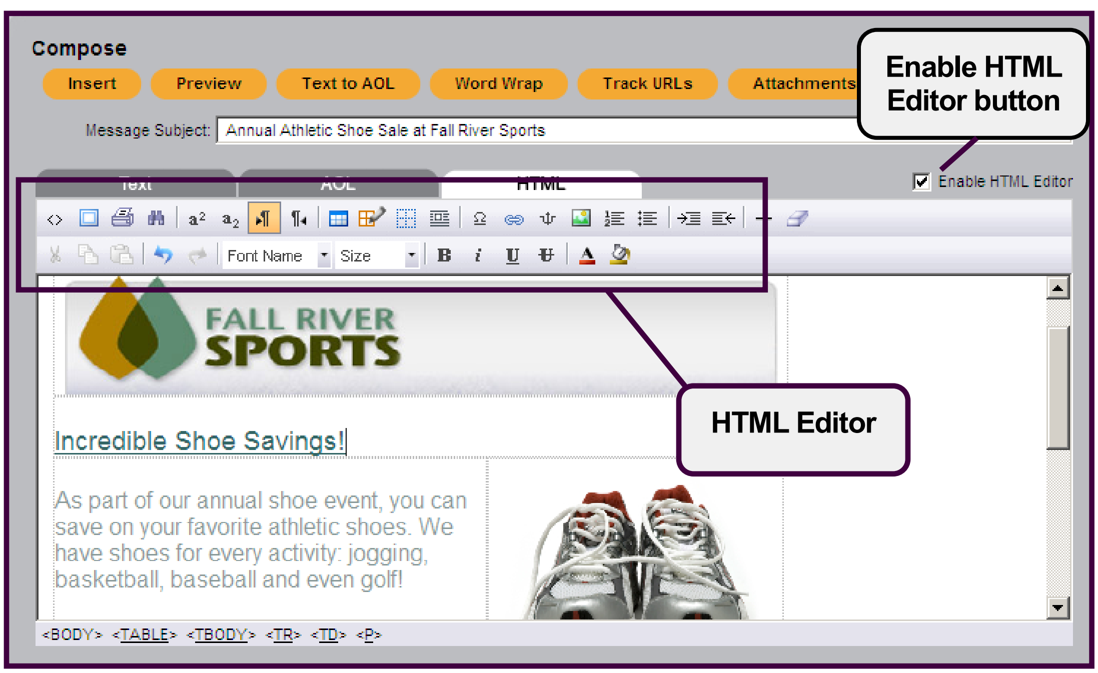
Note: DREAMmail provides an optional HTML Editor for your use in creating HTML messages.

Message Formats (cont.)

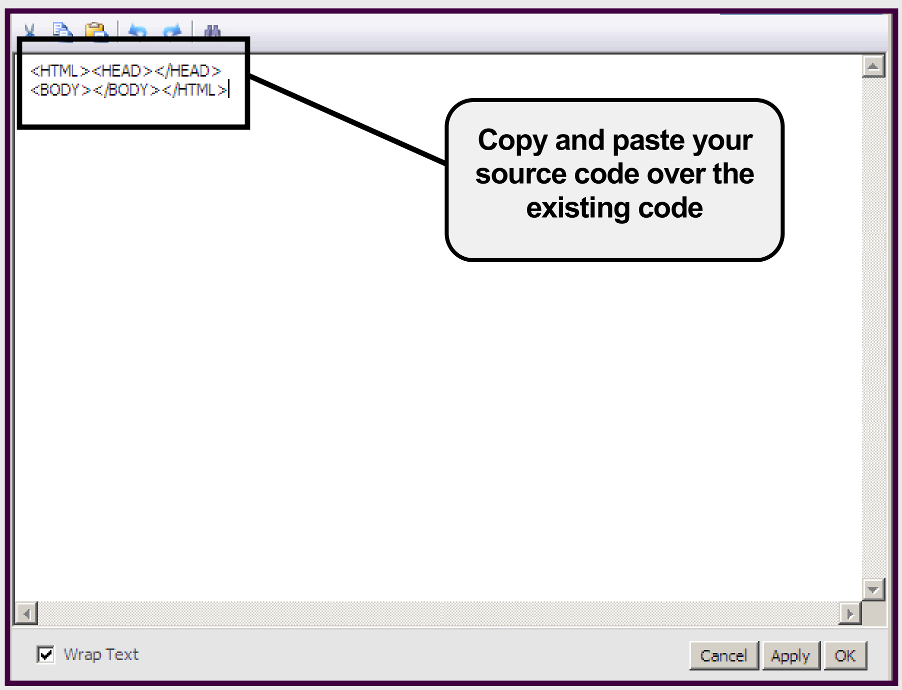
With DREAMmail, you can easily create messages in text only, AOL legacy and/or HTML format. Each message format is created on a different **tab**.



DREAMmail provides an HTML Editor to edit the HTML content of your message. Create your message using an HTML application, such as Dreamweaver or Front Page, and paste your content into the Editor for previewing and editing.



Step 2: Add Message Content

Step	Action
1.	Enter a **Subject Line** for the message.
2.	Enter the **message content** in the Text tab of the Compose section.
3.	Click the **Word Wrap** button. Click **OK** to confirm the wrap is finished.
4.	Click the **Text to AOL** button. Click **OK** to proceed with the conversion and **OK** to close the dialog box. The AOL version of the message is displayed in the AOL tab.
5.	Click the **HTML** tab. The HTML Editor displays.
6.	Click the **Enable HTML Editor** button. The HTML Editor appears.
7.	Click the **View/Edit Source** button  in the upper left corner of the Editor buttons. The Source Editor dialog box appears. 
8.	**Paste** your HTML source code in the Source Editor dialog box. **Note**: Paste over the existing HTML code or delete this code before pasting.
9.	Click **OK**. The HTML message appears in the HTML tab in WYSIWYG view.

Best Practices for Adding Message Content

Use a text editor to create your text message. Word processors often replace standard text characters with specialized characters that look better in print.

Word-wrap your text format messages. Older email versions do not automatically wrap text and your message may appear as one very long line of text.

Create a legacy AOL version of your message. If you do not, AOL users running 5.0 or earlier will see the text version but will not be able to click the links.

Create your HTML content outside of DREAMmail. DREAMmail's HTML Editor edits and corrects existing content. Create your message using an HTML application to ensure consistency and accuracy of your code.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports would like to create a follow up email reminding their text only subscribers of their incredible shoe sale. Use the "Shoe_Offer_upd.txt" file provided for training to target this message to Fall River Sports main mailing list. The message will be sent at a later date. HINT: You can ignore the Subscription and Unsubscription address links and the Message Settings section of the UI for this exercise.

Level 2: "I'm Confident I can do This"

Fall River Sports would like to create a new message for their latest sale on helmets. They have asked you to create a message for all text only and AOL legacy subscribers. The message content can be found in the "Helmet_Offer_upd.txt" file. The message will be sent to Fall River Sports main mailing list at a later date. HINT: You can ignore the Subscription and Unsubscription address links and the Message Settings section of the UI for this exercise.

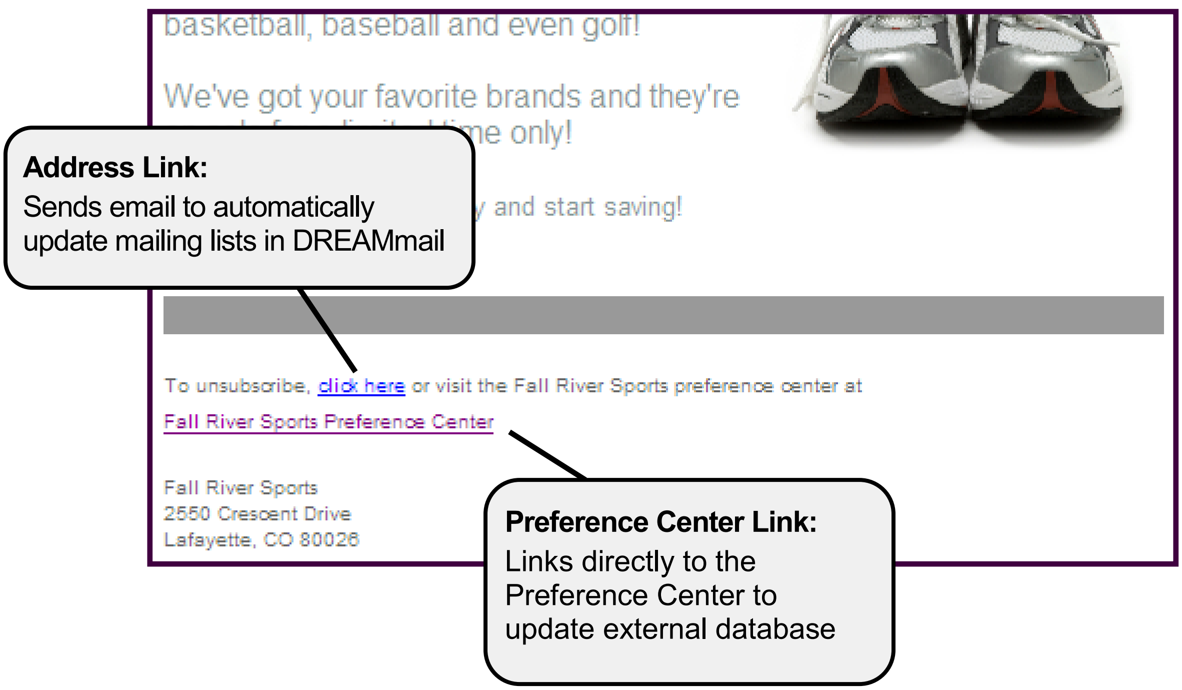
Level 3: "Bring it On!"

Fall River Sports is running a special on bike helmets. Their creative team has provided the content for the message. The content is in a file called "Helmet_Offer_upd.txt" and one called "Helmet_Offer_upd.html". Use these files to create the message to the subscribers of Fall River Sports main mailing list. HINT: You can ignore the Subscription and Unsubscription address links and the Message Settings section of the UI for this exercise.

Step 3: Add Address Links

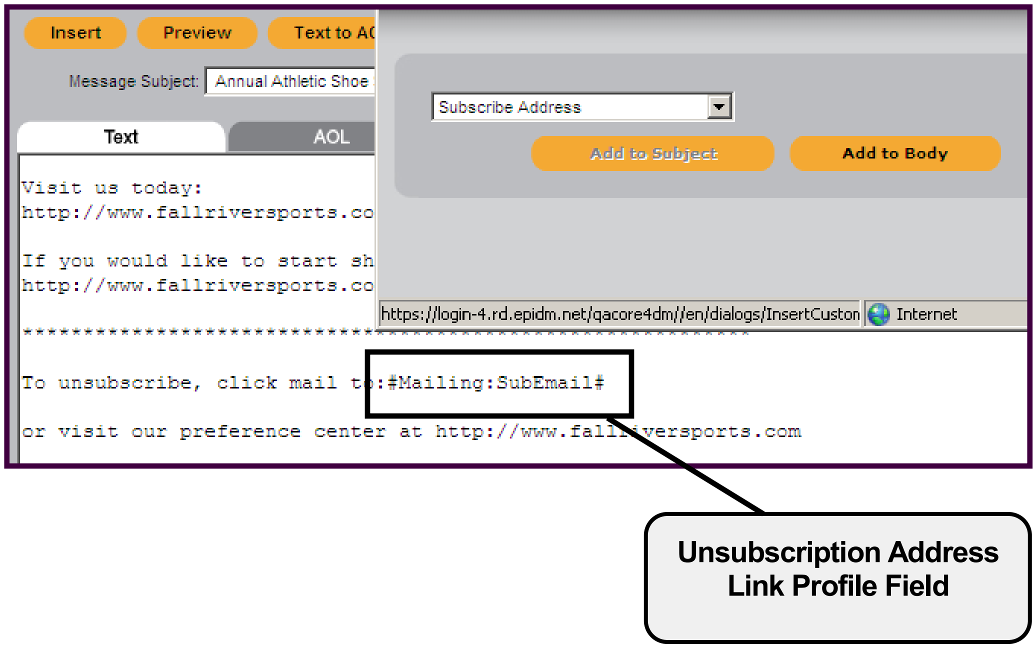
Address links are added to messages to allow recipients to subscribe and unsubscribe from your mailing lists. There are several ways to facilitate subscriptions and unsubscriptions to your mailing lists:

Link Type	Process	Database Updated
Preference Center	Directs recipient to your preference center to subscribe or unsubscribe	External database or DREAMmail
Subscription Address Link	Sends email to DREAMmail to automatically subscribe the sender	DREAMmail mailing list(s)
Unsubscription Address Link	Sends email to DREAMmail to automatically unsubscribe the sender	DREAMmail mailing list(s)



How to Add Address Links to Text Messages

For your **text message**, Unsubscription and Subscription Address profile fields (shown below) appear in the text message and serve as placeholders for the addresses. The links become active when the message is deployed.



Step	Action
1.	Click the **Text** tab of the message.
2.	**Position** your cursor in the text where you want to add the unsubscription address link.
3.	Click **Insert**. The Insert dialog box displays.
4.	Select **Unsubscribe Address** in the drop-down box.
5.	Click **Add to Body**. The unsubscription address profile field displays in your message.
6.	**Close** the Insert dialog box.
7.	**Repeat** this process for the Subscription address link.

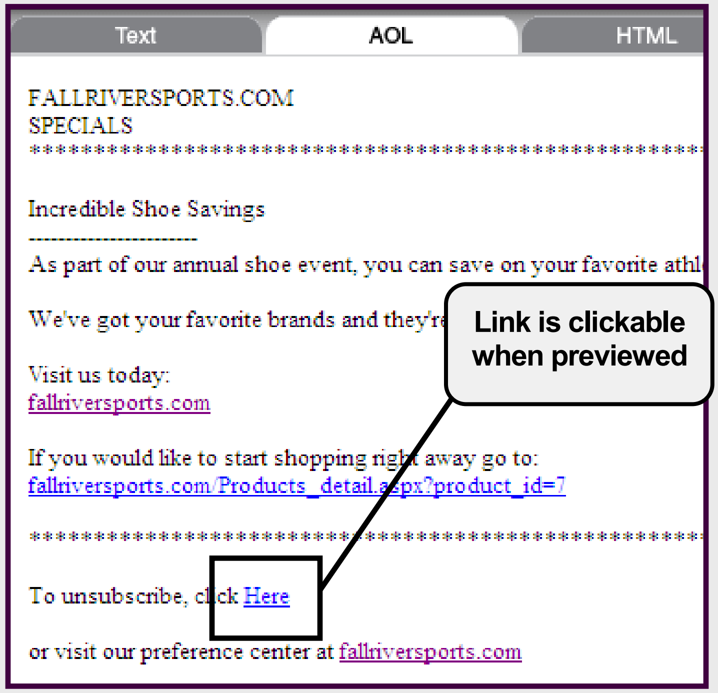
How to Add Address Links to AOL Legacy Messages

With **AOL messages**, the key to creating the Subscription and Unsubscription Address links is to make each link “clickable” by adding HTML coding before and after the address link profile fields. The links are functional when the message is previewed and/or deployed.

Step	Action
1.	Click the **AOL** tab of the message.
2.	**Position** your cursor in the AOL message where you want to add the unsubscription address link.
3.	Type the following: **<A HREF=”mailto:**
4.	Click **Insert.** The Insert dialog box displays.
5.	Select **Unsubscribe Address** from the drop-down box on the left.
6.	Click **Add to Body**. The unsubscription address profile field displays in your message.
7.	**Close** the Insert dialog box.
8.	Type the following after the address profile field: **“>Unsubscribe</A>**

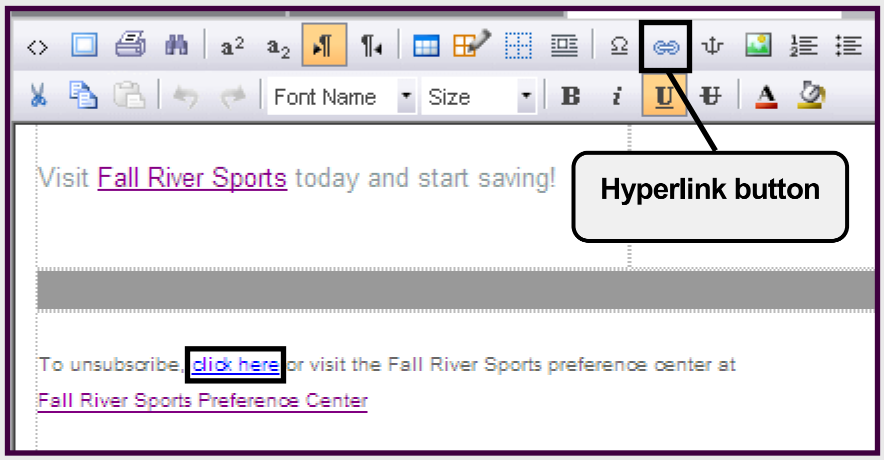
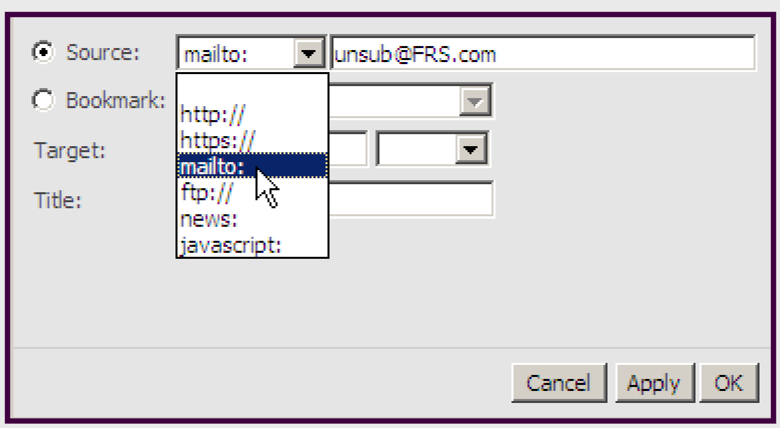
Continued on next page.

How to Add Address Links to AOL Legacy Messages (cont.)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9.</td><td>Click Preview to confirm the links are clickable. Close the preview box when completed.

</td></tr>
<tr><td>10.</td><td>Repeat this process for the Subscription Address link.</td></tr>
</table>

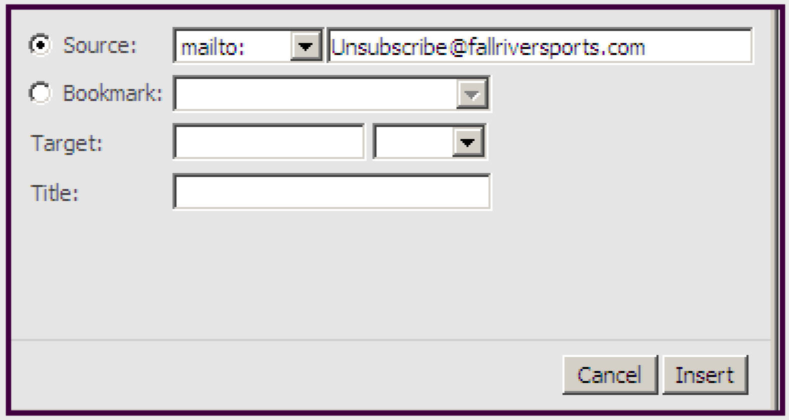
How to Add Address Links to HTML Messages

For **HTML messages**, create the Subscription and Unsubscription Address links using the Hyperlink button in the HTML Editor. The links are functional when the message is previewed and/or deployed. If you are not using the HTML Editor, enter the code for the address links as described below.

Step	Action
1.	Click the **HTML tab** of the message.
2.	Position your cursor in the **HTML message** where you want to add the unsubscription address link.
3.	Type a **link label** for the unsubscription address, e.g. Unsubscribe.
4.	**Highlight** the link label and click the **Hyperlink** button.  The Hyperlink dialog box displays. 
5.	Select **mailto:** in the drop-down menu for the Source field. Continued on next page.

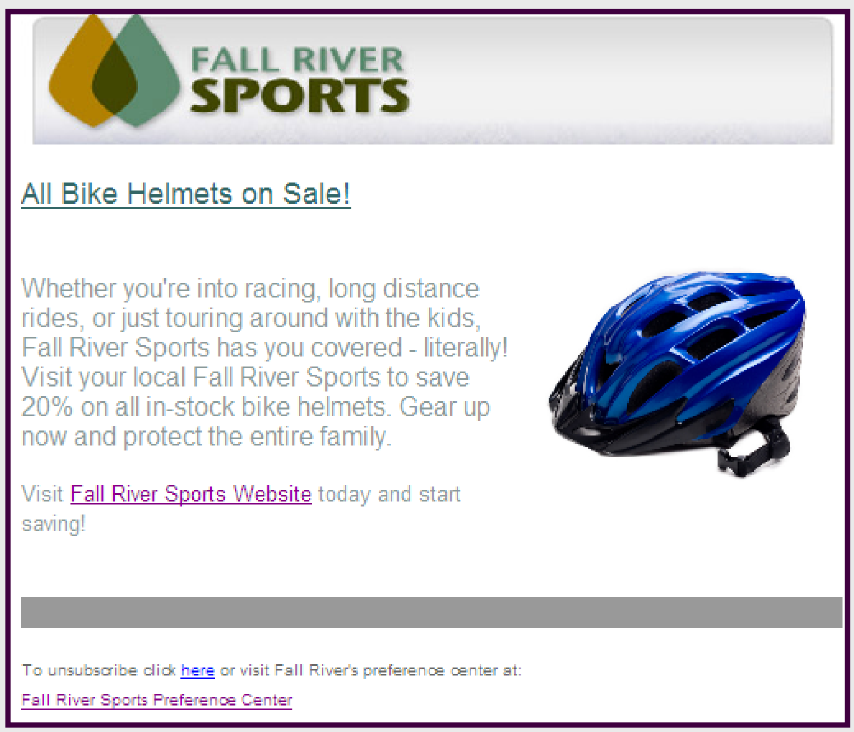
How to Add Address Links to HTML Messages (cont.)

6. **Type the email address** for the unsubscription address link, e.g. unsubscribe@fallriversports.com in the box to the right of the Source field.



7. Click **Insert** and **OK** to apply the settings. The link should now be clickable.

8. Click **Preview** to confirm the links are clickable. Close the preview box when completed.



9. **Repeat** this process for the Subscription Address link.

10. Click **Save**.

Best Practices for Adding Address Links

Imbed your subscription and unsubscription address links into your HTML content. This will save you some steps in creating these address links.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Locate the message you created for the Level 1 activity in the prior exercise. Add the subscription and unsubscription address links to the text format message.

Level 2: "I'm Confident I can do This"

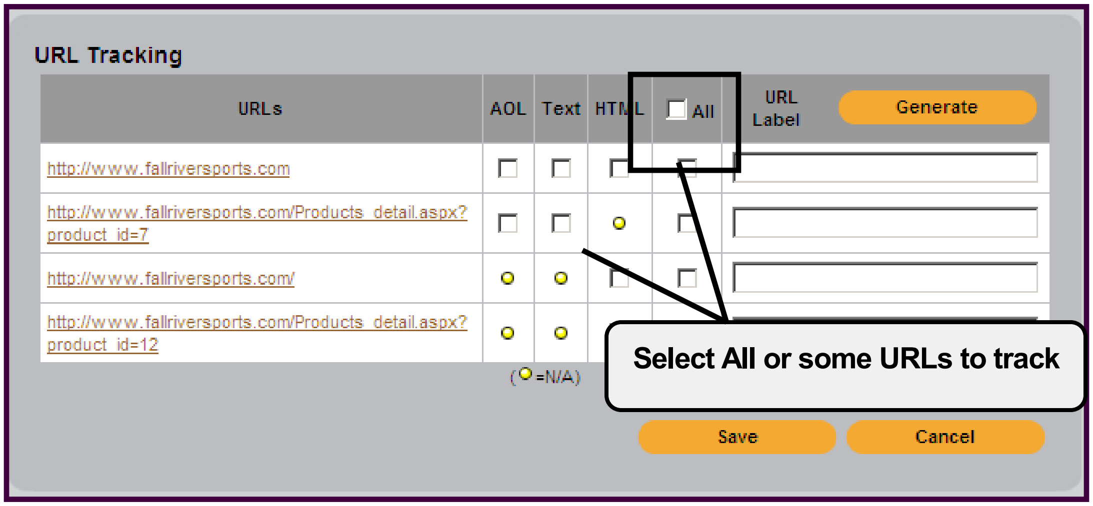
Locate the message you created for the Level 2 activity in the prior exercise. Add the subscription and unsubscription address links to the text and AOL format messages.

Level 3: "Bring it On!"

Locate the message you created for the Level 3 activity in the prior exercise. Add the subscription and unsubscription address links to the text, AOL and HTML format messages.

Step 4: Track URLs

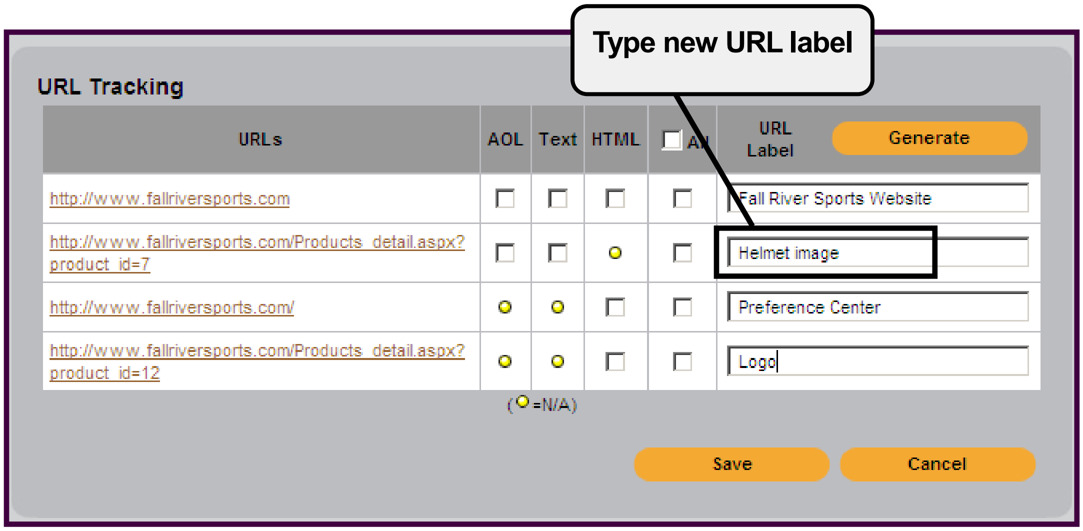
DREAMmail allows you to track any or all of the **URLs** in your text, AOL and HTML messages. Common URLs include links to the website home page and preference center, along with subscription and unsubscription address links.



Step	Action
1.	Click **Track URLs** in the Compose section. The URL Tracking screen displays a list of the URLs found in each message format.
2.	Click the **All** checkbox or click beside each URL that you want to track.
3.	Click **Generate** to create URL labels for reporting. You can modify the system-generated labels, as needed.
4.	Click **Save**. The URL Tracking screen closes and the screen refreshes to show the number of URLs being tracked in the Settings section.

Generating URL Labels for Reporting

In addition to tracking URLs, DREAMmail allows you to **generate** specific labels for your URLs for **reporting** purposes. This makes locating information for a specific URL in a report much easier.



In some cases, DREAMmail will provide a "suggested" URL label. A system generated label can be replaced by simply typing over it.

Common labels that can be used include:

- Home page
- Store index
- Preference Center
- Product Registration page

Note: Be consistent. If you label your link to your home page "Home Page," use this same label for all messages.

Updating URLs

The ability to update tracked URLs after a message has been deployed is available on certain message types and message statuses. A URL can be updated as many as **5 times within a 30 day period**.

These are the **allowable message types**:
- Standard
- Notification Triggered (including RTM)
- Recurring Triggered
- Recurring Child (not Recurring Master)

These are the acceptable **message statuses** for using the Update URL function:
- Sending
- Finished
- Paused
- Archived
- Armed (for RTM)
- Aborted
- Error
- Closed

Note: For message types/statuses not listed above, the message can be paused and the URL edited within the message itself.

Step	Action
1.	Access **Message Manager** and locate the message in which you wish to change or update the URL.
2.	Click the orange action button and select **Update URL**. Note: If Update URL is not listed as an option or is grayed out, the message type and/or status is not acceptable for this function.
3.	Locate the **URL** you wish to update.
4.	**Type over** the URL with the updated information.
5.	Modify the **URL label** if one exists already. If there is not a URL label, DREAMmail will prompt you to create one.
6.	Optional: Click **Test** to verify the destination of the redirected URL.
7.	Click **Save**.
8.	Click **OK** to close the verification pop-up box.

Best Practices for Tracking URLs

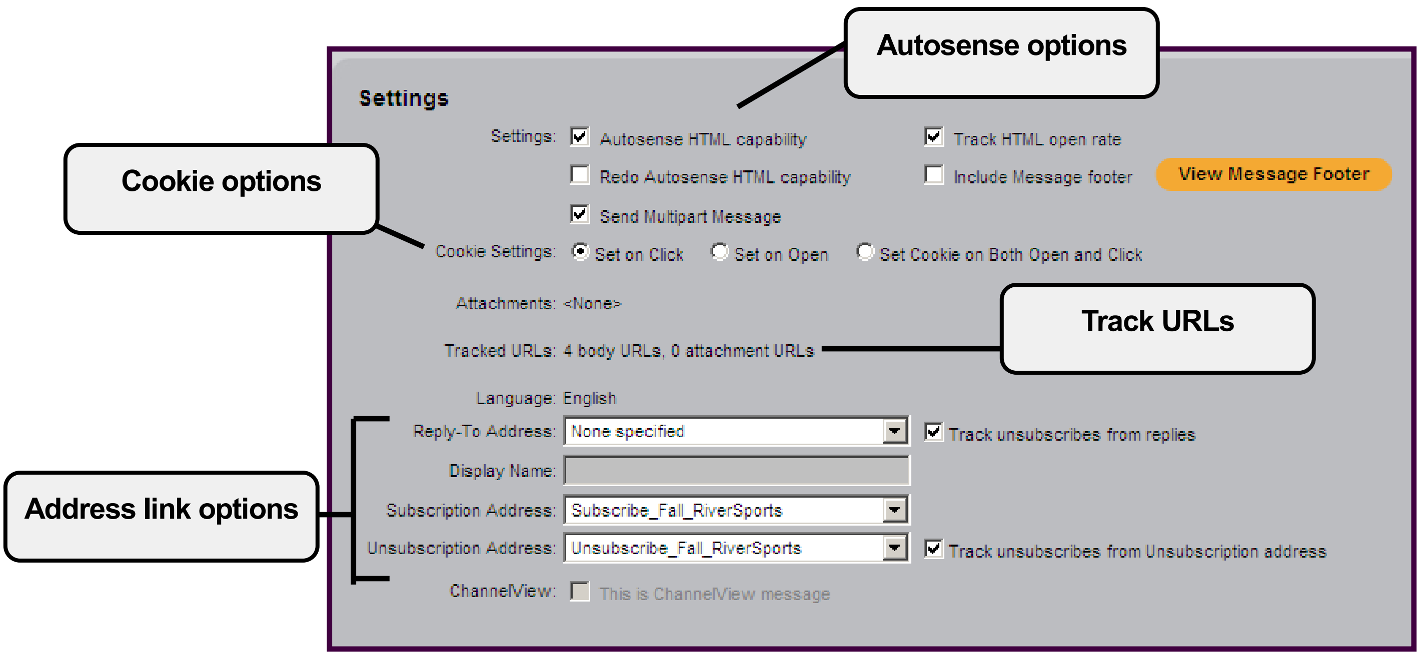
Track all links within all message formats. If you don't track a link, you will never be able to evaluate its effectiveness. You can always ignore these URLs in the reports, if you don't need the information.

Define a naming convention for URL labels. A constant structure to names lets you easily group together links of a similar type. For example, use "Article: Faster PCs," "Website: Home," or "Ad: 50% off Shirts."

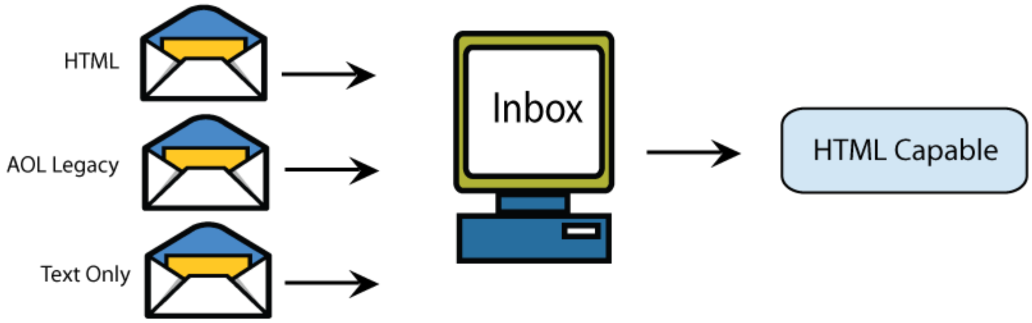
Step 5: Complete Message Settings

There are a variety of **settings** that you can complete for each message. Message settings include options to:

- Track unsubscriptions
- Set cookies
- Designate the subscription and unsubscription addresses
- Autosense recipients



Autosensing Recipients



When you compose a message in multiple formats, DREAMmail **autosenses**, or determines, the correct format for each subscriber on the mailing list. With autosensing, DREAMmail:

1. Sends all three message formats (text, AOL legacy and HTML) to new recipients on the mailing list.
2. Determines which format can be received, starting with HTML, then AOL and then text only.
3. Flags the subscriber's record for the appropriate format.
4. Sends all future messages to the subscriber in this format.

Sending Multi-Part Messages

The **Send Multi-part Message** setting allows you to send:

- Multiple email formats to one subscriber regardless of their delivery setting, i.e. you can send text and HTML messages to PDA users that enable them to view the text on the PDA and the HTML on their computer.
- A text message along with your HTML message for ISPs that deliver HTML as an attachment to a blank email.

How to Complete Message Settings

Step	Action
1.	Select **Autosense HTML Capability** in the Settings section.
2.	Optional: Click **Send Multipart Message**.
3.	Indicate the appropriate **Cookie Settings**.
4.	Verify the accuracy of your **Tracked URL** count.
5.	Optional: Select **Language**.
6.	Select the **Subscription Address** from the drop-down menu, if needed.
7.	Select the **Unsubscription Address** from the drop-down menu, if needed.
8.	Verify that both **Track unsubscribes from replies** and **Track unsubscribes from Unsubscription address** are checked.
9.	Click **Save**.

Saving Your Message

You have two options for saving your message:

- **Update**—saves the message without leaving the message
- **Save**—saves the message and returns you to Message Manager

Best Practices for Message Settings

Always autosense your messages. This enables DREAMmail to detect the appropriate message format for all future mailings for new subscribers.

Use Redo Autosense approximately every 6 months. Redoing autosense more often is generally not necessary and can slow your rate of deployment.

Track unsubscriptions using the Unsubscription Address link and via the Reply button. This information will not be available for reports unless it is tracked.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Locate the text only format message you created for the Level 1 activity in the prior exercise. Track all of the URLs in the message and autosense the message for all new subscribers. Save the message.

Level 2: "I'm Confident I can do This"

Locate the text and AOL messages you created for the Level 2 activity in the previous exercise. Perform the following edits:

- Autosense the message.
- Change the subscription and unsubscription address defaults.
- Track all URLs.
- Save the message.

Level 3: "Bring it On!"

Locate the message you created for the Level 3 activity in the previous exercise. Fall River Sports is requesting that you:

- Ensure everyone is autosensed.
- Send both text and HTML message to all subscribers.
- Track only the URLs associated with the HTML message.
- Create simple URL labels for reporting purposes.
- Change the default subscription address.

Summary

- There are five steps to creating messages: completing message set up, adding message content, adding Address links, tracking URLs and completing message settings.
- Messages can be created in text, AOL and/or HTML formats.
- Every message should contain a link allowing recipients to subscribe and/or unsubscribe from your mailing lists.
- Subscriptions and unsubscriptions can be accomplished via links to your preference center or using the DREAMmail address profiles.
- When the address profile is clicked, an email is sent to DREAMmail to process the subscription or unsubscription action.
- Track all URLs in your messages for reporting purposes.
- Autosensing each message allows DREAMmail to determine which message format (text, AOL legacy or HTML) that a new subscriber can receive and flag all future messages to be sent in that format.

Need More Information?

For additional information regarding creating an email marketing message, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 10: Using the HTML Editor

Overview

DREAMmail's optional HTML Editor can be used to quickly and easily change your HTML format message. In this lesson, you will learn how to use the HTML Editor.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Edit basic HTML content using the HTML Editor.
- Modify an image in a message.
- Add a hyperlink in a message.

Key Terms

Hyperlink: Text or graphical elements on a page that contain links to documents or to other web pages.

WYSIWYG: Pronounced "whizzy wig." Stands for "What You See is What You Get." In the HTML Editor, this functionality changes the HTML coding for any edits made to the HTML graphics and content, thereby simplifying the process of editing an HTML message.

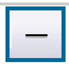
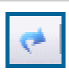
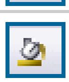
DREAMmail's HTML Editor

You can modify your HTML message by either editing the **source code** or by using the HTML Editor **toolbar**. The toolbar allows you to make simple changes to your HTML content, including changing the font type and size, inserting hyperlinks, and modifying images.

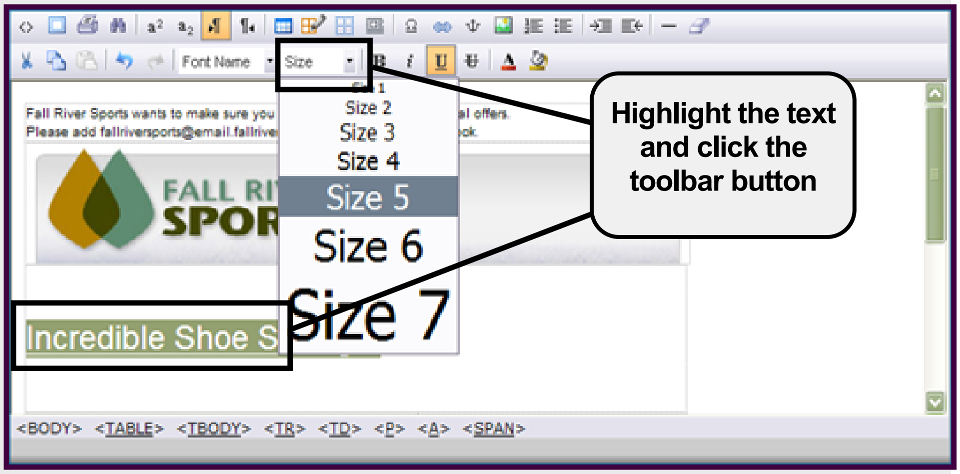
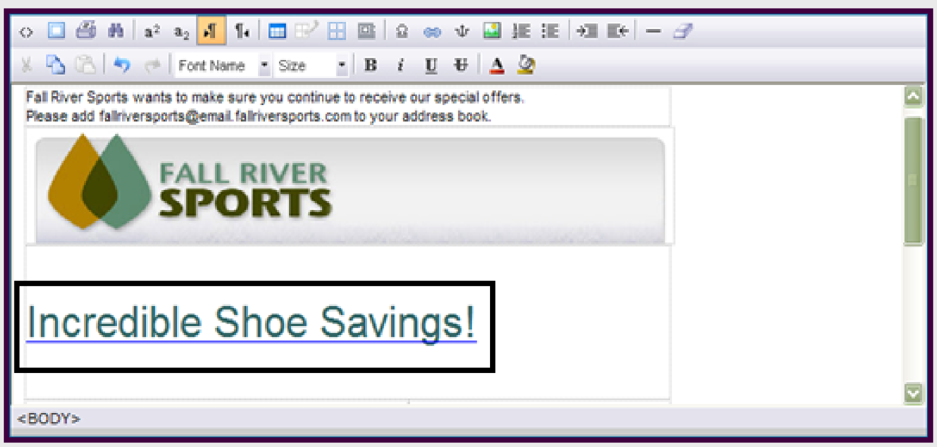
The HTML Editor Toolbar

Refer to the table below for a description of each **button** on the toolbar. Many of the editing options in the HTML Editor, e.g. the cut and paste buttons, function as they do in other commonly used software applications.

Button	Name	Description
	View/Edit Source	Toggles between Source Code view or the WYSIWYG view
	Full Screen	Brings the editor to a full screen from normal mode and vice versa
	Search	Performs a search of the content
	Superscript	Superscript text format
	Subscript	Subscript text format
	Left to Right	Left aligns text
	Right to Left	Right aligns text
	Insert Table	Creates a table
	Edit Table/Cell	Edits table/cell properties, including Table size, Edit Table or Edit Cell
	Show/Hide Guidelines	Hides or shows grid lines of a table
	Absolute	Places selected text or graphics in an absolute position
	Special Characters	Selects special characters
	Hyperlink	Creates a hyperlink
	Bookmark	Creates a bookmark

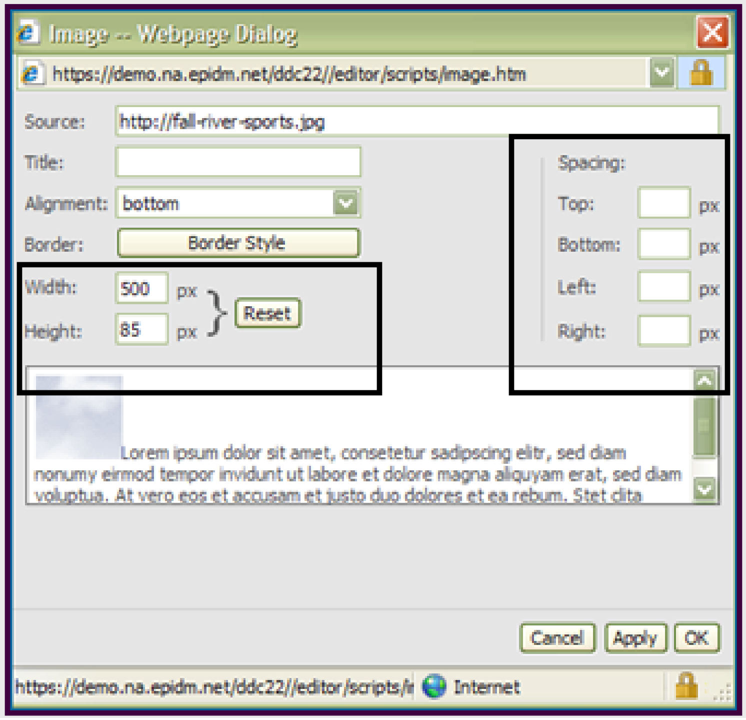
Button	Name	Description
	Image	Inserts an image and allows you to specify the image source, title, alignment, border style, width and height and spacing
	Numbering	Inserts numbering for a list
	Bullets	Inserts bullets for a list
	Indent	Right indents text/images
	Outdent	Left indents text/images
	Line	Inserts a line
	Remove Formatting	Removes formatting
	Cut	Cuts selected text
	Copy	Copies selected text
	Paste	Pastes selected text
	Undo	Allows you to undo the last action performed
	Redo	Allows you to redo the last action performed
Font Name	Font Name	Changes the font type
Size	Font Size	Changes the font size
	Bold	Bolds the selected text
	Italic	Italicizes the selected text
	Underline	Underlines the selected text
	Strikethrough	Strikes through the selected text
	Foreground Color	Selects the text foreground color
	Background Color	Selects the text background color

How to Edit Content Using the HTML Editor

Step	Action
1.	Click the **HTML tab** in the Compose section.
2.	If you have not already done so, click the **Enable HTML Editor** button.
3.	**Highlight** the portion of the existing text that you want to edit and click the applicable edit button in the toolbar.  The change is immediately viewable. 

How to Edit an Image

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click on the image that you want to edit.</td></tr>
<tr><td>2.</td><td>Click the Image button on the toolbar. The Image dialog box displays the current defaults for the image.

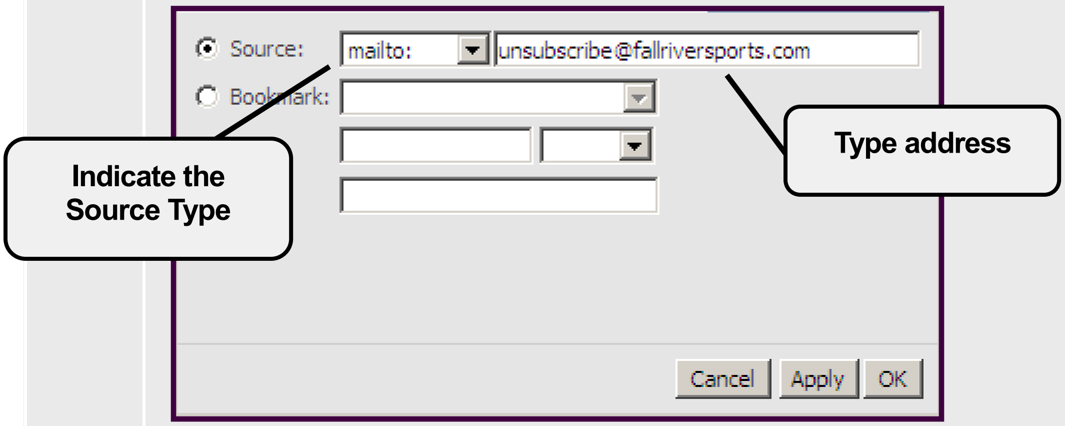


</td></tr>
<tr><td>3.</td><td>To increase or decrease the size of the image, click in the Width and Height boxes and enter either a larger or smaller number.</td></tr>
<tr><td>4.</td><td>To increase or decrease the spacing around the image, click in the Top, Bottom, Left and/or Right boxes and enter either a large or smaller number.</td></tr>
<tr><td>5.</td><td>Click OK to apply the new settings to the image.</td></tr>
</table>

Note: In WYSIWYG view, you can also resize an image by clicking on it and dragging the corner of the image.

How to Add a Hyperlink to a Message

Step	Action
1.	**Position** your cursor in your HTML message where you would like to add a hyperlink.
2.	Click the **Hyperlink** button in the toolbar.
3.	The **Hyperlink dialog box** displays.



Step	Action
4.	Indicate the **Source** of your hyperlink. (See descriptions below).
5.	Enter the **address** for your hyperlink in the next box, e.g. www.fallriversports.com
6.	Optional: Indicate a **Title** for your hyperlink, e.g. Home Page.
7.	Click **Insert** to apply the hyperlink and **OK** to return to your HTML message.

Hyperlink Sources

Source	Links to:
http://	A web site.
https://	A secure web site.
mailto:	An open email address to the address.
ftp://	An FTP site.
news:	A newsgroup.
javascript:	A scripting language.

Best Practices for Using the HTML Editor

Create your HTML content outside of DREAMmail. DREAMmail's HTML Editor is intended to be used for editing and correcting existing content. Use an HTML application to ensure consistency and accuracy of your created code.

Copy your HTML code into the Source Code View of the HTML Editor. This will ensure the integrity of your HTML code. Be sure to paste over the existing code in the Source Code dialog box.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I think I'm Ready"

Fall River Sports would like you to change the HTML format message you created for the last exercise. They are requesting the following changes:

- Increase the font size of the text to 3.
- Replace the word "golf" in the paragraph with "hiking"

Level 2: "I'm Confident I can do This"

Fall River Sports would like you to make some changes to the HTML format message you created for the last exercise. They are requesting the following changes:

- Increase the size of the image to 250 by 300.
- Add a border around the image.
- Bold the name of the shoe in the text and change the color of the font to red.

Level 3: "Bring it On!"

Fall River Sports would like you to make several changes to the HTML format message you created for the last exercise. They are requesting the following changes:

- Increase the spacing around the current image by 10 pixels.
- **Locate the file, "Athletic_shoes.jpg" and add this new image to the bottom right hand corner of the message.**
- Add a hyperlink to your favorite sports website, e.g. nba.com.

Summary

- There are two ways to edit your HTML content. You can either edit your HTML code directly or you can use the HTML Editor to make changes.
- The HTML Editor allows you to make common edits to your content, e.g. change font size or type, add hyperlinks or modify images.
- To make basic edits to HTML content, highlight the area you would like to change and click the applicable button on the toolbar.
- Edit images in HTML by clicking on the image and selecting the Image button on the toolbar.
- Add hyperlinks to your HTML content using the hyperlink button and indicating the appropriate source for the link.

Need More Information?

For additional information regarding the HTML Editor, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 11: Proofing Your Emails

Overview

In this lesson, you will learn how to send a message for proofing and approval. Sending a message for proofing is important to ensure the accuracy of your message before it is deployed.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- List the benefits of proofing a message.
- Send a message for proofing.
- Gain final approval for the deployment of your message.

Key Terms

Proofing: The process of checking for technical, grammatical, spelling, or content errors before your message is deployed.

Proofing List: A mailing list that consists of individuals within your company who are responsible for reviewing messages before the messages are sent.

Reviewers: Members of an approval mailing list who provide feedback about content and formatting of a message.

Dynamic Personalization: A method of customizing email messages based on subscriber information. This allows you to better target messages to subscribers' personal interests and needs.

The Proofing and Approval Process

The following steps are used to proof a message in DREAMmail:

1. Preview the message
2. Send the message for proofing
3. Obtain feedback
4. Edit the message, if needed
5. Obtain approval (optional)
6. Deploy the message

What You Must Do Before You Begin

Before sending messages for proofing, you MUST:

Stage	Process
1.	Set up email accounts to proof messages using the following email applications: Microsoft Outlook, Netscape Messenger, Hotmail, Yahoo, AOL 6.0 or later, and AOL 5.0 and lower.
2.	Create a Proofing List that contains the email addresses of those who will proof the message.
3.	Preview the message in Message Manager to ensure the appropriate mailing lists are selected and the links to graphics and websites are working.

Note: To avoid any technical errors, set up several different email accounts in several different applications. Open the same message in each account to ensure that the message is displayed correctly.

Step 1: Preview Your Message Before Proofing

Before sending a message for proofing, you should **preview** the message for accuracy. Previewing allows you to catch simple errors before others see them and also allows you to double check your message settings. Use the checklist below to preview your message before sending it for proofing.

Preview Checklist	√
Are the appropriate Mailing Lists selected?	
Do the links to the graphics and websites work?	
Is HTML autosensing enabled (if necessary)?	
Is HTML open-rate tracking enabled (if necessary)?	
Is the subject line appropriate?	
Is the From Address correct?	
Is the message content complete and accurate?	
Is the spelling correct?	
Is the grammar correct?	
Does the message contain clear instructions for subscribing to and unsubscribing from the mailing list?	
Do the URLs access the correct websites? Do they work?	
Are the graphics displayed?	
Has the message been composed in the correct formats?	
If the message format is HTML, is the layout correct?	

Step 2: Send Your Message for Proofing

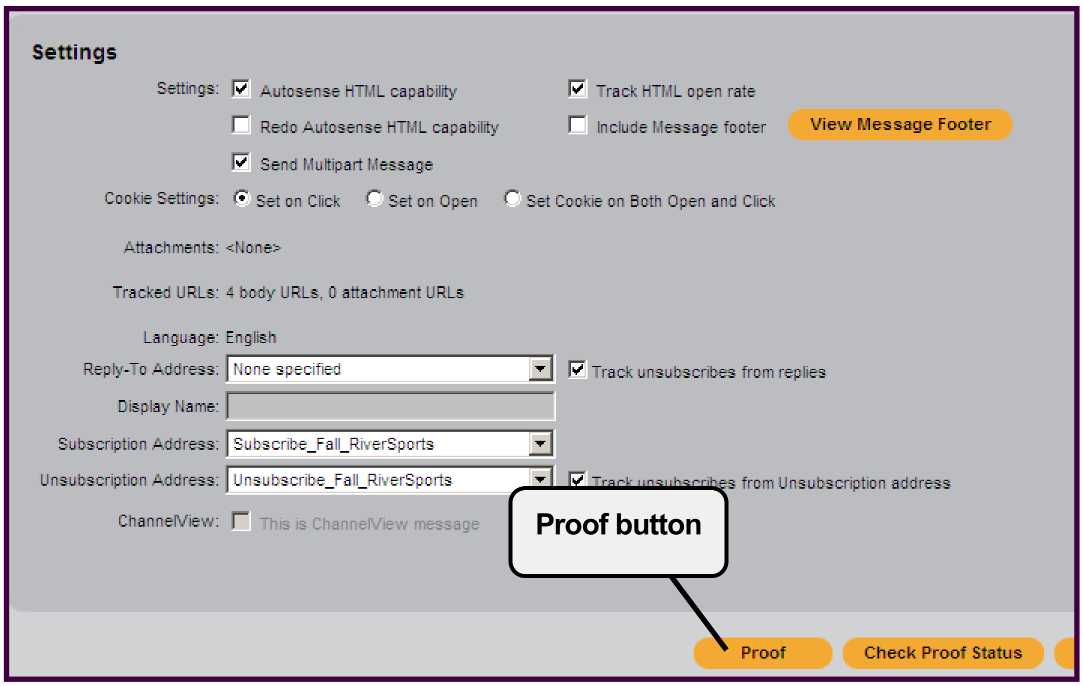
There are two ways to send messages for proofing. You can proof:

- **A Single Message using Message Composer** to send the message for proofing at the same time as the message is being composed.
- **Multiple Messages using Message Manager** to proof messages that have already been created.

Note: Messages sent for proofing are not displayed in the reports.

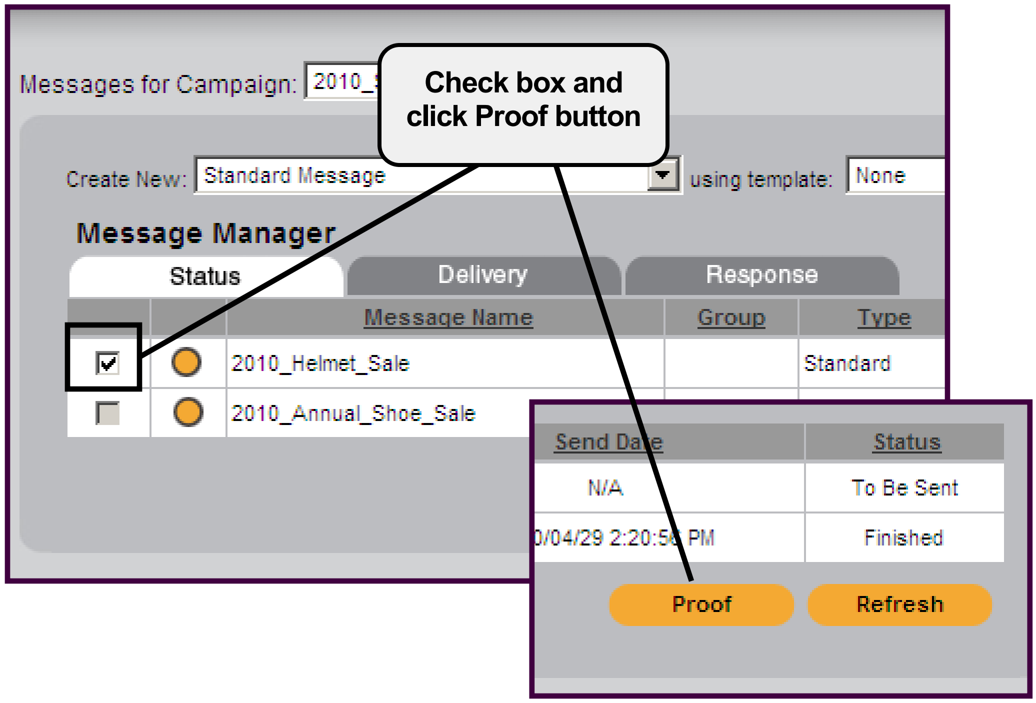
Proofing a Single Message

When composing or editing a message, click the **Proof** button at the bottom of the Message Composer screen. The Message Proofing Dialog box appears.



Proofing Multiple Messages

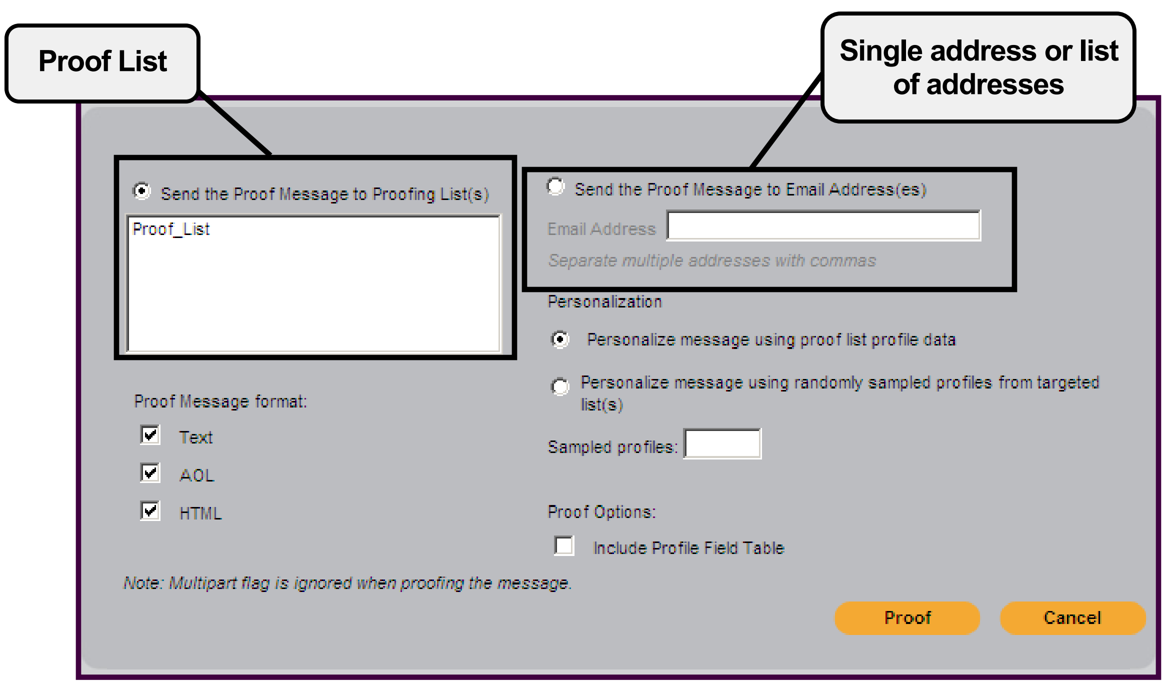
Proof **one or multiple** messages by selecting the checkboxes next to the messages you want to proof in Message Manager and clicking the Proof button.



The Message Proofing Dialog Box

Once you indicate you want to proof the message, you must complete the **Message Proofing** dialog box. The Message Proofing dialog box allows you to proof to:

1. A Proof mailing list
2. A single email address or list of addresses.



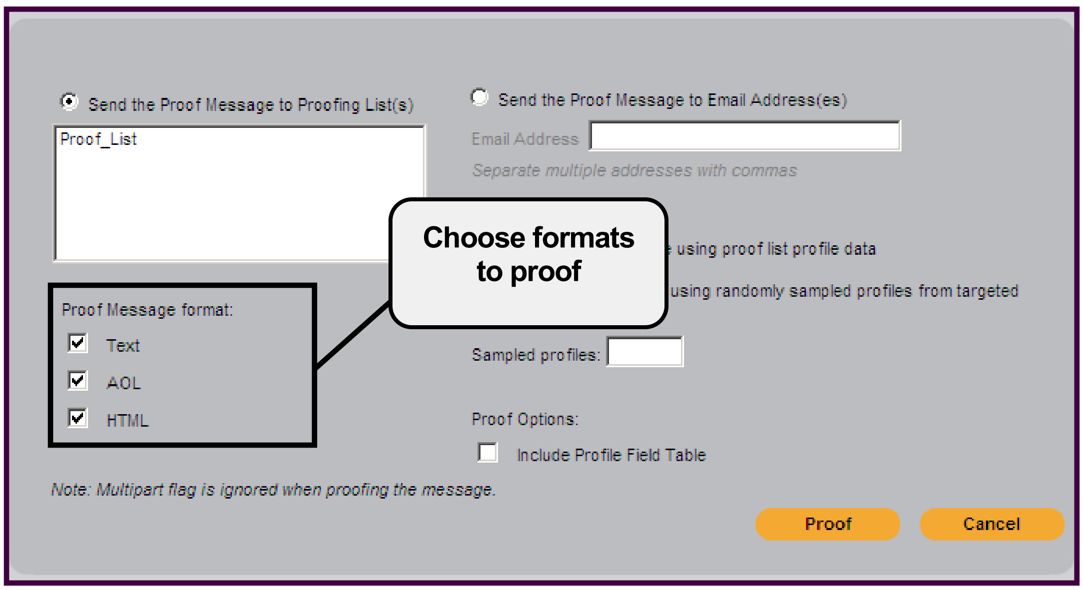
Additional Proofing Options

There are several **options** to choose from when sending a message for proofing.

Option	Description
Multi-format	Proofs one message at a time in multiple message formats: Text, HTML, and AOL legacy (AOL version 5.0 and below).
Dynamic Personalization	Tests Dynamic Personalization by pulling sample profile data from subscribers from the targeted list. You can also send multiple versions of the email to members of the Proof List.

Multi-Format Proofing

Proof multiple formats by selecting the checkboxes under **Proof Message** format. You can select to send to a Proofing List **or** send the proof to multiple email addresses.



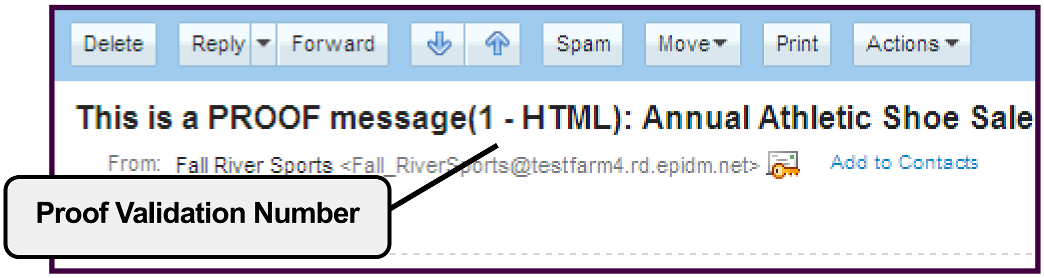
Proofing Dynamic Personalization

Please refer to the *Proofing Dynamic Content* section of **Unit 14: Personalizing Your Email** for information on how to proof dynamic content within a message.

Validation Numbers

When you send a message for proofing, DREAMmail automatically adds a **validation number** to the beginning of your subject line. It also lists the message format type.

- 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.



How to Send a Message for Proofing

Step	Action
1.	Compose a message in **Message Composer**.
2.	Click **Proof** at the bottom of Message Composer. The Message Proofing dialog box is displayed.
3.	Select one of the following options: **Send the Proof Message to Proofing List(s)** radio button and select the proofing list to which you want to send the message. OR **Send the Proof Message to Email Address(es)** radio button to specify the email addresses (separated by a comma) of the people whom you want to proof the message.
4.	Select the **message format(s)** you wish to proof in the checkboxes under Proof Message Format.
5.	Click Proof.
6.	Click OK to close the confirmation box indicating the proofing request was successfully submitted.

Step 3: Obtain Feedback

It is generally helpful to have others review your message and provide you feedback before you deploy it. Be sure to provide some guidance as to what to review when proofing.

Proofing Checklist

The **Proofing checklist** below can be used by the people proofing your message before it deploys.

Proofing Checklist	√
Do the links to the graphics and websites work?	
Is the subject line appropriate?	
Is the From Address correct?	
Is the message content complete and accurate?	
Is the spelling correct?	
Is the grammar correct?	
Does the message contain clear instructions for subscribing to and unsubscribing from the mailing list?	
Does the message display correctly using different email applications?	
Do the URLs access the correct websites? Do they work?	
Are the graphics displayed correctly?	
Has the message been composed in the correct formats?	
If the message format is HTML, is the layout correct?	

How to Proof a Message

Step	Action
1.	Open the message in the email accounts created for proofing.
2.	Use the checklist provided in this section to proof the message.
3.	Suggest changes to the message, if necessary.
4.	Send the changes back to the person creating the message. Changes are made by the creator and the message is sent again for proofing.
5.	Repeat Steps 1-4 until those proofing the message are satisfied.

Step 4: Edit the Message to Make Changes

Step	Action
1.	Click Messages > Message Manager.
2.	Click the orange action button in front of the message you want to edit.
3.	Click Edit.
4.	Make the changes to your message.
5.	Click Proof to resend the message to those proofing it. The validation number will increase by 1 in the new version of the message.

Note: Validation numbers help those proofing the message to know they are reviewing the most current version.

Step 5: Obtain Approval

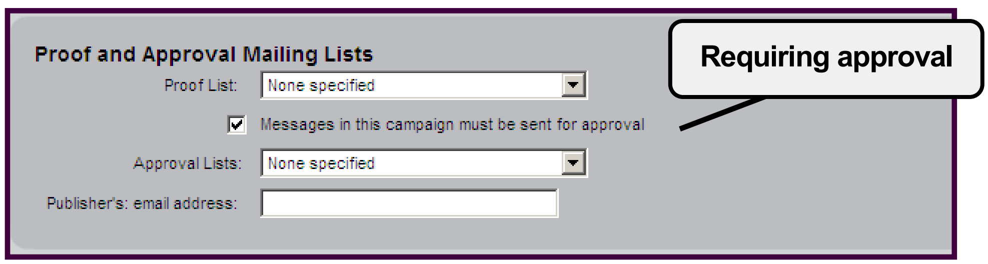
If you must obtain or grant **approval** prior to message deployment, the approval process in DREAMmail allows you to track the authorization of your messages. Approval messages can be sent to individuals in your company who review a message and either accept it or reject it before it is deployed.

Note: You do not have to use the process for tracking approvals in DREAMmail. You may use any process that works for you.

Setting Up the Approval Tracking Process in DREAMmail

Before you can begin tracking approvals in DREAMmail, you must first:

1. **Create a campaign that requires message approval. Select** the setting *Messages in this campaign must be sent for approval* in Campaign Manager. You cannot go back and add this after the campaign has been created.



2. **Create an Approval List** that contains the email addresses of your reviewers (or a list that is flagged as both a Proof and Approval List).

3. **Ensure the message is in Composing status.** You can not proof messages that have already been sent.

Note: For additional information on setting up a campaign to require the tracking of approvals in DREAMmail, please refer to the *Tracking Approvals in DREAMmail* section of **Unit 8: Working with Campaigns**.

How to Send a Message for Approval

Step	Action
1.	Click the **orange action button** next to the message that you want to send for approval. The action menu is displayed.
2.	Select **Send For Approval**. Members of the Approval list receive an email with links that enable them to accept or reject the message.
3.	Click **OK** to close the approval confirmation box.

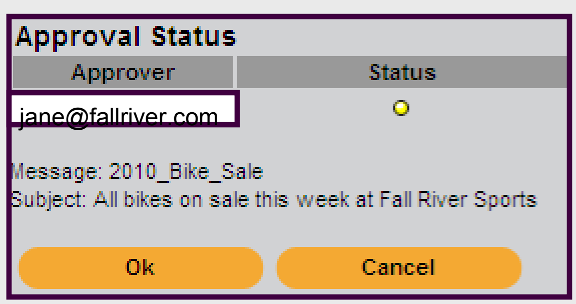
Responding to an Approval Message

Respondents of the message will see the following **links** at the bottom of the message asking them to either approve or disapprove the message:

> This is an approval mailing.
> Click here to approve: APPROVE
> Click here to disapprove: DISAPPROVE

How to Check the Approval Status of a Message

Follow the steps below to check the approval response to a message.

Step	Action
1.	Click the **orange action button** next to the message for which you want to check the approval status. The action menu is displayed.
2.	Select **View Approval Response**.
3.	View the responses in the Approval Status window. • A **yellow dot** indicates the reviewer has not responded. • A **green check mark** indicates the reviewer has approved the message. • A **red X** indicates the reviewer has rejected the message. 

Best Practices for Proofing and Approving Messages

Add the person doing the deployment to the Approval List. This allows the person trying to gain approval to know when the approval message was sent (in situations where different people approve and deploy the message).

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I Think I'm Ready"

Locate the message you created for the last activity and proof all three formats of this message to yourself. Do this without editing the message itself. Open and review the three messages you receive.

Level 2: "I'm Confident I Can Do This"

Select a previously created message and send for proofing to your proof list. Access your email and proof the message using the Proofing Checklist. Edit the message, making one change to the text message and reproof just the text portion of the message.

Level 3: "Bring It On!"

Set up a new campaign that requires messages to be approved before being deployed. Assign a classmate as the approver of the message. Create a text only message using a text file provided in training and send this message for approval. Check the status of the approval. Have your classmate approve the message and check the status again.

Summary

- The proofing process allows others to check for the accuracy of the email before it is deployed.
- Multiple messages can be proofed by selecting the checkboxes next to the Message Name.
- Multiple message formats can be proofed by selecting the checkboxes under Proof Message Format.
- DREAMmail automatically adds a validation number to the subject line of the proofing message. This differentiates a proofing message from your final message.
- Use the Preview and Proofing Checklists to proof messages for content, format, and functionality errors.
- The Approval Process allows you the option to track the final authorization of your message in DREAMmail after it is proofed and before it is deployed.
- When you send a message for approval, you can check the status to see which reviewers have approved or rejected the message.

Need More Information?

For additional information regarding proofing and approving emails, access the online Help files in DREAMmail or search the Knowledge Base.

Online Courses:

- Sending Messages for Proofing

Unit 12: Sending Your Email

Overview

After your message has been proofed, you are ready to send it. This lesson introduces the process of setting the send rate for a message, scheduling the message, and sending the message.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Set the send rate for a message.
- Schedule a message to be sent at a specific date and time.
- Send a message.
- Pause and then resume sending a message.

Key Terms

Deployment: The act of sending.

Send Rate: The deployment speed at which DREAMmail sends a message.

The Process of Sending a Message

When you send a message, you can **deploy** it immediately or **schedule** it for deployment at a later date. You can also set the rate at which your message is deployed.

Step	Action
1.	Validate the message (proof and approval process).
2.	<u>Optional</u>: Specify a send rate for the message.
3.	<u>Optional</u>: Schedule the message.
4.	Send the message.

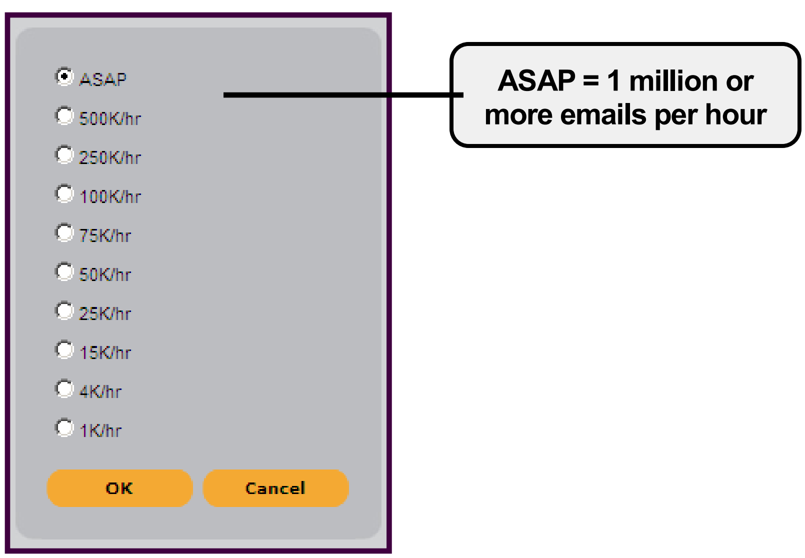
Setting the Send Rate of a Message

The **send rate** of a message determines how rapidly DREAMmail sends the message. Messages can be:

- Sent as quickly as possible, or
- Assigned a different rate of emails per hour to be sent.

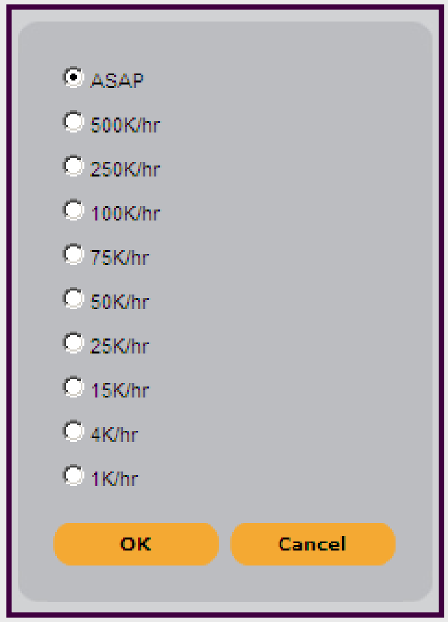
The optimal send rate may vary between campaigns. The advantage of setting a send rate is that you can better control the amount of traffic going to your website.

The send rates below show the number of messages sent per hour from which you can select in DREAMmail. The default is ASAP.



How to Set the Message Send Rate

Step	Action
1.	Select **Messages > Message Manager**. The Message Manager screen displays.
2.	Select the campaign from the **Messages for Campaign** drop-down list that contains the message for which you want to set a send rate.
3.	Click the **orange action button** beside the message.
4.	Click **Send Rate**. The Send Rate dialog box displays.



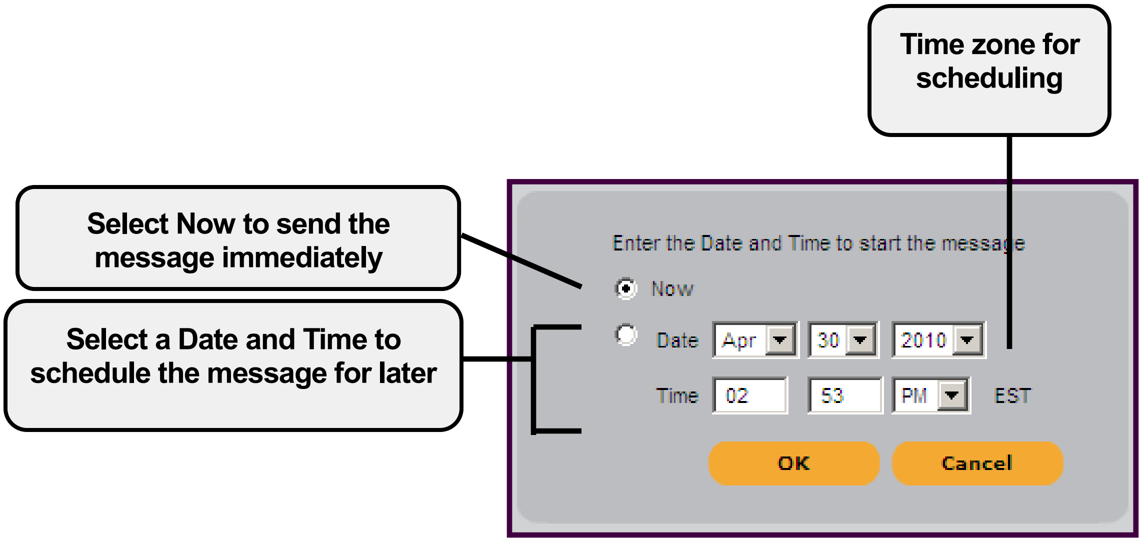
Step	Action
5.	Select a **Send Rate** (the number of messages you want to send per hour).
6.	Click **OK.** The Message Manager screen refreshes to reflect the new send rate.
7.	Click **OK** to close the confirmation box.

Best Practices for Send Rates

Slow down the send rate if your web site may not be able to handle the traffic that results from your email campaign.

Scheduling a Message for Deployment

In DREAMmail, you can also specify a future **date and time** for a message to be deployed. These selections are made in the Mailing Schedule Setting dialog box shown below.

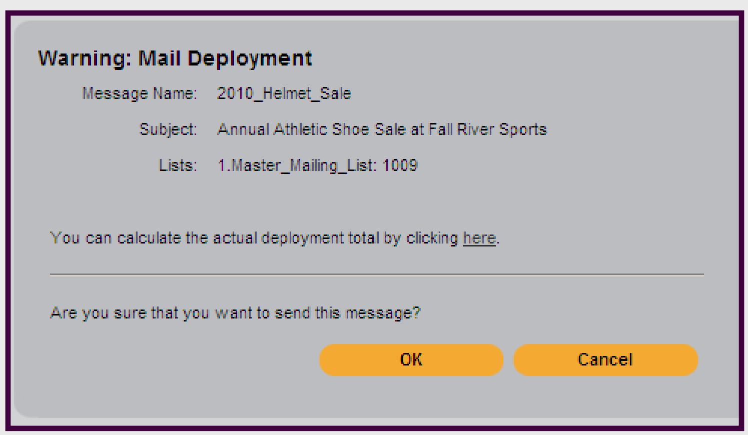


Note: Messages are scheduled based on the time of your server, in the example above, **Eastern Standard Time**. You may have to adjust the time that you schedule messages for your time zone.

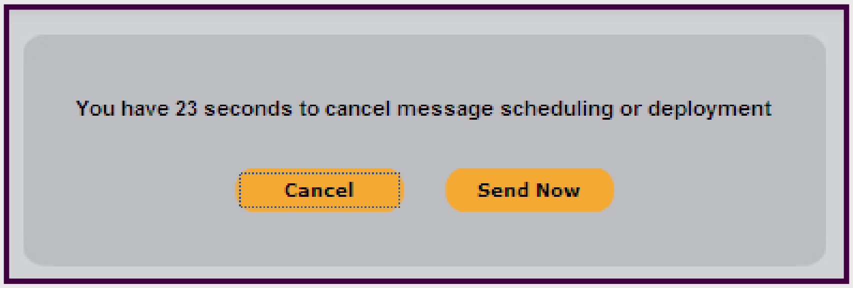
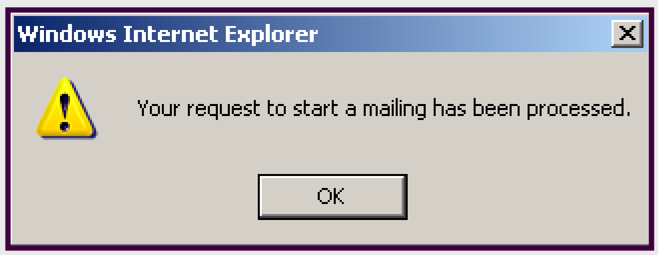
Advantages of Scheduling Messages

- Setting a schedule for sending messages ensures that subscribers receive newsletters and offers at the same time each day or week.
- A deployment schedule helps you to coordinate tasks before you send messages.
- Allows you to choose when to contact subscribers; e.g., send messages at night so that subscribers see them first thing in the morning, without having to be there to send the message.

How to Schedule a Message

Step	Action
1.	Select **Messages > Message Manager**.
2.	Select the campaign from the **Messages** drop-down list that contains the message you want to schedule for sending.
3.	Click the **orange action button** next to the message you want to send.
4.	Click **Send**.
5.	Do you want to send the message immediately? • If <u>yes</u>, select the radial button next to **Now**. Skip to Step 9. • If <u>no</u>, select the **Date and Time** radio button. Go to Step 6.
6.	Set the **date and time** on which you want DREAMmail to send the message. Note: The time zone is based on the EST time zone for North American clients.
7.	Click **OK** to confirm the date and time is correct in the confirmation box. The Warning: Mail Deployment box displays. This box allows you to: • Verify the correct mailing list is chosen. • Verify the Subject Line is correct. • See the total number of recipients. • Cancel the deployment, if necessary.  Continued on next page.

How to Schedule a Message (cont.)

Step	Action
8.	Click **OK**. A Deployment Confirmation box appears with a 30 second countdown timer. 
9.	Do you want to cancel the deployment? • If <u>yes</u>, click **Cancel**. Stop. • If <u>no</u>, let the timer count down. Click **OK** to close the dialog box. 

Note: Scheduling specific types of messages can temporarily block the deployment of subsequent messages. Please see the *Using Recency/Frequency to Target Messages* section of **Unit 13: Targeting Your Message**.

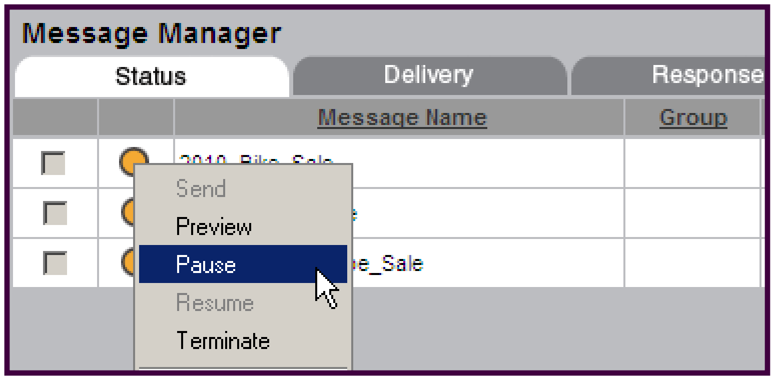
Best Practices for Scheduling Messages

Test different times to determine the optimal schedule for your messages. Typically, messages are set on a timer to be sent overnight, so that the message is waiting in subscribers' inboxes when they arrive to work. The nature of your email activity and your particular customers will determine the best time to start deployment of your messages.

Do not schedule messages to be deployed during off peak hours if you need to adjust the send rate.

Pausing and Resuming Messages

Sent messages can be **paused** if you find an error in the message text or if there is a technical problem with the message. A message can also be paused so you can change the send rate. Pausing messages does not recall messages that have already been sent. However, if a message has been paused, you can then resume sending it.



Step	Action
1.	Select **Messages > Message Manager**.
2.	Select a **campaign** from the Messages drop-down list that contains the message that you want to pause or resume.
3.	Click the **orange action button** next to the message.
4.	Select **Pause** or **Resume**.

Note: You cannot pause a message whose status is "Finished," "To Be Sent," "Blocked," "Error," "Aborted," or "Paused."

Terminating a Message

Messages can also be **terminated** if a problem that cannot be resolved is noted before deployment is completed. Use the orange action button in front of the message and click the Terminate option. Deployment for terminated messages cannot be resumed and messages that have already been delivered are not recalled.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I Think I'm Ready"
Select a message from one of your campaigns and send it immediately.

Level 2: "I'm Confident I Can Do This"
Select a message from a prior activity and schedule it to be sent 10 minutes from now .

Level 3: "Bring It On!"
Select a message from a prior activity and schedule it to be sent next week with a deployment rate of 5,000 messages per hour.

Summary

- The Send Rate determines whether a message is sent as quickly as possible or assigned a specific rate of emails to be sent per hour.
- Setting a Send Rate allows you to better control the amount of traffic going to your website.
- Scheduling messages allows you to send the message immediately or you can set a specific date and time to deploy the message.
- Setting a schedule for sending messages ensures communications are sent the same time each week and also helps you coordinate your tasks.
- Messages being deployed can be paused, if necessary, and then resumed.
- Messages being deployed can also be terminated but once terminated, deployment cannot be resumed.

Need More Information?

For additional information regarding proofing and approving emails, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 13: Targeting Your Message

Overview

Subscribers who see your message as irrelevant are more likely to stop reading your emails, and eventually unsubscribe. This unit introduces the features that allow you to define a specific target audience to receive your message.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Filter a message using both profile data and response conditions.
- Retarget the recipients of a previous message for a follow-up message.
- Exclude the recipients of a prior message from your target audience.

Key Terms

Offer: A particular promotional offering.

Re-targeting: The process of sending a follow-up message or promotional offer to a set of subscribers who received a previous message or offer.

Suppress: Also referred to as **exclude**. To ensure that a subscriber is not part of the final target audience.

Defining a Target Audience

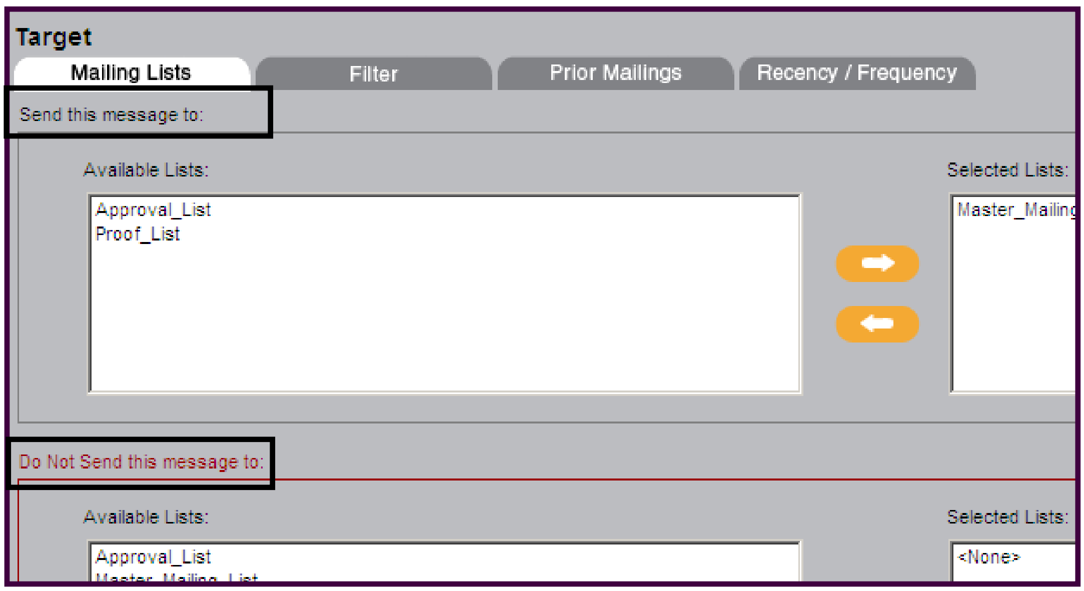
A **target audience** is a subset of your subscribers. To define your target audience, first determine your pool of potential recipients and then apply constraints that narrow the pool by including or excluding specific sets of subscribers.

To narrow the pool, you can **constrain** the target audience using:

- Mailing list membership
- Filters
- Recipients of prior mailings

Using Your Mailing Lists to Target Messages

When composing messages, you can identify specific mailing lists for **inclusion** or **exclusion**. Use the right arrow to move the appropriate mailing lists to the Selected Lists box for inclusion or exclusion.



Note: Any subscribers who are members of an **excluded** mailing list will not receive the message, even if targeted for inclusion on another mailing list.

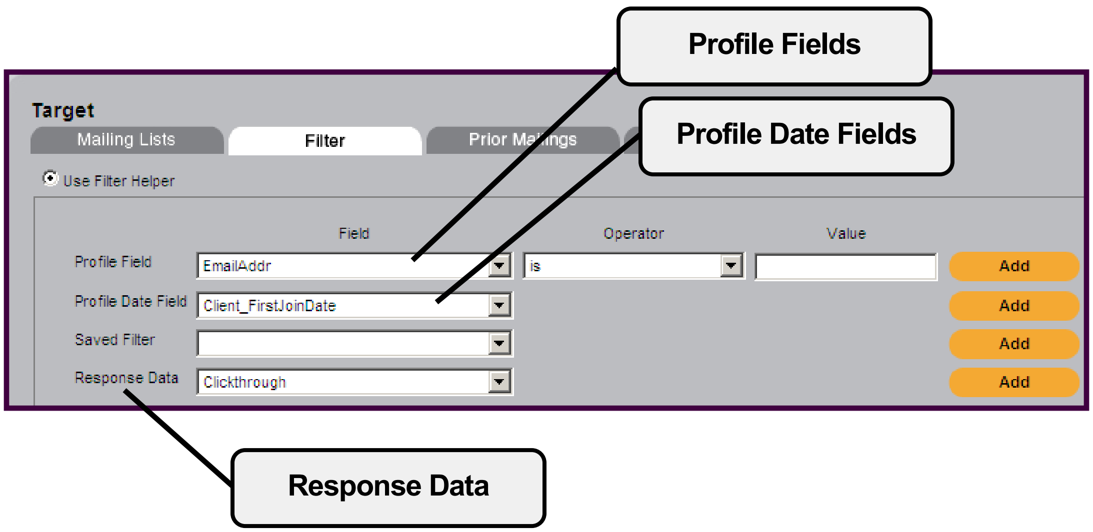
Using Filters to Target Messages

A **filter** is a condition or series of conditions that allows you to target your message to a subset of the target audience pool.

Types of Filters

Filters can be based on:

1. **Profile Fields**—Personal data related to the subscriber, e.g. age, gender or favorite vacation destination.
2. **Profile Date Fields**—Profile field dates related to the subscriber, e.g. the date the subscriber last purchased a product.
3. **Response Data**—How the subscriber has reacted to prior messages, e.g. opened a message or clicked a URL.



Subscriber Profile Fields

You can filter based on any **subscriber profile field** in DREAMmail, e.g. gender, state of residence, etc.

Common subscriber profile fields include:

- Email Address
- First Name
- Last Name
- Gender
- State of residence
- HTML capability
- Product purchased

Subscriber Profile Date Fields

You can filter based on any **subscriber profile date field** in DREAMmail.

Subscriber Profile Date Fields	The Date the Subscriber...
Client_FirstJoinDate	Subscribed to the Client
Client_LastOpenDate	Last opened an HTML format message for the Client
Client_LastClickDate	Last clicked a link from the Client
Client_LastSpotlightPurchaseDate	Last made a purchase from the Client
Client_LastSpotlightEventDate	Last completed an event action from the Client
Site_FirstJoinDate	Subscribed to the Site
Site_LastOpenDate	Last opened an HTML format message for the site
Site_LastClickDate	Last clicked a link from the Site
Site_LastSpotlightPurchaseDate	Last made a purchase from the Site
Site_LastSpotlightEventDate	Last completed an event action from the Site

Subscriber Response Data Fields

You can filter based on the **responses** of your subscribers to prior mailings.

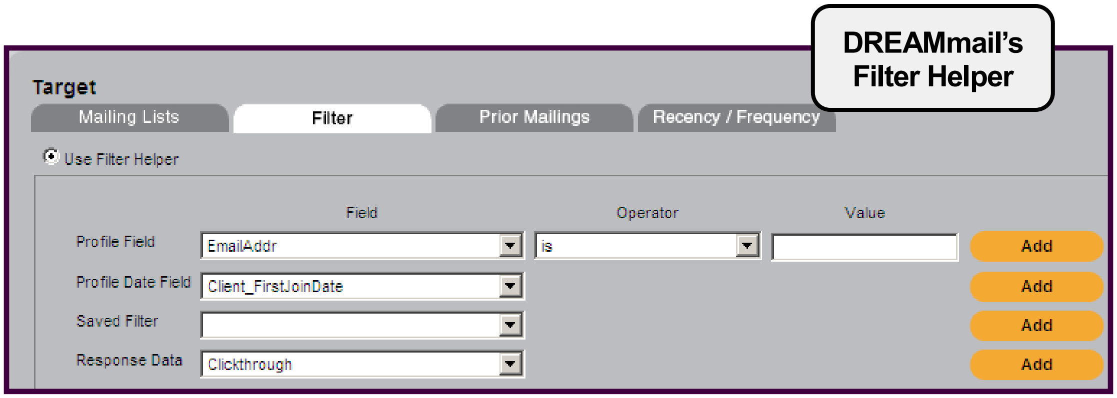
Response Data Fields	The Number of Times a Subscriber...
Clickthrough	Clicked through on any campaign, any message in a campaign, a specific message or URL
Spotlight	Spent money or responded to any campaign, any message in a campaign or a specific message for each category or subcategory
Pass Along	Passed any message from any campaign, any message within a campaign or a specific message to another recipient
HTML Open	Opened any campaign, any message in a campaign or a specific message within a campaign

Note: Subscriber Response Data filters are not part of the standard DREAMmail offering. Additional fees may apply.

Creating Filters

You can create filters using DREAMmail's **Filter Helper** by indicating the appropriate profile fields, profile date fields and/or subscriber response data for your target audience. Multiple filters are concatenated by the Boolean AND and OR operators.

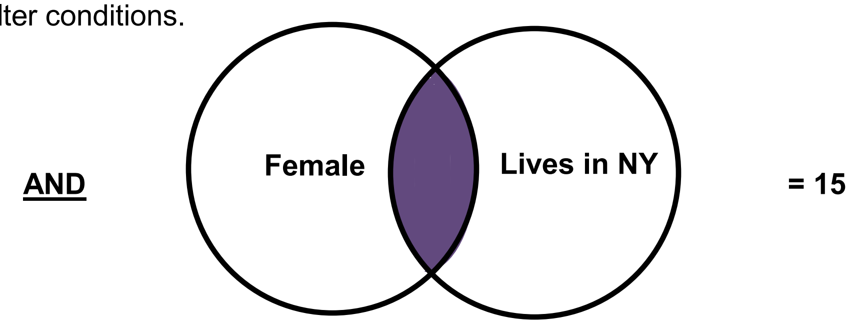
Tip: If you have filters that you will also be using with other messages, create the filter in the Filter Manager and pull the Saved Filter into

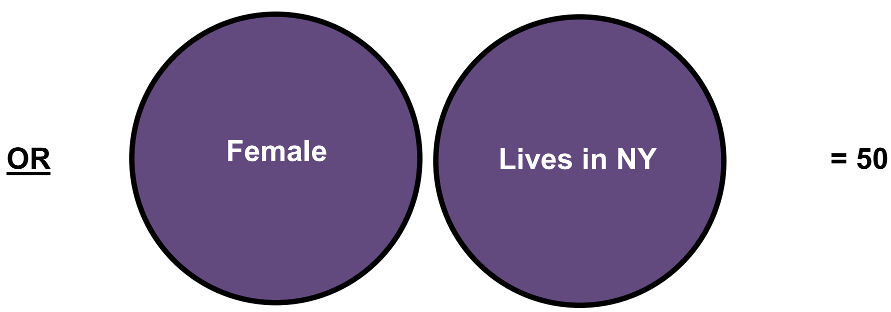


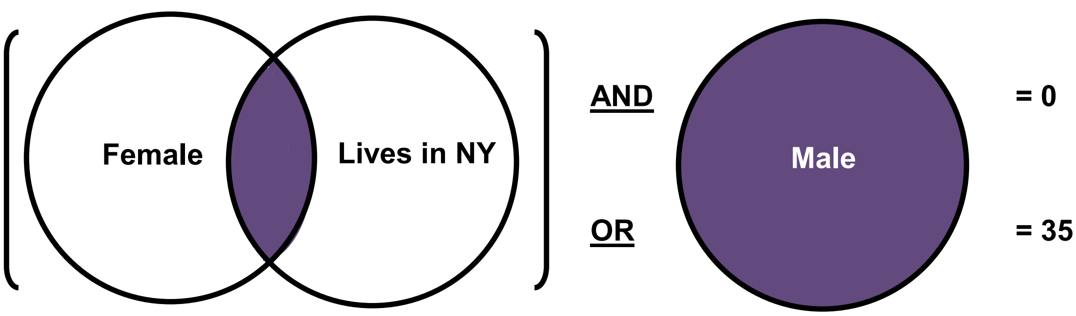
About Boolean Operators

Boolean operators allow you to define the **relationship** between two or more filter conditions.

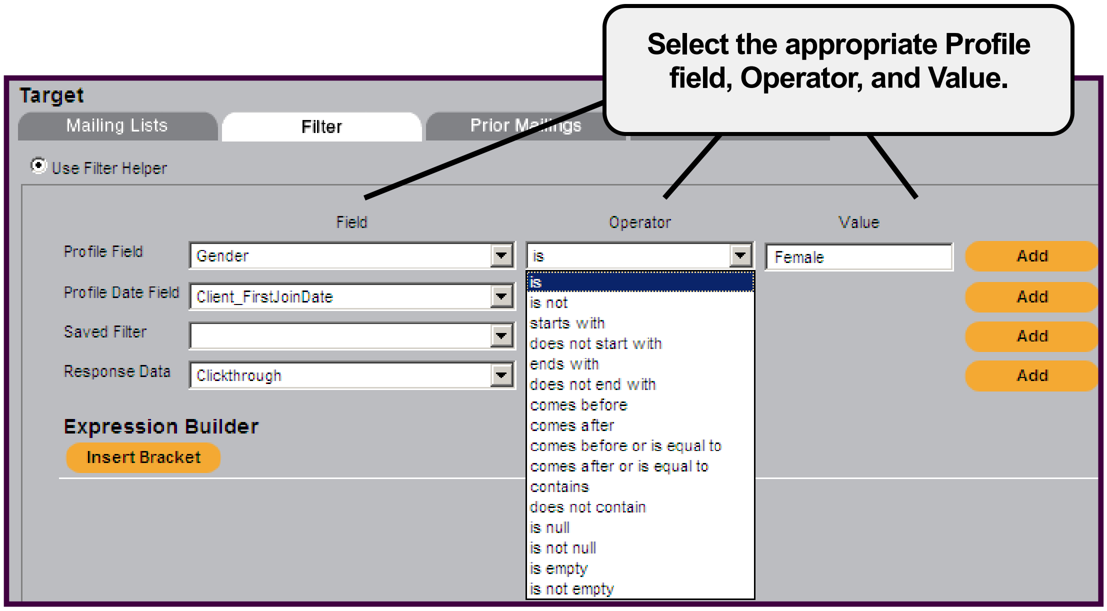
KEY:
Females = 20
Male = 20
Lives in NY = 30







How to Apply a Profile Field Filter



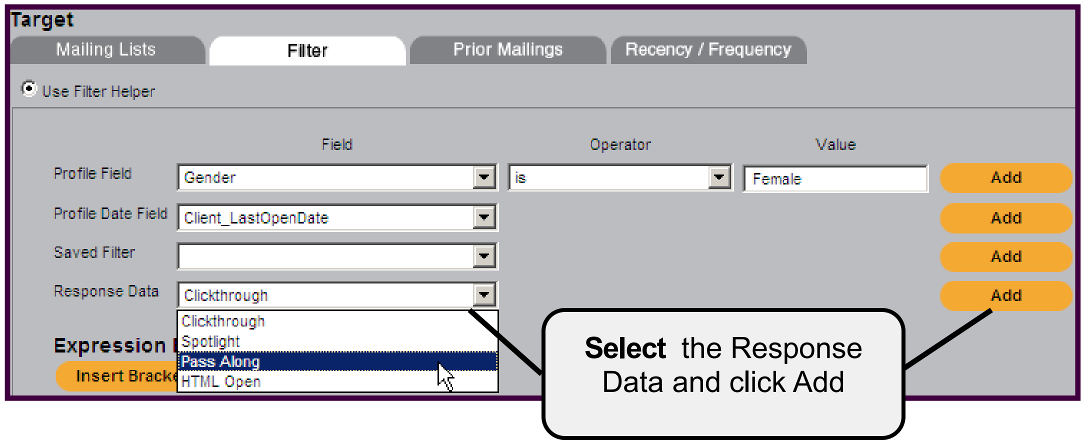
Step	Action
1.	Select the **Filter** tab in Message Composer. The Filter Helper displays.
2.	Select the **Profile Field** condition, e.g. “Gender.”
3.	Select the **Operator**, e.g. “is.”
4.	Enter the **Value** for the profile field, e.g. “F” or “Female”.
5.	Click **Add**. The filter condition appears in the Expression Builder box.

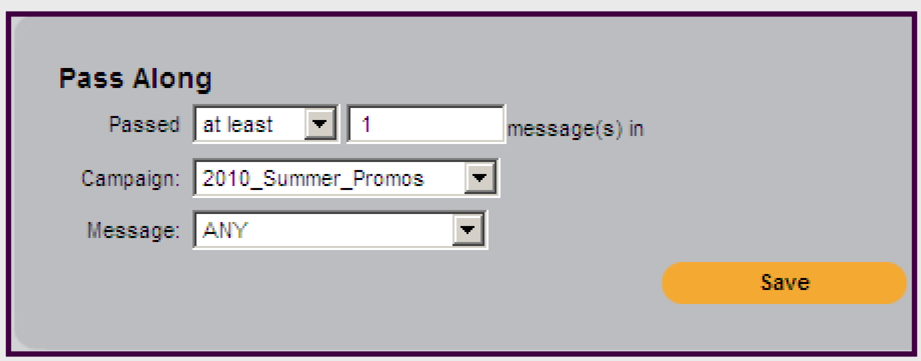
Note: When entering the **Value** for the profile field, be sure enter it exactly as it appears in your mailing list, e.g. the letter “M” or the word “Male”.

How to Apply a Profile Date Field Filter

Step	Action
1.	Select the **Filter** tab in Message Composer. The Filter Helper displays.
2.	Select the **Profile Date Field** condition, e.g. "Client_LastOpenDate."
3.	Click **Add**. The Profile Date Field dialog box displays. 
4.	Select **Relative Date** or **Absolute Date** to indicate whether the profile date will be a date range or a specific date in the Profile Date Field dialog box.
5.	Select the **Operator**, e.g. "less than."
6.	Enter the **value** for the number of days and how the days apply, e.g. "ago" or "away" for a Relative Date. Optional: Enter the **date** for the condition for Absolute Date.
7.	Click **Save**.

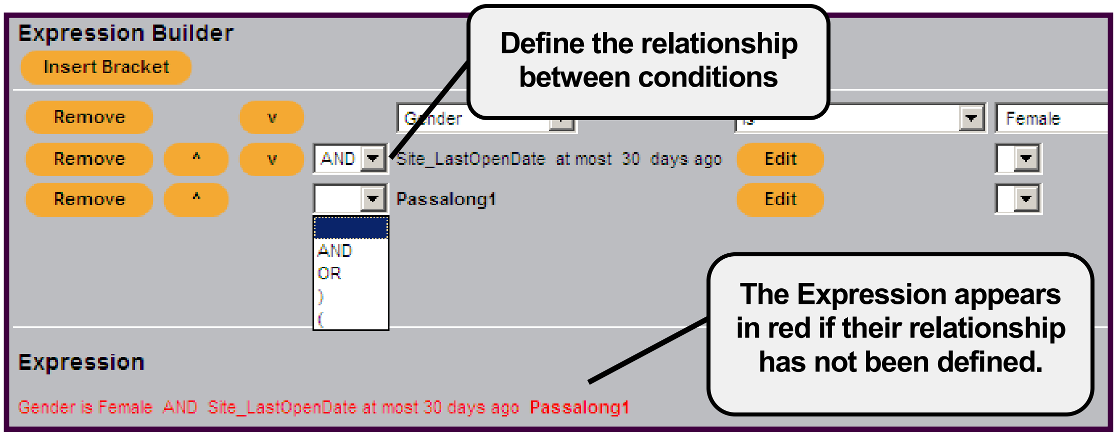
How to Apply a Response Data Filter



Step	Action
1.	Select the **Filter** tab in Message Composer. The Filter Helper displays.
2.	Select the **Response Data** condition, e.g. “Pass Along.”
3.	Click **Add**. The respective response data dialog box displays. 
4.	Select the **Operator**, e.g. “at least.”
5.	Enter the **Value** for the response data, e.g. “1.”
6.	Select the applicable **Campaign** and/or **Message** for the condition.
7.	Click **Save**. The dialog box for the Response Data closes and the filter condition appears in the Expression Builder box.

Applying Multiple Filters

When **multiple filters** are selected, you will indicate the relationship between filters in the Expression Builder box. In the example below, the filter applies only to females who have opened a message within the last 30 days and who have passed the message to at least 1 other person.



Note: If you have more than 15 separate filter conditions, it is recommended that you create a **SQL filter** and paste this into DREAMmail.

Best Practices for Using Filters

Use "did" something zero times to find subscribers who did not perform a particular response. DREAMmail's filter helper does not always provide options to find subscribers who did not take an action. Looking for subscribers who acted zero times achieves the desired results.

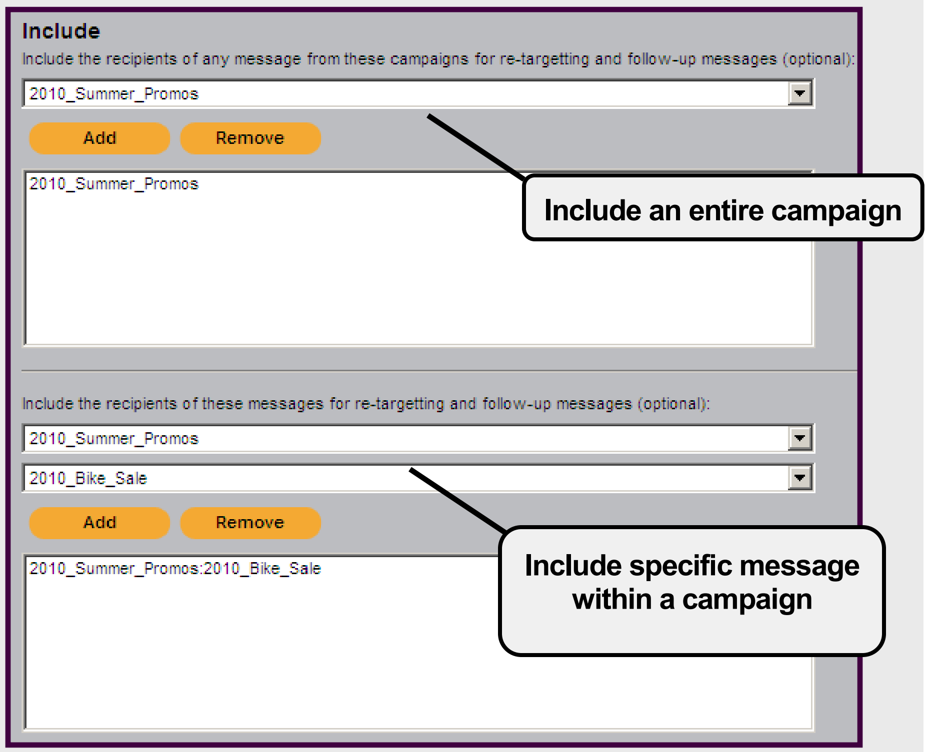
Create filters in Filter Manager for reuse. You can create filters in Filter Manager just as you can create a filter in a message. When you compose your message, simply add the saved filter to the message.

Always count your target audience when applying filtering. If you apply your filters incorrectly or you apply too many filters, your target audience may be so small as to not warrant deploying the message.

How to Target Using Prior Mailings

You can also target your message to the recipients of your **prior messages**. The target audience can include recipients of:

- Any message within a campaign
- A specific message

Step	Action
1.	Select the **Prior Mailings** tab in Message Composer.
2.	Click the **Change** button. The Include screen displays. 
3.	Select the **Campaign** to include in the target audience. OR Select the **Campaign and Message(s)** to include.
4.	Click **Add**.
5.	Click **OK**. The Prior Mailing tab updates to include this information.

Best Practices for Using Prior Mailings

Include past recipients, rather than recreating the target audience. Re-targeting the recipients of a past message is faster and more accurate than applying the mailing list and criteria used for the first message.

Re-target to remind, up sell or incent. Re-target past recipients to remind them that the offer is about to expire or to offer additional incentives.

Use re-targeting with site unsubscriptions. Because there is no way to unsubscribe from being a recipient of a past message, you should only use retargeting in combination with site unsubscribes.

Use behavioral filters with appropriate re-targeting. If you filter for subscribers who did not click on message X, you may also get subscribers who are on the mailing list but weren't recipients of message X (which is why they didn't click on it). Instead, target the message to recipients of message X and filter for subscribers who didn't click on message X.

Counting the Size of Your Target Audience

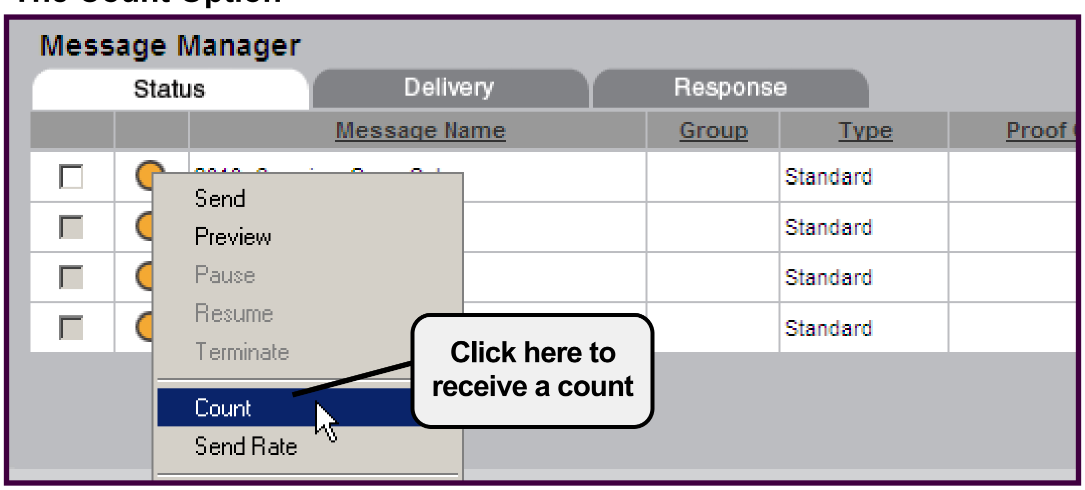
When you use filtering, you will **count the size** of your target audience to:

- Ensure you have a sufficient number of recipients to justify sending the message.
- Check for errors in your filters that lead to zero recipients targeted.

There are two ways to count the recipients of the message:

1. The **Count** option using the orange action button for the message.
2. The **Mail Deployment** dialog box when sending the message.

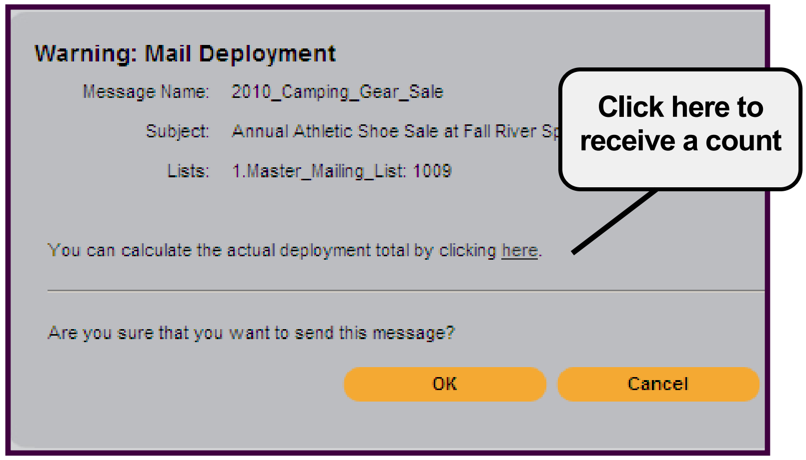
The Count Option



Note: The count includes only those valid and subscribed email addresses within your target audience.

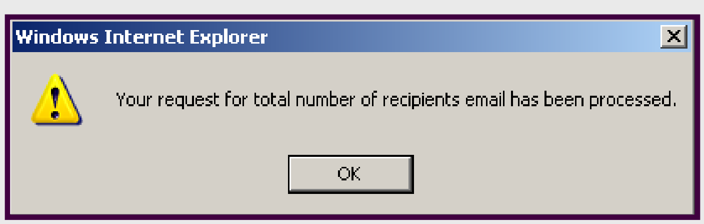
Counting the Size of Your Target Audience (cont.)

The Mail Deployment Dialog

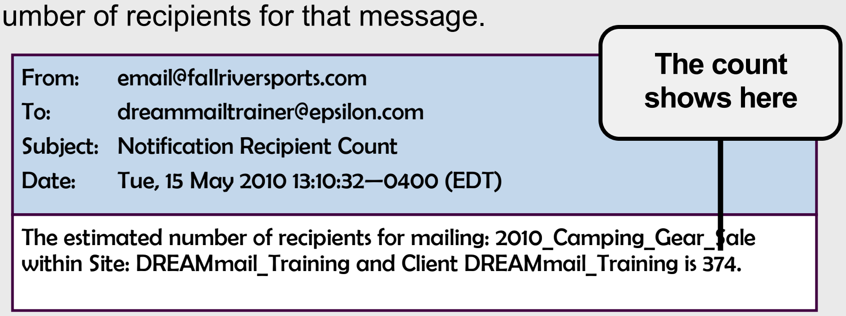


The **count** is then sent to the email address you specify. Sending to your email address allows you to continue to work in DREAMmail during counts of large, complex populations.

How to Count the Size of Your Target Audience

Step	Action
1.	Click the **link** in the Warning: Mail Deployment dialog box. An email address box displays.
2.	Type the email address of where you want the count to be sent. 
3.	Click **OK**.
4.	Click **OK** again to close the dialog box verifying your request was processed. 

How to Count the Size of Your Target Audience (cont.)

Step	Action
5.	Access the email account where the count was sent to see the total number of recipients for that message.  From: email@fallriversports.com To: dreammailtrainer@epsilon.com Subject: Notification Recipient Count Date: Tue, 15 May 2010 13:10:32—0400 (EDT) The estimated number of recipients for mailing: 2010_Camping_Gear_Sale within Site: DREAMmail_Training and Client DREAMmail_Training is 374.
6.	Click **OK** to close the Confirmation dialog box.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant’s work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: “I Think I’m Ready”
Access a message you created for a prior exercise activity and edit this message. Be sure the Fall River Sports main house file is included as the target mailing list. Filter this message for just females living in California. Count the number of targeted recipients.

Level 2: “I’m Confident I Can Do This”
Access a message you created for a prior exercise activity and edit this message. Be sure the Fall River Sports main house file is included as the target mailing list. Target this message to females living in California who have joined within the last 10 days.

Level 3: “Bring It On!”
Access a message you created for a prior exercise activity and edit this message. Be sure the Fall River Sports main house file is included as the target mailing list. Re-target this message to only those recipients who received a message for the Spring_Specials campaign and who opened the message and that no one recipient receives more than 2 messages per week.

Summary

- Targeting messages involves creating and sending a focused message to a subset of your subscribers who share a common trait, interest or behavior.
- You can target your subscribers by including or excluding entire mailing lists, by including just the recipients of prior messages, or by applying filters of specific subscriber characteristics, traits or behaviors.
- DREAMmail filters include those that define the subscriber population, e.g. age, and those that define a subscriber's prior responses to a message or campaign, e.g. clicked on a URL, opened a message, etc.
- Multiple filters can be defined and applied to a message to further target the audience.
- As a safeguard, you can apply specific rules in DREAMmail such that no recipient receives more than a maximum number of emails in a given time period or that a specific period of time occurs between messages received.
- Always count the intended recipients of a message that contains targeting.

Need More Information?

For additional information regarding targeting your messages to specific populations, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 14: Personalizing Your Message

Overview

You can make your messages more relevant to subscribers by customizing the content for each subscriber. This unit introduces the types of customization or personalization you can create using DREAMmail.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Create a personalized message salutation.
- Insert different content into a message based upon a subscriber's profile.

Key Terms

Content Segment: A block of message content that is saved independently from messages.

Personalization: The process of customizing message content to make it unique for each subscriber.

Types of Personalization

You can **customize** your messages by adding personal data from the subscriber record or by changing the content within the message to make it more pertinent to each recipient.

You can create two **types** of personalization in DREAMmail:

Type	Description
Basic Personalization	Insertion of subscriber profile data into the message
Dynamic Personalization	Insertion of different content segments into the message based on subscriber profile data

Basic personalization
This type of personalization allows you to create highly customized messages by inserting subscriber profile data into the message body or subject line.

Basic personalization can be used to:

- Insert the subscriber's first name in a greeting.
- Add the subscriber's email address to the unsubscription instructions.
- Complete statements regarding the subscriber or his/her interests.

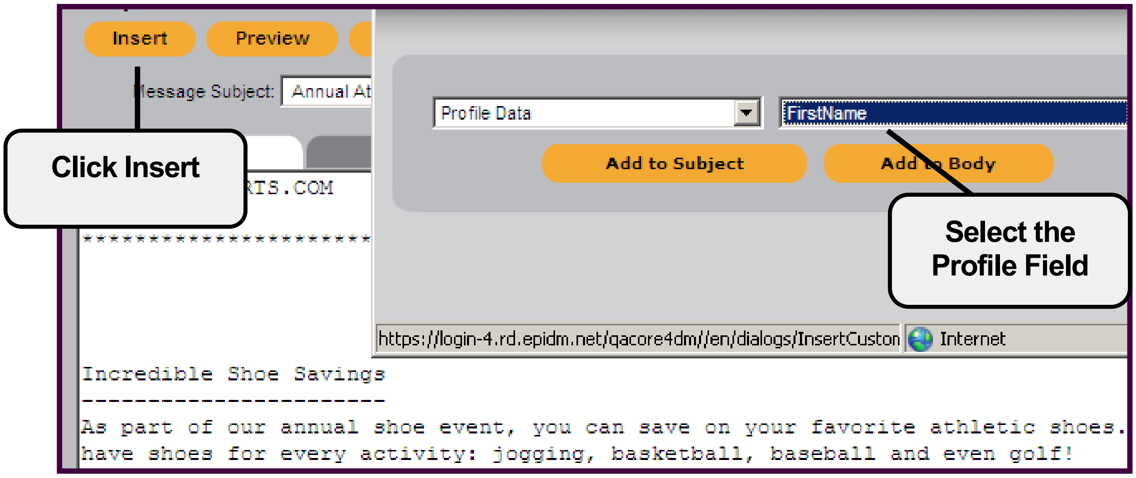
Types of Personalization (cont.)

Dynamic personalization
This type of personalization allows you to create one message and insert unique chunks of content or graphics for different subscribers. Dynamic personalization uses the data contained in the subscriber's profile field to control the content of the message body that varies, e.g. sending different promotional offers or editorial content based on the subscriber's interests.

EXAMPLE: A "favorite sport" profile field allows you tailor the message to different sports-related products and promotions.

How to Create Basic Personalization

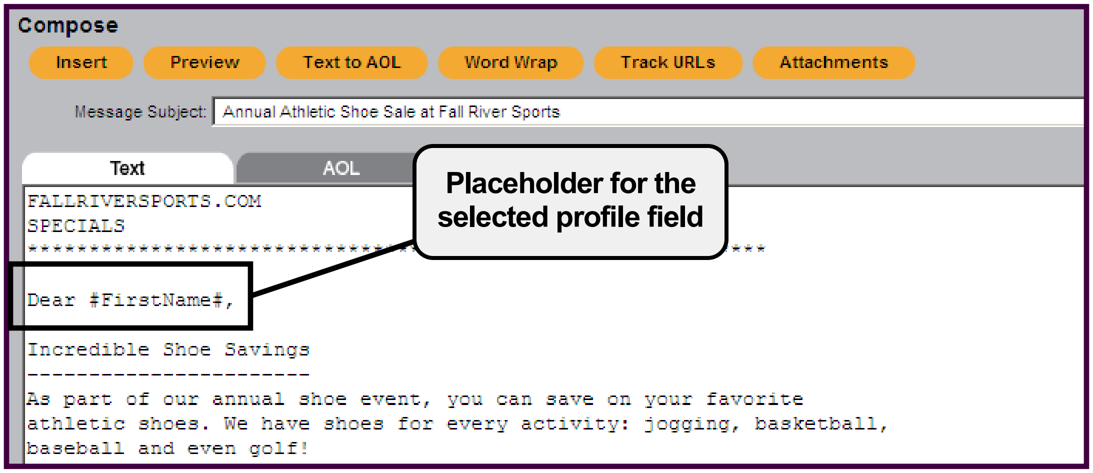
To create **basic personalization**, use the Insert button to add profile data fields to your message body or subject line. Before sending the message, DREAMmail replaces these references in the message with the corresponding data or content.



Step	Action
1.	Click **Messages** > **Message Manager**.
2.	**Create** a new message **or edit** an existing message.
3.	**Position** your cursor in the subject line or body of the message where you want to insert a profile field.
4.	Click the **Insert** button. The Insert dialog box displays.
5.	Using the drop-down menu on the right, select the **profile field** you want to insert.
6.	Click **Add to Subject** or **Add to Body.** The profile field appears in the message.
7.	Optional: Repeat steps 2-5 for each message format.
8.	**Close** the Insert dialog box. The Profile field appears in the message.
9.	Click **Save**.

Viewing Basic Personalization in a Message

Once you have clicked on Add to Body or Add to Subject, the selected profile field appears in the message surrounded by pound signs, i.e. **#FirstName#**. DREAMmail will substitute the actual profile data for the subscriber when the message is deployed.



Note: Always **proof** your message when using personalization to ensure accuracy.

Dynamic Personalization

To create dynamic personalization, you must first create the **segments** of content that will change within the message.

Content Segments

Content segments are “chunks” of content that you create outside of a message. Content segments are then pulled into a message prior to deployment. Content segments are created in DREAMmail’s Content Manager.

There are three **types** of content segments.

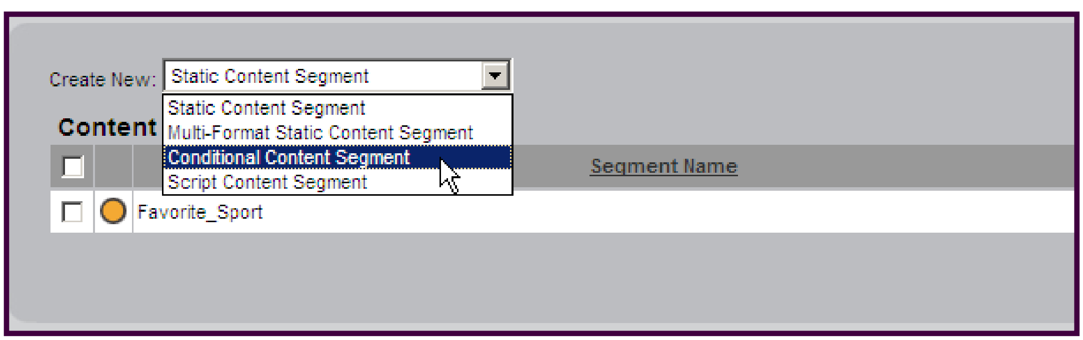
Type	Used to...
Static	Insert content to be sent to all subscribers
Conditional	Vary the content to be sent to all subscribers
Script	Manipulate content or insert complex content

Note: For additional information regarding creating content segments, refer to the DREAMmail Knowledge Base.

Conditional Content Segments

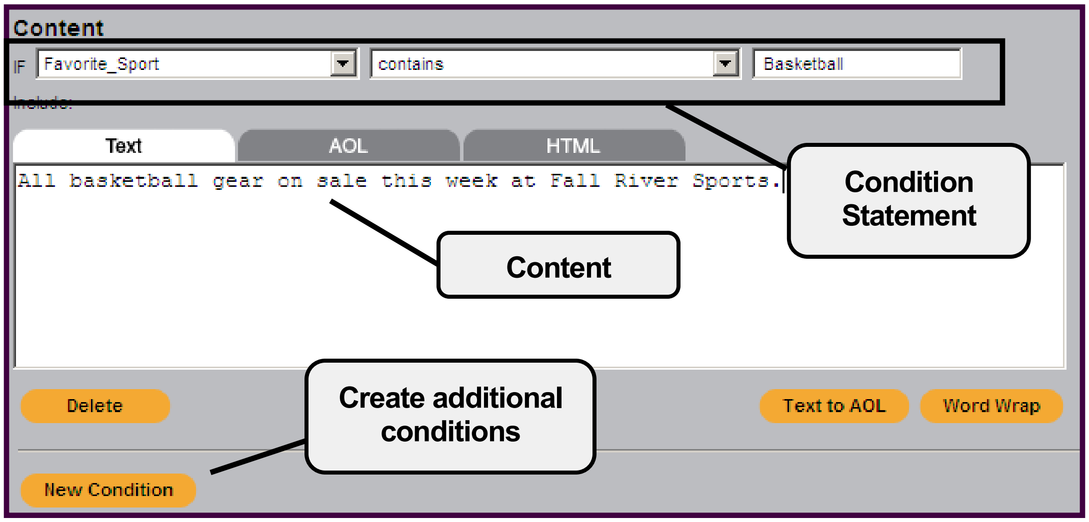
Conditional content segments contain:

- 1 or more “conditions” and the related content for each
- A **default statement** to be sent to any subscriber not matching the conditions.



Tip: Always create a default statement so your message does not contain any blank spaces.

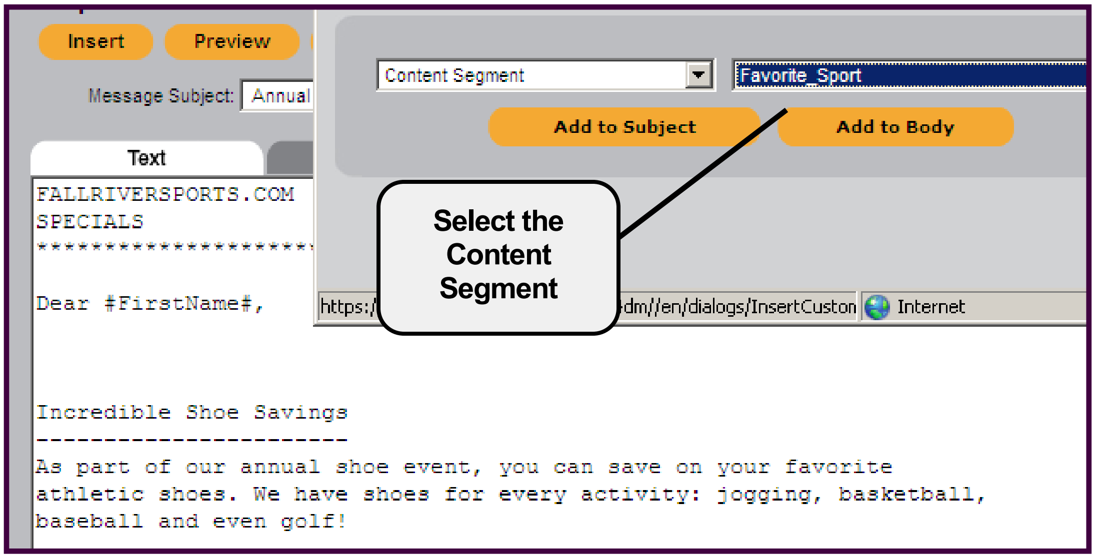
How to Create a Conditional Content Segment



Step	Action
1.	Click **Messages** > **Content Manager**.
2.	Select **Conditional Content Segment** in the Create New field.
3.	Click **Add**. The Conditional Content Composer screen displays.
4.	**Name** the conditional content segment.
5.	Create the first IF statement by selecting a **profile field**, **comparison operator** and entering a **value**.
6.	Type the content In the Text, AOL and HTML tabs that should be sent to subscribers matching the condition.
7.	Click **New Condition** to create additional content segments for other conditions. Repeat steps 5 - 6 for the new condition.
8.	Enter a **default message** in text, AOL and/or HTML format that should be sent to subscribers who do not match any of the conditions.
9.	Click **Select URLs**. The URL Tracking screen opens.
10.	Click **Select** for each URL you want to track and enter a **URL label**.
11.	Click **Save**. The content segment appears.

How to Create Dynamic Personalization

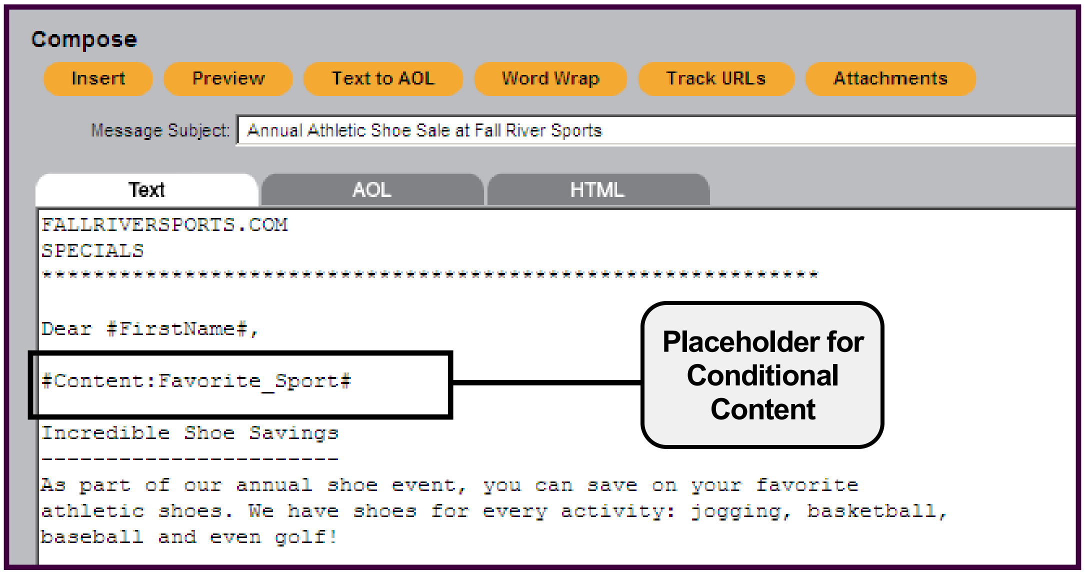
To add dynamic personalization to a message, create your conditional content segments and **insert** them into the body of the message.



Step	Action
1.	Click **Messages** > **Message Manager**.
2.	**Create** a new message **or edit** an existing message.
3.	**Position** your cursor in the subject line or body of the message where you want to insert the conditional content segment.
4.	Click the **Insert** button. The Insert dialog box displays.
5.	Using the drop-down menu on the left, select **Content Segment**.
6.	In the drop-down box on the right, select the **content segment** you want added to this message.
7.	Click **Add to Subject** or **Add to Body**.
8.	Optional: Repeat steps 2-6 for each message format.
9.	**Close** the Insert dialog box. The content segment appears in the message.
10.	Click **Save**.

Viewing Dynamic Personalization in the Message

Once you have clicked on Add to Body or Add to Subject, the selected content segment name appears in the message surrounded by **pound signs**, i.e. #Content: Shoe_Sale#. DREAMmail will substitute the actual content for the subscriber when the message is deployed.



Note: Be sure to sufficiently proof you message when using dynamic personalization. The more complex the conditions, the more messages you should proof.

Multi-Format Static Content Segments

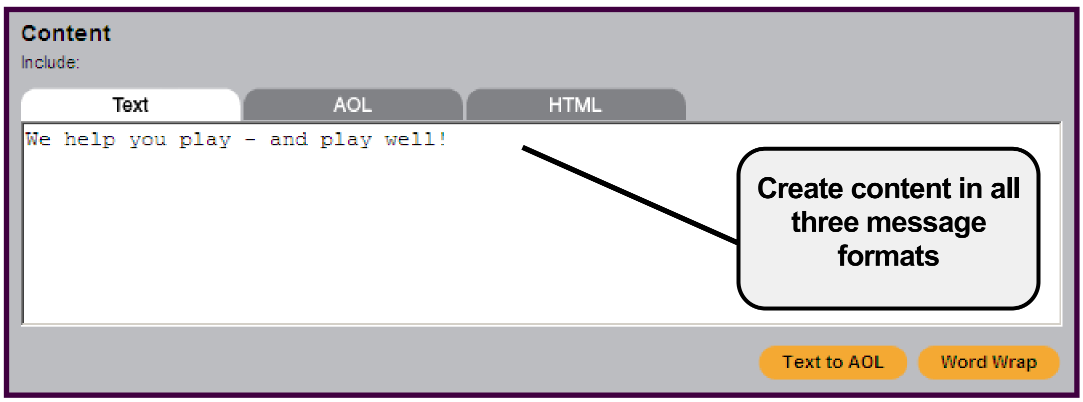
Multi-format Static Content Segments can also be pulled into messages and contain the same information for all recipients.

You can use multi-format static content segments for adding:

- The Subscription and Unsubscription Address links
- Headers and footers within your messages.

Note: Multi-format static content segments can be shared with any messages created within the Site.

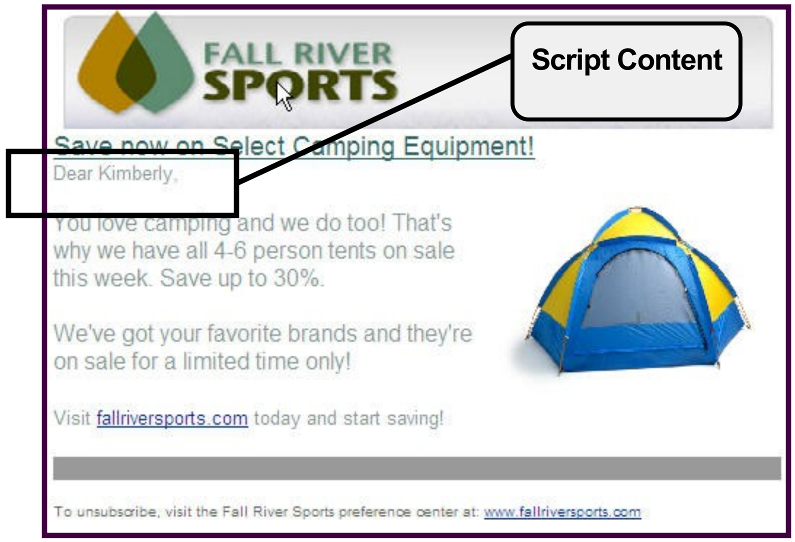
Multi-format static content segments can be created in text, AOL legacy and/or HTML format and can be previewed from this screen.



Script Content Segments

Script Content Segments include scripting language to perform specific functions. Common uses for Script Content Segments include:

- Substituting the words “Valued Customer” for NULL values in the first name profile field for greetings.
- Capitalizing the first letter in the first name to ensure a consistent look, e.g. “Dear ned” would become “Dear Ned”.



Example: First Name Script Content Segment

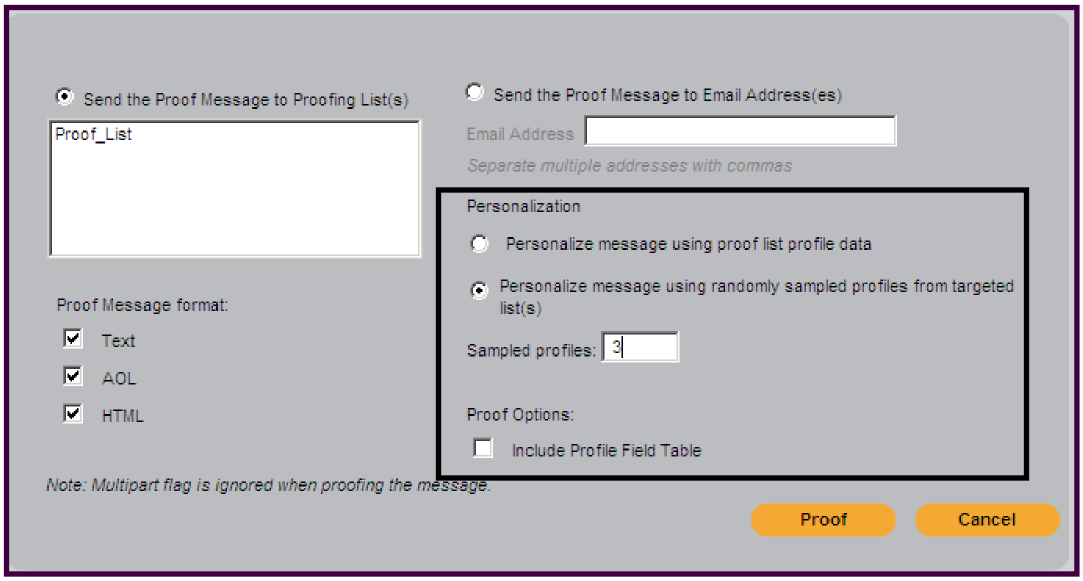
Step	Action
1.	Click on **Messages > Content Manager.**
2.	Select **Script Content Segment**.
3.	Click **Add**. The Script Content Composer screen displays.
4.	In the body of the Script Content Segment, **type the following**: <If condition=“#FirstName=’’ or IsNull(FirstName)#”> Valued Customer <Else> <Print expn=”#Capitalize (FirstName)#”> <EndIf> Note: The above expression contains double apostrophes - NOT quotation marks. Refer to the DREAMmail Advanced Messaging Guide for more information.
5.	Click **Save**.
6.	**Add** the script content to your message using the process described on the prior page.

Proofing Dynamic Content

Always **proof** a message containing dynamic content to verify the accuracy of the content being pulled under various conditions.

The options for dynamic personalization proofing include:

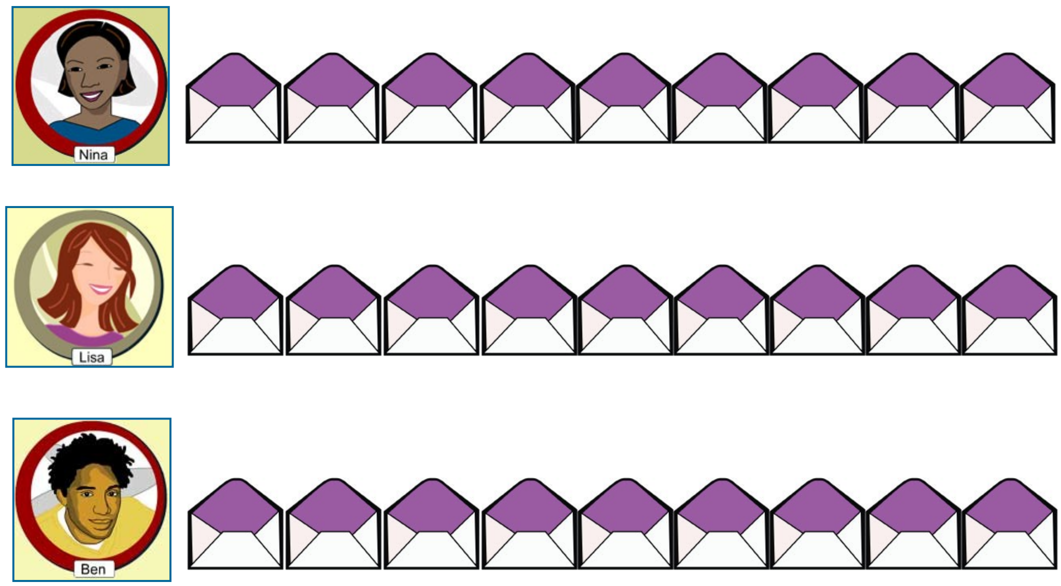
- **Personalize message using proof list profile data**: Select the proofing lists to which you want to send the message.
- **Personalize message using randomly sampled profiles from targeted list(s)**: Up to **50** profile samples can be used.



Note: Select the **Proof Field Table** checkbox to include profile data in the footer of your proof message.

Example of Proofing Dynamic Content

Nina, Lisa, and Ben are on a Proof List. There are **3 formats** (Text, AOL, and HTML) with **3 sampled profiles** for each format needing to be proofed. Because of this, they will each receive a total of **9 messages**.



Best Practices for Personalization

Mix dynamic and static content. It is easier to judge the effectiveness of personalized content when some offers are constant for all subscribers.

Include the subscriber's email address in the message footer. Subscribers often configure one email address to forward messages to another. Knowing which email address you used for a deployment will help subscribers who want to unsubscribe.

Proof conditional content segments in simple messages. The best way to verify that the conditional content segment is properly set up is to reference it in a message that has no other message body. Once you have confirmed that it works, you can then reference it within your real message.

Create 15 or fewer conditions. You can create an unlimited number of conditions within a conditional content segment, but this can become unmanageable for larger tasks. If the content for your conditions is stored in a database, write a program that automatically generates a dynamic personalization script.

Always specify a default value. While you may think that you have accounted for all possible values that could exist in a profile field, some data may be missing or malformed. For example, you shouldn't assume that the gender field will only contain "M" or "F" – some values may be blank, while others may contain meaningless values.

Try It Yourself!

The following exercises are designed to help you practice the skills you have just learned. The exercises are graduated in difficulty – jump in where you are most comfortable. If you are working in a classroom setting, append the names of anything you create with your initials so that each participant's work is unique. The answers to these exercises can be found in Appendix 1 at the back of this manual.

Level 1: "I Think I'm Ready"

Fall River Sports would like to add the subscriber's first name to a message they are about to send. Create a new text only message using the "Helmet_Offer_upd.txt" file and add the first name to the top of the message. Proof the message to your own email address.

Level 2: "I'm Confident I Can Do This"

Fall River Sports would like to promote different products based on the subscriber's gender for their next marketing email. If the subscriber is female, Fall River Sports would like to promote new school athletic tops and shorts. If the subscriber is male, they would like to promote athletic shoes of all kinds. You can assume the gender profile field is always completed. Create a new text only message using the "Helmet_Offer_upd.txt" file. Fall River Sports wants to be sure the personalization works for the subscribers on the list.

Level 3: "Bring It On!"

Fall River Sports would like to make their emails more personal to recipients. They would like to use the subscriber's first name at least twice in the next text email, including in the subject line. In addition, Fall River Sports has an overstock of bicycles in New York and golf equipment in California. Create a text only message using the "Helmet_Offer_upd.txt" file and add dynamic content to create interest in these products in these locations. Fall River Sports would like you to make anyone who is not living in CA or NY aware of the weekly special on weight-lifting equipment at all of their stores.

Summary

- Personalizing your messages make them seem more relevant to your subscribers.
- There are two types of personalization in DREAMmail—Basic and Dynamic.
- Basic personalization involves inserting basic profile information, e.g. first name, into a message.
- With Dynamic Personalization, you can create different segments of content to be inserted into a message based on the profile information of the recipient.
- Dynamic Personalization is created using content segments.
- There are 3 types of content segments: Conditional, Multi-format Static, and Script content segments.

Need More Information?

For additional information regarding personalizing your messages, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 15: Analyzing DREAMmail Reports

Overview

One of the advantages of email marketing over other marketing activities is the ability to get detailed, virtually immediate, information about how your customers respond to your products and offers. This unit presents basic information regarding navigating the various reports in DREAMmail.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

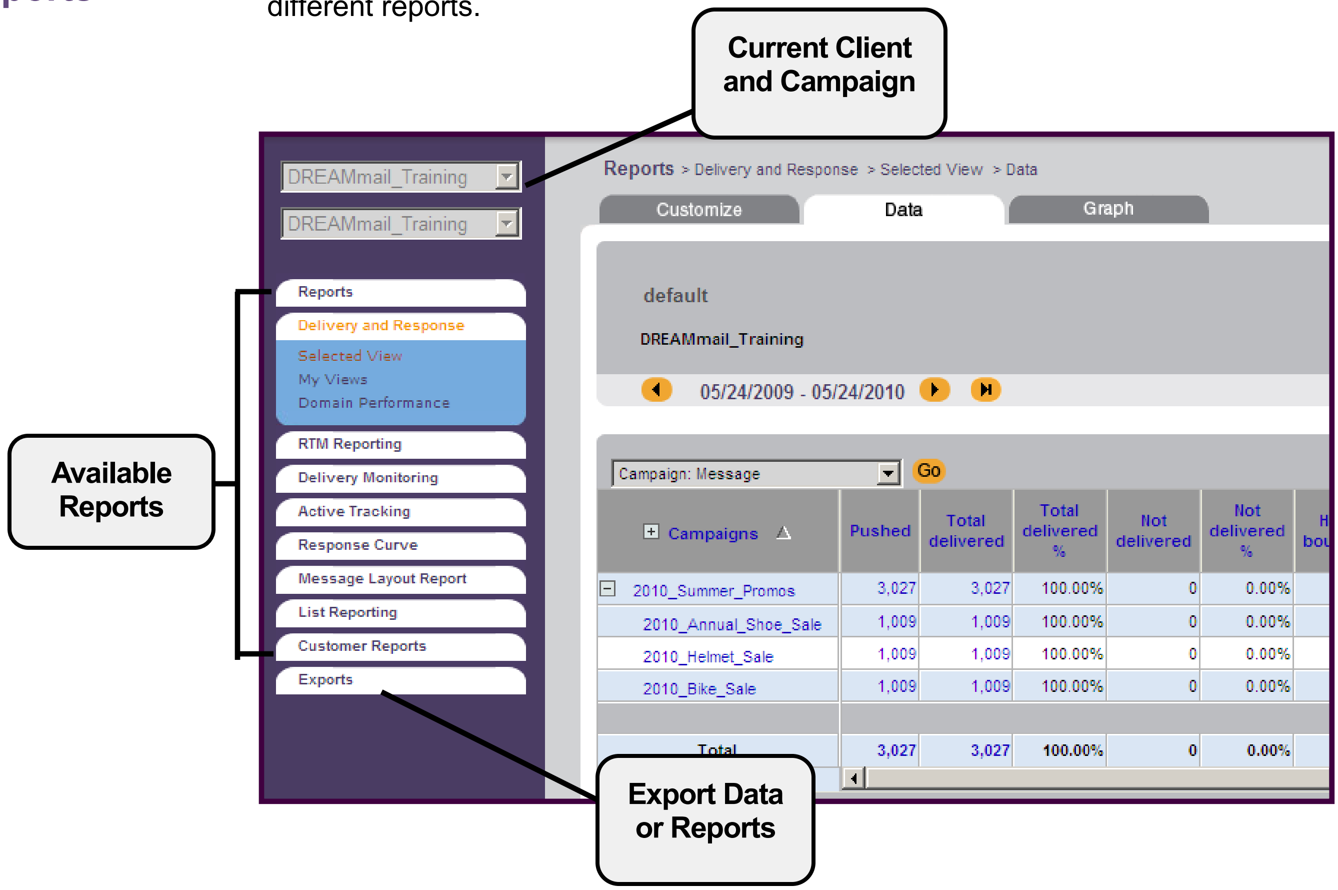
- Navigate DREAMmail reports.
- Identify the three categories of reports.
- Describe the purpose of each report in the DREAMmail reporting system.

Key Terms

Drill-down: Clicking on a number or a link in a report to access more detailed information.

DREAMmail Reports

DREAMmail Reports are accessed by clicking the **Reports** menu and submenu. The following User Interface is displayed. From here, you can access the different reports.



Report Categories

There are 11 different DREAMmail reports that are divided into three main report categories. Each report offers different data to address common business questions.

Email Performance	Mailing List Reports	Customer Reports
Delivery & Response	List Subscription	RFM (Recency—Frequency—Monetary)
Response Curve	List Churn	
Message Layout	List Status	Most Active
Active Tracking	Mailing History	
Delivery Monitoring	Import History	
Domain Performance		

Report Types

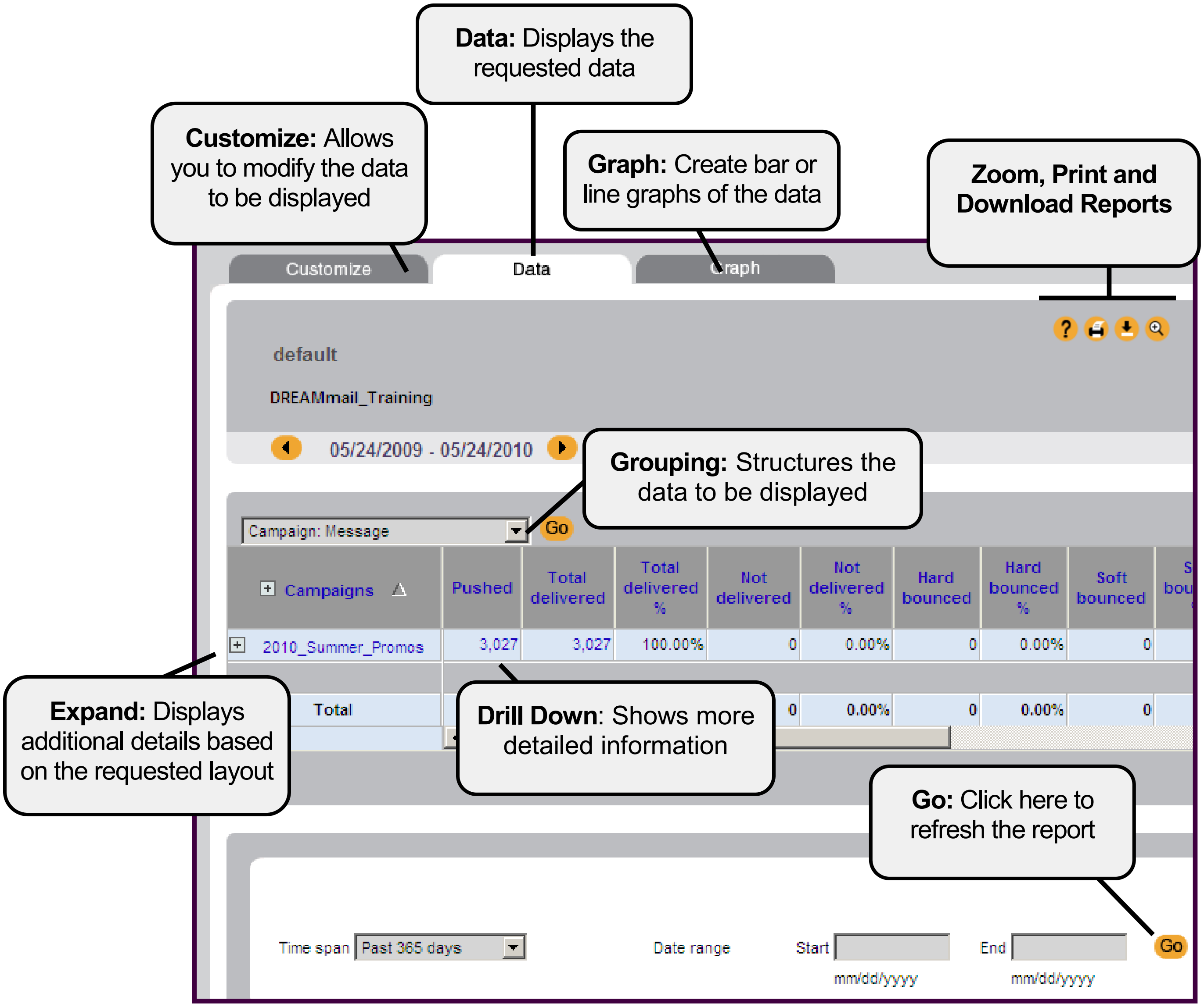
Email Performance	Description
Delivery & Response	Displays a variety of metrics for the elements of your campaign, e.g. messages, URLs, etc.
Response Curve	Graphically represents response data to messages over a specified period of time.
Message Layout	Graphically represents the impact of message layout on click through responses.
Active Tracking	Provides immediate information about response rates to messages and is refreshed every 15 seconds.
Delivery Monitoring	Displays how delivered messages are handled by recipient's ISPs.
Domain Performance	Shows delivery and response data based on domains.

Mailing List	Description
List Subscriptions	Provides detailed information about the number of subscriptions and unsubscriptions received both by email and through preference centers for each list.
List Churn	Displays how a list grows or declines in size over time due to subscriptions and unsubscriptions.
List Status	Provides summary data for all active lists in a Site. The data includes the date the list was last used and information on the number of HTML, AOL or text users for each list.
Mailing History	Summarizes all messages sent to members of a specific list.
Import History	Summarizes all imports on a site.

Customer	Description
RFM (Recency—Frequency—Monetary)	Provides insight into your active customer base in terms of how recently customers made purchases, how frequently purchases were made, and the monetary value of the purchases.
Most Active	Provides a list of the subscribers who, for a specified period of time within the campaign, clicked the most often, made the greatest number of purchases, or spent the largest amount of money.

About Reports

There are several ways to read and navigate the information in a report.



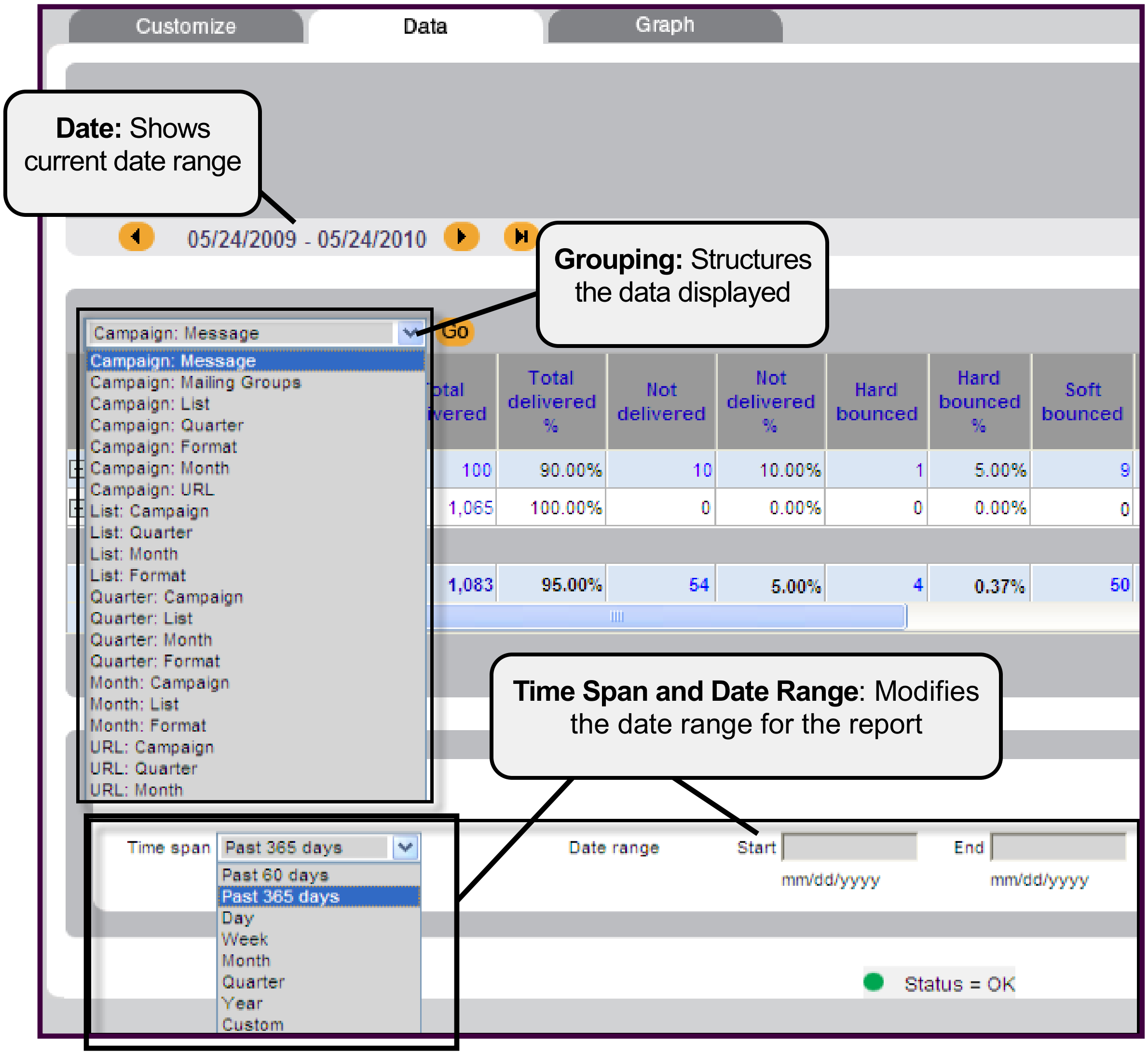
In the example above, the requested report layout is set up to display data at the **Campaign** level but can be expanded to display **Message** level data by clicking the "+" sign next to the campaign. The data is then displayed for each message in the campaign.

Note: Any time the hand cursor  appears in the report, you can **drill down** to additional information, often to a list of the email addresses meeting the report criteria.

Modifying a Report

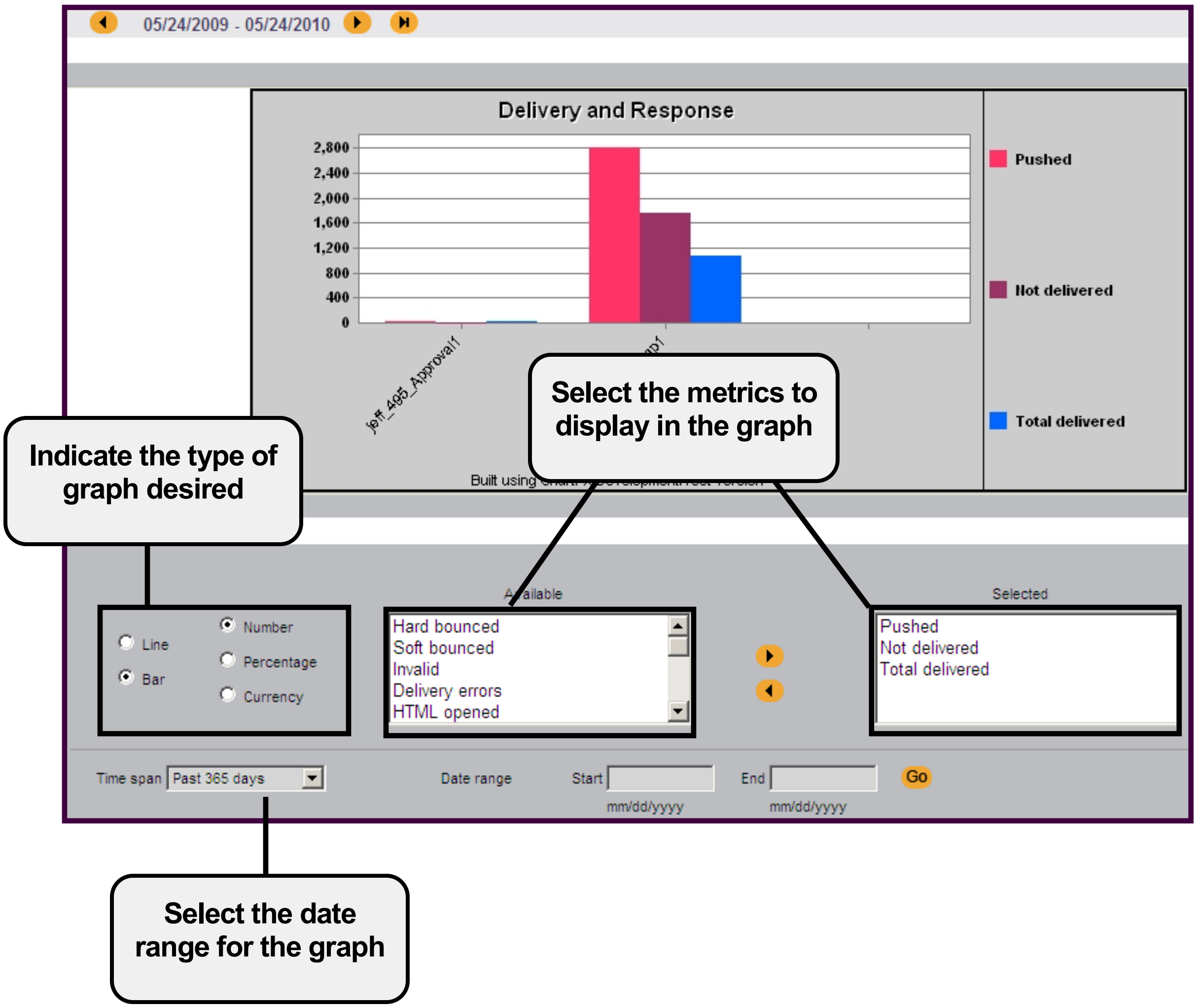
You can modify the report data at any point. Modifications include:

- Requesting different or additional data
- Modifying the time span for the current data



Graphing a Report

You can graph any of your report data. Click the **Graph** tab to specify the type of graph you would like to create (line or bar), along with the metrics you would like to display.



Best Practices for Accessing and Navigating Reports

Build objectives that focus on distinct reports. For promotional offers, it may be more important to understand how many subscribers clicked on a link to get to your web site rather than how many times they clicked. There generally is not a strong relationship between clicking a link multiple times and purchasing multiple items.

Baseline your key metrics. Look for any significant deviation from the response rates you would typically see. This could indicate that your messages are being blocked or filtered by an ISP.

Compare your results to industry standards. Epsilon publishes industry average statistics for newsletter and promotional offer activity so that you can determine how effective your activities are relative to others in your industry.

Graph data to determine patterns. Some information, such as the click through interval report, is better understood in graphic form.

Summary

- DREAMmail offers a variety of reports to assist you in analyzing your campaign management efforts.
- There are three basic report categories in DREAMmail: Email Performance, Mailing List and Customer Reports.
- Reports can be customized, as needed, and you can graph, download or print any report.
- You can customize a report by modifying the data to be displayed or the time frame for the report.

Need More Information?

For additional information regarding DREAMmail Reports, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 16: Email Performance Reports

Overview

Campaign effectiveness is the most common type of analysis that you will perform and the majority of your time in DREAMmail reports will likely be with the Email Performance Reports. This lesson introduces the structure, navigation and types of information contained in the Delivery and Response Reports.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Create a new Delivery & Response Report
- Modify an existing Delivery & Response Report
- Identify the metrics found in the Active Tracking and Response Curve Reports
- List the benefits of using the Message Layout, Delivery Monitoring and Domain Performance Reports

Key Terms

Domain name: A name that identifies one or more computers on the Internet.

Spotlight: A feature in DREAMmail that tracks post click activities, such as purchases or other non-purchase activities (events), back to campaigns and messages.

Delivery & Response Reports

Delivery and response reports are used to evaluate campaign effectiveness. They include information regarding the volume of email delivered and the response rates for click-throughs, HTML opens and purchase activities. These reports allow you to see the response rates for a particular message or campaign or to make comparisons between two messages or campaigns.

Benefits

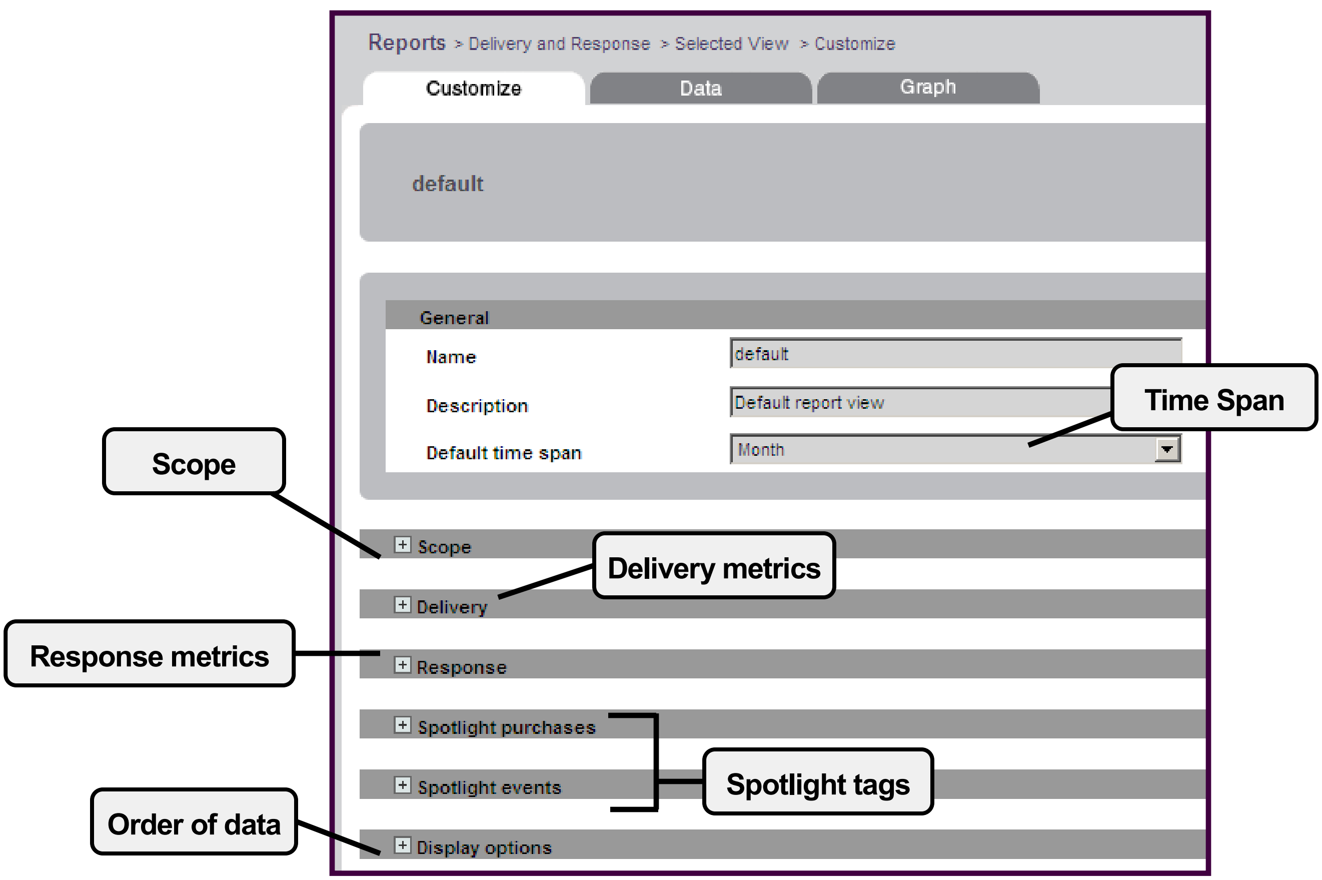
The Delivery & Response Reports provide insight into your campaign effectiveness by providing:

- Aggregate reporting capabilities
- Flexibility in defining report scope and view
- Ability to compare data across multiple factors

Creating a Delivery & Response Report

You can create and save up to 14 separate Delivery & Response Reports in DREAMmail. The **default** report can be modified and saved to create the new reports. To create a new report, you will define the:

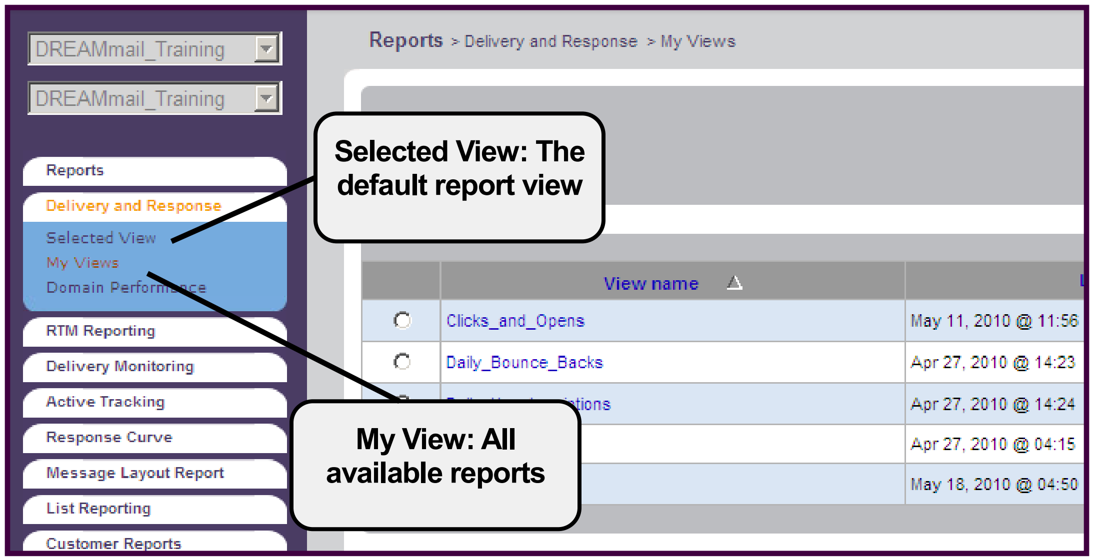
- Time span for the report
- Scope of the report
- Delivery metrics you want to see
- Response metrics you want to see
- Spotlight metrics you want to see
- Order in which the information is displayed in the report



My Views

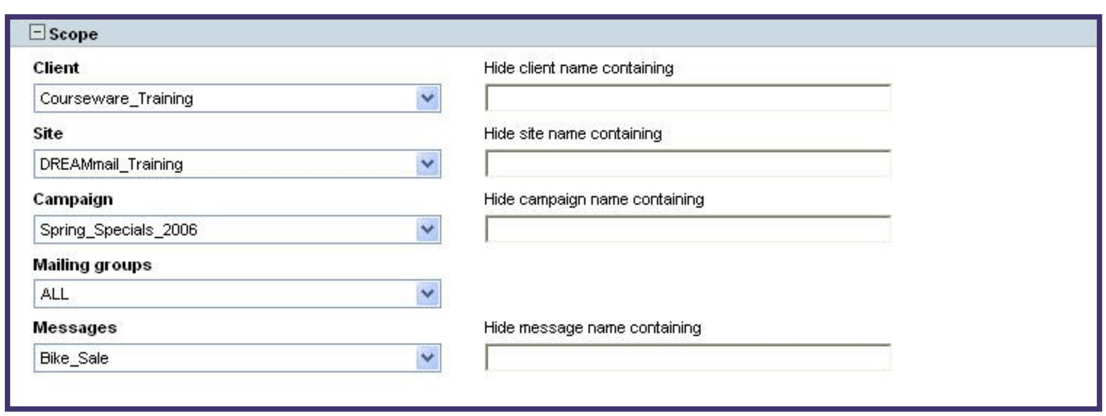
Your saved Delivery & Response reports can be found in the **My Views** section. From here you can:

- Determine which report you would like to see as your default report, also known as the **Selected View**
- Create new reports
- Modify an existing report and save it under a new name



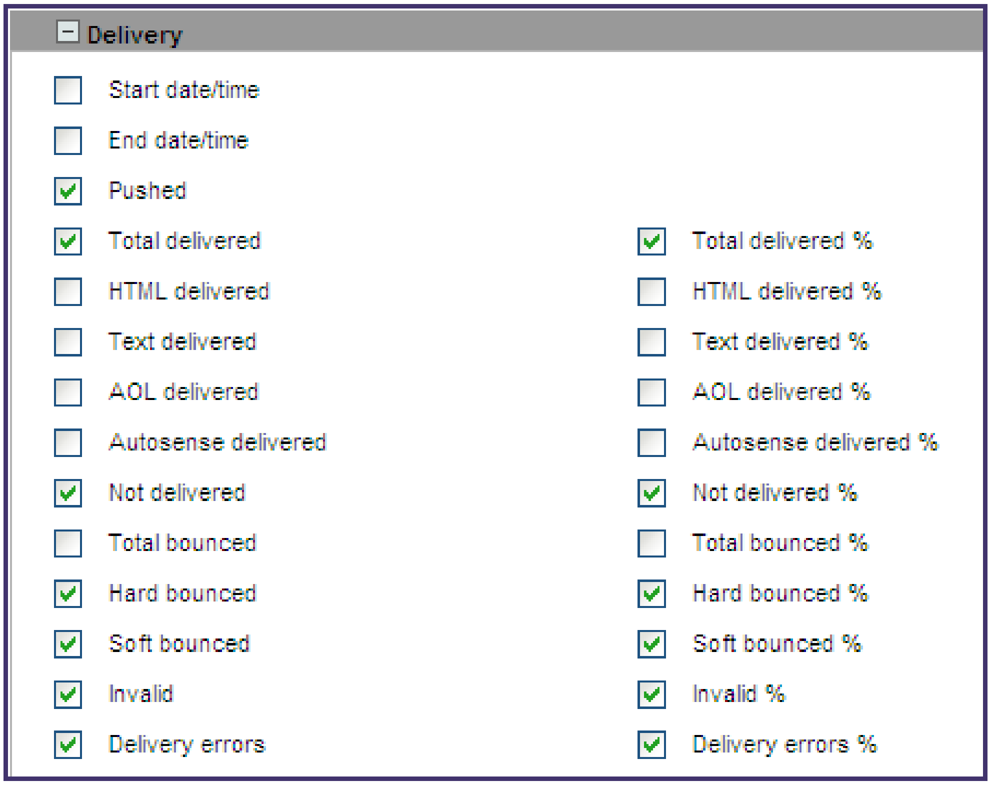
Report Scope

Scope refers to the level of the DREAMmail hierarchy at which data is viewed and analyzed in a report view. At all scope levels, data is grouped and sub-grouped either by default or by your selection. You can choose to hide specific report elements, for example certain campaigns or message, from a report or you can report on all elements.



Delivery Metrics

The following delivery metrics are available in the DREAMmail Delivery & Response report. Specific metrics can be selected or deselected, as needed, by checking and un-checking the boxes.



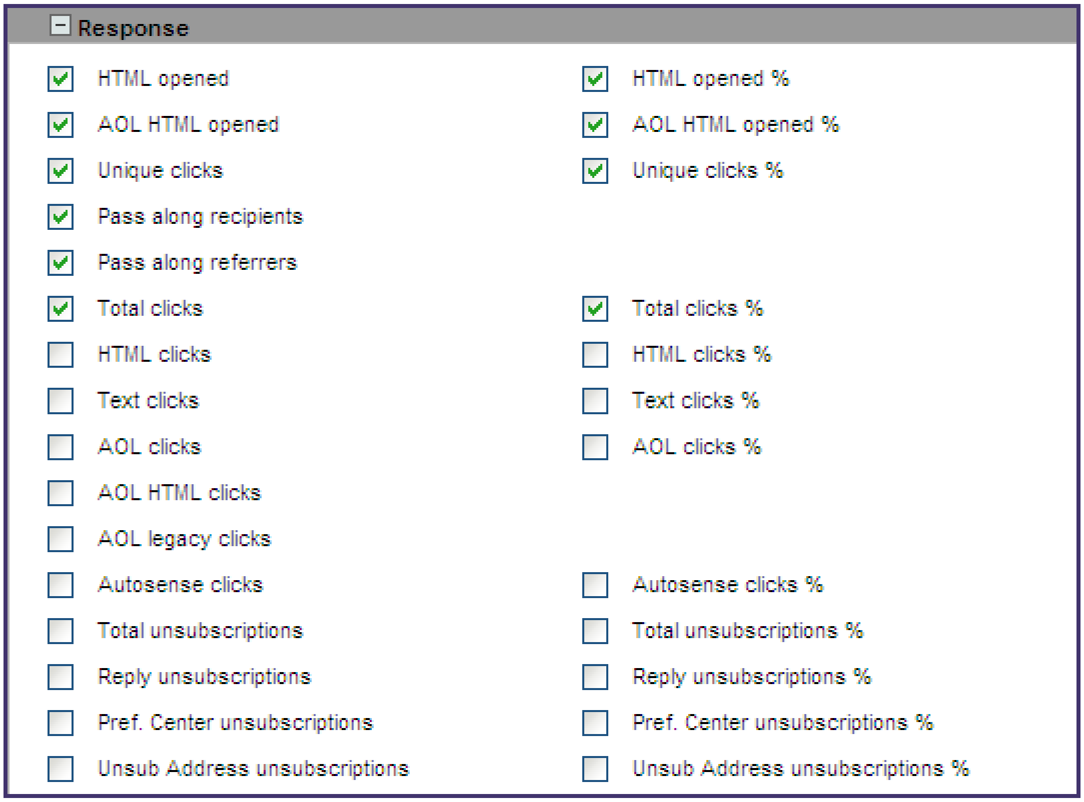
Delivery Metrics (cont.)

The following delivery metrics are available in the Delivery & Response Reports and can assist you in analyzing the effectiveness of your campaigns.

Metric	Description
Start date/time	The date and time at which DREAMmail pushed the first message to the first subscriber
End date/time	The date and time at which DREAMmail pushed the last message to the last subscriber
Pushed	The number of messages DREAMmail attempted to send
Total Delivered	The number of email addresses to which the message was successfully delivered
HTML Delivered	The number of HTML email addresses to which the message was delivered
Text Delivered	The number of text email addresses to which the message was delivered
AOL Delivered	The number of AOL 6.0+ email addresses to which the message was delivered
Autosense Delivered	The number of unknown email addresses to which DREAMmail successfully delivered an autosense message
Not Delivered	The number of messages that were not delivered due to bounce backs, delivery errors and invalid addresses.
Total Bounced	The number of pushed messages that resulted in a bounce back
Hard Bounced	The number of messages not delivered because the email address did not exist
Soft Bounced	The number of messages not delivered because DREAMmail could not connect to the receiving mail server, or the subscriber’s mailbox was full
Invalid Address	The number of messages that were not sent because the email address was incomplete or malformed
Delivery Errors	The number of messages that were not sent due to an internal DREAMmail system error

Response Metrics

The following response metrics are available in the DREAMmail Delivery & Response report. Specific metrics can be selected or deselected, as needed, by checking and un-checking the boxes.



Note: DREAMmail tracks **clicks** using an "HTTP Redirect." Each URL that is tracked is replaced with an encoded URL that contains information specific to the subscriber, the message, the mailing list and the destination URL.

Note: **Pass Alongs** are tracked through use of cookies. If the original recipient forwards the email to a friend who clicks the same URL, DREAMmail detects that the second recipient does not have the cookie sent to the original recipient.

Response Metrics (cont.)

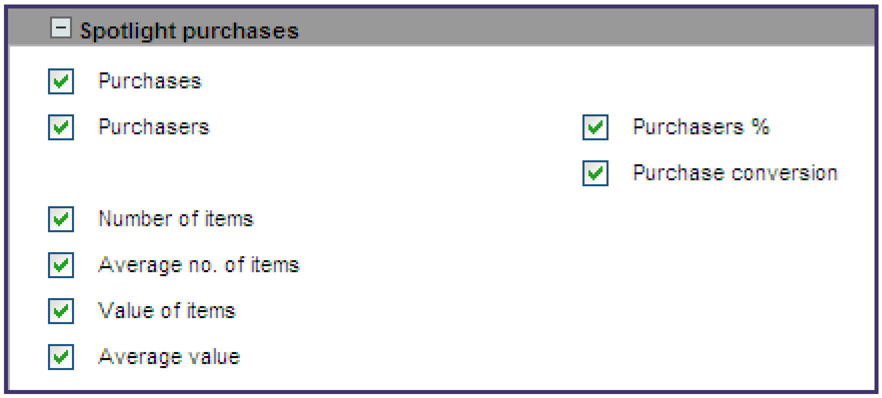
The following response metrics are available in the Delivery & Response Reports and can assist you in analyzing the effectiveness of your campaigns.

Metric	Description
HTML Opened	The number of unique subscribers who opened HTML format messages
AOL HTML Opened	The number of unique subscribers who opened AOL HTML format messages
Pass Along Recipients	The number of recipients who clicked through a message after it was forwarded to them
Pass Along Referrers	The number of unique subscribers who passed a message along (sometimes referred to as “evangelists” or “passers”)
Total Clicks	The total number of click-throughs for all message formats
Unique Clicks	The number of unique subscribers who clicked through at least one link in a message
HTML Clicks	The number of click throughs for HTML messages
Text Clicks	The number of click throughs for text messages
AOL Clicks	The number of click throughs for all types of AOL messages
AOL HTML Clicks	The number of click throughs for AOL HTML format messages
AOL Legacy Clicks	The number of click throughs for legacy AOL format messages
Autosense Clicks	The number of click throughs for autosense format messages
Total Unsubscriptions	The total number of recipients of a message who unsubscribed from the message
Reply Unsubscriptions	The number of recipients of the message who unsubscribed by replying to the message
Pref. Center Unsubscriptions	The number of recipients of the message who unsubscribed through a preference center
Unsub Address Unsubscriptions	The number of recipients of the message who unsubscribed using the Unsubscription Address link in the message

Spotlight Purchase Metrics

Spotlight is a DREAMmail feature that can track post-click activities occurring on your web site that were driven by a subscriber response to your message. Spotlight uses cookies and a hidden image on your web pages. Spotlight can be used to track purchase activity or the completion of non-purchase events (e.g. completing a survey).

The following spotlight purchase metrics are available in the DREAMmail Delivery & Response report. Specific metrics can be selected or deselected, as needed, by checking and un-checking the boxes.



Metric	Used to Indicate the...
Purchases	Total number of “sale” transactions where multiple transactions from one purchaser are counted individually
Purchasers	Number of unique subscribers who made a purchase
Purchase Conversion	Proportion of subscribers who clicked a link in a message and then made a purchase
Number of Items	Total number of items purchased
Value of Items	Total value of all purchases associated with the message
Average Value	Average value of all orders associated with the message

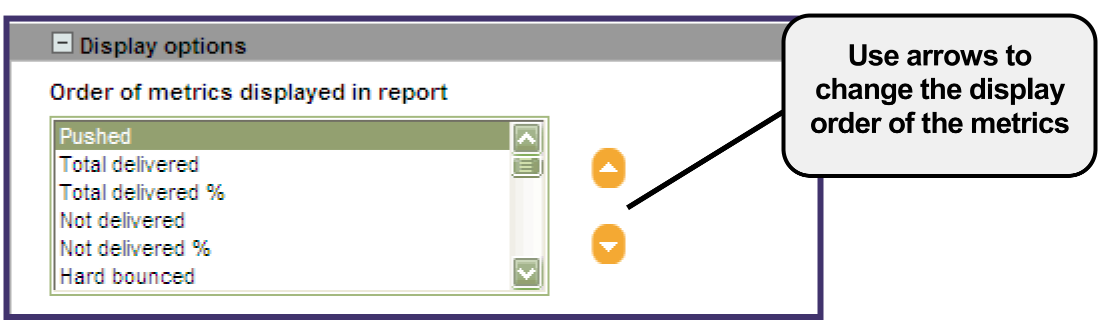
Spotlight Event Metrics

The following spotlight event metrics are available in the DREAMmail Delivery & Response report. Specific metrics can be selected or deselected, as needed, by checking and un-checking the boxes.

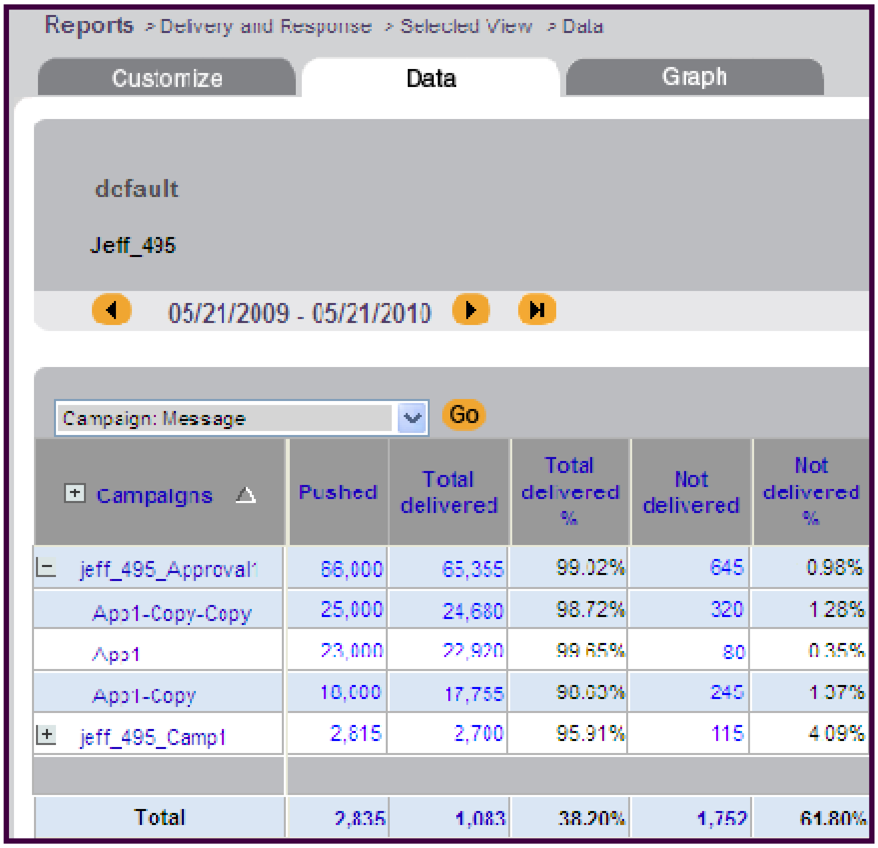
Metric	Used to Indicate the...
Responses	Number of events recorded on spotlight-tagged pages
Responders	Number of subscribers who encountered a spotlight counter tag
Event Conversion	Proportion of users who clicked a link that converted to a counted event

Displaying Metrics in a Report

You can determine the order in which the report metrics is displayed in a report by using the Up and Down arrows to move specific metrics further up or down the list.



Sample Delivery & Response Report



Best Practices for Delivery & Response Reports

Compare like campaigns and messages. When you perform an offer test, you hold every variable constant except one, so that you can isolate the impact of that change. If you are going to compare two messages or campaigns against one another where several variables have changed, it may not be possible to determine the exact cause for the difference in response rates.

Focus on response rates (percentages), rather than absolute numbers. One thousand click-throughs on a link may be excellent or poor, depending upon the number of subscribers to whom the message was sent.

How to View an Existing Delivery & Response Report

Step	Action
1.	In the Reports User Interface, click **Delivery and Response**. Your default Delivery & Response Report will display (your **Selected View**).
2.	<u>Optional</u>: Click **My Views**. Any other Delivery & Response reports you have created will display.
3.	Click on the **name** of one of these reports. The report will display.

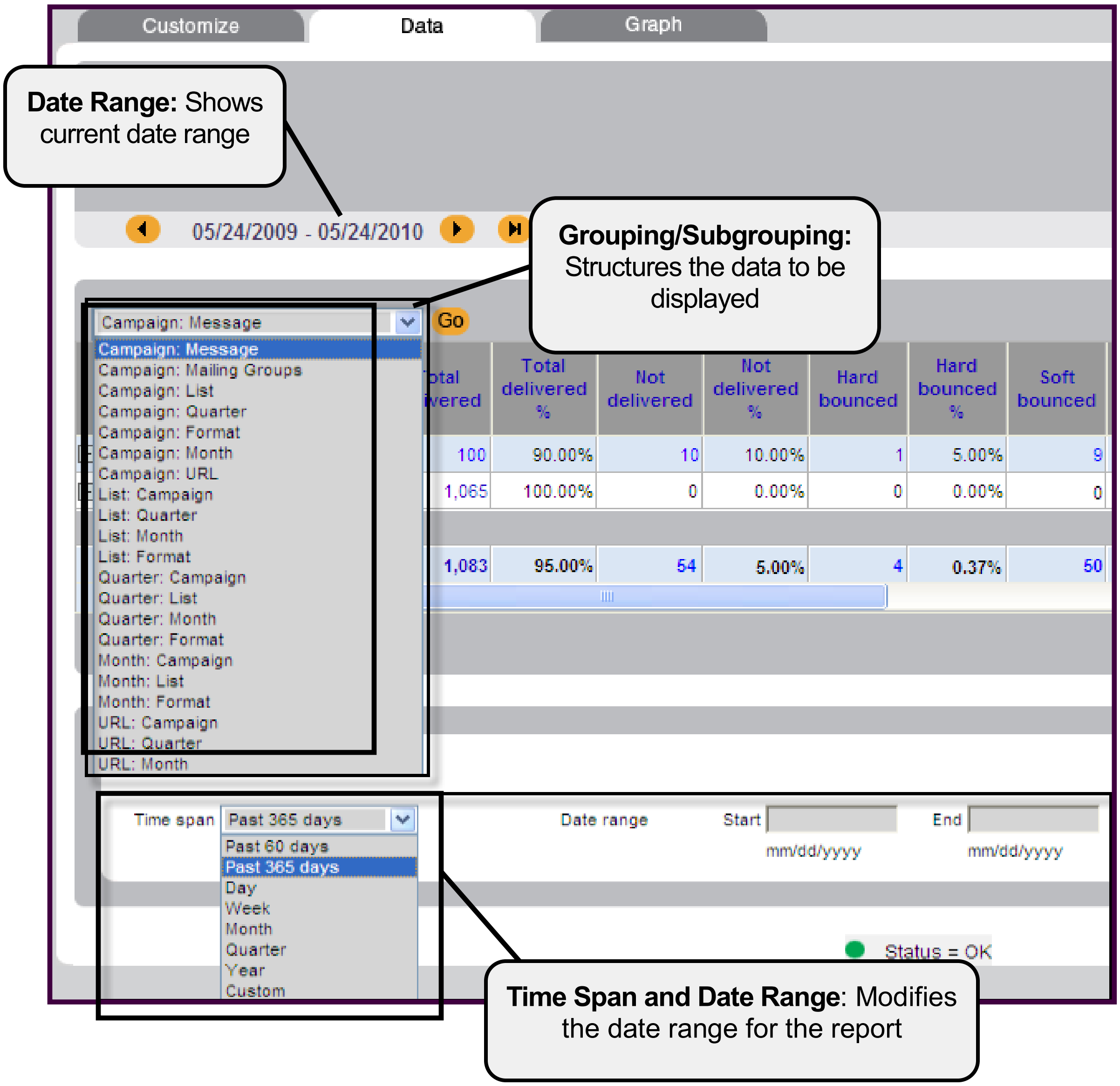
How to Create a New Delivery & Response Report

Step	Action
1.	In the Reports User Interface, click **Delivery and Response**. Your default Delivery & Response Report will display (your **Selected View**).
2.	Click the **Customize** tab. The current report information will display.
3.	**Rename** the report and create a new report **description**. Do not use spaces or special characters in your report name.
4.	Indicate the **default time span** for the new report.
5.	Click the **+** sign next to **Scope** and indicate the scope of the report.
6.	Click the **+** sign next to **Delivery** and select the delivery metrics for the report by checking and un-checking the boxes.
7.	Click the **+** sign next to **Response** and select the response metrics for the report by checking and un-checking the boxes.
8.	Click the **+** sign next to **Spotlight Purchases** and select the spotlight purchase metrics for the report by checking and un-checking the boxes.
9.	Click the **+** sign next to **Spotlight Events** and select the spotlight event metrics for the report by checking and un-checking the boxes.
10.	Click the **+** sign next to **Display Options** and determine the order in which you would like the metrics to display in the report by using the Up and Down arrows.
11.	Click **Save as New**.

Modifying the Information Displayed in the Report

There are several ways to modify the information displayed in a report, including the report:

- Grouping/Subgrouping—how the data is organized in the context of the report
- Date Range
- Time Span



Note: The default time span for all reports is 365 days.

Active Tracking Reports

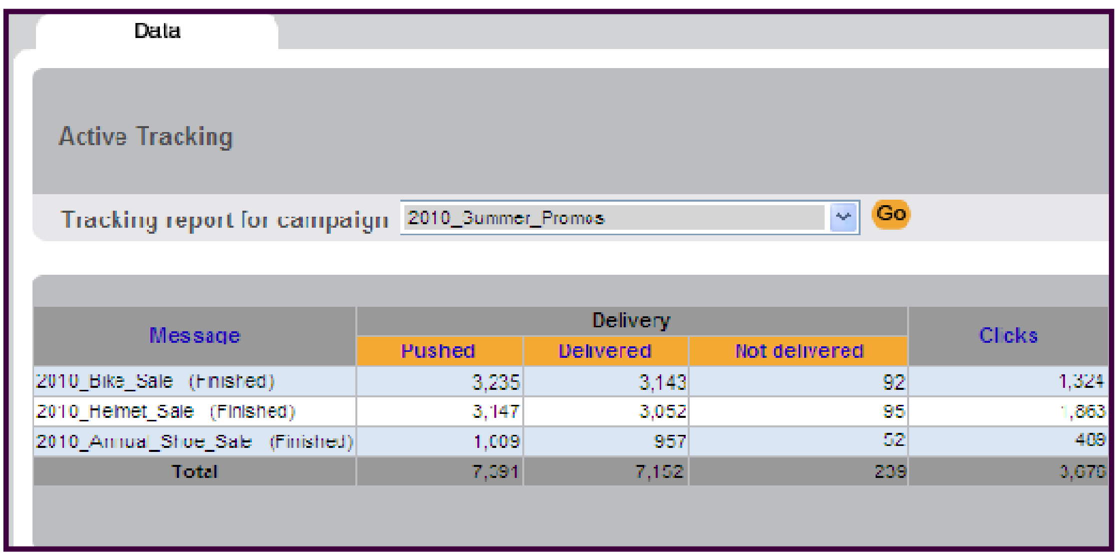
The Active Tracking Report provides basic information about your most recently sent messages in each campaign. This report is automatically updated every 15 seconds and includes:

- Pushed
- Delivered
- Not Delivered
- Clicks
- Pass Alongs
- Responses
- Number of Purchases
- Purchase Value

Benefits

The Active Tracking report monitors the deployment and immediate response rates to individual messages. The message-tracking data in this report is refreshed every 15 seconds, enabling you to view a campaign's progress from its inception.

Sample Active Tracking Report



Message	Delivery			Clicks
	Pushed	Delivered	Not delivered	
2010_Bike_Sale (Finished)	3,235	3,143	92	1,324
2010_Helmet_Sale (Finished)	3,147	3,052	95	1,863
2010_Annual_Shoe_Sale (Finished)	1,009	957	52	409
Total	7,391	7,152	239	3,070

Best Practices for Active Tracking Reports

Use active tracking to monitor deployment progress. Due to its real-time information, this report is the only report that is meaningful for this purpose.

Use active tracking to evaluate top-level results as part of an active campaign. For example, when you send an offer to a subset of your target audience, use Active Tracking to determine if the response rate is adequate before you deploy the message to the entire target audience.

Response Curve Reports

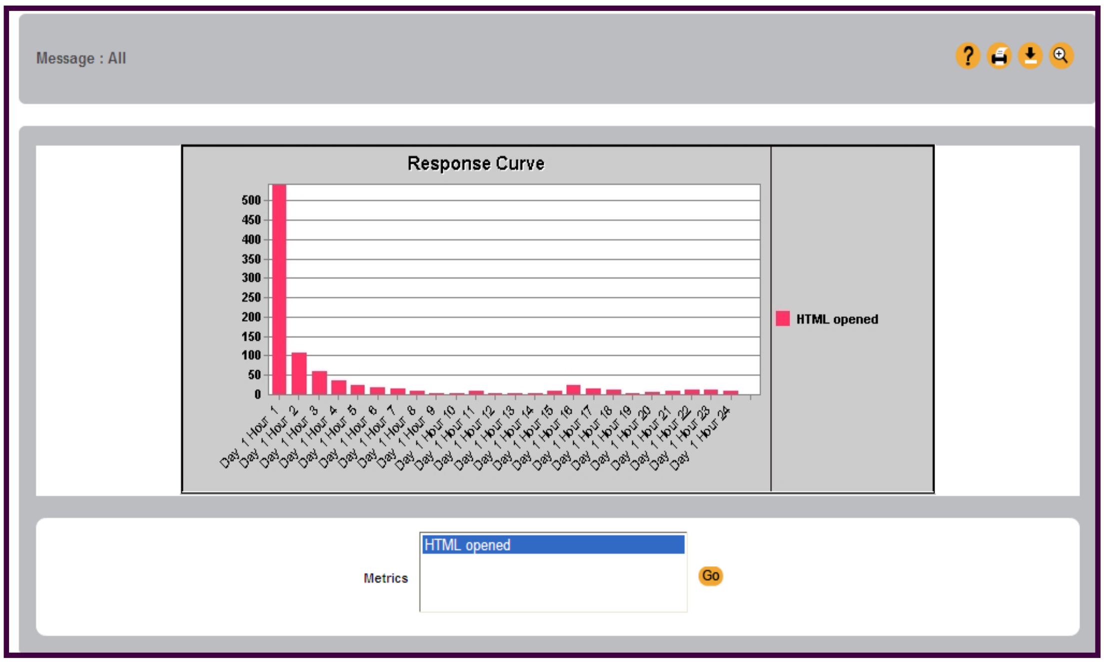
The Response Curve Report provides a graphical representation of the response rate to individual or all messages in a campaign. Available metrics include:

- HTML Opens
- Clicks
- Purchases
- Value of Items
- Responses
- Pass Alongs

Benefits

You can use this report to determine a message's peak response period and to show when the majority of responses were received.

Sample Response Curve Report



Best Practices for Response Curve Reports

Use the Response Curve to determine peak response periods to your messages. Since the Response Curve will show you hourly responses for metrics such a HTML Opens and Click-throughs, you can easily determine when most people interact with your messages. You may decide to change the time of day that you send messages based on peak response times.

Use the Response Curve to determine how long you can expect responses for after you send a message. Most responses to an email message occur in the first 24 to 48 hours. The Response Curve will help you determine how long your messages remain active so that you can tell when you will have the majority of your response data ready for evaluation.

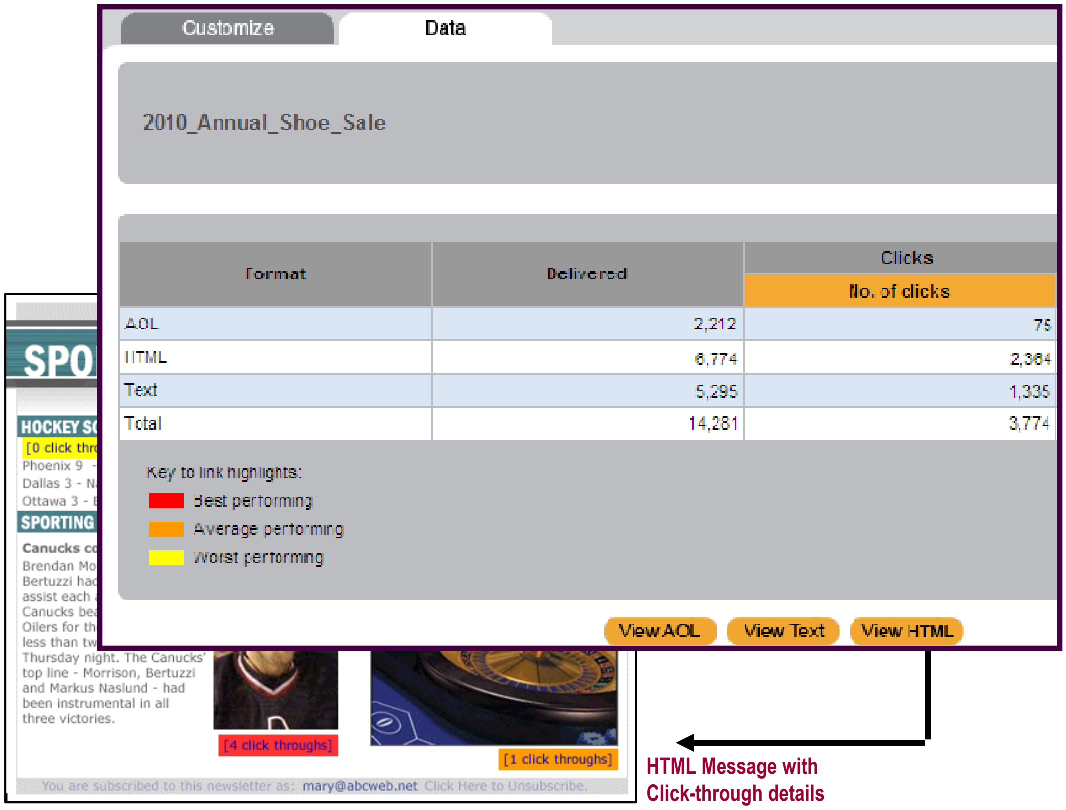
Message Layout Reports

In general, links that appear near the top of your message will perform better than those further down. With more complex HTML layouts, it may not be obvious which areas of the design grab subscribers' attention, and which ones fail to get noticed. The Message Layout Report shows click-through activity within the message contents.

Benefits

By placing the click-through results within the context of the message layout, it is easier to see the "hot" and "cold" spots in your message layout and to modify your layout for optimal consumer response.

Sample Message Layout Report



URL Performance Table

URLs updated after deployment using the Update URL function, will display in a separate URL Performance table located in the Message Layout report. To access, select the appropriate message format to view. Any updated URLs will be listed at the bottom of the displayed page in the URL Performance table. Refer to Unit 9 for more information.

Best Practices for Message Layout Reports

Use this report as part of a redesign process. In the same way that you can test offers, you can test different layout templates to understand your varying response patterns.

Analyze campaign effectiveness with Delivery and Response Reports. The Message Layout Report was not designed to be a primary tool for evaluating the effectiveness of a campaign. Delivery and Response reports provide more complete information.

Delivery Monitoring Reports

The Delivery Monitoring Report enables you to see how effective your campaigns are at reaching the user inbox. The report will show if a message is filtered to bulk, blocked or in the inbox.

Benefits

The benefits of using the Delivery Monitoring Report include Increased insight into your performance with the domains popular with your subscribers.

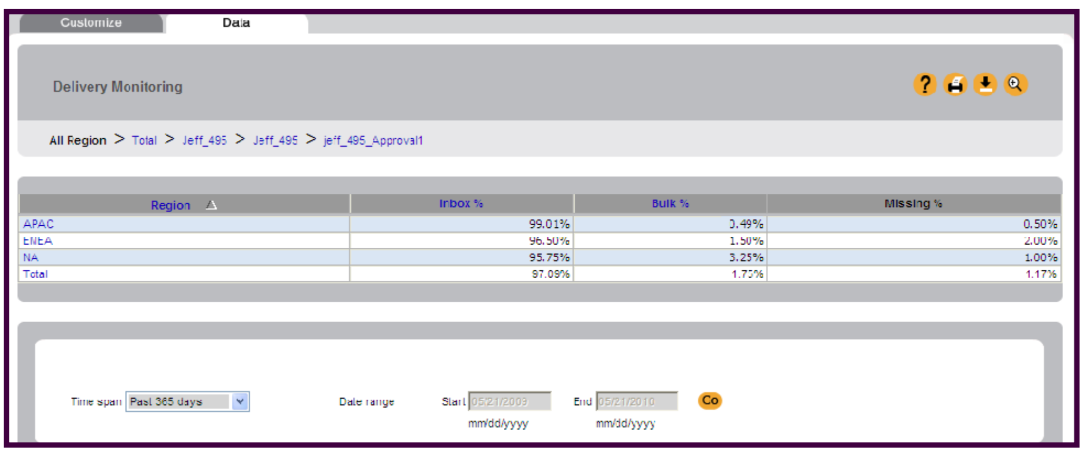
How Delivery Monitoring Works

Each time a message is sent, an “audit list” is automatically added as a target list. The audit list contains:

- Numerous seed domains across the Americas, Europe and Asia Pacific
- Up to 10 addresses for each domain

The audit list is then monitored and reported on in DREAMmail and can be sorted by region, if desired.

Sample Delivery Monitoring Report



Best Practices for Delivery Monitoring Reports

Develop baseline measures for your consumer audience. By having a good indication of the percentage of your messages that go to the inbox, bulk or are missing, you can better determine any significant deviance from this pattern.

Domain Performance Reports

Domain Performance Reports give you maximum visibility into how well your messages are performing across domains, including your top domains.

Benefits

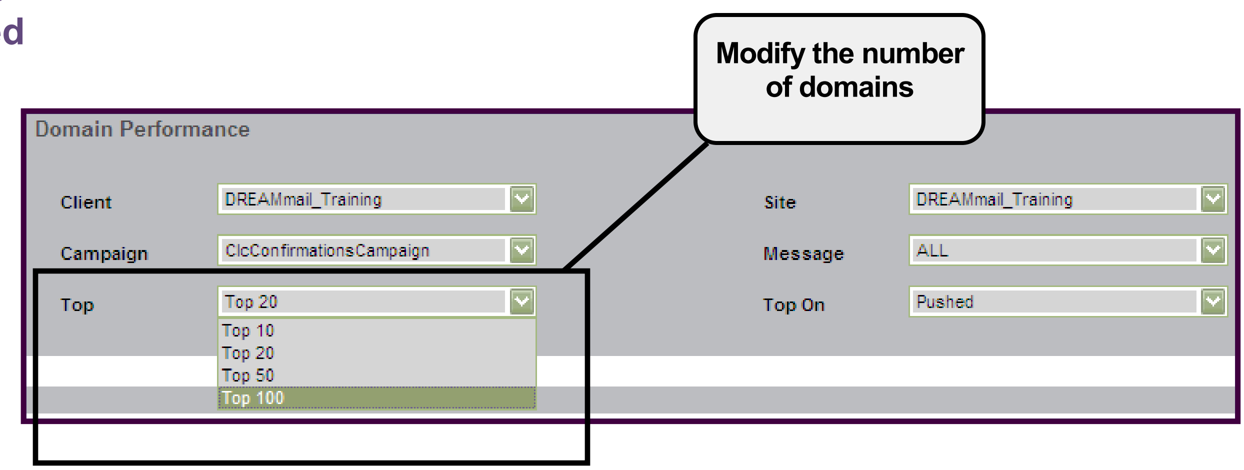
Benefits of using the Domain Performance Report include:

- Identifying your best performing domains based on delivery and performance metrics.
- Providing insight into how well your campaigns are performing across the domains in your customer list.
- Allowing you to identify high and low performing domains, to determine the reliability of delivering to a domain, and to understand the distribution of your customer file.

Sample Domain Performance Report

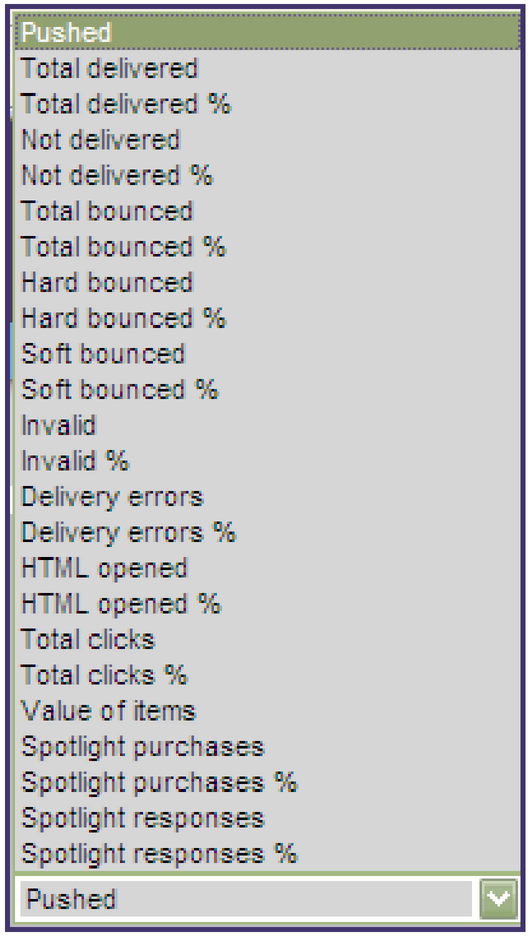
Domain	Pushed	Total delivered	Total delivered %	Not delivered
yahoo.com	110,000	107,483	97.71%	2,517
gmail.com	90,000	88,275	98.08%	1,725
epsilon.com	88,000	85,999	97.73%	2,001
hotmail.com	85,000	84,212	99.07%	788
aol.com	83,538	82,530	98.79%	1,008

Modifying the Number of Domains Displayed



Available Metrics

The following metrics are available with the Domain Performance report.



Summary

- Email Performance reports provide greater visibility to the performance of your messages and campaigns.
- You can create and save up to 14 different Delivery & Response reports.
- Saved reports are located in the My Views section of DREAMmail.
- You can modify the type of data to be displayed in the report or the time span for the displayed data.
- The Active Tracking report provides information regarding the immediate response to your messages.
- The Response Curve report graphically displays subscriber's responses over time.
- The Message Layout report graphically displays "hot" and "cold" URLs in your messages.
- Delivery Monitoring reports provide information regarding the percentage of your messages that go to the inbox, the bulk folder or are missing.
- Domain Performance reports provide key delivery metrics broken down by the top domains on your mailing lists.

Need More Information?

For additional information regarding Email Performance reports, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 17: Mailing List Reports

Overview

DREAMmail features five List Reports that provide detailed information about changes to your mailing lists in DREAMmail.

Objectives

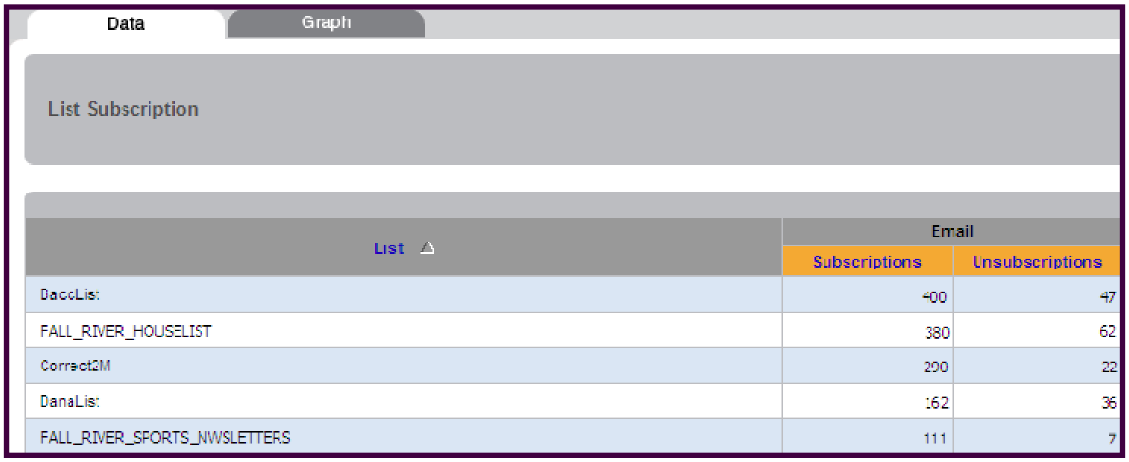
Upon completion of this unit, you will have the knowledge and skills to:

- List the various Mailing List Reports.

List Subscription Reports

It is important to understand if your lists are growing or shrinking over time.

Sample List Subscription Report



Data | Graph

List Subscription

List	Email Subscriptions	Email Unsubscriptions
DaccList	400	47
FALL_RIVER_HOUSELIST	380	62
Correct2M	200	22
DanaList	162	36
FALL_RIVER_SPORTS_NWSLETTERS	111	7

Available Metrics

Metric	Used to Indicate the Number of Subscribers Who...
Email Subscriptions	Joined the list by sending a message to a Subscription address.
Email Unsubscriptions	Requested to be removed from a list by sending a message to an Unsubscription address, or by replying to the message and indicating so in their response.
Preference Center Subscriptions	Joined the list via a List Generator or Preference Center.
Preference Center Unsubscriptions	Requested to be removed from a list via a List Generator or Preference Center.

Best Practices for List Subscriptions

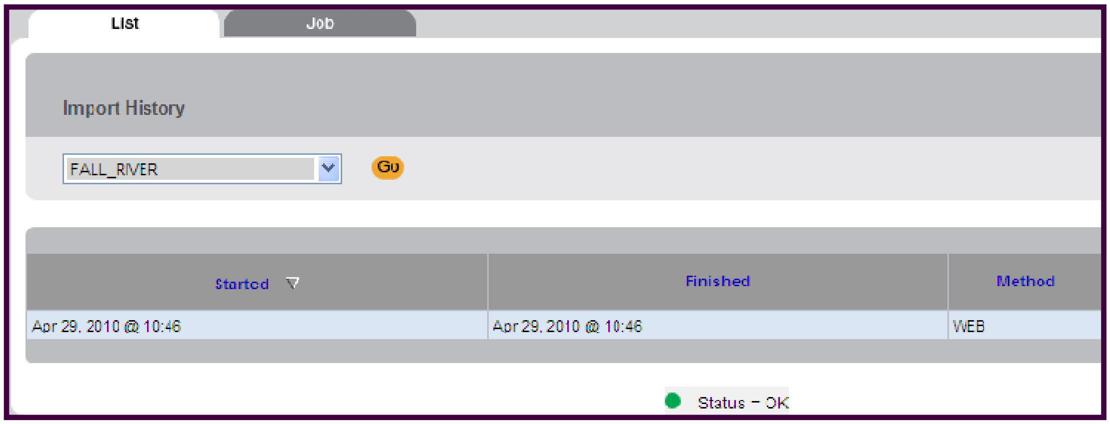
Enter a time span or date range to view unsubscription behaviors over a specific time period. By selecting a date range that corresponds to a mailing you have sent, you can determine unsubscribe levels for a particular mailing.

Look for significant changes in unsubscriptions after each deployment. If they occur, attempt to determine the cause.

Import History Reports

The Import History Report provides a summary of import activities for individual mailing lists on your DREAMmail site. The Import History Report provides a simple means of ensuring a list has been updated prior to mailing to the list.

Sample Import History Report



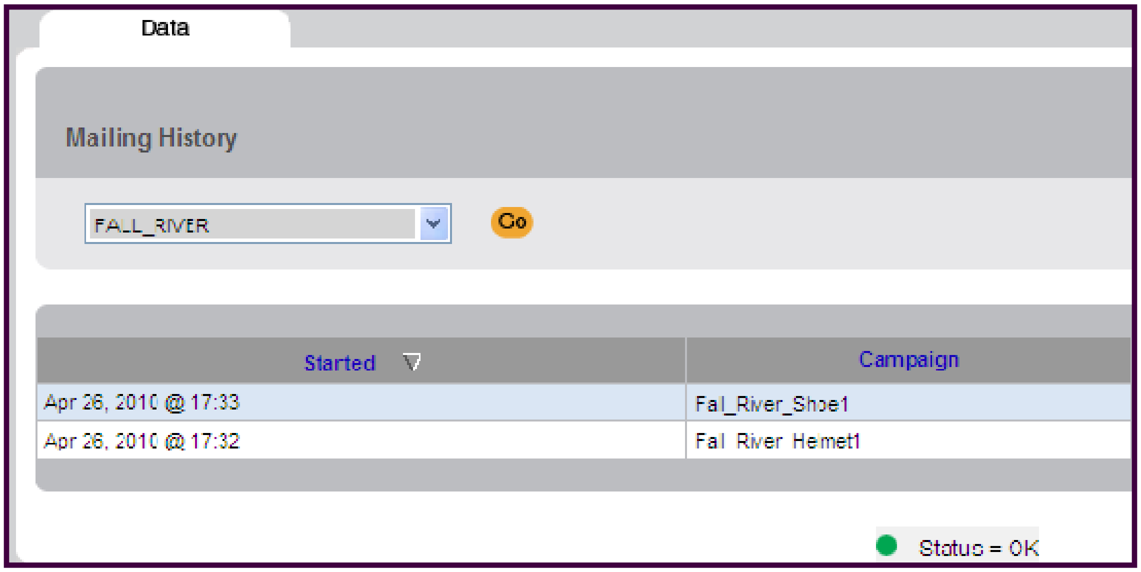
Available Metrics

Metric	Used to Indicate the..
Started	Date and time the import request started
Finished	Date and time the import request finished
Method	Method of import (Automated FTP, DREAMmail Connect, Interactive upload, or ODBC) and job name (for FTP imports)
Source	Number of records that were in the source import file
Rejected	Number of records that were rejected due to having invalid email addresses
Imports	Number of records that were successfully imported

Mailing History Reports

The List Mailing History report enables you to view all messages that have been sent to subscribers of a specific mailing list. You should use this report to ensure that you are not over mailing to an individual mailing list.

Sample Mailing History Report



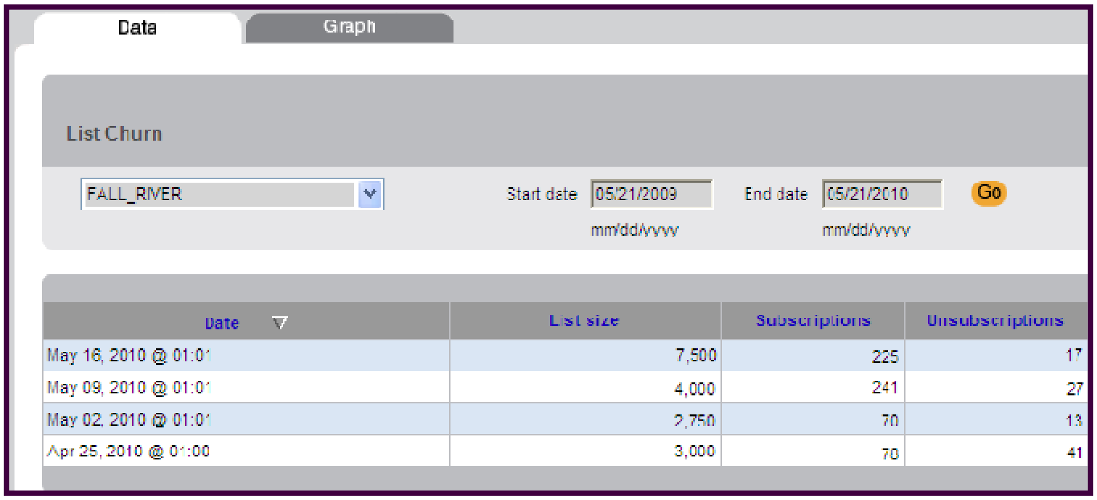
Available Metrics

Metric	Used to Indicate the...
Started	Date and time DREAMmail started sending the message
Campaign	Name of the campaign to which the message belongs
Message	Name of the message
Recipients from this List	Number of list records to which the message was deployed

List Churn Reports

The List Churn report measures the growth or decline in size of a mailing list over time due to subscriptions and unsubscriptions. This report provides a weekly snapshot of each active mailing list on a site that includes the size of the list and the number of subscriptions and unsubscriptions that occurred in the previous week.

Sample List Churn Report



Available Metrics

Metric	Used to Indicate the...
Date	Date and time of the weekly snapshot of the list data.
List Size	Number of email addresses that were on the list at the time of the snapshot
Subscriptions	Total number of subscriptions to the list during the week, including new records added to the list through importing
Unsubscriptions	Total number of unsubscriptions to the list during the week
Mailable List Size	Total number of active, valid email addresses that were on the list at the time of the snapshot
Portion Mailable	Proportion of the subscribers on the list who had valid, mailable addresses at the time of the snapshot

Note: This report is updated each Sunday.

List Status Reports

The List Status Report provides summary data for all active mailing lists. The summary data includes the:

- List size
- Number of mailable subscribers in a list
- Number of subscribers who will receive each format of a message
- Date of the last import into the list
- Date of the last mailing to the list

Sample List Status Report

Data

List Status

List △	Date last imported	Date last mailed	Size	Mailable			
				Text	AOL	HTML	Unknown
BaccList	April 11, 2010 @ 12:30	April 14, 2010 @ 3:32	8,000	150	50	7,798	2
Fall_River_ProofList	Apr 29, 2010 @ 10:46	May 04, 2010 @ 12:15	861	0	0	861	0
Correct2M	May 13, 2010 @ 13:12	May 13, 2010 @ 15:12	3,000,000	1	0	0	2,999,999
Newsletter_List	May 15, 2010 @ 11:52	May 19, 2010 @ 16:03	3,200	200	0	3,000	0

Available Metrics

Metric	Used to Indicate the...
List	Name of the mailing list
Date Last Imported	Ending date and time of the most recent import for the list
Date Last Mailed	Ending date and time of the most recent message that was sent to this list
Size	Number of email addresses on the list
Text, AOL, HTML, Unknown	Number of active valid email addresses on the list categorized by message format associated with the list
Total	Total number of active, valid email addresses on the list
Site Unsub	Number of addresses on the list that are site unsubscribed
Unconfirmed	Number of addresses on the list that have not provided sufficient information to meet the requirements of DREAMmail's optional Closed Loop Confirmation feature
Total	Total number of invalid email addresses on the list

Summary

- Mailing List reports provide insight into the activities associated with your mailing lists.
- The List Subscription report can help you determine whether your mailing list size is growing or shrinking over time.
- The Import History report provides a summary of all import activities for your mailing lists.
- The Mailing History report allows you to see which messages have been sent to which of your mailing lists and when.
- The List Churn report measures the growth or decline in the size of your mailing lists over time.
- The List Status report provides summary data regarding your mailing lists, including last imports and mailings and the size of the list. You can also export your mailing lists from this report.

Need More Information?

For additional information regarding Mailing List reports, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 18: Customer Reports

Overview

The Customer Reports in DREAMmail allow you greater insight into the post-click activities of your clients, including purchase behavior. Customer Reports use spotlight technology to track these behaviors and identify these clients.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- List the two Customer Reports.

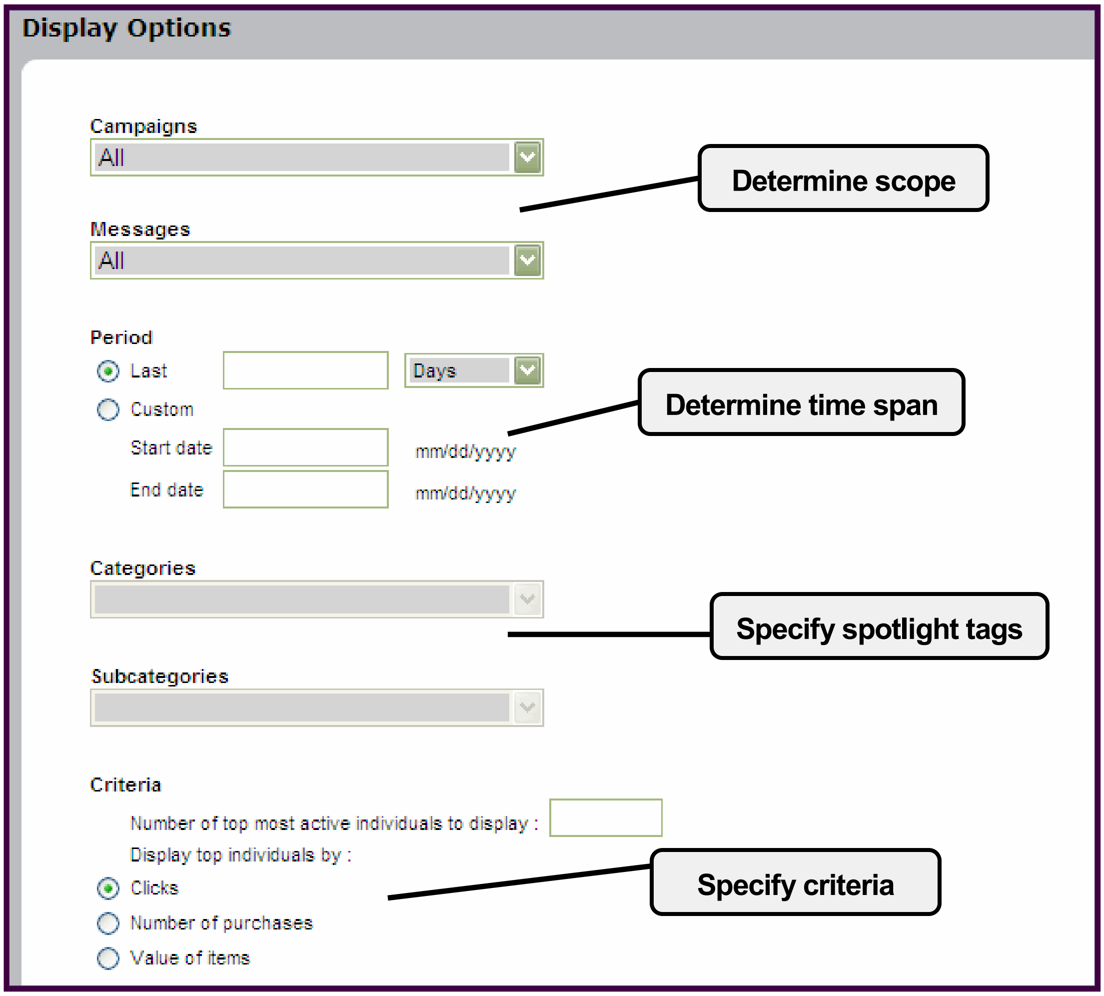
Key Terms

Spotlight: A feature in DREAMmail that tracks post click activities, such as purchases or other non-purchase activities (events), back to campaigns and messages.

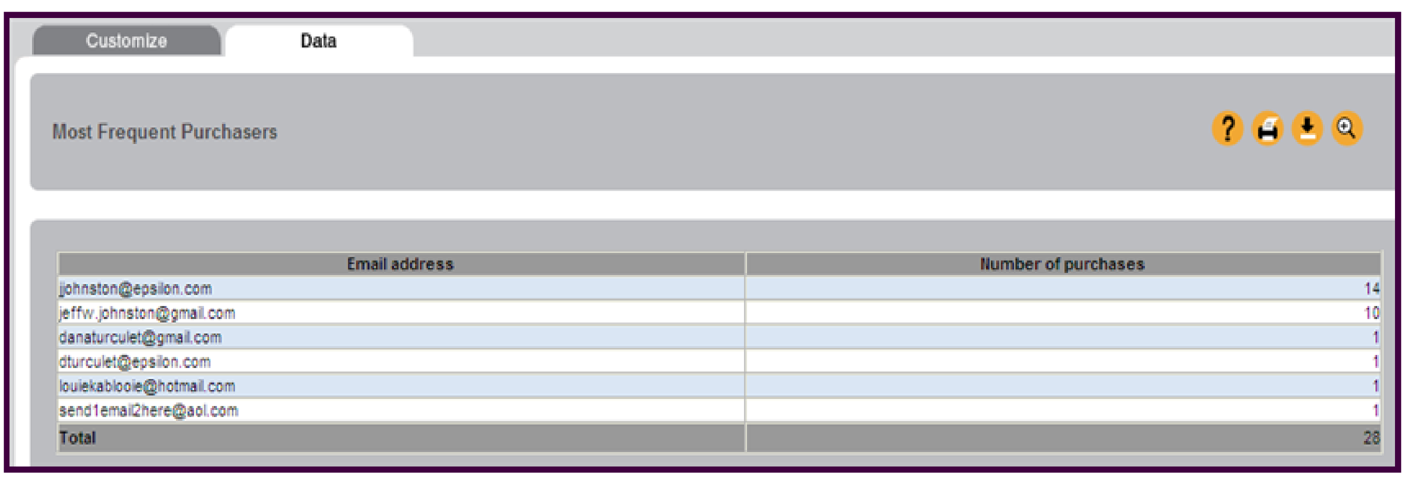
Most Active Customer Reports

The Most Active Customer Report enables you to identify your “most active” customers and generate new lists based on the frequency of certain types of customer activity, such as click-throughs, purchases, and value of purchases.

Requesting a Most Active Customers Report



Sample Most Active Customer



RFM Reports

The RFM (Recency-Frequency-Monetary) Report enables you to analyze your customer base to determine its ability to generate purchases and non-purchase responses. The reports provide data regarding:

- **Recency** — how recently customers made Spotlight purchase or event transactions
- **Frequency** — how often customers made Spotlight purchase or event transactions
- **Monetary value** — the monetary value of customers' purchases.

With the exception of the RFM Purchase Value report, the data that is displayed for each month is based upon transactions made during the 12 months that precede the current month. (The data for each month in the RFM Purchase Value report is based upon the purchases made during the corresponding month.)

For the RFM reports, DREAMmail takes a report "snapshot" on the first day of each month so that all transactions during the previous month can be summarized. For example, if you run the RFM Purchase Recency report in December 2004, its data will be based only upon transactions that were made between November 30, 2004 and December 1, 2003.

Sample RFM Report

Purchase Value | Purchase Multi-Buyer | Purchase Recency | Multi-Responders | Response Recency

12-Month Purchase Multi-Buyers

Date	Customers	Single	2	3	4+
Apr-2010	13,715,052	0	0	0	1
Mar-2010	N/A	0	1	0	1
Feb-2010	N/A	0	1	0	1
Jan-2010	13,114,047	0	1	0	1
Dec-2009	N/A	0	1	0	1
Nov-2009	114,186	0	1	0	1
Oct-2009	114,186	0	2	0	2
Sep-2009	105,185	0	2	0	2
Aug-2009	105,174	1	1	0	4
Jul-2009	105,174	1	1	0	4
Jun-2009	N/A	1	1	0	4
May-2009	105,174	1	1	0	4

Available Metrics

Metric	Used to...
Purchase Value	Indicate the number of active list subscribers whose total expenditures fell into specific price ranges and the average amount spent by individuals who made one or more purchases during a month
Purchase Multi-Buyer	Group the active list subscribers who made either singular or multiple purchases during the specified time period
Purchase Recency	Group the active list subscribers on the basis of when they made their most recent purchase
Multi-Responders	Group the active list subscribers on the basis of the number of non-purchase spotlight transactions
Response Recency	Group the active list subscribers on the basis of when they made their most recent non-purchase spotlight transaction

Summary

- The Customer reports in DREAMmail provide insight into the post-click activities of your customer, including purchase behavior.
- Customer reports are based on spotlight tag collection data.
- The Most Active Customer report allows you to see which of your customers clicked the most, make the highest number of purchases or spent the most money on your products.
- The Recency-Frequency-Monetary (RFM) report displays purchase responses over time, including the recency of last purchase, the number of times purchased and the value of the purchases.

Need More Information?

For additional information regarding Customer reports, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 19: Exporting Reports

Overview

DREAMmail enables you to export report data in a variety of ways. You can schedule recurring exports or you can export an ad hoc report to your desktop.

Objectives

Upon completion of this unit, you will have the knowledge and skills to:

- Export data directly from an ad hoc report.
- Schedule a report to be exported.
- Review exported data.

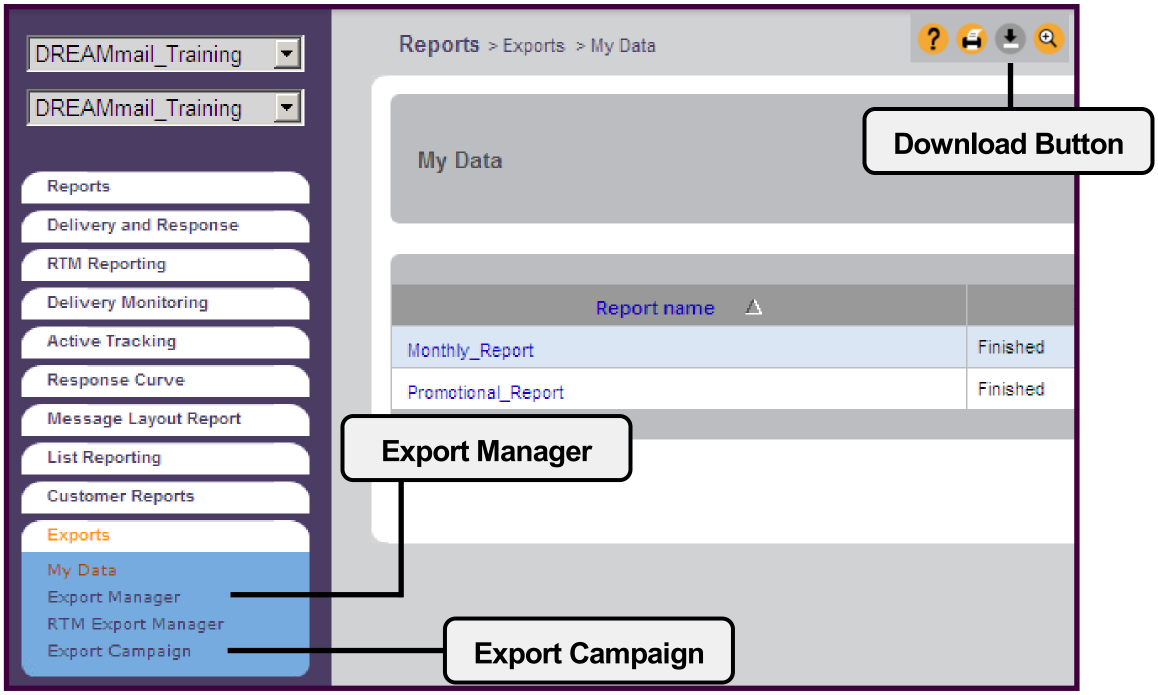
Key Terms

Export: To extract data from one system into a standard format file that can be loaded into another system.

Export Methods

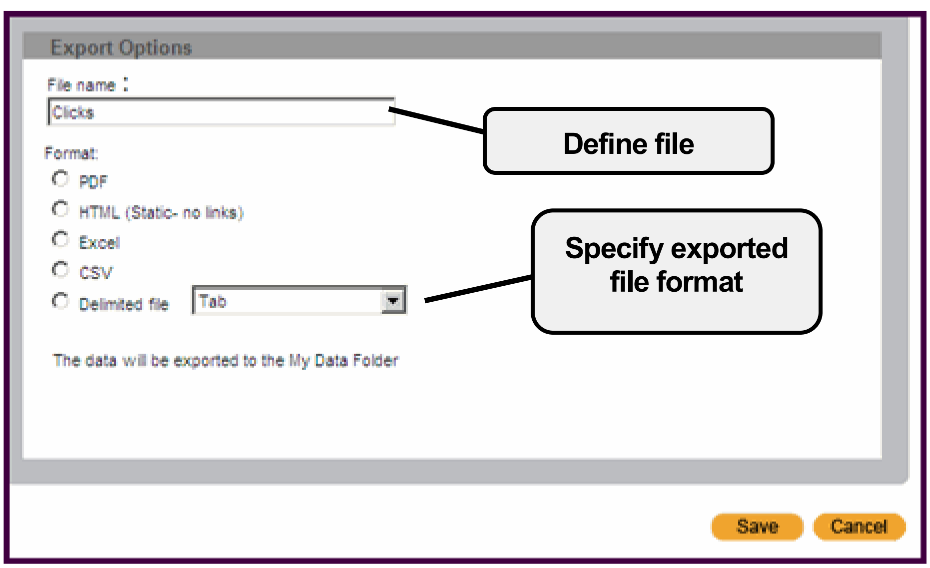
There are three ways to export reports from DREAMmail:

1. Clicking the **Download** button to export a specific report.
2. Use the **Export Campaign** feature to export specific metrics at a campaign level.
3. Use **Export Manager** to schedule reports to be exported to a DREAMmail SFTP site.



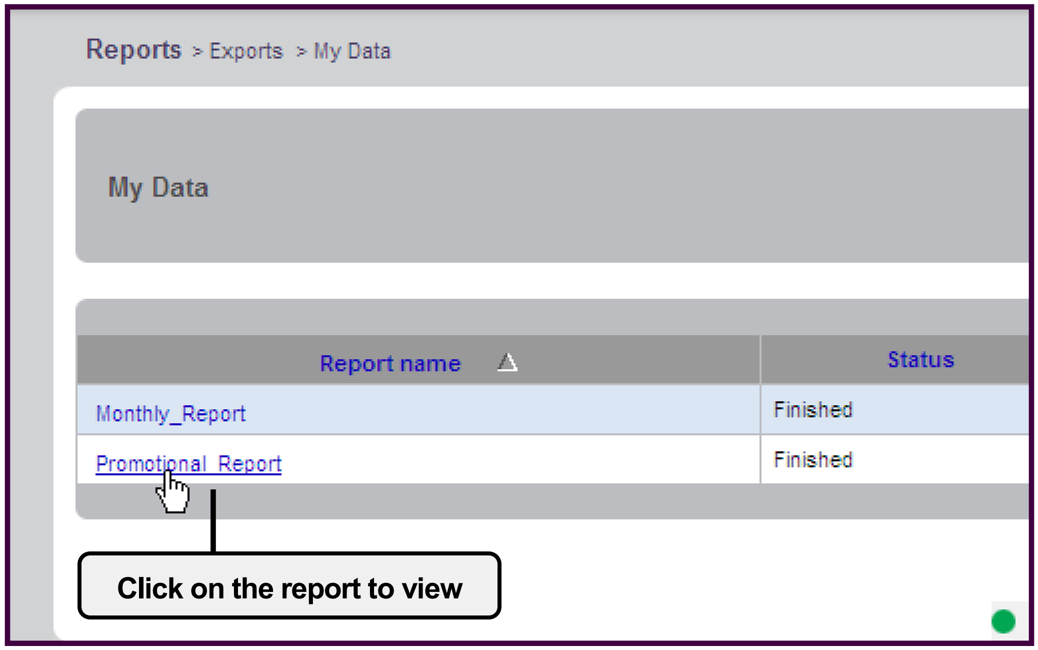
Using the Download Button

You can export your current report using the Download button.



Viewing a Downloaded Report

You can locate your downloaded reports by clicking on the **My Data** menu option under Exports.



Exporting a Campaign

The Export Campaign feature allows you to export data for individual messages or all messages within a specific campaign. You can export information regarding:

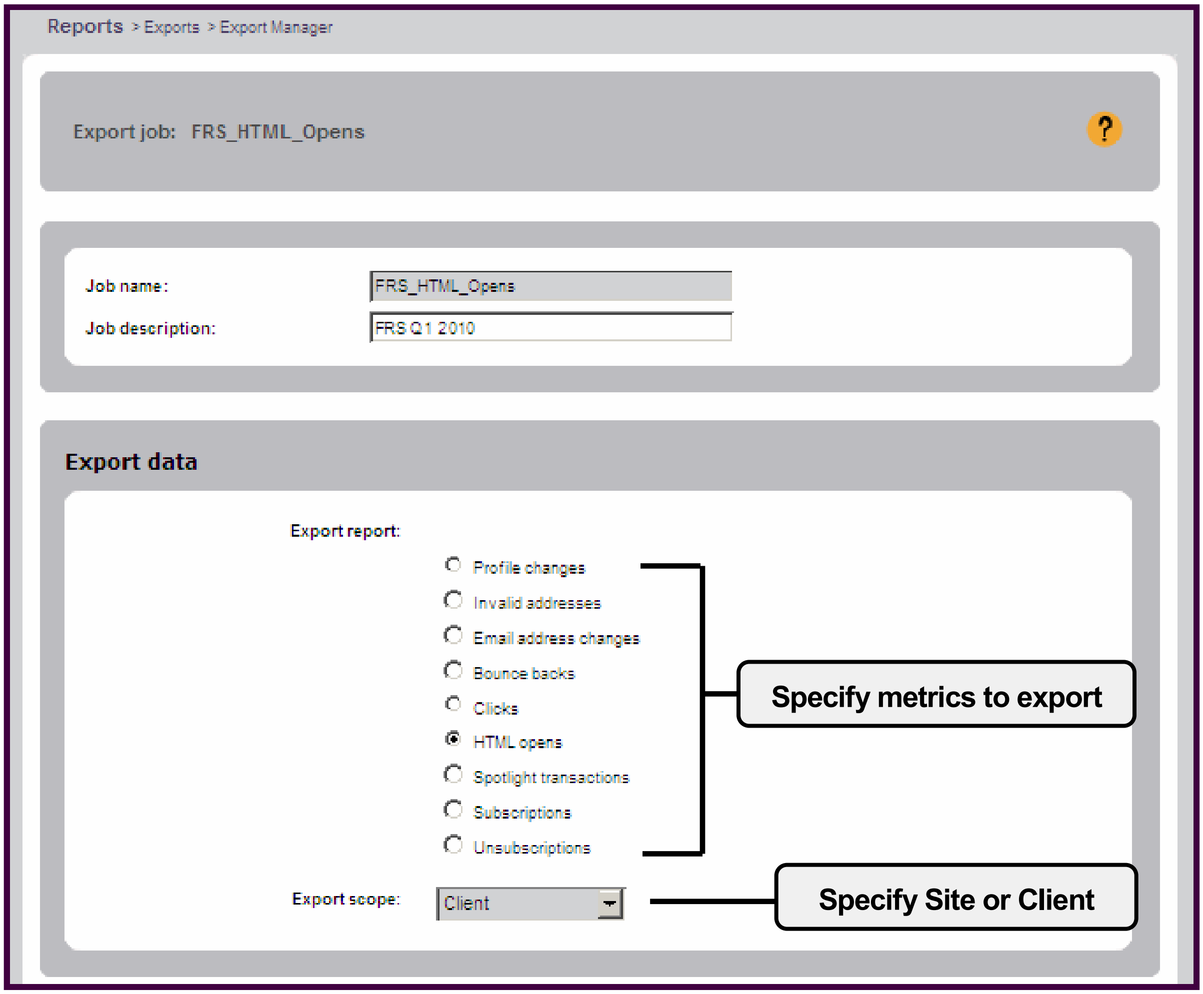
- Soft bounces
- Hard bounces
- Invalid email addresses
- Delivery errors
- HTML opened
- Pass along recipients
- Clicks
- Spotlight tags
- Unsubscribed

Once created, the report appears as a zip file in the My Data view. To open the report or save it to your desktop, click the name of the report and unzip the report.

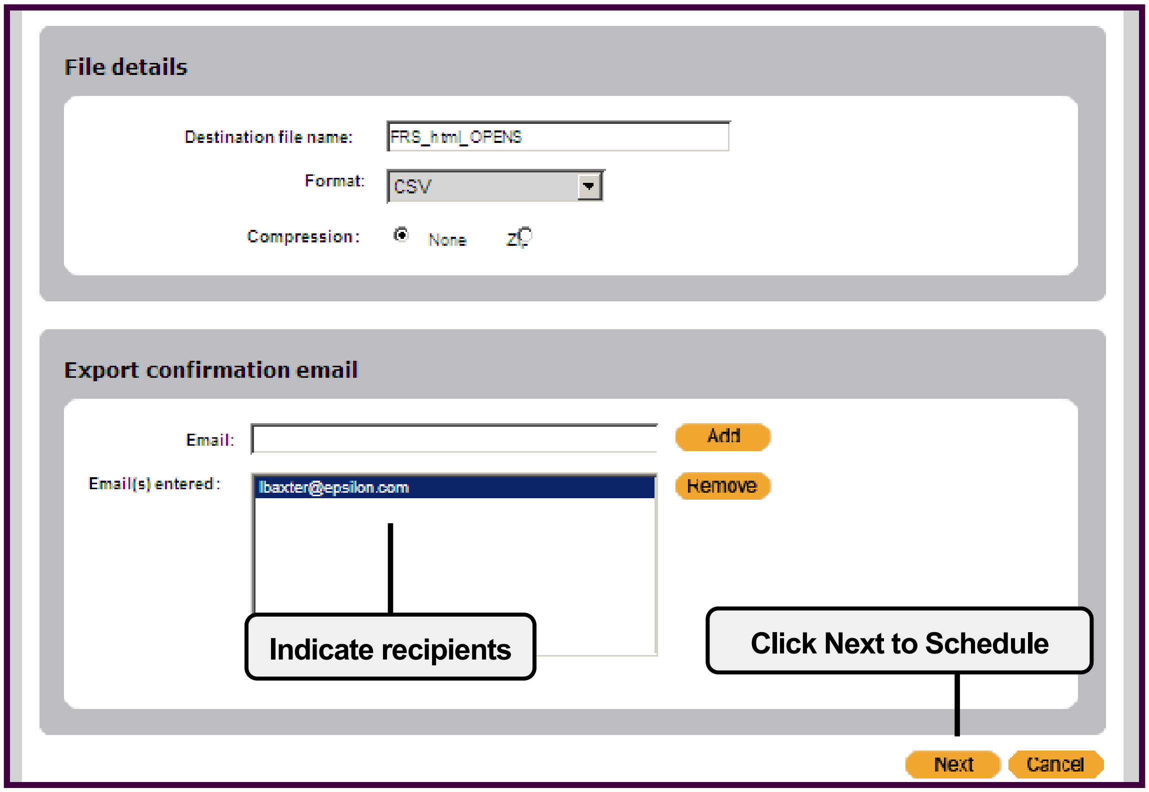
Scheduling Exports

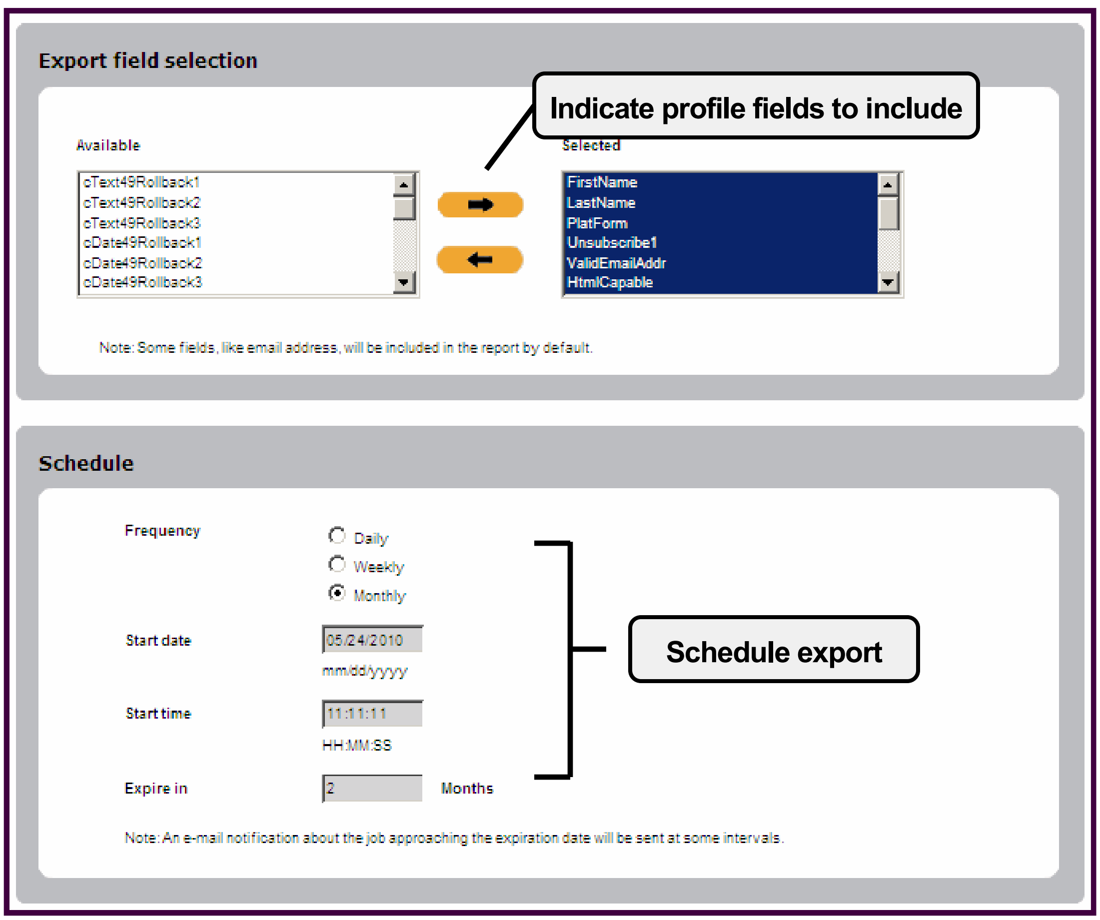
The Export Manager feature in DREAMmail allows you to schedule recurring report exports for automatic download to a DREAMmail FTP site. The exported reports are stored in a sub-folder entitled Report Exports. The same FTP site is used for your exported reports as is used for your mailing list imports.

Note: The FTP feature must be enabled to export reports.



Scheduling Exports





Summary

- There are several ways to export your data from DREAMmail.
- You can use the Download button to export the report you are currently viewing.
- You can view the exported report in the My Data section of DREAMmail.
- You can export standard data regarding your campaign, including bounces, opens and clicks, using the Export Campaign function.
- You can also schedule reports to be exported to a secure FTP site using the Export Manager function.

Need More Information?

For additional information regarding exporting reports, access the online Help files in DREAMmail or search the Learning Center for online and/or recorded sessions on this topic.

Unit 3: Creating Your Mailing List

Level 1: "I think I'm Ready"

Create a new proof mailing list for Fall River Sports Weekly Newsletter and grant yourself access to editing this list.

Hints: For this exercise, you will create a new mailing list and indicate it is for the Fall River Sports Weekly Newsletter. Generally you would indicate this in the name of the mailing list, but you could also this in the description of the mailing list. Select your name in the Available Users box and use the right arrow to grant yourself access to this list. This mailing list should be a Proof list. Save your list when finished.

Level 2: "I'm Confident I can do This"

Fall River Sports has recently opened a new franchise, Fall River Sports New Zealand. All subscribers to this site will be housed in a separate mailing list. Create the appropriate mailing list or lists to house the subscribers and to allow the marketing team to proof the mailings for this new franchise prior to deployment. Everyone on the marketing team has DREAMmail access and will need to edit the mailing list or lists.

Hints: For this exercise, you will need to create 2 new mailing lists. One will be a Standard mailing list to house the new subscribers for Fall River Sports New Zealand and a second list to house the individuals on the marketing team who will proof the mailings prior to deployment. You will probably want to indicate the list is for Bob' Sports New Zealand in both instances, either in the name of the lists or the description or both. In both instances, you will grant access to everyone to edit the lists. You will save both lists.

Level 3: "Bring it On!"

Fall River Sports has recently changed the proof and approval process for Fall River Sports. The entire marketing team is responsible for proofing the mailings, however, the Senior VP of Marketing is now responsible for approving specific messages prior to deployment. Although not every message will require approval, Bob's wants to ensure that the approval of specific emails is tracked and that this mailing list is always available, if needed. Only you are responsible for editing these lists.

Hints: For this exercise, you will create 2 new mailing lists. You will create a new Approval mailing list, giving yourself access to edit this list. You will make this a Permanent list so it will not be archived. You will also need to create a new Proof list, again giving yourself access to edit this list. Save both lists.

If you created a Proof list in the prior exercise, you will not be able to use this list because you had granted access to everyone in the prior exercise and this exercise limits edit access to just you. This is not something you can change on a mailing list once it's saved. You will probably want to inactivate the Proof list you created in the prior exercise so as not to confuse it with your new list. Or, if you did not complete the prior exercise, you can simply create a new Proof list.

Unit 4: Populating Your Mailing List—Manually Adding Subscribers

Level 1: "I think I'm Ready"

Fall River Sports New Zealand needs to be populated. The following individuals should be added to this new list:

- **jane@flo.delivery.com**
- **joe@flo.delivery.com**

HINT: If the site's member table already contains this email address, update the address and add it to the list.

Hints: For this exercise, you will access the Mailing List Manager and either click the Add button to create a new Proof mailing list (if you have not created one for a prior exercise) or click the Edit button to edit an existing list. Click Manually Add Subscribers to add the 2 names to the list. Save the mailing list when you are finished.

Level 2: "I'm Confident I can do This"

Fall River Sports has recently added another franchise, Fall River Sports West Coast. Bob Jones, the CEO of Fall River Sports will need to approve all email marketing messages sent for this new franchise. Bob's email address is bob.jones@fallriversports.com. Edit access to this list is limited to just you.
HINT: If the site's member table already contains this email address, update the address and add it to the list.

Hints: In this exercise, you will be creating a new Approval list. Grant access to yourself when creating this new mailing list. Manually add Bob's email address to the list and save the message.

Level 3: "Bring it On!"

The proof list for Fall River Sports New Zealand needs updating. The following individuals should be added to this list:

- **mary@flo.delivery.com**
- **sid@flo.delivery.com**

Hints: For this exercise, you are editing an existing mailing list to add the new subscribers. Use the orange action button next to the list and click on Manually Add Subscribers. Add the 2 new names to the list and save it. Because this subscriber may have already been added to DREAMmail by participants in prior classes, you may need to click the button to update the address and add it to your list.

Unit 4: Populating Your Mailing List—DREAMmail Web Imports

Level 1: "I think I'm Ready"

Fall River Sports needs to create a new house list for it's Fall River Sports New Zealand franchise. Create this list using the source file provided in training. The mailing list should contain all of the profile fields from the source file.

Hints: For this exercise, create a new Standard mailing list in DREAMmail or edit your list from a prior exercise. Using the file provided in training, import this file into your new mailing list. Map all of the profile fields from the source file into the profile fields in DREAMmail. Save the mailing list when finished. Be sure to refresh your screen by clicking on Mailing List Manager to see the total subscribers imported.

Level 2: "I'm Confident I can do This"

Fall River Sports needs to create a new mailing list for the subscribers to the Fall River Sports Weekly Newsletter. For this mailing list, only the email address is needed. Using the source file provided in training, import this file into DREAMmail.

Hints: For this exercise, create a new Standard mailing list in DREAMmail. Using the file provided in training, import the file and map only the email address. You do not need to map the other fields of the source file. Save your mailing list when finished.

Level 3: "Bring it On!"

Fall River Sports has additional members who need to be imported into the Bob Sport' house file. Locate this mailing list (or another house mailing list you created earlier) and import the subscribers from the "FallRiver_Subscribers.csv" file provided during training. All of the profile data will be used for this mailing list.

Hints: To complete this exercise, you will need to locate an existing house list and click the orange action button for the list. Click the Import Data option and locate the source file. Map all of the fields from the source file into the DREAMmail profile fields. Remember to refresh your screen when you have completed the import by clicking Mailing List Manager. Your mailing list size should increase to 1009 records.

Unit 4: Populating Your Mailing Lists—FTP Imports

Level 1: "I think I'm Ready"

The marketing department at Fall River Sports would like you to import a very large file containing new subscribers. The file is named "New_Subs_Houselist" and is tab delimited and 12MB compressed. The file contains the list of subscribers for the Fall River Sports mailing list. This source file contains the following headers:

- Email Address
- Gender
- State

Hints: For this exercise, you will need to add the list of new subscriber's to the Fall River Sports house file. Because the source file is larger than 10MB, you will need to create an FTP import job to do this. Create the FTP import job as a subscription action, add the source file to the Fall River Sports house file mailing list, indicate the format type as tab delimited and enter your name for the confirmation email. Map all of the fields into DREAMmail. Save the import job.

Level 2: "I'm Confident I can do This"

Fall River Sports would like their subscriptions automatically added to the Fall_River_Sports_Houselist mailing list. A file containing subscriptions will be available on a weekly basis and is called "Weekly_Subscriptions_XX-XX-XXXX" with the X's indicating the date the file was posted. The file will be delimited with double pipes and contains the following headers:

- Email Address
- Gender
- State
- First Name

Hints: For this exercise, you are creating an FTP job to accept automatic updates to the Fall River Sports house list. Create the FTP import job as a subscription action, add the source file to the Fall River Sports house file mailing list using a wildcard (Weekly_Subscriptions_*), indicate the format type as double pipe delimited and enter your name for the confirmation email. Map all of the fields into DREAMmail. Save the import job.

Level 3: "Bring it On!"

Fall River Sports would like their subscriptions automatically added to the Fall River Sports main mailing list. A file containing subscriptions will be available on a weekly basis and is called "Weekly_Subscriptions_XX-XX-XXXX" with the X's indicating the date of the file. The file will be delimited with double pipes and contains the following profile fields:

- Email Address
- Gender
- State

However, Fall River Sports does not want to use the State profile field.

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Unit 5: Managing Your Mailing List—Deleting and Merging Lists

Level 1: "I think I'm Ready"
Fall River Sports is no longer using the current proof list. Remove this list from view.

Hints: For this case, you will inactivate the current proof list for Fall River Sports. You can use the orange action button to do so or you can use the check box and the Make Inactive button. You are simply removing the list from view but not deleting it.

Level 2: "I'm Confident I can do This"
Fall River Sports would like to have one proof list that contains all of the proof lists you have created. The old proof lists will no longer be used. Create this new list.

Hints: For this exercise, you will merge all of the proof lists into one list. You can empty the prior mailing list or lists following the merge and/or you can inactivate them.

Level 3: "Bring it On!"
Fall River Sports would like to create a new mailing list that contains all of the subscribers for all of the house lists that you have created in prior exercises. However, they would like to continue to use the other mailing lists, as needed. Create this new list.

Hints: For this exercise, you will merge all of the proof lists you have created but you will not empty them following the merge into the new list. Because the individual lists may still be used, you will not inactivate the mailing lists.

Unit 5: Managing Your Mailing List—Viewing and Modifying Lists

Level 1: I think I'm Ready to Try This!
Locate the main subscriber list for Fall River Sports. View the records for all subscribers on this mailing list.

Hints: For this exercise, you will use the orange action button in front of the Fall River Sports House List and click on Edit Members. Click the View button and select the fields you want to display. You can use the Show All button to display the fields if you are unsure which profile fields belong to the list. Click Mailing List Manager when you are finished.

Level 2: I am Confident I can do This!
Obtain a count of just the females living in New York who are part of the Fall River Sports main mailing list. How many subscribers (both valid and invalid) are on this list?

Hints: For this exercise, you will need to locate and filter the Fall River Sports House List. Select the filter criteria:

- Gender is Female
- State is NY

Indicate "AND" as the relationship between these profile fields and save the filter. Next, click on the View button to view the filtered list. The count displays at the top of this screen.

Level 3: Bring it on!
Locate all female subscribers at the domain "flo-delivery.com" for the Fall River Sports house list. Generate a new mailing list.

Hints: For this exercise, you will need to locate and filter the Fall River Sports House List. Select the filter criteria:

- Email Address contains Flo

Save this filter. Next, click on the View button to view the filtered list. Once you see the list, click the Generate List button to create and name your new list. Click on Mailing List Manager to ensure your list has been saved.

Unit 6: Working with Subscriber Records

Level 1: I think I'm Ready to Try This!

Locate your subscriber record in DREAMmail and modify any of your profile fields except your email address.

Hints: For this exercise, you will locate and edit the subscriber record you entered into DREAMmail for a prior exercise. Using the Subscriber Manager, search all records using you email address as the filter. Once located, click on your email address and modify the data in one of your profile fields, e.g. first or last name. Save the record once you have made the change.

Level 2: I am Confident I can do This!

Locate a subscriber record in DREAMmail and unsubscribe this person from a mailing list to which he or she is currently subscribed. Do not use your own subscriber record.

Hints: For this exercise, you can use any profile field to locate a subscriber record, e.g. gender or first name. Once you have accessed a subscriber record and clicked on the email address for the subscriber, click on the Site Profile Fields tab, select the appropriate site and click the "True" radio button for the Unsubscribe field. Save the record when you are done.

Level 3: Bring it on!

Locate the subscriber record for someone at the domain "flo-delivery.com." Select any record and unsubscribe this person from the Fall River Sports House List mailing list.

Hints: For this exercise, you will need to view just those subscriber records whose domain is flo-delivery.com. You can do this by searching for Email Addresses ending with this domain. Once you have located a record, click the List Membership tab and using the right arrow, unsubscribe this person from the Fall River Sports House List mailing list.

Unit 7: Creating Addresses

Level 1: "I think I'm Ready"

Fall River Sports needs to change the address to which new subscriptions are processed. All subscriptions for Fall River Sports will be processed via a new address link in the marketing messages being sent. New subscribers should be added to Bob's main house file. Create the appropriate address.

Hints: For this exercise, you will need to create a new subscription address. Indicate the action as subscription and the mailing list as Fall River Sports House File. You are not required to create a notification message. If you are having trouble saving, be sure you are using a unique name for the address.

Level 2: "I'm Confident I can do This"

Fall River Sports needs to change the address to which new subscriptions and unsubscriptions are processed. All subscriptions and unsubscriptions will be processed via a new link in the marketing messages being sent. Subscriptions for this campaign will be added to Fall River Sports main mailing list. Unsubscriptions will be handled at the Site level. Fall River Sports would like to send a notification for all unsubscriptions. Create a new subscription and an unsubscription address for this campaign.

Hints: For this exercise, you will need to create both a new subscription and unsubscription address. Indicate the action as list subscription and the mailing list as Fall River Sports House File for the subscription address. Indicate the action as site unsubscription for the site. You are not required to create a notification message for the subscription address but should for the unsubscription address. If you are having trouble saving, be sure you are using a unique name for the address.

Level 3: "Bring it On!"

Fall River Sports needs to change it's subscription and unsubscription process. All subscriptions and unsubscriptions will be processed via a link in the marketing messages being sent. All subscriptions will be processed to Fall River Sports main mailing list and to another mailing list of your choice. The company has determined that recipients who wish to unsubscribe should not receive any additional messages from any of Fall River Sports subsidiaries except confirmation that the request has been processed. Create both a new subscription and unsubscription address.

Hints: For this exercise, you will need to create both a new subscription and unsubscription address. Indicate the action as list subscription and the mailing list as Fall River Sports House File for the subscription address. Indicate the action as site unsubscription for the client. You are not required to create a notification message for the subscription address but should for the unsubscription address. If you are having trouble saving, be sure you are using a unique name for the address

Unit 8: Working with Campaigns

Level 1: "I think I'm Ready"

Fall River Sports wants to run an after-holiday sale on excess merchandise. The campaign will expire in one month. The messages in this campaign do not require approval prior to deployment. Create a campaign for this marketing initiative.

Hints: For this exercise, you will create a new campaign. The campaign will expire one month from when you created it. Select a Proof list for this message but do not select an Approval list or indicate the campaign requires approval before messages can be sent. Select your default addresses and save your campaign. You do not need to do anything with the Message Footer or Profile Update Notification fields.

Level 2: "I'm Confident I can do This"

The marketing team at Fall River Sports would like to initiate a monthly newsletter for hockey fans and for football fans. Both newsletter require approval by Bob Jones, the CEO of Fall River Sports. Bob's email address is: bob.jones@fallriversports.com. Create the campaign(s) for the newsletters.

Hints: For this exercise, you will create two new campaigns—one for the hockey issue and one for the football issue. Select a Proof list, indicate messages require approval, select an Approval list and enter the email address for Bob Jones in the Publisher's email address field. Select your default addresses and save your campaign.

Level 3: "Bring it On!"

List some of the many ways in which campaigns can be organized for both promotional ads and newsletters.

Hints: There are numerous ways in which campaigns can be organized, depending on your business needs, including by:

- Date—daily, weekly, monthly, yearly
- Business organization—division, region, office
- Product type
- Email type—newsletter, promotional ad, announcement

Unit 9: Creating a Message—Create Text, AOL and HTML Messages

Level 1: "I think I'm Ready"
Fall River Sports would like to create a follow up email reminding their text only subscribers of the free shipping offer for any products purchased in the next two weeks. Use the "Bob-text_2" file provided for training to target this message to Bob's main mailing list. The message will be sent at a later date. HINT: You can ignore the Subscription and Unsubscription address links and the Message Settings section of the UI for this exercise.

Hints: For this exercise, you will need to locate the appropriate file and create a new email message. The message is intended for only those recipients who received text only, so only the Text tab should be completed. You can create this message under any campaign. Locate and copy the file and paste it into the Text tab of the email. Select Fall River Sports House List mailing list for the mailing list. Save the message.

Level 2: "I'm Confident I can do This"
Fall River Sports would like to create a new message for their latest sale on helmets. Bob has asked you to create a message for all text only and AOL legacy subscribers. The message content can be found in the "Bob-text_3" file. The message will be sent to Bob's main mailing list at a later date. HINT: You can ignore the Subscription and Unsubscription address links and the Message Settings section of the UI for this exercise.

Hints: For this exercise, you will create a text only message and convert the message to the AOL format. Compose this message under the last campaign you created. Locate the appropriate file, copy the contents and paste them into the Text tab of a new email. Click the Text to AOL button to create the AOL version of the message. Target the message to the Fall River Sports House File mailing list. Save the message.

Level 3: "Bring it On!"
Fall River Sports is running a special on bicycles. The creative team at Fall River Sports has provided the content for the message. The content is in a file called "Bob-HTML_4" and one called "Bob-Text_4". Use these files to create the message to the subscribers of Fall River Sports main mailing list. HINT: You can ignore the Subscription and Unsubscription address links and the Message Settings section of the UI for this exercise.

Hints: For this exercise, you will create a message in all three formats. Compose the message by copying the text file and pasting it into the Text tab. Convert the text to AOL by clicking the Text to AOL button. Copy the HTML source code and paste this into the HTML editor—be sure to click the Source Code button and highlight the existing code before pasting in the new code. Select the Fall River Sports House List as your targeted mailing list and save the message.

Unit 9: Creating a Message—Adding Address Links to Messages

Level 1: “I think I’m Ready”

Locate the message you created for the Level 1 activity in the prior exercise. Add the subscription and unsubscription address links to the text format message.

Hints: For this exercise, you will need to locate and edit the appropriate message. Click the orange action button and select Edit to make changes to the message. In the Compose section, click the Insert button and select Subscription Address and click Add to Body. Be sure your cursor is in the correct location. Do the same for the Unsubscription Address. Save the message.

Level 2: “I’m Confident I can do This”

Locate the message you created for the Level 2 activity in the prior exercise. Add the subscription and unsubscription address links to the text and AOL format messages.

Hints: For this exercise, you will need to locate and edit the appropriate message. Click the orange action button and select Edit to make changes to the message. In the Text tab, click the Insert button and select Subscription Address and click Add to Body. Be sure your cursor is in the correct location. Do the same for the Unsubscription Address. Click on the AOL tab and locate the position for the address links. Enter the appropriate HTML code to start the address link, click the Insert button, select the Subscription address option and click Add to Body. Enter the remainder of the HTML coding to make the link clickable. Click the Preview button to verify your coding is correct. Save the message.

Level 3: “Bring it On!”

Locate the message you created for the Level 3 activity in the prior exercise. Add the subscription and unsubscription address links to the HTML format messages.

Hints: For this exercise, you will need to locate and edit the appropriate message. Click the orange action button and select Edit to make changes to the message. In the HTML tab, position your cursor where you would like to enter the address and type the name of the link. Highlight the link and click the Hyperlink button. Select Mailto: as the source and enter the email address for the Subscription Address link. Repeat this process for the Unsubscription Address link. Click the Preview button to verify your links are clickable and that they open an email.

Unit 9: Creating a Message— Track URLs and Message Settings

Level 1: "I think I'm Ready"

Locate the text only format message you created for the Level 1 activity in the prior exercise. Track all of the URLs in the message and autosense the message for all new subscribers. Save the message.

Hints: For this exercise, you will need to locate a message you created in a prior exercise. Edit the message by clicking the orange action button and selecting Edit. Scroll up to the Compose section of the screen and click the Track URLs button. You can check each box or click the All button to track all of the URLs. Save your tracked URLs and scroll down to the Message Setting box. Click the check box in front of Autosense HTML capability. Save your edits.

Level 2: "I'm Confident I can do This"

Locate the text and AOL messages you created for the Level 2 activity in the previous exercise. Perform the following edits:

- Autosense the message.
- Change the subscription and unsubscription address defaults.
- Track all URLs.
- Save the message.

Hints: For this exercise, you will need to locate a message you created in a prior exercise. Edit the message by clicking the orange action button and selecting Edit. Scroll down to the compose section of the screen and click the Track URLs button. You can check each box or click the All button to track all of the URLs. Save your tracked URLs and scroll down to the Message Setting box. Click the check box in front of Autosense HTML capability. Using the drop down menus, select a different subscription and unsubscription address (if available). Save your edits.

Level 3: "Bring it On!"

Locate the message you created for the Level 3 activity in the previous exercise. Fall River Sports is requesting that you:

- Ensure everyone is autosensed.
- Send both text and HTML message to all subscribers.
- Track only the URLs associated with the HTML message.
- Create simple URL labels for reporting purposes.
- Change the default subscription address.

Hints: For this exercise, you will need to locate a message you created in a prior exercise. Edit the message by clicking the orange action button and selecting Edit. Scroll down to the compose section of the screen and click the Track URLs button. Check each box in front of the URLs associated with the HTML message. Click the Generate button and re-label the URLs. Save your tracked URLs and scroll down to the Message Setting box. Click the check box in front of Redo Autosense HTML capability and Send Multipart Message. Using the drop down menus, select a different subscription address (if available). Save your edits.

Unit 10: Using the HTML Editor

Level 1: "I think I'm Ready"

Fall River Sports would like you to change the HTML format message you created for the last exercise. Fall River Sports is requesting the following changes:

- Increase the font size of the text to 3.
- Replace the word "golf" in the paragraph with "hiking"

Hints: For this exercise, you will need to locate and edit your last message. Click the orange action button and select Edit. Click on the HTML tab, highlight the text and click the Size button on the toolbar. Select "3" as the size. Delete the word "golf" and type the word "hiking." Save your changes.

Level 2: "I'm Confident I can do This"

Fall River Sports would like you to make some changes to the HTML format message you created for the last exercise. Fall River Sports is requesting the following changes:

- Increase the size of the image to 250 by 300.
- Add a border around the image.
- Bold the name of the shoe in the text and change the color of the font to red.

Hints: For this exercise, you will need to locate and edit your last message. Click the orange action button and select Edit. Click on the HTML tab. Click on the image and click the Image button on the toolbar. Increase the height and width of the image and click the Border Style option. Click on any of the border options. Highlight the word "Jogmaster2K" in the text and click the Bold button and the font color palette. Select a red font. Save your changes.

Level 3: "Bring it On!"

Fall River Sports would like you to make several changes to the HTML format message you created for the last exercise. Fall River Sports is requesting the following changes:

- Increase the spacing around the current image by 10 pixels.
- Locate the file, "Bob_HTML_5." and add this new image to the bottom right hand corner of the message.
- Add a hyperlink to your favorite sports website, e.g. nba.com.

Hints: For this exercise, you will need to locate and edit your last message. Click the orange action button and select Edit. Click on the HTML tab. Click on the image and click the Image button on the toolbar. Increase the spacing around the image by adding 10 pixels to the top, bottom and sides. Locate the new file and paste it into the image. Indicate the alignment of the image as bottom right. Type the link to your new website in the text of the message, highlight it and click the Hyperlink button. Enter the address for the website in the address field. Save your changes.

Unit 11: Proofing Your Emails

Level 1: "I Think I'm Ready"

Locate the message you created for the last activity and proof all three formats of this message to yourself. Do this without editing the message itself. Open and review the three messages you receive.

Hints: For this exercise, you will need to locate a message from a prior exercise that contains all three message formats. From Mailing List Manager, click the checkbox next to the message you want to proof and click the Proof button. In the Message Proofing dialog box, enter your email address in the Send the Proof Message to Email Address(es) box. Access your email application and open all three message formats for this email.

Level 2: "I'm Confident I Can Do This"

Select a previously created message and send for proofing to your proof list. Access your email and proof the message using the Proofing Checklist. Edit the message, making one change to the text message and reproof just the text portion of the message.

Hints: For this exercise, you will need to locate a message from a prior exercise that contains all three message formats. From Mailing List Manager, click the checkbox next to the message you want to proof and click the Proof button. In the Message Proofing dialog box, select a Proof list to send the message to, being sure your name is on the proof list. Access your email application and open all three message formats for this email. Return to DREAMmail and edit the message. Make a modification to the text message and click the Proof button at the bottom of the screen. In the Proof Message dialog box, uncheck the marks for the HTML and AOL formats so you will proof just the text version. Send the text message again for proofing. Access your email application and verify that only the text message was resent for proofing.

Level 3: "Bring It On!"

Set up a new campaign that requires messages to be approved before being deployed. Assign a classmate as the approver of the message. Create a text only message using a text file provided in training and send this message for approval. Check the status of the approval. Have your classmate approve the message and check the status again.

Hints: For this exercise, you will need to create a new campaign. In Campaign Manager, indicate the messages for the campaign must be approved and enter an email address in the Publisher's field. Create a new text only message for this campaign using the "Bob-text.txt" file. Save the message. Click the orange action button next to this message and click the Send for Approval option and then check the status of the message using the View Approval Response option. Have your coworker or classmate approve the message using the link in the email.

Unit 12: Sending Your Email

Level 1: “I think I’m Ready”

Select a message from one of your campaigns and send it immediately.

Hints: For this exercise, you will need to locate a message from a previous exercise. Click the orange action button next to the message and click the Send option. Click OK through the confirmation boxes and watch the 30-second countdown.

Level 2: “I’m Confident I can do This”

Select a message from a prior activity and schedule it to be sent 10 minutes from now .

Hints: For this exercise, you will need to locate a message from a previous exercises that has not been sent. Click the orange action button next to the message and click the Send Rate option. Select the send rate of 1K/hr and click OK through the confirmation boxes. Next, click the Send option again using the orange action button. Click the radio button next to date and schedule the message to be deployed 10 minutes from now. Click OK through the confirmation boxes.

Level 3: “Bring it On!”

Select a message from a prior activity and schedule it to be sent next week with a deployment rate of 5,000 messages per hour.

Hints: For this exercise, you will need to locate a message from a previous exercises that has not been sent. Click the orange action button next to the message and click the Send Rate option. Select the send rate of 5K/hr and click OK through the confirmation boxes. Next, click the Send option again using the orange action button. Click the radio button next to date and schedule the message to be deployed seven days from now. Click OK through the confirmation boxes.

Unit 13: Targeting Your Message

Level 1: "I Think I'm Ready"
Access a message you created for a prior exercise activity and edit this message. Be sure the Fall River Sports main house file is included as the target mailing list. Filter this message for just females living in California. Count the number of targeted recipients.

Hints: For this exercise, locate a message from a prior exercise that has not been sent. Click the orange action button and select the Edit option. Be sure the Fall River Sports House File mailing list is selected. Click the Filter tab. In the Profile Field box, select the "Gender" profile field. Select "is" for the operator. Type "F" for the value and click the Add button. The condition will appear in the Expression Builder section. In the Profile Field box, select "State." Select "is" for the operator. Type "CA" in the value field and click the Add button. The condition will appear in the Expression Builder section. Indicate the relationship between the conditions as "AND" in the Expression Builder section. Save the message. Using the orange action button, select Count and enter your email address. View the count in your email provider.

Level 2: "I'm Confident I Can Do This"
Access a message you created for a prior exercise activity and edit this message. Be sure the Fall River Sports main house file is included as the target mailing list. Target this message to females living in California who have joined within the last 10 days.

Hints: For this exercise, locate a message from a prior exercise that has not been sent. Click the orange action button and select the Edit option. Be sure the Fall River Sports House File mailing list is selected. Click the Filter tab. In the Profile Field box, select the "Gender" profile field. Select "is" for the operator. Type "F" for the value and click the Add button. The condition will appear in the Expression Builder section. In the Profile Field box, select "State." Select "is" for the operator. Type "CA" in the value field and click the Add button. The condition will appear in the Expression Builder section. Indicate the relationship between the conditions as "AND" in the Expression Builder section. In the Response Data field, select Pass Along and click Add. Indicate the recipient joined the list within the last 10 days. Save the message.

Level 3: "Bring It On!"
Access a message you created for a prior exercise activity and edit this message. Be sure the Fall River Sports main house file is included as the target mailing list. Re-target this message to only those recipients who received a message for the Spring_Specials campaign and who opened the message.

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Hints: For this exercise, locate a message from a prior exercise that has not been sent. Edit the message. Be sure Fall River Sports House File mailing list is included. Click the Prior Mailings tab and the Change button. Select the Spring_Specials campaign for inclusion and click OK. Save the message.

Unit 14: Personalizing Your Message

Level 1: "I Think I'm Ready"

Fall River Sports would like to add the subscriber's first name to a message they are about to send. Create a new text only message using the "Bob_txt_5" file and add the first name to the top of the message. Proof the message to your own email address.

Hints: For this exercise, you need only create a text version of the message. In the Message Composer, add a couple of blank lines to the top of the message body, type "Dear," click the insert button to add the FirstName profile field and type a comma. Save the message. Proof the message to your email address.

Level 2: "I'm Confident I Can Do This"

Fall River Sports would like to promote different products based on the subscriber's gender for their next marketing email. If the subscriber is female, Fall River Sports would like to promote new school athletic tops and shorts. If the subscriber is male, Fall River Sports would like to promote athletic shoes of all kinds. You can assume the gender profile field is always completed. Create a new text only message using the "Bob_txt_5" file. Fall River Sports wants to be sure the personalization works for the subscribers on the list.

Hints: For this exercise, you need only create a text version of the message. In the Content Manager, create two conditional content segments—one for females with the shirts/shorts content and one for males with content regarding shoes. In the Message Composer, locate an appropriate position for this content and click the insert button. Click on Content Segment and locate the segment your created. Add this to the body of your message. Proof the message to your email address using profile data from the mailing list.

Level 3: "Bring It On!"

Fall River Sports would like to make their emails more personal to recipients. Fall River Sports would like to use the subscriber's first name at least twice in the next text email, including in the subject line. In addition, Fall River Sports has an overstock of bicycles in New York and golf equipment in California. Create a text only message using the "Bob_txt_4" file and add dynamic content to create interest in these products in these locations. Fall River Sports would like you to make anyone who is not living in CA or NY aware of the weekly special on weight-lifting equipment at all Fall River Sports stores.

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Hints: For this exercise, you need only create a text version of the message. In the Content Manager, create two conditional content segments—one for those in NY with the bicycle content and one for those in CA with content regarding golf equipment. Create the default content for anyone not living in NY or CA. In the Message Composer, locate an appropriate position for this content and click the insert button. Next, Add a couple of blank lines to the top of the message body, type "Dear," click the insert button to add the FirstName profile field and type a comma. Add the first name to the subject line as well. Then, click Insert and Content Segment to locate the segment your created. Add this to the body of your message. Proof the message to your email address using profile data from the mailing list.