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DREAMmail User Guide

Version 5.0

Epsilon Learning

Delivering Your Knowledge

Contents

Preface

About this Guide

This guide is part of the set of documents that describe DREAMmail, and is a comprehensive guide for DREAMmail users. This guide covers all aspects of DREAMmail with complete descriptions of all DREAMmail functionality.

How this Guide is Organized

This guide is divided into the following chapters:

Chapter	Description
Understanding DREAMmail	Provides a detailed overview of DREAMmail including information on: ▪ Additional DREAMmail tools ▪ Using DREAMmail Help ▪ Available modules in DREAMmail ▪ Available reports in DREAMmail ▪ Using the Support buttons ▪ Tips for entering data into fields ▪ Determining the version of DREAMmail
Setting Up DREAMmail	Provides detailed information on DREAMmail administrative tasks that must be completed before users can start deploying campaigns in DREAMmail.
Managing Mailing Lists	Provides detailed information on: ▪ Managing subscribers ▪ Managing mailing lists ▪ Managing FTP import jobs
Managing DREAMmail Email Addresses	Provides detailed information on composing: ▪ From, Subscription, and Unsubscription addresses ▪ Triggered Message addresses ▪ Reply-To Addresses

Chapter	Description
Managing Campaigns	Provides detailed information on creating, editing, deleting, reactivating, and deactivating campaigns.
Managing Messages	Provides detailed information on: ▪ Using the QuickSend Message Wizard ▪ Composing messages ▪ Managing existing messages ▪ Managing content segments ▪ Using templates in messages ▪ Creating business rules for messages ▪ Creating offer tables
Validating Messages	Provides detailed information on validating messages, including: ▪ Proofing messages ▪ Approving messages
Using Filters	Provides detailed information on using filters, including: ▪ Creating, editing, and saving filters ▪ Creating Custom SQL filters ▪ Creating filters to target messages and to edit mailing lists
Managing Data Hygiene	Provides detailed information on creating, editing, deleting, enabling, and viewing hygiene rules.
DREAMmail Reports	Provides detailed information on using DREAMmail reports.

Related Documents

Related documents include:

- *DREAMmail 5.0 Real-Time Messaging Guide*
- *DREAMmail 5.0 List Generator Guide*
- *DREAMmail 5.0 Ad Manager User Guide*
- *DREAMmail 5.0 Programming Guide*
- *DREAMmail 5.0 Advanced Messaging Guide*

Conventions Used in this Guide

The following conventions are used in this guide:

Convention	Use
Boldface font	Menu options, button names, key words
`Courier` font	Code examples
Italic font	Section and document titles

Understanding DREAMmail

This chapter includes the following information:

- **Understanding DREAMmail**
- **Deploying Campaigns**

Understanding DREAMmail

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

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

Once your message is sent, DREAMmail tracks delivery and response data, including such data as:

- The number of messages opened
- The number of messages not delivered
- The number of times that links in the message were clicked
- Purchases resulting from the message

You can analyze this data using DREAMmail reports to determine the effectiveness of your campaigns.

This section includes the following information:

- **Additional DREAMmail Tools**
- **Using DREAMmail Help**
- **Available Modules in DREAMmail**
- **Available Reports in DREAMmail**
- **Using the Support Buttons**
- **Tips for Entering Data into Fields**
- **Determining the Version of DREAMmail**
- **Using a Static Network Address Translation**

Additional DREAMmail Tools

Along with the features available in the DREAMail application itself, there are additional DREAMmail tools you can use in the deployment of campaigns. These tools include:

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

Note: Information on using these additional tools are included in their specific guides.

Using DREAMmail Help

DREAMmail Help provides context-sensitive help files to describe the features available in the DREAMmail application.

Available Modules in DREAMmail

The table below describes the DREAMmail modules. However, if your user account has not been granted a specific user privilege, the associated menu item or module may not appear in the menu.

Module	Description
Client Setup	Enables you to configure client settings, such as: ▪ Bounce back and autosense thresholds ▪ Exclusion rules ▪ The List Generator **Note:** This module is for DREAMmail administrators only.
Site Setup	Enables you to create new sites in a client and to configure preferences for the sites. **Note:** This module is for DREAMmail administrators only.
Addresses	Enables you to create and manage the DREAMmail email addresses used in campaigns.
Filters	Enables you to create and manage filters for use in messages and mailing lists.
Hygiene Rules	Enables to you create and manage data hygiene rules that are applied to data being imported into your mailing lists.
Mailing Lists	Enables you to create and manage lists of subscribers to whom you want to send messages. The FTP Import Manager enables you to add and remove subscribers to existing mailing lists. Using Subscribers functionality, you can modify individual subscriber records.
Campaigns	Enables you to set up and manage default information that you want to include in messages associated with a specific campaign. This includes default DREAMmail email addresses and footers in messages.
Messages	Enables you to create and manage the messages you want to send to subscribers as part of a campaign. Content Manager enables you to create and manage the content segments used to personalize a message. Template Manager creates and manages message templates. Message Wizard lets you quickly create a simple DREAMmail message in a single process.
Reports	Enables you to analyze and present data regarding campaigns, mailing lists, customer activity, export activity and message layout. You also use reports to export mailing lists and report data. **Note:** DREAMmail initiates a new browser window to display reports.

Available Reports in DREAMmail

You can use the following reports to analyze and summarize data about the messages that you send to subscribers. Using Reports provides detailed information on available DREAMmail reports. The table below describes the DREAMmail reports.

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

Using the Support Buttons

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

Button	Description
My Profile	When clicked, displays the Change Password Information window and the Timezone window.
Resources	Provides links to DREAMmail Guides.
Logout	Provides functionality to log you out of DREAMmail.
Help	Provides context-sensitive help for all DREAMmail pages.

Tips for Entering Data into Fields

Use the following guidelines for entering data into DREAMmail user interface fields:

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

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

Determining the Version of DREAMmail

To display the version of the DREAMmail server and user interface you are using, click Admin. The version information displays at the top of the Admin tab.

Using a Static Network Address Translation

Epsilon recommends you access DREAMmail using a static network address translation (NAT) on your network infrastructure. If you are not using a static NAT, occasional 404 errors can occur. If you are experiencing frequent 404 errors, verify with your IT department if you are using a static NAT.

Deploying Campaigns

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

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

To deploy campaigns:

Step	Action
1	Log in to DREAMmail.
2	Create a mailing list. Depending on your business needs, you might perform this step only once. You can create one mailing list and use that mailing list for each email campaign. **Note:** If you are creating a campaign for RTM messages or direct deployment messages, you do not need to create a mailing list.
3	Create DREAMmail email addresses to manage the email campaign. Depending on your business needs, you might perform this step only once. You can create DREAMmail email addresses and use these email addresses for each email campaign.
4	Create a campaign.
5	Compose messages.
6	Validate the messages
7	Send the messages.
8	Report the results.

Setting Up DREAMmail

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

Administrative tasks in DREAMmail include:

- **Creating and Configuring Clients**
- **Setting Up Sites**
- **Implementing List Generator**
- **Configuring P3P Privacy Policies**
- **Managing User Accounts**

Creating and Configuring Clients

A client is an organizational element in DREAMmail. Depending upon the user's organization, the client can be an entire organization, a sub-region of an organization, or a business unit in an organization. Each Epsilon customer must create a client or have a client created for them.

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

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

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

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

This section includes the following information:

- Creating Clients
- Configuring Clients
- Configuring General Client Settings
- Creating a Foreign Key
- Creating and Editing Web Domains
- Choosing Profile Fields at the Client Level
- Creating and Applying Exclusion Rules
- Exposing Recency and Frequency Data for a Client

Creating Clients

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

To create a client:

Step	Action
1	Click **Admin** > **Client Setup**. The **Clients List** window opens.
2	Click **New** from the toolbar. The **New Client** dialog box appears.
3	Type the name of the client that you want to create in the **Client Name** field.
4	Type the name of the first site you want to create in the client in the **Site Name** field.
5	Click **Create**.

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

Configuring Clients

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

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

To configure a client:

Step	Action
1	Configure the General Client settings. **"Configuring General Client Settings" on page 23** provides detailed information.
2	Create a Foreign Key. **"Creating a Foreign Key" on page 24** provides detailed information.

Configuring General Client Settings

To configure the General Client settings:

Step	Action
1	Click **Admin** > **Client Setup**. The **Clients List** window opens.
2	Click the **General** tab. The **Configuration** window opens.
3	Specify bounce back thresholds in the **Bounce Back** area. **Note**: When bounceback thresholds are met, the subscriber is flagged as invalid. You can manually reset this flag by editing subscribers included in a mailing list. **"Editing Subscribers in a Mailing List" on page 53** provides additional information.
4	Specify an autosense threshold in the **Autosense Threshold** drop-down list. Autosense threshold identifies the number of messages that must be received by a subscriber, who is only able to receive text messages, before flagging the subscriber as being able to receive only text messages and not HTML messages.
5	Enable or disable the **Expose Recency and Frequency Data** setting. This setting allows for recency and frequency targeting to be enabled (or disabled) in the **Targeting** window when sending messages.

Step	Action
6	Enable or disable the **Batch Operational Message** option. Batch Operational Messages allow messages to bypass the Unsubscription or Invalid flag set in DREAMmail. This feature may be required in cases where messages are being deployed to paid subscribers. Delivery for these types of messages must be attempted for each subscriber on the list regardless of their email address status.
7	Enable RTM messaging for the client if you want users to be able to create RTM messages.

Creating a Foreign Key

To create a foreign key:

Step	Action
1	Configure the general Client settings. **“Configuring General Client Settings” on page 23** provides detailed information.
2	Minimize the **Configuration** window. The **Foreign Key** window appears.
3	Type a name for the foreign key in the **Foreign Key Name** field.
4	Select the type of the key as **Text** or **Numeric** from the **Data Type** list**.**
5	Type a length of the key in the **Length for Text** field.
6	Click **Create**.

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

Creating and Editing Web Domains

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

Creating a Web Domain

A web domain is the domain in which all response-tracking URLs are hosted for a given site. The web domain and its P3P compact policy (if present) are identified to a subscriber’s browser when DREAMmail serves cookies to the browser. When you configure a web domain, you can specify an expiration setting for all cookies that are associated with the web domain.

You configure your web domains at the client level to specify the expiration of cookies served by the domain and the P3P policies for the domain. Then at the site level, you select a web domain that matches your Redirector URL. After you select a web domain, the site serves cookies and sends its P3P compact policy according to the configuration of the web domain.

Each web domain can be used for multiple sites under one client, but each site can have only one web domain. A web domain can also be shared by multiple clients on the same server farm. In this case, all sites of all clients who share a domain have the same privacy settings. Any changes made to the privacy settings of the domain affect all sites in the domain.

When you create a new web domain, you must configure the web domain to specify the cookie expiry and P3P policies for the domain.

To add a web domain:

Step	Action
1	Click **Admin** > **Client Web Domains**. The **Client Web Domains** window opens.
2	Click **New** from the toolbar. The **New Web Domain** dialog box appears.
3	Configure the web domain.
4	Click **Create**.

Editing a Web Domain

To edit a web domain:

Step	Action
1	Click **Admin** > **Client Web Domains**. The **Client Web Domains** window opens.
2	Click the name of the web domain you want to edit in the **Domain Name** column.
3	Configure the web domain.
4	Click **Save**.

Configuring Web Domains

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

To configure a web domain:

Step	Action
1	Click **Admin** > **Client Web Domains**. The **Client Web Domains** window opens.
2	Click **New** or click the name of the web domain that you want to edit in the **Domain Name** list.

Step	Action
3	Type a name for the domain that you want to declare in the **Web Domain** field or verify that the name of the web domain that you are editing is correct. **Note**: The name of the web domain must match the domain in the Redirector URL.
4	Specify when cookies expire in the web domain.
5	Enter your full privacy policy into the **P3P Full Policy** text box.
6	Enter your compact privacy policy into the **P3P Compact Policy** text box.
7	Click **Create**.

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

Deleting a Web Domain

To delete a web domain:

Step	Action
1	Click **Admin** > **Client Web Domains**. The **Client Web Domains** window opens.
2	Click the check box next to the name of the web domain you want to delete.
3	Click the **Delete** icon . A message appears confirming whether you want to delete the web domain.
4	Click **Delete**.

Choosing Profile Fields at the Client Level

When profile fields are selected (by clicking a checkbox) at the client level they become available for use:

- In the preference center forms and mini-forms that you create to collect user registration data in your preference center.
- By the List Generator in all the sites under the client.

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

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

To choose profile fields at the client level:

Step	Action
1	Click **Admin** > **Client User Profile**. The **Client Level Profile Fields** window opens.
2	Choose the profile fields that you want to be available when you create preference center forms and mini-forms.
3	Click **Save** from the toolbar. These profile fields are applied to all sites under the client and cannot be excluded. However, if you do not include a field at the client level, you can still choose it at the site level.

Adding a New Client Level Field

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

Step	Action
1	Click **Admin** > **Client User Profile**. The **Client Level Profile Fields** window opens.
2	Click **New** from the toolbar. The **New Client Level Field** dialog box appears.
3	Type the new field name in the **Field Name** field.
4	Select the type of data from the **Data Type** list.
5	Type the length of the text field in the **Length for Text** field. **Note**: Complete this step if you selected TEXT as the Data Type.
6	Click **Create**. The new field is added to the User Profile Data.

Creating and Applying Exclusion Rules

Client exclusion rules allow you to set up and apply exclusion rules to mailing lists when you configure a client to prevent a set of subscribers from receiving messages from a specific client.

Important: Exclusion rules are permanent. Email addresses can never receive messages from you or your company once you have excluded them. Unless you are currently using client exclusion rules, Epsilon recommends that you use the Exclude Filter instead.

The Exclusion Rules feature is not dynamic. Each time new subscribers are added to mailing lists, you must re-apply any existing exclusion rules to that client. This ensures that the exclusion rules are applied to all new subscribers. If you import new subscribers every day, Epsilon recommends re-applying exclusion rules once a week, rather than every day.

Use exclusion rules to prevent subscribers who meet certain criteria (such as having an email address at a given domain) from receiving messages. You can use wildcards to create the following exclusion rules, prevent:

- All subscribers at a specific domain from receiving messages (for example, *@company.com)
- A specific subscriber at all domains from receiving messages (for example, postmaster@*)
- A specific subscriber at a specific domain from receiving messages (for example, john@company.com)

Creating Exclusion Rules

To create exclusion rules:

Step	Action
1	Click **Admin> Client Setup > Exclusion Rules** tab. The **Client Exclusion Rules List** window opens.
2	Click **New**. The New **Exclusion Rule** window opens.
3	Enter the exclusion rule that you want to create. For example, *@company.com.
4	Click **Create**. A message confirming that the exclusion rule was successfully created appears.

Applying Exclusion Rules

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

Step	Action
1	Click **Admin> Client Setup > Exclusion Rules** tab. The **Client Exclusion Rules List** window opens.
2	Click the exclusion rule that you want to apply to the mailing lists in the selected client.
3	Click **Apply**. A message confirming that the exclusion rule was successfully applied appears. The selected exclusion rules are applied to all mailing lists in the client. **Note**: After every import, the suppression rules must be re-applied.

Deleting an Exclusion Rule

To delete an exclusion rule:

Step	Action
1	Click **Admin> Client Setup > Exclusion Rules** tab. The **Client Exclusion Rules List** window opens.
2	Click the exclusion rule that you want to delete.
3	Click the **Delete** icon . A message confirming that you want to delete the exclusion rule appears.
4	Click **Delete**.

Exposing Recency and Frequency Data for a Client

Recency in DREAMmail refers to how recently a subscriber received a message. You use recency data to target messages to subscribers who have not received messages from you or your company within a specified number of days. Recency data enables you to specify the number of days that must pass before a subscriber can receive additional messages from your company.

Frequency in DREAMmail refers to how often subscribers receive a message. You use frequency data to target messages to subscribers who have not received messages from you or your company within a specified time period.

Note: Both recency settings and frequency settings can seriously affect the time at which messages are sent.

You can use recency data and frequency data to avoid sending an excessive number of messages to your subscribers. Limiting the number of messages that subscribers receive improves the effectiveness of your messages. You can apply a recency setting at the site or client level.

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

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

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

Setting Up Sites

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

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

This section includes the following information:

- Creating a Site
- Configuring a Site
- Configuring Site Settings
- Configuring Site Content
- Configuring Site Options
- Configuring Site RTM Settings
- Creating a User Account on the DREAMmail FTP Server
- Choosing Profile Fields at the Site Level

Creating a Site

To create a site:

Step	Action
1	Click **Admin** > **Site Setup**. The **Sites List** window opens.
2	Click **New** from the toolbar. The **New Site** dialog box appears.
3	Type a name for the site that you want to create in the **Site Name** field.
4	Click **Create**. The new site is added to the selected client and becomes the current site.

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

Configuring a Site

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

To configure a site:

Step	Action
1	Configure site settings. **"Configuring Site Settings" on page 31** provides detailed information.

Step	Action
2	Configure site content. **"Configuring Site Content" on page 32** provides detailed information.
3	Configure site options. **"Configuring Site Options" on page 32** provides detailed information.
4	Configure site RTM settings. **"Configuring Site RTM Settings" on page 33** provides detailed information.

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

Configuring Site Settings

To configure site settings:

Step	Action
1	Click **Admin** > **Site Setup**. The **Sites List** window opens.
2	Click the **General** tab. The **Configuration** window opens.
3	Specify the following settings: • Web Host URLs • Email Domain • Web Domain • Confirmation URL • Hosted Messages and Archiving **Note:** **"Configuring Hosted Messages" on page 31** provides detailed information. • Redirect URL
4	Type a description for the site in the **Site Description** text box.
5	Click **Save**.

Configuring Hosted Messages

You can configure each site to store a copy of sent messages and have these stored messages available for online viewing and retrieval. Hosted email messages display in an Internet browser in their original HTML format. For messages that include multi-parts, only the HTML portion displays in the viewer.

To configure hosted messages:

Step	Action
1	Click **Admin** > **Site Setup**. The **Sites List** window opens.
2	Click the **General** tab. The **Configuration** window opens.
3	Specify the Hosted Messages and Archiving settings by: • Clicking the **The Site is Enabled for Hosted Messages** option. • Entering the URL for the hosted email viewing service in the **Hosted URL** field. **Note**: The Hosted URL field is a read-only field. • Entering the number of days to retain the hosted email in the **Retention Period** field. **Note:** The minimum value for the **Retention Period** field is 10 day and the maximum value is 30 days. Admin, Server, and Trusted Application users are the only users with permission rights to change the site's hosted email and retention period value.
4	Click **Save**.

Configuring Site Content

To configure site content:

Step	Action
1	Configure site settings. **"Configuring Site Settings" on page 31** provides detailed information.
2	Minimize the **Configuration** window. The **Content** window appears.
3	Specify the following settings: • Character Set Support • Indicator Strings • Notification Email List
4	Click **Save**.

Configuring Site Options

To configure site options:

Step	Action
1	Configure site settings. **"Configuring Site Settings" on page 31** provides detailed information.

Step	Action
2	Configure site content. **"Configuring Site Content" on page 32** provides detailed information.
3	Minimize the **Content** window. The **Options** window appears.
4	Specify the following settings: • Import Support • Response Data and Recency Frequency • Batch Operational Messages • Product Integration • Archive Delivery and Response Data
5	Click **Save**.

Configuring Site RTM Settings

To configure site RTM Settings:

Step	Action
1	Configure site settings. **"Configuring Site Settings" on page 31** provides detailed information.
2	Configure site content. **"Configuring Site Content" on page 32** provides detailed information.
3	Configure site options. **"Configuring Site Options" on page 32** provides detailed information.
4	Minimize the **Options** window. The **RTM** window appears.
5	Specify RTM Settings.
6	Click **Save**.

Creating a User Account on the DREAMmail FTP Server

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

To create a user account on the DREAMmail FTP server:

Step	Action
1	Click **Admin** > **Site Setup**. The **Sites List** window opens.

Step	Action
2	Click the **General** tab. The **Configuration** window opens.
3	Minimize the **Configuration** window and the **Content** window. The **Options** window appears.
4	Click the **Enable FTP Import** option in the **Import Support** area. **Note**: Disabling this setting has no impact on previously created import jobs. The jobs remain in DREAMmail and are not modified.
5	Click **Change User ID.** The **Change User** dialog box appears. **Note**: You create one user account per site. For security reasons, the password is encrypted in the system and cannot be retrieved by support personnel.
6	Type a user name in the **User** field.
7	Type a password in the **Password** field.
8	Re-enter the password in the **Password Confirmation** field.
9	Click **Change**.

Note: To change the password for an FTP user account, click the Change Password button in the Import Support area.

Choosing Profile Fields at the Site Level

When you choose profile fields for a specific site, they become available for use in the standard forms and mini-forms you create to collect user registration data in your preference center.

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

Choosing Profile Fields at the Site Level

To choose profile fields at the site level:

Step	Action
1	Click **Admin > Site User Profile**. The **Customize Profile Updates** window opens.
2	Choose the profile fields in the **Site Level Profile Fields** area that you want to be available when you create preference center forms and mini-forms.
3	Click **Save**. The profile fields are applied to the site. Any profile fields that you choose at the client level are automatically applied to all sites.

Adding a New Site Level Profile Field to a User Profile

To add a new site level profile field to the user profile:

Step	Action
1	Click **Admin > Site User Profile**. The **Customize Profile Updates** window opens.
2	Click **New** in the **Site Level Profile Fields** area. The **New Site Level Field** dialog box appears.
3	Type the new field name in the **Field Name** box.
4	Select the type of data from the **Data Type** list.
5	Type the length of the text field in the **Length for Text** field. **Note**: Complete this step if you selected TEXT as the Data Type.
6	Click **Create**. The new field gets added to the User Profile Data.

Implementing List Generator

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

You use the data entered by subscribers to:

- Manage mailing lists
- Update subscribers' preferences
- Filter and customize messages in campaigns

Note: The List Generator Guide provides detailed information on using the List Generator.

Configuring P3P Privacy Policies

Platform for Privacy Preferences (P3P) is a privacy standard developed by the World Wide Web Consortium. The standard provides users with a simple, automated way to gain more control over the use of their personal information on websites that they visit.

Compliance with P3P requires that a website make a P3P compact policy accessible to users' browsers. P3P-enabled browsers compare the site's P3P compact policy to the privacy settings of the user's browser to determine whether the browser will accept cookies from that site. The P3P compact policy that you include when you configure a web domain is applied to all DREAMmail sites associated with the web domain. Visitors to your site can refer to the site's P3P full policy to determine whether or not to opt-out of cookies served by the website.

If a web domain is shared by multiple clients on the same server farm, all sites of all clients have the same privacy policy. Any change made to the privacy policy of the domain affects all sites in the domain.

The website, http://www.w3.org/P3P, provides additional information about P3P standards.

Setting Privacy Polices in DREAMmail

DREAMmail enables you to make your sites compliant with P3P. Compliance with P3P ensures that DREAMmail cookies that are served by your site are not blocked by P3P-enabled browsers.

Making Sites P3P-compliant

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

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

Opting-out of the DREAMmail Cookie

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

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

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

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

Managing User Accounts

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

A user account consists of three parts:

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

If a user has access to multiple sites, his or her privileges are the same for every site.

This section includes the following information:

- **Types of User Accounts**
- **Creating User Accounts**
- **Entering User Information**
- **Configuring User Access Information**
- **Configuring User Privilege Information**
- **Editing User Accounts**
- **Deleting User Accounts**

Types of User Accounts

When you create a user account, you must assign a user type. In DREAMmail, a user type specifies the components that a user can access and the tasks that a user can perform. You can assign the following user types:

- **Standard User** — Standard users are DREAMmail users who are responsible for creating and launching email campaigns, but are not responsible for administrative functions, such as creating sites. You can tailor a standard user account for each user by enabling or disabling user account settings. This enables standard users to have access to different features according to their job functions. For example, you can permit one standard user to have access to mailing lists, but limit another standard user to composing and sending messages.

  Users with a standard user account can change the privacy settings and submit DREAMmailConnect requests.

  Important: If you create a standard user account for the purpose of using DREAMmailConnect, you or another user must never log into the DREAMmail user interface with that standard user account. The DREAMmailConnect user name must be used only to submit DREAMmailConnect requests. This is because when you log into DREAMmail, the password associated with the user name expires every 30 days. In order for DREAMmailConnect to function properly, a password must never expire.

- **Client Administrator** — Client Administrators are users who have been designated as the administrator of a given client. Client administrators can create sites within the client to which they are assigned and have full access privileges to these sites. Additionally, client administrators can create standard user accounts, but cannot create other Client Administrator accounts.
- **Channel Administrator** — A Channel Administrator is a DREAMmail user that has been designated as the administrator of a set of clients. Epsilon channel partners, or re-sellers, assign this role to a single person in their company.

  Channel administrators can create clients, as well as sites within these clients. Channel administrators have full access privileges to the sites and clients for which they are the administrator. Additionally, channel administrators can create Client Administrator accounts and Standard User accounts, but not other Channel Administrator accounts.

Creating User Accounts

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

To create a user account complete the following three steps:

Step	Action
1	Enter user information. **"Entering User Information" on page 40** provides additional information.
2	Configure user access information. **"Configuring User Access Information" on page 41** provides additional information.
3	Configure user privilege information. **"Configuring User Privilege Information" on page 42** provides additional information.

Entering User Information

To enter user information:

Step	Action
1	Click **Admin** > **User Manager**. The **Users List** window opens.
2	Click **New**. The **User Information** window opens.

Step	Action
3	Enter a combination of the user’s first and last names in the **User Name** field. A user name must be unique within a server. Contact your Epsilon representative for more information about what server you use to access DREAMmail.
4	Enter the user’s email address in the **Email Address** field.
5	Enter the password that you want to assign to the user in the **Password** field.
6	Enter the user’s password again in the **Password Confirm** field.
7	Select the type of user account that you want to create from the **User Type** list. The **User Access Information** window opens **Note**: Only Channel Administrators can designate a user type. If you are not a Channel Administrator, proceed to the next step, configuring user access information.

Configuring User Access Information

To configure user access information:

Step	Action
1	Enter user information. **“Entering User Information” on page 40** provides additional information.
2	Select a client from the **Select Client** list.
3	Select the sites to which you want the user to have access from the **Available Sites** list.
4	Select the clients to which you want the user to have access from the **Available Clients** list.

Configuring User Privilege Information

To configure user privilege information:

Step	Action
1	Enter user information. **"Entering User Information" on page 40** provides additional information.
2	Configure user access information. **"Configuring User Access Information" on page 41** provides additional information.
3	Minimize the **User Access Information** window. The **User Privilege Information** window appears.
4	Specify the privileges that you want to assign to the user in the **User Privilege Information** window.

Editing User Accounts

To edit user accounts:

Step	Action
1	Click **Admin** > **User Manager**. The **Users List** window opens.
2	Click the **View Actions** icon next to the user name for which you want to edit account information.
3	Click **Open**. The **User Information**, the **User Access Information**, and the **User Privilege Information** windows open.
4	Update the user's name or password in the **User Information** window, if necessary.
5	Minimize the **User Information** window. The **User Access Information** window appears.
6	Update the user's access information if necessary.
7	Minimize the **User Access Information** window. The **User Privilege Information** window appears.
8	Update the user's privileges if necessary.
9	Click **Save**.

Deleting User Accounts

To delete a user account:

Step	Action
1	Click **Admin** > **User Manager**. The **Users List** window opens.
2	Click the **View Actions** icon  next to the user name of the user account you want to delete.
3	Click **Delete**. A message confirming that you want to delete the user account appears.
4	Click **Delete**.

Managing Mailing Lists

This chapter includes the following information:

- **Managing Subscribers**
- **Managing Mailing Lists**
- **Managing FTP Import Jobs**

Managing Subscribers

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

In addition, you can locate and update subscriber records in any list of any site in any client that you currently manage (although you can search only one client at a time).

This section includes the following information:

- Searching Subscriber Records
- Selecting a Subscriber Record
- Changing Subscriber Information

Searching Subscriber Records

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

To find subscriber records:

Step	Action
1	Click **Data** > **Subscribers.** The **Search Client Records** window opens. **Note**: If the **Search Client Records** window does not display, your user privileges are not configured to grant you access. Contact your DREAMmail administrator.
2	Select the profile field that you want to use for searching subscriber records from the **Profile Field** drop-down list.
3	Select an operator to compare the profile field to the value that you specify in the next step (for example, EmailAddr contains @aol) from the **Operator** drop-down list.
4	Type a value in the **Value** field to serve as the search criterion.
5	Drag and drop client-level and site-level profile fields that you want to view in the subscriber's record from the **Available Fields** box to the **Selected Fields** box. ▪ Press the **Ctrl** key as you click to make multiple selections. ▪ Profile fields such as **MemberID** and **EmailAddr** are automatically included in the subscriber record.
6	Click **Search**. The **Client Members List** appears. DREAMmail conducts a case-insensitive search and displays the first 500 subscriber records that meet the search criterion in the Client Members List. The results of the search might take a long time to display if your search matches a large number of client-level and site-level profile fields. To ensure a fast response, narrow your search criteria.

Selecting a Subscriber Record

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

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

To select a subscriber record:

Step	Action
1	Search subscriber records. **"Searching Subscriber Records" on page 46** provides additional information.
2	Click the email address of the subscriber that you want to update. The **Edit Member Profile** dialog box appears.

Changing Subscriber Information

Use the Edit Member Profile dialog box edit fields identified in the original search and fields not included in the original search. This dialog box consists of the:

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

Changing Client Profile Fields

The Client Profile Fields tab enables you to change the values of the profile fields at the client level.

To change client profile fields:

Step	Action
1	Search subscriber records. **"Searching Subscriber Records" on page 46** provides additional information.
2	Select a subscriber record. **"Selecting a Subscriber Record" on page 47** provides additional information.
3	Click the **Client Profile Fields** tab.

Step	Action
4	Select the appropriate character set from the **Character Set** drop-down list if you want to enter characters into the text-based profile fields. **Note**: By default, this field is set to the Site default language. You must change this value from the Site default setting.
5	Update the subscriber's record by changing fields in the **Client-Level Data** area.
6	Click **Update**. Changes you have made are updated.

Changing Site Profile Fields

The Site Profile Fields tab enables you to change the values of profile fields at the site level.

To change site profile fields:

Step	Action
1	Search subscriber records. **"Searching Subscriber Records" on page 46** provides additional information.
2	Select a subscriber record. **"Selecting a Subscriber Record" on page 47** provides additional information.
3	Click the **Site Profile Fields** tab.
4	Select a site from the **Select Site** drop-down list. ▪ If the subscriber has never been a member of the site, DREAMmail displays the following message: ***This member is not subscribed to this site***. In this case, no profile fields are displayed. ▪ If the subscriber is or has been subscribed to the site (and has subsequently unsubscribed from the list), all the site-level profile fields are displayed. **Note:** You can re-subscribe a former subscriber to the site by setting the **Unsubscribe** option to False.
5	Select the appropriate character set from the **Character Set** drop-down list if you want to enter characters into the text-based profile fields. **Note**: By default, this field is set to the Site default language. You must change this value from the Site default setting.
6	Update the subscriber's record by changing fields in the **Site Profile Data** area.
7	Click **Update**. Changes you have made are updated.

Changing List Membership

The List Membership button enables you to subscribe and unsubscribe the subscriber from mailing lists. When you add a subscriber to a mailing list, the subscriber automatically becomes a member of the mailing list's site. The List Membership button displays all the mailing lists types.

To subscribe and unsubscribe members from mailing lists:

Step	Action
1	Search subscriber records. **"Searching Subscriber Records" on page 46** provides additional information.
2	Select a subscriber record. **"Selecting a Subscriber Record" on page 47** provides additional information.
3	Click the **List Membership** button. The **List Membership** dialog box appears.
4	Select a site from the **Select Site** drop-down list. ▪ The **Subscribed** text box displays the site's mailing lists to which the subscriber currently belongs. ▪ The **Unsubscribed** text box displays the site's mailing lists to which the subscriber does not belong.
5	Click the mailing list in the **Unsubscribed** text box to add a subscriber to a mailing list. ▪ Press the **Ctrl** key as you click to select multiple lists. ▪ Drag and drop the content to the left.
6	Click the mailing list in the **Subscribed** text box to remove a subscriber from a mailing list. ▪ Press the **Ctrl** key as you click to select multiple lists. ▪ Drag and drop the content to the right.
7	Click **Save**.

Managing Mailing Lists

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

This section includes the following information:

Creating a Mailing List

To create a mailing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click **New**. The **Mail List Information** window, the **Mailing List User Access** window, and the **Mailing List Properties** window open.
3	Type a name for the mailing list in the **List Name** field.
4	Type a brief explanation of the list’s function in the **Description** field.
5	Select the users who you want to have access to the list in the **Mailing List User Access** window. ▪ Drag and drop the users from the **Allowable Users** lists to the **Users Granted Access** list to allow additional users access. ▪ Drag and drop users from the **Users Granted Access** list to the **Allowable Users** list to remove access from users.
6	Select the type of mailing list and the properties that you want to enable for this mailing list in the **Mailing List Properties** window. ▪ Select the type of mailing list that you want to create. ▪ Specify the properties that you want to enable for this mailing list.

Step	Action
7	Click **Create**.

Creating a Test Mailing List

Test lists are mailing lists that contain a small, randomly selected group of subscribers. You create test lists from a subset of a mailing list.

You send messages to test lists to check subscriber response to a message before sending the message to a large group of subscribers. The messages that you send to test lists are test messages.

When you add subscribers to a test list, these subscribers are removed from the original mailing list to which they were subscribed. This ensures that subscribers do not receive the message a second time when you send the message to your full mailing list. You can later merge the test list with the original list, if necessary.

You can also test messages by using message caps and groups to create test messages.

To create a test mailing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing Lists** window opens.
2	Click the **View Actions** icon  next to the mailing list from which you want to create a test list.
3	Select **Create Test List**. The **Create Test List** dialog box appears.
4	Enter a name for the new test list in the **Test List Name** field.
5	Enter the number of addresses that you want to remove from the selected mailing list in the **Members in the New List** field.
6	Click **Create Test List**. A message confirming that the text mailing list was successfully created appears.
7	Send a message to the test list.

Adding Subscribers to a Mailing List

DREAMmail subscribers are Internet users who belong to one or more mailing lists because they agreed to receive email messages from one or more companies. Subscribers are referred to as members in the DREAMmail database.

Note: Not all recipients of DREAMmail messages are subscribers. For example, you do not have to belong to mailing list to receive an RTM message.

There are a variety of methods for adding subscribers to a mailing list:

- Import subscribers using Import Manager.
- Import subscribers using the Web-based import feature.
- Add subscribers to the mailing list one at a time.
- Use List Generator to automatically add subscribers to a mailing list directly from your website.
- Create XML requests in DMConnect to add subscribers to mailing lists. The *DREAMmail Programming Guide* provides additional information on this functionality.
- Send your database to your Epsilon representative so that he or she can create the mailing list for you.

Importing Subscribers Using the Web-based Import Feature

If you import a file of subscriber records by using DREAMmail's web-based import tool, the file must follow certain import rules. If problems occur during the import, error messages are displayed.

To import subscribers using the web-based import feature:

Step	Action
1	Select **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list into which you want to import subscribers.
3	Select **Import Data**. The **Import Data** dialog box appears.
4	Browse for or enter the name of the file that you want to import in the **File Name** field.
5	Click **Next**. The **Import Data Mailing List Field Mapping** dialog box appears.
6	Select the names of the fields in the import file that you want to map to existing profile fields in the mailing list.
7	Click **Import**.

Add Subscribers to the Mailing List One at a Time

You can add individual subscribers who are not stored in a database file to a mailing list when you want to create a small mailing list such as a proofing or approval list or you want to add a small number of subscribers to an existing list without re-importing the entire database.

To add one subscriber at a time:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list to which you want to add a subscriber.
3	Select **Manually Input Data**. The **Manually Input Data** dialog box appears.
4	Select the **Profile Fields** you want uploaded to this mailing list.
5	Click **Next**. The **Manually Input Data Add Members** dialog box appears.
6	Enter the information about the subscriber in the corresponding fields.
7	Click **Add**. The subscriber's information is moved to the **Added Member List**.
8	Click **Submit** when all the new information for the new member has been added.

Editing Subscribers in a Mailing List

You can select members of a current list to edit, or you can create a new list from the selected members and edit this new list.

To edit the contents of an existing mailing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list that you want to edit.
3	Select **Edit Members**. The **Edit Members** dialog box appears.
4	Click the **Use Filter Helper** button to create an expression.
5	Drag and drop profile fields form the **Available Profile Fields** list to the **Selected Profile Fields** list.

Step	Action
6	Click **Next**. The **Edit Members List Result** dialog box appears.
7	Type a name for the list in the **New List Name** field.
8	Click **Generate List**.

Changing the Status of a Mailing List

The status of a mailing list can be either active or inactive. Use the View: Active/Inactive drop-down list in the Mailing List window to choose active or inactive mailing lists.

The following rules apply to inactive lists:

- You can only activate and delete inactive lists.
- You cannot send messages to an inactive mailing list.
- DREAMmail automatically changes the status of an active mailing list to inactive after 90 days if the mailing list is not used or does not meet specific criteria. After becoming inactive, a mailing list is automatically deleted 90 days later. Therefore, only mailing lists that have not been used in 180 days are deleted. Before a mailing list is deleted in this manner, it is backed up and can be recovered upon request.

Note: You can prevent DREAMmail from inactivating or deleting a mailing list by making the list permanent.

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

Making a Mailing List Inactive

There are several ways of making a list inactive:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Select one or more of the mailing lists that you want to make inactive.
3	Click **Deactivate** in the tool bar.

or

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon  next to the mailing list that you want to make inactive.
3	Select **Deactivate**.

or

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list that you want to make inactive.
3	Select **Properties**. The **Properties** tab opens.
4	Scroll to the **Mailing List Properties** window and click **Inactive** from the **Properties** list of options.
5	Click **Save**.

Making an Inactive Mailing List Active

To make an inactive mailing list active:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Select **Inactive** from the **View** drop-down list. The inactive mailing lists appear.
3	Click the **View Actions** icon next to the mailing list that you want to make active.
4	Select **Activate**.

or

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Select **Inactive** from the **View** drop-down list. The inactive mailing lists appear.
3	Select one or more of the mailing lists that you want to make inactive.
4	Click **Activate** in the tool bar.

Making a Mailing List Permanent

To improve overall system performance, DREAMmail automatically deactivates a mailing list unless the following criteria are met:

- List was created in the last 90 days
- Data was imported into the list in the last 90 days
- List was included or excluded in a message in the last 90 days
- List is a proofing and approval list
- List appears in a Preference Center or Mini-Form
- List is a suppression list
- List is imported as part of an automated FTP job
- List is a permanent list

After the status of a mailing list becomes inactive, the mailing list is deleted by DREAMmail 90 days later. Therefore, only mailing lists that have not been used in 180 days are deleted. Before a mailing list is deleted in this manner, it is backed up and can be recovered upon request.

To prevent this from happening, you can declare a mailing list that has an active status to be "permanent."

To make a mailing list permanent:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list that you want to make permanent. **Note:** The mailing list must be active in order to make it permanent.
3	Select **Properties**. The **Properties** tab opens.
4	Scroll to the **Mailing List Properties** window and click **Permanent List** from the **Properties** list of options.
5	Click **Save**.

Viewing the History of a Mailing List

To view the history of a mailing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list whose history you want to view.
3	Select **Properties**. The **Properties** tab opens.
4	Scroll to the **Mailing List History** window. The mailing list history displays in the **Importing history status** box.

Splitting a Mailing List

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

To split a mailing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list that you want to split.
3	Select **A/B Split Lists**. The **A/B Split List** dialog box appears.
4	Select the number of lists that you want to create from the original mailing list from the **Number of Splits** field.
5	Enter a name for each new list in the **List Name** field.
6	Change the size or percentage of the original list’s members assigned to each new list.
7	Click **Split List**.

Merging a Mailing List

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

To merge mailing lists to an existing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click **Merge List** from the tool bar. The **Merge List** dialog box appears.
3	Click the **Merge to Existing List** option.
4	Drag and drop the mailing lists you want to merge from the **Available Lists** box to the **List to be Merged** box.
5	Select the existing list from the **Merge to List** drop-down list.
6	Click the **Empty the Merge From list when it has been successfully merged to the Merge To List** option if you want to delete the list(s) you selected in the **Lists to be Merged** box.
7	Click **Merge**. **Note:** You cannot add subscribers to a mailing list having a status of Read Only. To change the status of a list, you must modify the list's properties.

To merge mailing lists into a new list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click **Merge List** from the tool bar. The **Merge List** dialog box appears.
3	Click the **Create a New List** option.
4	Drag and drop the mailing lists you want to merge from the **Available Lists** box to the **Lists To be Merged** box.
5	Type a name for the new list in the **Save as a New List** field.
6	Click the **Empty the Lists to be Merged after the new list has been created successfully** option if you want to delete the list you selected in the **Lists to be Merged** box.
7	Click **Merge**. **Note:** You cannot add subscribers to a mailing list having a status of Read Only. To change the status of a list, you must modify the list's properties.

Deleting a Mailing List

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

To delete a mailing list:

Step	Action
1	Click **Data > Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon next to the mailing list that you want to delete.
3	Select **Delete**. A message confirming that you want to delete the mailing list appears.
4	Click **Delete**.

Managing FTP Import Jobs

Use the FTP Import Manager to create and manage recurring FTP import jobs that can be used to add or removed subscribers from mailing lists. An import job also specifies the action that you want DREAMmail to apply to the specified file. These actions usually include adding subscribers to or removing subscribers from a mailing list.

DREAMmail automatically performs the following steps during the import process:

- Automatic rejection of individual records in the source file that do not conform with the format specified in the FTP import job. This does not prevent the FTP job from running – the properly formatted records of the source file are imported.
- Rejection of the entire source file if its overall format does not match the definition in the FTP import job.

This section includes the following information:

- **Creating an FTP Import Job**
- **Mapping Profile Fields in an FTP Import Job**
- **Changing the Password of an FTP User Account**

Creating an FTP Import Job

To create an FTP import job complete the following three steps:

Step	Action
1	Enter the import job information. **"Entering the Import Job Information" on page 60** provides detailed information.
2	Configure import job settings. **"Configuring the Import Job Settings" on page 61** provides detailed information.
3	Enter the import file information. **"Entering the Import File Information" on page 61** provides detailed information.

Entering the Import Job Information

To enter the import job information:

Step	Action
1	Click **Data > Import Manager**. The **Import List** window opens.
2	Click **New**. The **Import Job Information** window, the **Settings** window, and the **File Details** window open.
3	Enter a name in the **Name** field.
4	Enter a brief description in the **Description** field.

Configuring the Import Job Settings

To configure the import job settings:

Step	Action
1	Minimize the **Import Job Information** window. The **Settings** window appears.
2	Specify whether you want to add subscribers to an existing mailing list or remove subscribers from an existing client, site or mailing list. When you select **Subscription (List)**, a **Clear and replace existing list** option displays along with a **Available lists** drop-down list. You can choose a list from the **Available lists** drop-down list. If you mark the **Clear and replace existing list** option, when the import job is run, and a file is imported, the destination list is cleared before the new file is added to replace it. In case multiple lists are selected for import, and the option is selected, all lists will be cleared on import of the new file.
3	Select a hygiene rule from the **Hygiene Rule Selection** drop-down list if you want to perform data hygiene on the mailing list.
4	Enter the email addresses to which you want DREAMmail to send a notification message when the FTP import is complete in the **Import Confirmation Emails** field.

Entering the Import File Information

To enter the import file information:

Step	Action
1	Minimize the **Settings** window. The **File Details** window appears.
2	Enter the name of the file you want to import in the **Source File Name** field. **Note**: The source file must adhere to certain import rules.
3	Enter the name of a suppression file in the **Suppression File Name** field if you want to purge names from the source file.
4	Specify the character used to delimit fields in the import file from the **Format Type** list.
5	Map the fields in the heading row of the import file to the fields in the mailing list in the **File Import Field Mapping** area.
6	Click **Create**.
7	FTP the file that contains the list of subscribers to the DREAMmail FTP server. The name of this file must be the same as the name you specify in the import job. DREAMmail processes the job automatically.

Mapping Profile Fields in an FTP Import Job

When you create an import job to import subscribers into a mailing list, you must map the fields in the import file to existing profile fields in the DREAMmail database. You can add profile fields in the DREAMmail database by accessing the mailing list into which you are importing subscribers and creating new profile fields in the mailing list.

To map profile fields in an FTP import job:

Step	Action
1	Create an import job. **"Creating an FTP Import Job" on page 60** provides detailed information.
2	Scroll to the **File Import Field Mapping** area of the **File Details** window.
3	Enter the file name of the import file in the **Import File Field Name** field.
4	Select the corresponding DREAMmail field name from the **DREAMmail Field Name** list.
5	Click **Add**.
6	Repeat steps 3 through 5 until you have mapped all of the fields in the import file to existing profile fields. All the fields you have mapped will be displayed in the Mapped Fields table.

Changing the Password of an FTP User Account

To change the password of an FTP user account:

Step	Action
1	Click Site **Admin** > **Site Setup**. The **Sites List** window opens.
2	Click the **General** tab.
3	Scroll to the **Options** window.
4	Select the **Enable FTP Import** option, in the **Import Support** area.
5	Click the **Change Password** button. The **Change Password** dialog box appears.
6	Type the old password.
7	Type the new password and confirm the new password.
8	Click **Change**.

Managing DREAMmail Email Addresses

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

This chapter includes the following information:

- **Composing From, Subscription, and Unsubscription Addresses**
- **Composing a Triggered Message Address**
- **Composing Reply-To Addresses**

Composing From, Subscription, and Unsubscription Addresses

The From address displays the email address of the company or person sending a message in the inbox of the subscriber's email application. Subscribers can use the From address to reply to a message. Generally, subscribers reply to a message if they do not understand how to use the Subscription or Unsubscription email address, or if they want more information about your company, products, or services.

Note: The From address is the only required DREAMmail email address. You must create a From address before you can create any other type of DREAMmail email address and you must also assign at least one action to the From address.

When you send a message that includes a profile field in the display name of the From address, DREAMmail replaces the profile field with its associated content in the DREAMmail database.

A **Subscription** address enables a potential subscriber to be added to a specified mailing list. In order for a potential subscriber to be added to a specified mailing list, you must assign the List Subscription action to the Subscription address. You can assign a Subscription address to a message or a campaign.

You create an **Unsubscription** address to enable subscribers to send a request to be removed from:

- A specified mailing list
- All mailing lists in a specified site
- All mailing lists in the client

In order for a subscriber to be removed from a specified mailing list, site, or client, you must assign the corresponding action to the Unsubscription address. You can assign an Unsubscription address to a message or a campaign.

To compose From, Subscription, and Unsubscription Addresses:

Step	Action
1	Enter address information. **"Entering Address Information" on page 65** provides detailed information.
2	Configure the type of action. **"Configuring the Type of Action" on page 65** provides detailed information.
3	Compose the notification message. **"Composing the Notification Message" on page 66** provides detailed information.

Entering Address Information

To enter address information:

Step	Action
1	Click **Data** > **Addresses**. The **Addresses List** window opens.
2	Select **From Address**, **Subscription Address**, or **Unsubscription Address** from the **Address Type** list. **Note:** You must create a From address before you can create any other type of address.
3	Click **New** from the toolbar. The **Address Information** window opens.
4	Enter the email address that you want to specify for the selected address type. Enter only the section of the address that precedes the domain name. If there is no domain name displayed following this field, contact your Epsilon representative.
5	If you are creating a From address, enter the name that you want to be displayed in the message that you send to the subscriber in the **Display Name** field. Do not use apostrophes in the name. **Note:** You can personalize the display name by including profile fields. Enclose each profile field with exactly two hash marks (#). If DREAMmail cannot find the profile fields in the DREAMmail database, the message is not sent and Message Manager displays a delivery status of **Error** for the message.
6	Type a brief description of the email address in the **Description** field. **Note:** Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.

Configuring the Type of Action

To configure the type of action:

Step	Action
1	Click **Data** > **Addresses**. The **Addresses List** window opens.
2	Enter address information. **"Entering Address Information" on page 65** provides detailed information.
3	Scroll to the **Actions** window.

Step	Action
4	From the **Type of Action** drop-down list, select the type of action that you want to assign to the email address. If you assign: ▪ Trigger Event Mailing as the action, select the campaign and message that contain the triggered message. ▪ List Subscription or List Unsubscription as the action, select a mailing list.
5	Select the campaign and message that contain the triggered message from the **Campaign** list and **Message** list if you selected Trigger Event Mailing as the action in Step 4. **or** Select a mailing list from the **List** drop-down list if you selected List Subscription or List Unsubscription as the action in Step 4.

Composing the Notification Message

To compose the notification message:

Step	Action
1	Click **Data** > **Addresses**. The **Addresses List** window opens.
2	Enter address information. **"Entering Address Information" on page 65** provides detailed information.
3	Configure the type of action. **"Configuring the Type of Action" on page 65** provides detailed information.
4	Scroll to the **Notification** window.
5	Select a **Reply Address** for the notification message if you are creating Subscription and Unsubscription Addresses. **Note:** If you are creating a From Address, select a **Reply-To Address**.
6	Type the names that you want to use in the notification message in the **Reply-To Display Name** text box. **Note:** Do not use apostrophes in the names.
7	Select the appropriate character set from the **Character Set** drop-down list if your site supports multiple languages. The character set specifies the encoding information that DREAMmail inserts into the message header. This encoding information enables the message to display correctly in the subscriber's email application.
8	In the **Notification message to send if actions are completed successfully Message Subject** field**,** type a subject for the notification message.

Step	Action
9	Click the tab that corresponds to the format in which you want to compose the message. For HTML-based messages, use the HTML Editor.
10	Type the text that you want to be displayed as the body of the notification message.
11	In the **Notification message to send if actions are completed unsuccessfully Message Subject** field**,** type a subject for the notification message.
12	Click the tab that corresponds to the format in which you want to compose the message. For HTML-based messages, use the HTML Editor.
13	Type the text that you want to be displayed as the body of the notification message.
14	Click **Create**.

Composing a Triggered Message Address

A Triggered Message address is an email address that, when replied to, causes DREAMmail to automatically send a triggered message to subscribers who replied to the address. For example, you can specify that the Triggered Message address **productinfo@mydomain.com** sends back an email containing product information to the subscribers who reply using this address. You can create more than one Triggered Message address so that you can use a different email address for different campaigns and messages.

Before you can create a Triggered Message address, you must create the Triggered Message that you want DREAMmail to send when subscribers reply using the Triggered Message address. You can assign only the Trigger Event Mailing action to the Triggered Message address.

Entering Address Information

To enter address information:

Step	Action
1	Click **Data** > **Addresses**. The **Addresses List** window opens.
2	Select **Triggered Message Address** from the **Address Type** list. **Note:** You must create a From address before you can create any other type of address.
3	Click **New** from the toolbar. The **Address Information** window opens.
4	Enter the email address that you want to specify for the selected address type. Enter only the section of the address that precedes the domain name. If there is no domain name displayed following this field, contact your Epsilon representative.
5	Type a brief description of the email address in the **Description** field. **Note:** Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.

Configuring the Type of Action

To configure the type of action

Step	Action
1	Click **Data** > **Addresses**. The **Addresses List** window opens.
2	Enter address information. **"Entering Address Information" on page 68** provides detailed information.
3	Scroll to the **Actions** window.
4	Select **Triggered Event Mailing** from the **Type of Action** drop-down list.
5	Select the campaign that contains the triggered message from the **Campaign** drop-down list.
6	Select the triggered message you want DREAMmail to send when a subscriber replies to this address from the **Message** drop-down list.
7	Click **Add**.
8	Click **Create**.

Composing Reply-To Addresses

A Reply To address specifies the address to which a message is sent when a subscriber replies to your message by clicking the Reply button in his or her email application.

Replies sent to the Reply To address bypass DREAMmail and are sent directly to the specified Reply To address. Therefore, DREAMmail cannot process the message. Most companies use the Reply To address only for test messages. If you create a Reply To address for validation purposes, ensure you remove the Reply To address before you send the final message to subscribers.

The Reply To address is an optional DREAMmail email address. If you do not create a Reply To address and a subscriber clicks the Reply button, the subscriber's email is sent to the From address that you create. You can assign a Reply To address to a message or a campaign. You can also create more than one Reply To address so that you can use a different address for different campaigns and messages.

You cannot assign actions to Reply To addresses. However, you can use profile fields to dynamically personalize the Reply To address and display name of the Reply to address. When you send a message that includes a profile field in the Reply To address or display name, DREAMmail replaces the profile field with its associated content from the DREAMmail database.

Examples of Reply Addresses

The following examples show valid Reply To addresses that contain profile fields. The profile fields, which are enclosed by hash marks (#), must exist in the mailing list of subscribers to which the message is being set. Examples include:

#agents#@abcdomain.com

cio@#domain-name#

#clientemail# (where clientemail represents a complete email address such as nyc@abcdomain.com)

Composing Reply-To Addresses

To compose Reply-To Addresses:

Step	Action
1	Click **Data** > **Addresses**. The **Addresses List** window opens.
2	Select **Reply-To Address** from the **Address Type** list. **Note:** You must create a From address before you can create any other type of address.
3	Click **New** from the toolbar. The **Address Information** window opens.
4	Enter an address in the **Email Address** field that you want to specify for the selected address type. **Note:** Enter the entire email address including the domain name; for example, **company1@abcdomain.com**.

Step	Action
5	Type the name you want to be displayed in the message that you send to the subscriber in the **Display Name** field. Do not use apostrophes in the name. **Note:** You can personalize the display name by including profile fields. Enclose each profile field with exactly two hash marks (#). If DREAMmail cannot find the profile fields in the DREAMmail database, the message is not sent and Message Manager displays a delivery status of **Error** for the message.
6	Type a brief description of the email address in the **Description** field. **Note:** Do not use apostrophes or punctuation in your description. Using punctuation in the description can result in the notification message not being saved.
7	Click **Create**.

Validation Rules for Reply To Addresses

Like all email addresses in DREAMmail, the content of Reply-To addresses must conform to the RFC 822 standard for email addresses. In addition, the following rules are in effect:

- The Reply To address must contain zero or one “at” signs (@).
- If an “at” sign (@) is present in the Reply To address, the format of the address must be <alias>@<domain>, where both <alias> and <domain> can contain zero or more profile fields.
- If there are no profile fields in the alias and domain, <alias> must be equal to or greater than one character and <domain> must be equal or greater than three characters.

Note: DREAMmail does not validate profile fields in the display name of the Reply To address.

Managing Campaigns

DREAMmail campaigns consist of messages that you send as part of a marketing effort to promote a product, company, service, newsletter, or website. Campaigns can also contain transactional messages, such as confirmations and notifications, that can be automated in response to web transactions or subscriber events.

Campaigns provide a way to organize your messages into logical groups. When you create a campaign, the properties that you apply to the campaign are applied by default to all the messages associated with that campaign.

Before deploying a campaign, decide how you want to group messages in each campaign. Planning ahead, in this way, helps you to logically structure your campaigns and also enables you to make the best use of DREAMmail reports in determining the effectiveness of messages in a specific campaign.

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

Any properties assigned to campaigns are assigned by default to each message in that campaign. Properties for individual messages can be edited. For example, you can specify a default From Address, Reply Address, Unsubscribe Address, and Subscribe Address to be used for all the messages that you create in a campaign.

This chapter includes the following information:

- **Creating a Campaign**
- **Editing a Campaign**
- **Deleting a Campaign**
- **Reactivating a Campaign**
- **Deactivating a Campaign**

Creating a Campaign

When you create a campaign, the properties applied to the campaign are applied by default to the messages associated with the campaign. These properties can be edited when you create the message. The properties and settings of the message override the properties and settings of the campaign.

Note: Fields designated with an asterisk (*) on the user interface are required.

To create a new campaign:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns List** window opens.
2	Click **New**. The **Campaign Information** window opens.
3	Enter the campaign name and expiration date information. ▪ Type a name for the campaign in the **Campaign Name** field. **Note:** The campaign name can only contain alphanumeric characters, the underscore character (_), and the dash character (-). ▪ Click the **Date** icon  located next to the **Expiration Date** field to select the campaign end date. This is the date by which messages can no longer be sent from this campaign. **Note:** The expiration date must be greater than the current date. You can manually type the required date in the mm/dd/yyyy format.
4	Enter the proof and approval mailing list information for the new campaign. ▪ Select a proofing mailing list from the **Proof List** drop-down list. This list will be the proof list selected by default when you choose to proof a message in the campaign. You can select a different proof list when you specify the proofing options. ▪ Click the **Send message in campaign for approval** option if messages in the campaign will require approval. When selecting this option, only Standard Messages are available for the campaign. To send these messages, they must be approved by a user with approval privileges. **Note:** You cannot change the status of the **Send Message in campaign for approval** option once the campaign is saved. ▪ If you have selected the **Send message in campaign for approval** option, select a mailing list from the **Approval List** drop-down list. The list should contain the members that must comment on approving the message.

Step	Action
5	Enter the default email addresses information. ▪ Select the **From Address** to be the default From Address for messages created in the campaign. ▪ Select the **Reply To Address** to be the default Reply To Address for messages created in the campaign. A Reply To Address should be specified if the reply address of the recipient is different from the sender's address selected in the **From Address** list. ▪ Click the **Track message unsubscribe requests from replies** option to track the number of unsubscribes sent to the recipient's address specified in the **Reply To Address** list. ▪ Select the **Subscribe Address** to which subscription requests can be sent to subscribe to a list. These addresses are setup in the Addresses module accessed from the **Data** tab. ▪ Select the **Unsubscribe Address** to which unsubscription requests can be sent to unsubscribe from a client, site, or list. These addresses are setup in the Addresses module accessed from the **Data** tab. ▪ Click the **Track message unsubscribe requests from Unsub address** option to track the number of unsubscribes sent to the list of recipient's addresses specified in the **Unsubscribe Address** list. **Note:** If you do not specify addresses for the Reply To Address, Subscribe Address, and Unsubscribe Address lists, recipients' replies are automatically sent to the sender's address selected from the From Address list. Epsilon recommends that you do not select a recipient's address from the Reply To Address list. The addresses you selected from the From Address, Reply To Address, Subscribe Address, and Unsubscribe Address lists are used as default addresses in all messages associated with any new message in this campaign.
6	Click **Create**. A message confirming that the campaign has been successfully created appears.

Editing a Campaign

To edit a campaign:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns List** window opens.
2	Click the **View Actions** icon located next to the name of the campaign you want to edit. The **View Actions** menu appears.
3	Click **Open**. **Note:** Alternatively, you can click the campaign name to open the campaign.
4	Edit the properties that you want to change for the selected campaign. **Note:** You cannot edit the name of the campaign. Click **Update Owner** to change the owner of the campaign to you.
5	Click **Save**. A message confirming that the campaign has been successfully updated appears.

Deleting a Campaign

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

To delete a single campaign:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns List** window opens.
2	Select **Inactive** from the **View** list. A list of inactive campaigns displays. To delete campaigns, they must be in an inactive status.
3	Click the **View Actions** icon located next to the name of the campaign you want to delete. The **View Actions** menu appears.
4	Click **Delete**. The **Confirm** dialog box appears confirming whether you want to delete the campaign.
5	Click **OK**. The campaign is removed from the campaigns list.

To delete multiple campaigns:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns List** window opens.
2	Select **Inactive** from the **View** list. A list of inactive campaigns displays. The **Delete** icon also displays in the toolbar.
3	Click the check box next to the **View Actions** icon for the campaigns you want to delete. **Note:** To select all campaigns, click the check box in the table header row.
4	Click the **Delete** icon . The **Confirm** dialog box appears confirming whether you want to delete the campaign.
5	Click **OK**. The campaigns are removed from the campaigns list.

Reactivating a Campaign

You can activate any inactive campaign using the Activate button located in the Campaign List window toolbar or by selecting Activate from the View Actions menu.

To reactivate a campaign:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns List** window opens.
2	Select **Inactive** from the **View** list. A list of inactive campaigns displays.
3	Click the check box next to the **View Actions** icon for the campaign you want to reactivate. **Note:** To select all campaigns, click the check box in the table header row.
4	Click **Activate**. The **Activate** dialog box appears confirming whether you want to activate the campaign.
5	Click **OK**. The campaign is added to the **Active Campaigns** list.

Deactivating a Campaign

You can change the status of a campaign from Running or Finished to Inactive.

You can deactivate any active campaign using the Deactivate button located in the Campaign List window toolbar or by selecting Deactivate from the View Actions menu.

To deactivate a campaign:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns List** window opens.
2	Select **Active** from the **View** list.
3	Click the check box next to the **View Actions** icon  for the campaign you want to deactivate. **Note:** To select all campaigns, click the check box in the table header row.
4	Click **Deactivate**. The **Deactivate** dialog box appears confirming whether you want to deactivate the campaign.
5	Click **OK**. The campaign is added to the **Inactive Campaigns** list.

Managing Messages

Messages are emails that you send as part of the process of deploying a campaign. A message consists of a subject line and a body that contains the content of the message. Content can include:

- Text
- Images
- URL links to ecommerce or content website
- Web forms

To ensure all your subscribers can read the messages you send them, regardless of what email application they use, you can compose the same message in text or HTML formats. DREAMmail delivers the correct most content rich format for each subscriber when you send the message.

The four DREAMmail message types are:

- Standard
- Standard Recurring
- Recurring Triggered
- Notification Triggered

This chapter includes the following information:

- **Using the QuickSend Message Wizard**
- **Composing Messages**
- **Managing Existing Messages**
- **Managing Content Segments**
- **Using Templates in Messages**
- **Creating Business Rules for Messages**
- **Creating Offer Tables**

Using the QuickSend Message Wizard

The QuickSend Message wizard is a tool that enables you to quickly create DREAMmail messages in a five-step process. This process is useful when you are creating a DREAMmail message for the first time or if you want to speed up the process of creating a standard message. You can move back and forth among the steps that you have completed by clicking the icons associated with each of the five steps of the QuickSend Message wizard process.

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

Using the QuickSend Message wizard involves completing the following steps:

Step	Action
1	Access the **QuickSend Message** wizard. **"Accessing the QuickSend Message Wizard" on page 82** provides detailed information.
2	Choose a campaign. **"Choosing a Campaign" on page 83** provides detailed information.
3	Choose a mailing list. **"Choosing a Mailing List" on page 83** provides detailed information.
4	Choose a From address. **"Choosing a From Address" on page 84** provides detailed information.
5	Compose the message. **"Composing the Message" on page 84** provides detailed information.
6	Preview, proof, and send the message. **"Previewing, Proofing, and Sending the Message" on page 84** provides detailed information.

Accessing the QuickSend Message Wizard

To send a message using the QuickSend Message wizard:

Step	Action
1	Access the Messages window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **QuickSend Message** icon . The **QuickSend Message** wizard opens. **Note:** You can also access the QuickSend Message wizard by clicking the **Quicksend a Message Now** link located on the DREAMmail **Dashboard**.

Choosing a Campaign

To choose a campaign:

Step	Action
1	Access the QuickSend Message wizard. **"Accessing the QuickSend Message Wizard" on page 82** provides detailed information.
2	Select a campaign from the **Existing Campaign** list. **Note:** When accessing the QuickSend Message wizard form the **Dashboard**, you are also able to create a new campaign for the message.
3	Click **Next**. The wizard advances to Step 2 of 5: Choose a Mailing List.

Choosing a Mailing List

To choose a mailing list:

Step	Action
1	Do one of the following: ▪ Click the **Existing List** option and select a list. ▪ Click the **New List** option and enter a name.
2	Click **Import Data** to import subscribers into the list that you choose. **Note:** This step is required if you clicked the **New List** option in Step 1. You can only use the web-based method of importing data.
3	Click **Filter List Members** to further target subscribers who will receive the message. Do one of the following: ▪ Click the **Use Filter Helper** option to create a filter. ▪ Click the **Use SQL Filter** option to create a custom SQL filter. ▪ Click **Save** when you have finished creating the filter.
4	Click **Next**. The wizard advances to Step 3 of 5: Choose a From Address.

Choosing a From Address

To choose a From Address:

Step	Action
1	Do one of the following: ▪ Click the **Existing From Address** option and select an address. If you chose an existing campaign at the beginning of the QuickSend Message wizard process, the campaign's default From address, display name, and associated actions display. ▪ Click the **New From Address** option, enter a name and a **Display Name** for the address, and assign an action to the address by either clicking the **Unsubscribe from list** option and selecting an associated list from the drop-down list, or by clicking the **Unsubscribe from site** option.
2	Click **Next**. The wizard advances to Step 4 of 5: Compose Message.

Composing the Message

To compose the message:

Step	Action
1	Enter a **Message Name** and **Subject Line** for the message.
2	Select the **Language**.
3	Click the tabs that correspond to the formats in which you want to compose the message (Text or HTML) and enter content for the message. You can personalize the content by entering references to profile fields and content segments. **Note:** Use the HTML Editor to create and edit HTML messages.
4	Click **Insert** to enter a reference variable to personalize the subject or the body of the message. **Note:** You can also insert a Share to Social button.
5	Click **URL Tracking** to edit the URL tracking options for the message.
6	Click **Next**. The wizard advances to Step 5 of 5: Preview, Proof, and Send Message.

Previewing, Proofing, and Sending the Message

To preview, proof, and send the message:

Step	Action
1	Click the **Proof** button to access DREAMmail's proofing process.
2	Click the **Send** button to send the message.

Composing Messages

Use the Message Composer window to compose, edit, and format the content of your messages. If you are composing a new message, you must first create a message in the Messages window.

You can compose the following types of messages:

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

  DREAMmail sends these types of messages to a mailing list when campaigns are deployed. You can compose test versions of these messages to send to a subset of the target audience.

- **Recurring triggered** — This type of triggered message is used for actions such as updates or changes to data. A recurring triggered message is generally sent in response to an external event, rather than a direct subscriber action. For example, you can use recurring triggered messages to provide customers with alerts when stock prices changes.

- **Notification triggered** — This type of triggered message is used for actions such as the confirmation of an order or notification that an order has been sent. Generally, this type of triggered message is sent in response to an action that a subscriber performs. For example, if a subscriber purchases an item online, DREAMmail sends a notification triggered message to confirm the purchase. This type of triggered message is used by List Generator and Real Time Messaging.

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

Composing Standard Messages

Standard messages consist of a subject line and a body that contains the content of the message. Content can include text, images, URL links to ecommerce or content website, web forms, and file attachments. The format of a message can be text or HTML. DREAMmail delivers the most content rich version to the recipient upon delivery.

DREAMmail sends these types of messages to a mailing list when campaigns are deployed.

To compose standard messages:

Step	Action
1	Enter message information. **"Entering Message Information" on page 86** provides detailed information.
2	Compose the message. **"Composing a Message" on page 87** provides detailed information.
3	Target the message. **"Targeting a Message" on page 88** provides detailed information.

Step	Action
4	Configure message settings. **"Configuring Message Settings" on page 89** provides detailed information.
5	Schedule the message for deployment. **"Scheduling the Message for Deployment" on page 90** provides detailed information.

Entering Message Information

To enter message information:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Select **Standard Message** from the **New** list.
3	Click **New**. The **Message Information** window opens.
4	Type a name for the message in the **Name** field.
5	Click either the **Everyone matching the criteria** or the **No more than** option. **Note:** If you select the **No more than** option, enter a number if you want to specify a message cap.
6	Click the **Include this message in a Message Group** option to include the message in a message group.
7	Select the message group from the **Message Group** list. **Note:** You can also create a new group for the message.

Creating a New Message Group

A group is comprised of a set of standard DREAMmail messages within a single campaign. One example of a group could be a test message. You create groups and assign messages to them to prevent a subscriber from receiving multiple messages from the same group.

When messages belong to a group, only one message from that group can be sent to a single subscriber. If you send a message or schedule a message to be sent while another message from the same group is being sent, the message is put on hold until the first message is sent to the specified mailing lists.

When you create a new message, you can add a message to an existing group or create a new group for the message. You create a new group from the Messages Informations window.

To create a new message group:

Step	Action
1	Click **New Group** in the **Messages Informations** window. The **New Mailing Group** dialog box appears.
2	Type a name for the new mailing group in the **Mailing Group** field.
3	Click **OK**. The new group is added to the **Message Group** list.

Composing a Message

Use the Message Composer window to compose a message.

To compose a message:

Step	Action
1	Select the sender's address from the **From Address** list. ▪ Select a From Address only if you want to override the default From Address specified for the campaign. ▪ If the From Address that you want to use is not displayed in the drop-down list, you can create it in the Addresses module accessed by clicking **Data** > **Addresses**.
2	Type a **Display Name** if you want to modify the way the From Address is displayed in the message.
3	Type a subject line for the message in the **Message Subject** field. Include any references to dynamic personalization that you want to use. **Note:** If you use dynamic personalization in the subject field of the message, do not enter text after a reference to a profile field, or content segment. If you do, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.)
4	Click the tab that corresponds to the format in which you want to compose the message and position your cursor in the canvas area. For HTML-based messages, click the **HTML** tab.
5	Type the content for the body of the message. **Note:** While composing a message, if you are adding a URL to the message, do not insert a period after the URL.
6	Click **Insert** to enter a reference variable or Share to Social buttons to personalize the subject or the body of the message.
7	Click **URL Tracking** to edit URLs to be tracked in the message and to provide labels for your URLs. The URL labels are used in DREAMmail reports.
8	Click **Create**. A confirmation message appears.
9	Target the message for specific subscribers. **“Targeting a Message” on page 88** provides detailed information.

Step	Action
10	Configure the message settings. **"Configuring Message Settings" on page 89** provides detailed information.
11	Click the **Preview** icon to view how your message will actually be in the text or HTML formats.
12	Click **Proof** to configure the message for proofing.
13	Click **Check Proofing Status** to view the status of whether the proof was delivered successfully. A Status/Error report displays for the message if an error exists.
14	Schedule the message for deployment. **"Scheduling the Message for Deployment" on page 90** provides detailed information.

Targeting a Message

Use the Target window to target the message to specific subscribers.

To target a message:

Step	Action
1	Click the **Mailing Lists** tab to include or exclude subscribers on available mailing lists for the message you are composing. Drag and drop specific mailing lists listed in the **Available Lists** list to either the **Send Message To** box or the **Do Not Send Message To** box. Addresses in the Send Message To box are sent the message. Address in the Do Not Send Message To box are suppressed upon sending.
2	Click the **Filter** tab to create a filter to use with the message. This tab includes two options for creating a filter to target the message. Click one of the options below to create a filter: ▪ **Use Filter Helper** option — Creates a filter using the expression builder. ▪ **Use SQL Filter** option — Creates a custom SQL filter. **Note:** The filter that you specify is applied only to those subscribers who are included in the mailing list, message, or campaign that you select in the Mailing Lists and Prior Mailings tabs.
3	Click the **Prior Mailings** tab to include or exclude subscribers that have been sent mailings in other campaigns or other mailings.
4	Click the **Recency/Frequency** tab to set the Recency and Frequency settings for the message you are composing. You can exclude subscribers from the lists you have chosen to Send Message To based upon recency or frequency of contact. This allows you to exclude certain members of the list based on when and how often they have been contacted.

Configuring Message Settings

Use the Settings window to configure options for your message.

To configure message settings:

Step	Action
1	Specify one of the following three options to determine when DREAMmail sets a cookie on the subscriber's computer: ▪ **Set on Click** — When the subscriber clicks on a tracked URL in the message, DREAMmail sets a cookie. This is the default setting for messages in text and HTML formats. ▪ **Set on Open** — When the subscriber opens an HTML-format message, DREAMmail sets a cookie. ▪ **Set cookie on both Open and Click** — When the subscriber opens an HTML-format message or clicks on a tracked URL in the message, DREAMmail sets a cookie.
2	Verify attachments. If you had selected to attach a file to the message in the **Message Composer** window, the name of the attachment is displayed here.
3	Verify tracked URLs. If you had selected to track URLs to the message in the **Message Composer** window, the name of the URL is displayed here along with the number of instances the URL is tracked. **Note:** Identical URLs will be tracked in aggregate, however, URLs are case sensitive and are treated uniquely with alternate capitalizations.
4	Specify the character set. Sites can be configured to support multiple languages. If your site supports multiple languages, you can choose a character set with which to compose the message. (You cannot use more than one character set in an individual message.) To override the default language setting for a site when you compose a message, specify a different character set for the message.
5	Select a **Reply To Address**, **Subscription Address**, and **Unsubscription Address** if you want to override the default addresses specified for the campaign. **Note:** Click the **Track unsubscribes from replies** or **Track unsubscribes from Unsubscription address** to track unsubscribes from this message in your Delivery and Response report.
6	Type the name that you want displayed as the Reply-to address in the **Display Name** text field.
7	Verify Batch Operational Messages settings. When enabled, Batch Operational Messages (BOM) gives you the option to bypass the Client and/or Site unsubscription values in DREAMmail. This feature may be required in some cases where messages are being deployed to paid subscribers. Delivery for these types of messages must be attempted for each subscriber on the list regardless of their email address unsubscribe status. This option will be visible only if Batch Operational Messages are enabled at the Site level.

Scheduling the Message for Deployment

To schedule a message for deployment:

Step	Action
1	Click **Schedule** from the **Message** toolbar or from the **View Actions** menu. The **Schedule** dialog box appears.
2	Click either the **Send message immediately** option or the **Send on Date** option. **Note:** If you clicked the **Send on Date** option, select the date, time zone, and start time you want DREAMmail to send the message.
3	Click the appropriate send rate option to throttle the deployment of your message.
4	Click **Schedule**. The **Schedule – Confirmation Message** appears.
5	Click **OK**.

Composing Standard Recurring Messages

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

Standard recurring messages are used to send automatically recurring messages. DREAMmail sends these types of messages to a mailing list on a recurring schedule specified in the scheduling of the message. Each standard recurring message creates a master recurring message type, which is essentially the message template. A child recurring message is created for each mailing instance of the master recurring message.

To compose standard recurring messages:

Step	Action
1	Enter message information. **"Entering Message Information" on page 91** provides detailed information.
2	Compose the message. **"Composing a Message" on page 91** provides detailed information.
3	Target the message. **"Targeting a Message" on page 92** provides detailed information.
4	Configure message settings. **"Configuring Message Settings" on page 93** provides detailed information.

Step	Action
5	Schedule the message for deployment. **"Scheduling the Message for Deployment" on page 94** provides detailed information.

Entering Message Information

To enter message information:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Select **Standard Recurring Message** from the **New** list.
3	Click **New**. The **Message Information** window opens.
4	Type a name for the message in the **Name** field.

Composing a Message

Use the Message Composer window to compose a message.

To compose a message:

Step	Action
1	Select the sender's address from the **From Address** list. ▪ Select a From Address only if you want to override the default From Address specified for the campaign. ▪ If the From Address that you want to use is not displayed in the drop-down list, you can create it in the Addresses module accessed by clicking **Data** > **Addresses**.
2	Type a **Display Name** if you want to modify the way the From address is displayed in the message.
3	Type a subject line for the message in the **Message Subject** field. Include any references to dynamic personalization that you want to use. **Note:** If you use dynamic personalization in the subject field of the message, do not enter text after a reference to a profile field, or content segment. If you do, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.)
4	Click the tab that corresponds to the format in which you want to compose the message and position your cursor in the canvas area. For HTML-based messages, click the **HTML** tab.
5	Type the content for the body of the message. **Note:** While composing a message, if you are adding a URL to the message, do not insert a period after the URL.

Step	Action
6	Click **Insert** to enter a reference variable or a Share to Social button to personalize the subject or the body of the message.
7	Click **URL Tracking** to edit URLs to be tracked in the message and to provide labels for your URLs. The URL labels are used in DREAMmail reports.
8	Click **Create**. After creating the message, you can check the message size of each message format.
9	Target the message for specific subscribers. **"Targeting a Message" on page 92** provides detailed information.
10	Configure the message for settings. **"Configuring Message Settings" on page 93** provides detailed information.
11	Click the **Preview** icon to view how your message will actually be in the text or HTML formats.
12	Click **Proof** to configure the message for proofing.
13	Click **Check Proofing Status** to view the status of whether the proof was delivered successfully. A Status/Error report displays for the message if an error exists.
14	Click **Send Count** to email the count of total recipients of a message. **"Sending Counts" on page 102** provides detailed information.
15	Schedule the message for deployment. **"Scheduling the Message for Deployment" on page 94** provides detailed information.

Targeting a Message

Use the Target window to target the message to specific subscribers.

To target a message:

Step	Action
1	Click the **Mailing Lists** tab to include or exclude subscribers on available mailing lists for the message you are composing. Drag and drop specific mailing lists listed in the **Available Lists** list to either the **Send Message To** box or the **Do Not Send Message To** box. Addresses in the Send Message To box are sent the message. Address in the Do Not Send Message To box are suppressed upon sending.

Step	Action
2	Click the **Filter** tab to create a filter to use with the message. This tab includes two options for creating a filter to target the message. Click one of the options below to create a filter: **Use Filter Helper** option — Creates a filter using the expression builder. **Use SQL Filter** option — Creates a custom SQL filter. **Note:** The filter that you specify is applied only to those subscribers who are included in the mailing list, message, or campaign that you select in the Mailing Lists and Prior Mailings tabs.
3	Click the **Prior Mailings** tab to include or exclude subscribers that have been sent mailings in other campaigns or other mailings.
4	Click the **Recency/Frequency** tab to set the Recency and Frequency settings for the message you are composing. You can exclude subscribers from the lists you have chosen to Send Message To based upon recency or frequency of contact. This allows the user to exclude certain members of the list based on when and how often they have been contacted.

Configuring Message Settings

Use the Settings window to configure options for your message.

To configure message settings:

Step	Action
1	Specify one of the following three options to determine when DREAMmail sets a cookie on the subscriber's computer: ▪ **Set on Click** — When the subscriber clicks on a tracked URL in the message, DREAMmail sets a cookie. ▪ **Set on Open** — When the subscriber opens an HTML-format message, DREAMmail sets a cookie. The HTML open-rate tracking setting in the message must be enabled. ▪ **Set cookie on both Open and Click** — When the subscriber opens an HTML-format message or clicks on a tracked URL in the message, DREAMmail sets a cookie.
2	Verify attachments. If you had selected to attach a file to the message in the **Message Composer** window, the name of the attachment is displayed here along with the number of instance the URL.
3	Verify tracked URLs. If you had selected to track URLs to the message in the **Message Composer** window, the name of the URL is displayed here along with the number of instances the URL is tracked. **Note:** Identical URLs will be tracked in aggregate, however, URLs are case sensitive and are treated uniquely with alternate capitalizations.

Step	Action
4	Specify the character set. Sites can be configured to support multiple languages. If your site supports multiple languages, you can choose a character set with which to compose the message. (You cannot use more than one character set in an individual message.) To override the default language setting for a site when you compose a message, specify a different character set for the message.
5	Select a **Reply To Address**, **Subscription Address**, and **Unsubscription Address** if you want to override the default addresses specified for the campaign. **Note:** Select the **Track unsubscribes from replies** or **Track unsubscribes from Unsubscription address** to track unsubscribes from this message in your Delivery and Response report.
6	Type the name that you want displayed as the Reply-to address in the **Display Name** text field.
7	Verify Batch Operational Messages settings. When enabled, Batch Operational Messages (BOM) gives you the option to bypass the Client and/or Site unsubscription values in DREAMmail. This feature may be required in some cases where messages are being deployed to paid subscribers. Delivery for these types of messages must be attempted for each subscriber on the list regardless of their email address unsubscribe status. This option will be visible only if Batch Operational Messages are enabled at the Site level.

Scheduling the Message for Deployment

To schedule a message for deployment:

Step	Action
1	Click **Schedule** from the **Message** toolbar or from the **View Actions** menu. The **Schedule** dialog box appears.
2	Select the **Time Zone** and **Start Time**.
3	Click the recurrence option and corresponding values.
4	Select the date you want DREAMmail to start sending the message.
5	Enter the end after or end by information.
6	Click the send option for delayed messages.
7	Click the appropriate send rate option to throttle the deployment of your message.
8	Click **Schedule**. The **Schedule – Confirmation Message** appears.
9	Click **OK**.

Composing Triggered Messages

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

- **Notification** — This type of triggered message is used for actions such as the confirmation of an order or notification that an order has been sent. Generally, this type of triggered message is sent in response to an action that a subscriber performs. For example, if a subscriber purchases an item online, DREAMmail sends a notification triggered message to confirm the purchase. This type of triggered message is used by List Generator and Real Time Messaging.

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

- **Recurring** — This type of triggered message is used for actions such as updates or changes to data. A recurring triggered message is generally sent in response to an external event, rather than a direct subscriber action. For example, you can use recurring triggered messages to provide customers with alerts when stock prices changes.

Triggered messages are similar to standard messages, except that triggered messages do not require you to specify a mailing list. You can compose triggered messages in the same formats as a standard message, apply the same settings, and include URLs and attachments in the message. You can also use dynamic personalization in triggered messages.

The status of triggered messages can be:

- Armed
- Closed
- Composing

If a triggered message has a status of Armed, when a specified triggering event occurs, DREAMmail sends the message in response to one or more subscribers. You can disarm a message in order to edit it. This will change the message status to Composing. When a triggered message has a Closed or Composing status, the message cannot be sent to subscribers. Messages with statuses of Closed are never able to be sent again. Messages with a status of Composing can be armed again to be sent.

DREAMmail can only archive triggered messages with a status of Closed or Armed. You cannot start, stop, pause, or abort triggered messages. You cannot use the automated proofing and approval processes with triggered messages. Reporting statistics for triggered messages cover the entire period for which the message has a status of Armed.

To compose triggered messages:

Step	Action
1	Enter message information. **"Entering Message Information" on page 97** provides detailed information.

Step	Action
2	Compose the message. **“Composing a Triggered Message” on page 97** provides detailed information.
3	Configure message settings. **“Configuring Message Settings” on page 98** provides detailed information.
4	Arm the message. **“Arming, Disarming, and Closing a Triggered Message” on page 99**
5	Schedule the message for deployment. **“Scheduling the Message for Deployment” on page 94** provides detailed information.

Entering Message Information

Composing a triggered message is similar to composing a standard message. You specify a subject line, body (in one or more formats), and any personalization that you want to use.

To enter message information:

Step	Action
1	Access the **Messages** window. You cannot create triggered messages in a campaign that has been configured to require approval. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Select **Notification Triggered Message** or **Recurring Triggered Message** from the **New** list. **Note:** If you are composing a triggered message for RTM or List Generator, you must specify Notification Triggered Message as the type.
3	Click **New**. The **Message Information** window displays.
4	Type a name for the message in the **Name** field.
5	Select an item from the **Type** drop-down list if you want to assign a type to the message. This feature enables Epsilon to report on your triggered messages on the basis of the type you specify. **Other** is the default value.

Composing a Triggered Message

Use the Message Composer window to compose a triggered message.

To compose a message:

Step	Action
1	Select the sender's address from the **From Address** drop-down list. ▪ Select a From Address only if you want to override the default From Address specified for the campaign. ▪ If the From Address that you want to use is not displayed in the drop-down list, you can create it in the Addresses module accessed by clicking **Data** > **Addresses**.
2	Type a **Display Name** if you want to modify the way that the from address is displayed in the message.
3	Type a subject line for the message in the **Message Subject** field. Include any references to dynamic personalization that you want to use. **Note:** If you use dynamic personalization in the subject field of the message, do not enter text after a reference to a profile field, or content segment. If you do, DREAMmail cannot send your message. (You can enter text only before the profile field or content segment.)
4	Click the tab that corresponds to the format in which you want to compose the message and position your cursor in the canvas area. For HTML-based messages, click the **HTML** tab.

Step	Action
5	Type the content for the body of the message.
6	Click **Insert** to enter a reference variable or a Share to Social button to personalize the subject or the body of the message. **Note:** The maximum allowable number of client profile fields for notification triggered messages is 512. If the number of profile fields for the client exceeds 512, the notification triggered message will time out and will not be deployed, if desired.
7	Click **URL Tracking** to edit URLs to be tracked in the message and to provide labels for your URLs. The URL labels are used in DREAMmail reports.
8	Click **Create**. A confirmation message appears.
9	Configure the message settings. **“Configuring Message Settings” on page 98** provides detailed information.
10	Click the **Preview** icon to view how your message will actually be in the text or HTML formats.
11	Arm the triggered message. **“Arming, Disarming, and Closing a Triggered Message” on page 99** provides detailed information.

Configuring Message Settings

Use the Settings window to configure options for your message.

To configure message settings:

Step	Action
1	Specify one of the following three options to determine when DREAMmail sets a cookie on the subscriber's computer: ▪ **Set on Click** — When the subscriber clicks on a tracked URL in the message, DREAMmail sets a cookie. This is the default setting for messages in text and HTML formats. ▪ **Set on Open** — When the subscriber opens an HTML-format message, DREAMmail sets a cookie. ▪ **Set cookie on both Open and Click** — When the subscriber opens an HTML-format message or clicks on a tracked URL in the message, DREAMmail sets a cookie.
2	Verify attachments. If you had selected to attach a file to the message in the **Message Composer** window, the name of the attachment is displayed here.
3	Verify tracked URLs. If you had selected to track URLs to the message in the **Message Composer** window, the name of the URL is displayed here.

Step	Action
4	Specify the character set. Sites can be configured to support multiple languages. If your site supports multiple languages, you can choose a character set with which to compose the message. (You cannot use more than one character set in an individual message.) To override the default language setting for a site when you compose a message, specify a different character set for the message.
5	Select a **Reply To Address**, **Subscription Address**, and **Unsubscription Address** if you want to override the default addresses specified for the campaign. **Note:** Select the **Track unsubscribes from replies** or **Track unsubscribes from Unsubscription address** to track unsubscribes from this message in your Delivery and Response report.
6	Type the name that you want displayed as the Reply-to address in the **Display Name** text field.

Arming, Disarming, and Closing a Triggered Message

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

To arm, disarm, or close a triggered message:

Step	Action
1	Access the Messages window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions icon**  located next to the name of the campaign you want to open. The **View Actions** menu appears.
3	Do one of the following: ▪ Select **Arm**. The status of the message changes to Armed. ▪ Select **Disarm**. The status of the message changes to Composing. ▪ Select **Close**. The status of the message changes to Closed.

Managing Existing Messages

DREAMmail messages are emails sent as part of the process of deploying a campaign. A message consists of a subject line and a body of text that contains the content of the message. The body content of a message can include text, images, URL links to ecommerce or content websites, web forms, and file attachments. The message can be in text or HTML formats.

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

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

This section includes the following information:

- **Accessing the Messages Window**
- **Previewing Messages**
- **Editing Messages**
- **Sending Counts**
- **Opening Messages**
- **Updating URLs**
- **Updating Personalized URLs**
- **Viewing Properties**
- **Checking the Proofing Status of a Message**
- **Duplicating Messages**
- **Deleting Messages**
- **Archiving Messages**
- **Viewing the Size of a Message**
- **Inserting Variables**
- **Tracking URLs**
- **Sending Messages**
- **Pausing Outgoing Messages**
- **Resume Sending Paused Messages**
- **Terminating Messages**
- **Viewing the Estimated Number of Subscribers to Receive a Message**

Accessing the Messages Window

Use the Messages window to perform message management tasks. Basic message management tasks include creating, editing, deleting, and archiving messages. From the Messages window, you can specify the type of message you want to create and apply a template to the message.

To display the Messages window:

Step	Action
1	Click the **Campaigns** menu item. The **Campaigns Lists** window opens displaying a list of active campaigns.
2	Click the **View Actions icon** located next to the name of the campaign you want to open. The **View Actions** menu appears.
3	Click **Open**. The **Campaigns Information** window opens.
4	Minimize the **Campaigns Information** window. The **Messages** window displays.

Previewing Messages

To preview the various formats of a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to preview. The **View Actions** menu appears.
3	Click **Preview**. The **Preview** window opens. The message format (Text and HTML) tabs are displayed, where you can preview the message.

Editing Messages

You can edit a message before sending it to recipients. Once a message is sent to recipients, you cannot edit the message.

To edit messages:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to edit. The **View Actions** menu appears.
3	Click **Open**. The message opens in the **Message Composer** window. **Note:** Alternately, you can open the message by clicking the name of the message.
4	Edit the message.
5	Click **Save**. A message confirming that the message has been successfully saved appears.

Sending Counts

To send the count of total recipients of a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to edit. The **View Actions** menu appears.
3	Click **Send Count**. The **Send Count** dialog box appears.
4	Type the email address where you want the number of recipients sent in the **Email Address** field. A message confirming that your request has been processed appears.

Opening Messages

To open an existing message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message. The **View Actions** menu appears.
3	Click **Open**. The message displays.

Updating URLs

You can modify a tracked URL in any message with a status of sending, armed, aborted, paused, archived, closed or finished. Any tracked URLs within the body of the message or contained within content segments and offer tables referenced in the message can be updated. Tracked URLs can be modified for any message type, including standard, recurring, and triggered messages, however at least one message must be deployed before the URLs for a triggered message can be changed. A single URL can be updated as many as 5 times within a 30 day period for each message.

To update URLs:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message containing URLs you want to update. The **View Actions** menu appears.
3	Click **Update URLs**. The **Update URLs** dialog box appears displaying the following information: ▪ Any tracked URLs ▪ Revision count (the number of times the URL has been updated) ▪ Location (whether the URL is located in your message body, an offer table, or nested within a content segment in your message) ▪ Message format (Text, or HTML)
4	Modify the URL.
5	Create or modify its associated URL label. **Note:** If a URL label already exists, you must modify the URL label for any updated URL. This ensures both URLs can be tracked separately in reports.

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

Note: Once updated, the new URL displays in the properties for the message. The URL does not change within the message, content segment or offer table canvases. When displayed in the Properties function, the personalized portion of the URL does not display.

Updating Personalized URLs

URLs that contain personalization will maintain the personalization parameters in any updates. URLs cannot be updated with new personalization parameters. Any new personalization parameters made to the URL when updating, will result in an error.

Viewing Properties

To view message properties:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message. The **View Actions menu** appears.
3	Click **Properties**. The **Properties** tab appears. This provides a read-only version of your message displaying the properties.

Checking the Proofing Status of a Message

The DREAMmail Status/Error Report defines proofing errors. The report provides you with the following information:

- **Error Code** — A numeric code followed by a brief description.
- **Type** — Indicates where the error was detected: message or content segment.
- **Name** — Name of the message or content segment.
- **Format** — Format of the message: Text, HTML, ALL, or Subject.
- **Detail Description** — A detailed description of the error that includes the text that caused the problem. If the error is due to an internal error, you are instructed to contact DREAMmail support.

To check the proofing status of a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the message. The **View Actions** menu appears.
3	Click **Check Proofing Status**. The **Check Proofing Status** dialog box appears.
4	Click **OK** to close the dialog box.

Duplicating Messages

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

To duplicate a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the message you want to duplicate. The **View Actions** menu appears.
3	Click **Save As**. The **Save As Message** dialog box appears
4	From the **Save As into Campaign** drop-down list, select the campaign into which you want to save the message.
5	Type a name for the new message in the **Save As Message Name** field.
6	Click **Next**. A new tab opens displaying the **Message Information** window, the **Message Composer** window, the **Target** window, and the **Settings** window for the new message.

Deleting Messages

You can only delete messages that have not been sent.

The table below defines the type of messages that can be deleted:

Message Type	Status
Standard Message	▪ To be Sent ▪ Composing ▪ Pending Approval ▪ Approved and To Be Sent
Standard Recurring Message	▪ Composing **Note:** You must pause the message in order to set the message status to Composing.
Recurring Triggered Message	▪ Composing **Note:** The message must not be armed; or if armed, must be disarmed in order to set the status of the message to Composing.
Notification Triggered Message	▪ Composing **Note:** The message must not be armed; or if armed, must be disarmed in order to set the status of the message to Composing.

To delete messages:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the message you want to delete. The **View Actions** menu appears.
3	Click **Delete**. The **Delete** dialog box appears confirming whether you want to delete the message.
4	Click **Delete**.

Archiving Messages

DREAMmail allows you to manually archive all sent messages, including standard messages with a status of Finished and triggered messages with a status of Closed.

To manually archive a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the message you want to manually archive. The **View Actions** menu appears.
3	Click **Archive**. A message appears confirming that you want to archive the message.
4	Click **OK**.

Viewing the Size of a Message

DREAMmail automatically calculates and displays the size of standard messages for each message format. Knowing the size of your messages can help you plan and budget for a campaign.

DREAMmail counts every character as a single byte, unless you are using a double-byte character set, in which case each character is two bytes. HTML tags, as well as white space, are included in the message size calculation. Every time you update or edit a message, the size of each message format is recalculated. DREAMmail calculates message size before you send the message.

Note: DREAMmail calculates message size for standard messages only.

To view the size of a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the desired message. The **View Actions** menu appears.
3	Click **Properties**. The message sizes for all message formats are displayed in the upper-right corner.

Inserting Variables

You can personalize a message by inserting reference variables in the subject line and the body of the message. When you send a message, DREAMmail replaces the reference variables with the corresponding information from the DREAMmail profile lists. For example, if you insert a reference variable for first name, the first name of the recipient replaces the reference variable.

To insert a reference variable:

Step	Action
1	Click in the **Message Subject** field or the body of the message where you want to insert a reference variable.
2	Click **Insert**. The **Insert** dialog box appears.
3	Select a variable type from the list displayed on the left. Valid variable types include: ▪ Profile data ▪ Content segments ▪ Offer tables ▪ Subscribe Addresses ▪ Unsubscribe Addresses ▪ Hosting URL ▪ Social Buttons ▪ Content from URLs ▪ Event variables (Triggered Messages only) **Note:** You cannot select the Offer Table, content from URLs, or Share to Social Buttons when you are inserting a variable in the subject line of the message. The Hosting URL variable is only available if the **The Site is Enabled for Hosted Messages** option is selected. **"Configuring Hosted Messages" on page 31** provides detailed information.
4	Select a variable from the list displayed on the right.
5	Click **Insert**. The reference variable is inserted in the Subject line or in the body of the message at the location of the pointer. The "#" marks appears before the first letter of the variable and after the last letter of the variable. For example, if you select a variable type as first name and insert it in the subject line, #First Name# appears in the subject line. The "#" sign indicates that the inserted word is a reference variable. **Note:** DREAMmail displays the default view for content segments and offer tables.
6	Verify that the location of the reference is correct.
7	Click **Save**.

Tracking URLs

You can mark URLs inserted into the body of a message for tracking when the message is deployed. When you mark a URL for tracking, DREAMmail counts the number of times recipients click (click-through) the URL in the message. By default, all URLs inserted into a message are marked for tracking. You can access this information in DREAMmail reports. Tracking URLs help you determine the success of a given campaign or the popularity of a given message or URL.

To help organize your tracked URLs in reports, DREAMmail's Auto URL Labeling feature enables you to automatically assign a short, descriptive label to each URL without having to type out the label.

Note: Tracked URLs can be modified post deployment. For composing, armed, or sent messages, use Update URLs to modify or correct the destination URL.

To track URLs:

Step	Action
1	Click **URL Tracking** in the **Message Composer** Window. The **URL Tracking** dialog box appears listing the URLs inserted into the message. By default, all URLs are selected for tracking.
2	Click specific check boxes to deselect individual URLs. **Note:** DREAMmail cannot track a URL in a text message if you enter a period (.) after the URL. If you need to add a period after the URL, ensure you leave a space between the URL and the period, for example, "Contact us at www.FallRiverSports.com ."
3	Click **Generate** to have DREAMmail assign a label to the URL or create labels for your URLs by entering text in the **URL label** field. DREAMmail automatically generates labels for selected URLs in the URL Label field. **Note:** You can edit URL labels that have been generated by DREAMmail.
4	Click **Save**.

Sending Messages

After you have composed and validated a message, you can send it to the mailing lists you specified when you created the message. For triggered messages, messages in armed status are deployed when their established triggering event occurs. You can also send a Bcc (blind carbon copy) of the message to a designated inbox for archival and compliance purposes.

Sending Messages Immediately

Ensure you validate messages before sending them to subscribers. Messages can be paused if they are in the status of sending, but messages already sent cannot be recalled.

To send a Standard Message immediately:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the message you want to send. The **View Actions** menu appears.
3	Select **Schedule.** The **Schedule** dialog box appears.
4	Click the **Send message immediately** option.
5	Click **Schedule**. The **Schedule-Confirmation Message** dialog box appears confirming whether you want to send the message.
6	Click **OK**. If there are no recency-frequency messages scheduled for deployment, the message is sent. If there are recency-frequency messages scheduled for deployment, the message may be blocked until those messages are sent.

Specifying the Send Rate of a Message

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

To specify a send rate:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon  next to the message you want to send. The **View Actions** menu appears.
3	Select **Schedule.** The **Schedule** dialog box appears.
4	Click the desired **Send rate** throttling option.
5	Click Schedule. The **Schedule-Confirmation Message** dialog box appears confirming whether you want to send the message.
6	Click **OK**.

Scheduling a Message for Deployment

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

Note: You can also schedule a standard messages to be deployed at a future date and time. However, the message will not be deployed on a recurring schedule.

To schedule a message for deployment:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to send. The **View Actions** menu appears.
3	Select **Schedule.** The **Schedule** dialog box appears.
4	Click the **Send on date** option.
5	Select the **Time Zone** and **Start Time**.
6	Click the recurrence option and corresponding values.
7	Select the date you want DREAMmail to start sending the message.
8	Enter the end after or end by information.
9	Click the option for sending messages that are delayed at the scheduled send time.
10	Click the send rate.
11	Click **Schedule**. The **Schedule – Confirmation Message** dialog box appears confirming whether you want to send the message.
12	Click **OK**. If there are no recency-frequency messages scheduled for deployment, the message is sent. If there are recency-frequency messages scheduled for deployment, the message may be blocked until those messages are sent.

Pausing Outgoing Messages

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

To pause outgoing messages:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to pause. The **View Actions** menu appears.
3	Select **Pause**.

Resume Sending Paused Messages

If a message has been paused, you can resume sending it.

To resume sending paused messages:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to resume sending. The **View Actions** menu appears.
3	Select **Resume**.

Terminating Messages

You can terminate an outgoing message if you discover an error in the message text, or if there is a technical problem with the message. You cannot resume sending after a message has been terminated. If you want to temporarily stop a message, you can pause the message.

To terminate a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to terminate. The **View Actions** menu appears.
3	Select **Terminate**.

Viewing the Estimated Number of Subscribers to Receive a Message

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

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Actions** icon next to the message you want to know the estimated number of subscribers who will receive the message. The **View Actions** menu appears.
3	Select **Send Count**. The **Send Count** dialog box appears.
4	Type an email address where you want the count of subscribers sent in the **Email Address** field.
5	Click **OK**. An email containing the count of subscribers will be sent to the email address specified.

Managing Content Segments

A content segment is a unit of information that you can include in a message. A content segment can contain any type of information that you normally include in a message such as URLs, profile fields, references to other content segments, and in some cases, programming logic. Using content segments is a more sophisticated way of personalizing a message than inserting individual profile fields.

A content segment can contain either static or dynamic elements:

- Static content elements contain a single block of editorial content that is included in all messages that reference the content segment.
- Dynamic content elements consist of conditional and script content elements that can contain multiple blocks of editorial information, condition statements, or scripting. Conditional statements determine the block that is to be inserted into messages that reference the content segment.

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

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

Use the Content Segments module to create and manage content segments.

This section includes the following information:

- **Creating a Content Segment**
- **Adding Conditions to a Content Segment**
- **Inserting Images into Content Segments**
- **Editing a Content Segment**
- **Duplicating a Content Segment**
- **Displaying which Campaigns and Messages are using the Content Segment**
- **Deleting a Content Segment**

Creating a Content Segment

You can:

- Create content segments in either text or HTML formats.
- Type content for the segment or cut and paste content from a different source.
- Include URLs.
- Include Scripts — Enter the script in the Default Content window. The script must be in a CDATA section. Ensure that you include all tags and the URLs of any websites that you cite; URLs must begin with http:// or https://. Also, ensure you include all necessary tags and position them correctly.

Note: The guidelines that apply to message formats also apply to content segments.

To create a content segment:

Step	Action
1	Enter content segment information. **"Entering Content Segment Information" on page 115** provides detailed information.
2	Enter default content information. **"Entering Default Content Information" on page 115** provides detailed information.

Entering Content Segment Information

To enter content segment information:

Step	Action
1	Click **Assets** > **Content Segments**. The **Content Segment List** window opens.
2	Click **New** from the toolbar. The **Content Segment Information** and the **Default Content** windows open.
3	Type a name for the content segment in the **Name** field.
4	Type a description for the content segment in the **Description** field.
5	Select a character set from the **Character Set** list. **Note:** The character set helps DREAMmail interpret message content. The default value is English (US-ASCII). If your content contains characters outside the US-ASCII character set (extended ASCII or double-byte), you must specify the character set you use.

Entering Default Content Information

To enter default content information:

Step	Action
1	Enter content segment information. **"Entering Content Segment Information" on page 115** provides detailed information.
2	Minimize the **Content Segment Information** window. The **Default Content** window appears.
3	Click the **Text** tab to access the text content segment editing area or click the **HTML** tab to access the HTML content segment editing area. **Note:** Click the **Enable HTML Editor** option to display the HTML toolbar.
4	Click **URL Tracking** if you want to track URLs in the content segment to determine their click-through rate.

Step	Action
5	Click **Insert** to include a graphic image or content from a URL.
6	Click **Add Condition** to add conditional information to the segment.
7	Click the **Preview** icon . A **Preview** window opens. **Note:** Click the **Text** or **HTML** tab to preview the final format.
8	Click **Create**. A message confirming that the Content Segment has been successfully created appears.

Adding Conditions to a Content Segment

To add conditions to a content segment:

Step	Action
1	Create a content segment. **"Creating a Content Segment" on page 114** provides detailed information.
2	Click **Add Condition** to add a conditional expression. A conditional content segment expression builder appears.
3	Use the drop-down lists to create a conditional statement. For example, IF City contains New York, use the: ▪ First drop-down list to select the profile field you want to use as a condition. ▪ Second drop-down list to select an operator to compare the profile field against the text that you type in the third field. ▪ Third field to type the text that you want to use to complete the condition statement.
4	Click the **Text** tab to access the text content segment editing area or click the **HTML** tab to access the HTML content segment editing area.
5	Compose the content you want DREAMmail to send to those subscribers who meet the condition that you specified in the Step 4. **Note**: ▪ Click **Add Condition** and repeat the previous three steps to create another condition. ▪ You can create more than one condition statement to include subscribers who meet additional criteria or to include subscribers who do not meet any criteria specified in the condition statement. ▪ The profile field that you select should be the same for all conditions in a specific content segment.

Step	Action
6	Click the tab in the **Default Content** window that corresponds to the format in which you want to compose content that you want DREAMmail to send to subscribers who do not meet any of the criteria specified in the condition statements.
7	Compose the content.
8	Click **Create**.

Inserting Images into Content Segments

You can insert variables and images into content segments using the Insert dialog box.

To insert an image:

Step	Action
1	Create a content segment. **"Creating a Content Segment" on page 114** provides detailed information.
2	Place your cursor in HTML Editor.
3	Click **Insert**. The **Insert** dialog box appears.
4	Choose **Content Segment** from the drop-down list.
5	Enter the image properties: ▪ Source ▪ Title ▪ Alignment ▪ Border Style ▪ Width and Height ▪ Spacing
6	Click **Insert.** The image displays in the HTML Editor.

Editing a Content Segment

To edit a content segment:

Step	Action
1	Click **Assets** > **Content Segments**. The **Content Segment List** window opens.
2	Click the **View Actions** icon located next to the name of the content segment you want to edit. The **View Actions** menu appears.

Step	Action
3	Click **Open**. The **Content Segment Information** window and the **Default Content** windows open.
4	Edit the content segment.
5	Click **Save**. A message confirming that the content segment has been successfully saved appears.

Duplicating a Content Segment

To duplicate a content segment:

Step	Action
1	Click **Assets** > **Content Segments**. The **Content Segment List** window opens.
2	Click the **View Actions** icon  located next to the name of the content segment you want to duplicate. The **View Actions** menu appears.
3	Click **Save As**. The **Content Segment Information** window and the **Default Content** window opens.
4	Enter a new name in the **Name** field.
5	Click **Create**. A message confirming that the content segment has been successfully saved appears.

Displaying which Campaigns and Messages are using the Content Segment

To display which campaigns and messages are using the content segment:

Step	Action
1	Click **Assets** > **Content Segments**. The **Content Segment List** window opens.
2	Click the **View Actions** icon located next to the name of the desired content segment. The **View Actions** menu appears.
3	Click **View Campaigns**. The **View Campaigns** window opens listing all campaigns and messages using the content segment.

Deleting a Content Segment

To delete a content segment:

Step	Action
1	Click **Assets** > **Content Segments**. The **Content Segment List** window opens.
2	Click the **View Actions** icon located next to the name of the content segment you want to delete. The **View Actions** menu appears.
3	Click **Delete**. The **Delete** dialog box appears confirming whether you want to delete the content segment.
4	Click **Delete**.

Note: Deleting a content segment used in a current message results in an error when the message is deployed. Also, deleting a content segment used in an offer table deletes the content segment from the offer table.

Using Templates in Messages

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

This section includes the following information:

- Creating Templates
- Editing Templates
- Implementing URL Tracking in Templates
- Inserting Template Variables in Templates

Creating Templates

The process of creating a template includes:

Step	Action
1	Entering template information. **"Entering Template Information" on page 120** provides detailed information.
2	Composing the template. **"Composing the Template" on page 121** provides detailed information.
3	Configuring template settings. **"Configuring Template Settings" on page 121** provides detailed information.

Entering Template Information

To enter template information:

Step	Action
1	Click **Assets** > **Templates**. The **Template List** window opens.
2	Click **New**. The **Template Information** window opens.
3	Type a name for the template in the **Name** field.
4	Type a description for the template in the **Description** field.

Composing the Template

Use the Template Composer window to compose a template.

To compose the template:

Step	Action
1	Type the text that you want to be displayed in the subject line of the template in the **Message Subject** field, including any references to dynamic personalization that you want to use.
2	Click the tab that corresponds to the format (Text or HTML) in which you want to compose the template message.
3	Type the message text in the composer canvas. **Note:** Each message format has its own requirements and delivery rules.
4	Click **Insert** to enter a reference variable or Share to Social buttons to personalize the subject or the body of the message.
5	Click **URL Tracking** to edit the URL tracking options for the message.
6	Click **Create**.
7	Configure the template settings. **"Configuring Template Settings" on page 121** provides detailed information.

Configuring Template Settings

Use the Settings window to configure template settings.

To configure template settings:

Step	Action
1	Specify one of the following three options to determine when DREAMmail sets a cookie on the subscriber's computer: ▪ **Set on Click** — When the subscriber clicks on a tracked URL in the message, DREAMmail sets a cookie. This is the default setting for messages in text and HTML formats. ▪ **Set on Open** — When the subscriber opens an HTML-format message, DREAMmail sets a cookie. ▪ **Set Cookie on Both Open and Click** — When the subscriber opens an HTML-format message or clicks on a tracked URL in the message, DREAMmail sets a cookie.
2	Verify attachments. If you had selected to attach a file to the template in the **Template Composer** window, the name of the attachment is displayed here.
3	Verify tracked URLs. If you had selected to track URLs inserted in the template in the **Template Composer** window, the name of the URL is displayed here.
4	Specify the character set. Sites can be configured to support multiple languages. If your site supports multiple languages, you can choose a character set with which to compose the template. (You cannot use more than one character set in an individual template.) To override the default language setting for a site when you compose a template, specify a different character set for the template.

Editing Templates

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

Note: You can also edit a template by clicking the template name in the Templates List window.

To edit templates:

Step	Action
1	Click **Assets** > **Templates**. The **Template List** window opens.
2	Click the **View Actions** icon  located next to the name of the template you want to edit.
3	Select **Open**. The **Template** tab opens displaying the **Template Information** window, the **Template Composer** window, and the **Settings** window.
4	Edit the template information.
5	Click **Save**.

Implementing URL Tracking in Templates

To implement URL tracking in templates:

Step	Action
1	Click **Assets** > **Templates**. The **Template List** window opens.
2	Create a new template or access an existing template. **"Composing the Template" on page 121** provides detailed information.
3	Enter the URLs that you want to track in the body of the template.
4	Click **URL Tracking** in the **Template Composer**. The **URL Tracking** dialog box appears.
5	Deselect the URLs that you do not want to track.
6	Click the **Generate** button if you want to automatically create a label for each selected URL. **Note:** You can also create your own URL label by entering it in the **URL Label** field.
7	Click **Save**.

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

Inserting Template Variables in Templates

Template variables are placeholders for text that you insert into templates. When you compose a message with a template that contains template variables, you replace the template variables with text that is specific to the message.

By using template variables, you can reuse templates with different messages without having to update or change the text for each message.

You must specify the default values for template variables by using the specify template variables button. You are prompted to do this when you save a template for the first time.

The following variables can be inserted in a template:

- Profile data
- Content Segments
- Offer Tables
- Subscribe Address
- Unsubscribe Address
- Social Media buttons
- Content from URLs

To insert template variables in templates:

Step	Action
1	Create a new template or access an existing template. **"Composing the Template" on page 121** provides detailed information.
2	Place your pointer in the **Message Subject** field or in the message body.
3	Click **Insert** in the **Template Composer**. The **Insert** dialog box appears.
4	Select a variable type from the list displayed on the left.
5	Select a variable from the list displayed on the right.
6	Click **Insert**.
7	Click **Save**.

Creating Business Rules for Messages

Use the Business Rules module to create and manage the business rules you want to use in conjunction with offer tables.

Note: A business rule cannot be used without an offer table.

A business rule is a conditional expression that you create by using subscribers' profile data and Boolean operators (AND and OR).

You associate business rules with content segments on a one-to-one basis in an offer table. When you insert the offer table into a message, the business rules in the table are applied to the profile data of the subscribers who receive the message. If a match occurs, the content segment that corresponds to the business rule is included in the message. After you create a business rule, you can reuse it repeatedly in different messages.

The process of creating a business rule includes entering business rule information and creating a business rule expression.

This section includes the following information:

- **Creating a Business Rule**
- **Editing a Business Rule Expression**
- **Duplicating a Business Rule**
- **Displaying which Campaigns and Messages are using the Business Rule**
- **Deleting a Business Rule Expression**

Creating a Business Rule

To create a business rule:

Step	Action
1	Enter business rule information. **"Entering Business Rule Information" on page 124** provides detailed information.
2	Create a business rule expression. **"Creating a Business Rule Expression" on page 125** provides detailed information.

Entering Business Rule Information

Use the Business Rule List window to create and manage the business rules you want to use in conjunction with content segments and offer tables.

To enter business rule information:

Step	Action
1	Click **Assets** > **Business Rules**. The **Business Rule List** window opens.
2	Click **New**. The **Business Rule Information** window opens.

Step	Action
3	Type a name for the business rule in the **Name** field.
4	Type a description of the business rule in the **Description** field.

Creating a Business Rule Expression

Use the Business Rule Composer window to create a business rule expression.

To create a business rule expression:

Step	Action
1	Select the types of data you want to use as conditional expressions in the business rule from the drop-down lists. Valid types include **Profile Field** and **Profile Date Field**. If you select **Profile Field**, select the desired profile field value from the profile field value drop-down list. If you select **Profile Date Field**, the **Profile Date Field** dialog box appears. Select the desired profile field date from the drop-down list, click either the **Relative Date** or **Absolute Date**, and complete the appropriate options. Click **Set Date** when finished.
2	Click **Add Expression** to add an additional conditional expression. As you create the rule, each time you click the **Validate** button, the syntax is displayed in the **Validate** box. **Note:** Drag and drop the conditional expressions to rearrange and refine the syntax of the rule.
3	Click **Create**. **Note:** The criteria in the Expression box when you create or save the business rule will be the expression saved for the business rule.

Editing a Business Rule Expression

To edit a business rule expression:

Step	Action
1	Click **Assets** > **Business Rules**. The **Business Rule List** window opens.
2	Click the **View Actions** icon  located next to the name of the business rule you want to edit. The **View Actions** menu appears.
3	Select **Open**. The **Business Rule Information** window and the **Business Rule Composer** windows open.

Step	Action
4	Edit the business rule.
5	Click **Save**. A message confirming that the business rule has been successfully saved appears.

Duplicating a Business Rule

To duplicate a business rule:

Step	Action
1	Click **Assets** > **Business Rules**. The **Business Rule List** window opens.
2	Click the **View Actions** icon located next to the name of the business rule you want to duplicate. The **View Actions** menu appears.
3	Click **Save As**. The **Business Rule Information** window and the **Business Rule Composer** windows open.
4	Enter a new name in the **Name** field.
5	Click **Create**. A message confirming that the business rule has been successfully saved appears.

Displaying which Campaigns and Messages are using the Business Rule

To display which campaigns and messages are using a business rule:

Step	Action
1	Click **Assets** > **Business Rules**. The **Business Rule List** window opens.
2	Click the **View Actions** icon located next to the name of the desired business rule. The **View Actions** menu appears.
3	Click **View Campaign**. The **View Campaign** window opens listing all campaigns and messages using the business rule.

Deleting a Business Rule Expression

To delete a business rule expression:

Step	Action
1	Click **Assets** > **Business Rules**. The **Business Rule List** window opens.
2	Click the **View Actions** icon located next to the name of the business rule you want to delete. The **View Actions** menu appears.
3	Click **Delete**. The **Delete** dialog box appears confirming whether you want to delete the business rule.
4	Click **Delete**.

Note: Deleting a business rule used in an offer table removes the business rule from the offer table. Any message using an offer table containing a deleted business rule results in an error when deployed.

Creating Offer Tables

An offer table consists of one-to-one associations between business rules and content segments. Like profile fields and content segments, you insert the offer table into a message to personalize its content.

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

To create an offer table:

Step	Action
1	Enter offer table information. **"Entering Offer Table Information" on page 128** provides detailed information.
2	Create an offer table expression. **"Creating an Offer Table Expression" on page 129** provides detailed information.

Entering Offer Table Information

Use the Offer Tables List window to create and manage the offer tables you want to use for personalizing messages.

To enter offer table information:

Step	Action
1	Click **Assets** > **Offer Tables**. The **Offer Tables List** window opens.
2	Click **New**. The **Offer Table Information** window opens.
3	Type a name for the offer table in the **Name** field.
4	Type a description of the offer table in the **Description** field.

Creating an Offer Table Expression

Use the Offer Table Composer window to create an offer table expression. You build an offer table expression by matching a business rule with a content segment.

To create an offer table expression:

Step	Action
1	Select a business rule from the **Select Business Rule** list.
2	Select a content segment from the **Select Content** list. **Note:** To create additional matches between a business rule and content segment, click **Add Expression** and repeat steps 1 and 2.
3	Select a default content segment from the **If a subscriber does not match any of the criteria above, then they will receive Select Content** list.
4	Click the offer delivery type. Valid options include: ▪ **Send subscriber only the first offer they match** — The message will contain only the content segment that corresponds to the first business rule that applies to the subscriber. ▪ **Send subscriber all offers that match the subscriber's profile** — The message will contain the content segments that correspond to all the business rules that apply to the subscriber. **Note:** The default content segment is not included in the message if any other content segment in the offer table has been included.
5	Click **Create**.

Validating Messages

After you compose a message, validating it is the next step in the process of deploying a campaign. Validating messages in DREAMmail consists of individuals in your company reviewing and approving the messages before you send it.

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

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

This chapter includes the following information:

Proofing Messages

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

You can submit multiple messages in multiple formats for simultaneous proofing. You can also personalize the messages, using either the profile data from subscribers on the proofing lists, or random profile data from subscribers whom the message targets.

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

Email Applications — To ensure that there are no technical errors with your message, set up several different email accounts in different email applications. Open the same message in each account to ensure that the message is displayed correctly.

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

Verify Message Set Up — Epsilon also recommends verifying the setup of the message. Review the message in campaigns to ensure that personalization is correct, that the appropriate mailing lists are selected, and that links to graphics and websites are working.

This section includes the following information:

- **Sending a Message for Proofing**
- **Setting Up Email Accounts and Applications to Proof Messages**
- **Checking the Proofing Status of a Message**

Sending a Message for Proofing

You can send messages for proofing from the:

- Messages window in the Campaign module
- Tool bar of the message itself
- Quicksend Message wizard

When you send a message for proofing, DREAMmail automatically adds a validation number to the beginning of your subject line. This number increases by one each time you proof the message. When you send the final version of your message to a standard mailing list, DREAMmail removes the validation number from the subject line.

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

To send a message for proofing:

Step	Action
1	Set up the email accounts and applications that you want to use to proof the message.
2	Create a **proof** list in the **Mailing List tab** of the **Target** window.
3	Click the **View Actions icon** located next to the name of the message you want to send for proofing. The **View Actions** menu appears. **Note: ????Alternately, you can click the check box located next to** the message you want to send for proofing and click the **Proof** button to have the **Proof Message** dialog box appear.
4	Click **Proof**. The **Proof Message** dialog box appears.
5	Do one of the following: ▪ Click **Send the Proof Message to Proofing List(s)** option and select the proofing lists to which you want to send the message. ▪ Click **Send the Proof Message to Email Address(es)** option and specify the email addresses (separated by commas) of the persons whom you want to proof the message.
6	In the **Proofing Message Format** area of the **Proof Message** dialog box, select the **TEXT or/and HTML** check boxes to indicate the proofing message format. **Note**: If there is no content in the message for a specific format, you cannot select the format.
7	Select one of the following methods for dynamically personalizing the message during the proofing process: ▪ **Personalize message using proof list profile data —** This method uses the profile data of the subscribers included in the proofing list. ▪ **Personalize message using randomly sampled profiles from targeted list(s)** — This method uses profile data from actual subscribers whom the message targets. Enter the number of subscribers whose profile data is to be sampled in the **Sampled profiles** text box up to a maximum of 50. (If you specify 10 profiles, and you select 2 formats for a single message, each person on the proofing list receives 20 messages to proof.)
8	Select the **Include profile field table** option to include profile data in the footer of your proof message.
9	Click **Proof**. The messages are sent to recipients included in the proof list.
10	Open the message in the email accounts that you created for proofing.
11	Use the proofing checklist to proof the message.

Step	Action
12	Make changes to the message, if necessary. **Note: ????If you or someone included in the proofing list finds an** error in the message, you can edit the message in the Campaigns module.
13	Click **Save**.

Setting Up Email Accounts and Applications to Proof Messages

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

- Microsoft Outlook
- Netscape Messenger
- Hotmail
- Yahoo
- AOL

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

Checking the Proofing Status of a Message

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

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

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

- In the Messages window, click the **View Actions** icon located next to the name of the message and click **Check Proofing Status**.
- In the Message Composer window, click the **Check Proofing Status** button.

Approving Messages

The approval process enables you to obtain feedback and approval from members of your company before you send a message. In the approval process, individuals review the message before it is sent to a specified mailing list.

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

This section includes the following information:

- **Configuring/Enabling a Message for Approval**
- **Sending Messages for Approval**
- **Checking the Approval Response of a Message**

Configuring/Enabling a Message for Approval

The message that you send for approval must be associated with a campaign for which message approval is enabled. To enable message approval, ensure that the Send message in campaign for approval option is selected. This option is located in the Campaign Information window.

Sending Messages for Approval

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

To send messages for approval:

Step	Action
1	Create approval lists in the **Mailing List tab** of the **Target** window. An approval list consists of the email addresses of no more than 40 reviewers who accept or reject a message before DREAMmail sends the message.
2	Select the desired approval list from the **Approval List** drop down in the **Proof and Approval Mailing Lists** area of the **Campaign Information** window.
3	To configure/enable message approval, click the **Send messages in campaign for approval** option in the P**roof and Approval Mailing Lists** area of the **Campaign Information** window. **Note: ????The message that you send for approval must be** associated with a campaign for which message approval is enabled. This should be done when you create a campaign.
4	Access the **Messages** window.
5	Click the **View Action**  icon. The **View Actions** menu appears.
6	Click **Send for Approval**. The Send for Approval popup box appears.

Checking the Approval Response of a Message

Use the Message window to check the approval response of a message.

To check the approval response of a message:

Step	Action
1	Access the **Messages** window. **"Accessing the Messages Window" on page 100** provides detailed information.
2	Click the **View Action**  icon next to the message for which you want to view the approval response. The **View Actions** menu appears. **Note: ????In order to view the approval response of a message, the** Messages in this campaign must be sent for approval setting must be enabled in the campaign.
3	Click **View Approval Response**. The **View Approval Response** dialog box appears.
4	Check the response of each viewer: ▪ A yellow dot indicates the reviewer has not responded. ▪ A green check mark indicates the reviewer has accepted the message. ▪ A red X indicates the reviewer has rejected the message.
5	Click **OK**.

Using Filters

This chapter includes the following information:

About Filters

A filter is a series of conditional expressions concatenated by the Boolean operators AND and OR. Use filters to select a group of subscribers from a mailing list based on a set of conditions that you specify. and to select a group of subscribers and target messages to those subscribers based on criteria specified in the filter.

Conditional expressions are statements that you combine to create a filter. Like filters, conditional expressions are comprised of a condition, an operator, and a value.

The conditions that you use in conditional expressions are based on data about subscribers' profile data, historical response data, and attributes captured by DREAMmail. DREAMmail uses the conditions that you specify to determine which subscribers in a mailing list or prior mailing to select.

The operators and values that you use in conditional expressions are contingent on the condition that you use. For example, the operators and values that you use with the Profile Field condition are different than the operators and values that you use with the Response Data condition.

To save and reuse a filter with multiple messages or mailing lists, you must create the filter in the Filter Composer window. You can create and apply filters to messages and targeted mailing lists in the Message module and the Mailing List module, respectively, but you cannot save these filters.

Use the Filter module to create and save filters that you can use to select subscribers based on certain criteria, such as city of residence. You can apply a saved filter to messages for targeting or to mailing lists to search for subscribers.

Note: You can create filters in the Message module and the Mailing List module but you cannot save and reuse these filters. In order to save and reuse a filter, you must create it in the Filters module.

Creating and Saving Filters

The Filter module enables you to create and save filters and to reuse filters with new messages and mailing lists.

To create and save filters for reuse with messages and mailing lists:

Step	Action
1	Click **Data** > **Filters**. The **Filter List** window opens.
2	Click **New** from the toolbar. The **Filter Information** window and the **Filter Composer** window open.
3	Type a name for the filter in the **Name** field.
4	Type a description of the filter in the **Description** field.
5	Click the **Use Filter Helper** option to create a filter or click the **Use SQL Filter** option to create a custom SQL filter. **"Using Filter Helper to Create Filters" on page 141** and **"Creating Custom SQL Filters" on page 142**provide additional information.
6	Click **Create**. **Note**: You can apply a saved filter to messages for targeting or to a mailing list to search for subscribers.

Editing Filters

You can edit a saved filter if you want to use the filter with a different message.

To edit filters:

Step	Action
1	Click **Data** > **Filters**. The **Filter List** window opens.
2	Click the **View Actions** icon next to the filter that you want to edit.
3	Select **Open**. The **Filter Information** window and the **Filter Composer** window open.
4	Make the changes to the filter.
5	Click **Save**.

Using Filter Helper to Create Filters

Filter Helper enables you to create filters by using criteria from profile fields, date profile fields, and response data. You can access Filter Helper when you create or edit a filter in the Filter module, search for subscribers using a filter in the Mailing List module, or when you compose a message in the Message module. However, you can save and re-use the filters that you create only if you create them in the Filters module.

To create a filter using Filter Helper:

Step	Action
1	Click **Data** > **Filters**. The **Filter List** window opens.
2	Click **New** from the toolbar. The **Filter Information** window and the **Filter Composer** window open.
3	Click the **Use Filter Helper** option.
4	Select the types of data that you want to use as conditional expressions in the filter from the following drop-down lists: • **Profile Field —** Select a field and specify an operator and value. • **Profile Date Field —** Select a relative or absolute date in the pop-up window. • **Saved Filter —** Select an existing filter. • **Response Data —** Select click-throughs, pass alongs, HTML open rate, or Spotlight data in the pop-up window.
5	Click the **Add Expression** button.
6	Use the drop-down lists and buttons to complete the syntax of the filter.
7	Click **Create**.

Creating Custom SQL Filters

You can create a custom SQL filter when you create or edit a filter, search for subscribers using a filter in the Mailing Lists module, or when you compose a message in the Message module. However, you can save and re-use the SQL filters that you create only if you create them in the Filters module.

To create custom SQL filters, you use profile fields to construct an SQL WHERE clause. The WHERE clause cannot consist of any other type of subscriber data, such as response data.

To create a custom SQL filter:

Step	Action
1	Click **Data** > **Filters**. The **Filter List** window opens.
2	Click **New** from the toolbar. The **Filter Information** window and the **Filter Composer** window open.
3	Click the **Use SQL Filter** option to create a filter. **Note**: DREAMmail displays the Use SQL Filter feature only if your user privileges allow you access to the feature.
4	Decide which profile fields you want to use to create the custom SQL filter.
5	Enter the SQL WHERE clause in the **Where** field using the selected profile fields to complete the clause.
6	Click **Create**.

Creating Filters to Target Messages

You can target a message by creating a new filter or applying a saved filter to the message. If you create a new filter in this way, you cannot save or reuse it. To save and reuse filters, you must create them in the Filter Composer window.

You can create filters to target messages, by specifying conditions that subscribers must meet in order to receive a message. The conditions that you specify can be based on profile fields, profile date fields, and response data.

You can apply a saved filter to a message for targeting or you can create a new filter in Message window. If you create a new filter in the Message window, you cannot save this filter to reuse with other messages.

To create a filter to target messages:

Step	Action
1	Compose a new message or access the message for which you want to specify a filter. **"Managing Messages" on page 81** provides detailed information.
2	Click the **Filter** tab of the **Target** window.
3	Select the **Use Filter Helper** option to create a filter select the **Use SQL Filter** option to create a custom SQL filter. **"Using Filter Helper to Create Filters" on page 141** and **"Creating Custom SQL Filters" on page 142**provide additional information.
4	Finish composing the message.

Creating Filters to Edit Mailing Lists

When you edit a mailing list, you can search for subscribers in the list by creating a new filter or by applying a saved filter. If you create a new filter in this way, you cannot save or reuse it. To save and reuse filters, you must create them in the Filter Composer window.

To create a new filter to search for subscribers:

Step	Action
1	Click **Data** > **Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon  next to the mailing list that you want to search for subscribers.
3	Select **Edit Members**. The **Edit Members** dialog box appears.
4	Select the **Use Filter Helper** option to create a filter select the **Use SQL Filter** option to create a custom SQL filter. **"Using Filter Helper to Create Filters" on page 141** and **"Creating Custom SQL Filters" on page 142**provide additional information.
5	Select the **View** option if you want to view or edit individual subscriber records generated by the filter.
6	Click **Next**.
7	Type a unique name for the list in the **New List Name** field. **Note**: This step is only required if you want to create a new list from the result set.
8	Click **Generate List**.

Using Saved Filters to Edit Mailing Lists

You create and save filters in the Filters module. You can then use these filters when you edit a mailing list to search for subscribers based on the criteria defined in the filter.

To use a saved filter to search for subscribers:

Step	Action
1	Click **Data** > **Mailing Lists**. The **Mailing List** window opens.
2	Click the **View Actions** icon  next to the name of the mailing list in which you want to search for subscribers.
3	Select **Edit Members**. The **Edit Members** dialog box appears.
4	Click the **Use Filter Helper** option.
5	Select a saved filter from the **Saved Filter** drop-down list that you want to apply to the mailing list.
6	Click the **Add** button to the right of the drop-down list.
7	Use the **Expression Builder** to add any additional conditions that you want to use to filter the mailing list.
8	Select the **View** option to determine how the filter output is displayed.
9	Click **Next**. The **Edit Member** dialog box appears.
10	Click **Generate List** if you want to generate a list based on the result set.

Using Response Data in Conditional Expressions

You can select any of the following types of response data to build conditional expressions in a filter:

- **Click-throughs**

  You can use click-throughs in conditional expressions to specify the number of times that a subscriber must have clicked a URL in a given campaign or message to be selected. You can create click-through expressions for a specific URL, or for any URL in a campaign or a message.

- **Spotlight Data**

  You can use Spotlight data in conditional expressions to specify subscriber post-click activity as a criteria that subscribers must meet to be selected. Spotlight data is collected by the DREAMmail Spotlight feature and includes information such as those subscribers who visited a website and the subscribers who purchased a product after receiving a message that contained a tracked URL.

  You can create Spotlight conditional expressions for a specific message in a specific campaign, any message in a specific campaign, and any message in any campaign. Users can also specify the category and subcategory to further narrow down the targeting.

- **Pass alongs**

  You can use pass alongs in conditional expressions to specify the number of messages that a subscriber must have forwarded to someone else in order to be selected by the filter.

  A message is counted as a pass along only if all of the following events take place:

  - A subscriber clicks a link in a message.
  - The subscriber then sends that message to someone else.
  - The person to whom the subscriber sent the message clicks a link in the message.

  Since one subscriber can initiate multiple pass alongs, you can specify in the conditional expression the number of messages that a subscriber must have forwarded in order to be selected by the filter.

  You can create pass along conditional expressions for a specific message in a specific campaign, or any message in a specific campaign or any message in any campaign.

- **HTML Open Rates**

  You can use HTML open-rate data in conditional expressions to specify the number of HTML messages that a subscriber must have opened in order to be selected by the filter. You can create HTML open-rate conditional expressions for a specific message in a specific campaign, any message in a specific campaign, or any message in any campaign.

Note: In order to be accurate, the data you are applying the filter to should be at least 24 hours old.

Using Date Profile Fields in Conditional Expressions

You can use date profile fields in conditional expressions to specify a date as a criterion that subscribers must meet in order to be selected.

You can create conditional expressions using two types of dates:

- **Relative dates** — Measure whether the selected profile field occurs within a time frame that is relative to when the message is sent.
- **Absolute dates** — Specify the exact date on which the selected profile field must occur in order for a subscriber to be selected.

Managing Data Hygiene

Data hygiene is a process of file and record validation that enables you to improve the quality of subscriber data in a source file prior to using FTP to import the file into a mailing list. Data hygiene results in maximizing the number of valid email addresses in the mailing list and minimizing bounce backs. You perform data hygiene by creating hygiene rules that consist of criteria that you select to:

- Correct common syntactical errors in email addresses
- Remove duplicate email addresses
- Reject records with an invalid format or an invalid email address
- Format the date and time field
- Purge specific email addresses from the import job
- Reject import files whose format does not match the definition of the import job

After you have created and saved a rule, you can apply it to subscriber data that you are importing as a recurring FTP import or as a one-time FTP import (that you create using DREAMmailConnect).

This chapter includes the following information:

Creating Hygiene Rules

To perform data hygiene on subscriber data that you are importing, you must define a hygiene rule.

Note: You cannot use data hygiene rules for web imports, ODBC imports, or data that is uploaded through List Generator.

To create data hygiene rules:

Step	Action
1	Click **Data** > **Hygiene Rules**. The **Hygiene Rules List** window opens.
2	Click **New** from the toolbar. The **Hygiene Rule Information** and the **Hygiene Rule Criteria** windows open.
3	Type a name for the hygiene rule in the **Name** field.
4	Type a description of the rule in the **Description** field.
5	Click the **Client-Level** option or the **Site-Level** option to indicate the level at which the rule will be available to users. **Note**: Rules defined at the client-level are accessible by all sites under the client; rules defined at the site-level are accessible only to users of the site.
6	In the **Hygiene Rule Criteria** window, click the hygiene criteria that you want to include in the rule. **Note**: The **Reject Records with Invalid Email Address**, **Reject Records with Invalid Top Level Domain**, and **Reject Duplicate Email Address** criteria are selected by default and cannot be de-selected.
7	Click **Create**.

Note: You cannot use data hygiene rules for web imports, ODBC imports, or data that is uploaded through List Generator.

Selecting Criteria for Hygiene Rules

When you create a hygiene rule, you select the criteria that you want to include in the rule. Criteria for hygiene rules consist of:

- Correct Root Domain
- Correct Structural Errors
- Correct Errors in Popular Email Domains
- Default Top-Level Domain Name
- Allow Multiple Consecutive Periods (..) in Email Address
- Reject Records with Invalid Email Address
- Reject Records with Invalid Top-Level Domain
- Reject Duplicate Email Address
- Format Date Field
- Date Format in Source File

Correct Root Domain

This criterion corrects common misspellings of root domains that appear in an email address (for example, .comm becomes .com).

Correct Common Domain

This criterion corrects email addresses that cite an incorrect top-level domain (for example, .edu and .com) for commonly used domains. This criterion applies only to the domains shown below:

Incorrect Domain	Correct Domain
aol.edu	aol.com
aol.org	aol.com
hotmail.edu	hotmail.com
hotmail.org	hotmail.com
yahoo.edu	yahoo.com
yahoo.org	yahoo.com

Correct Structural Errors

This criterion performs the following structural corrections in email addresses:

- Removes all spaces including leading, trailing, and embedded spaces.
- Replaces consecutive special characters such as periods (.) and 'at' signs (@) with a single instance of the special character (for example, @@ becomes @).

  Note: If you select the Allow multiple Consecutive Periods (..) in Email Address criterion, consecutive periods are not corrected in the data file.
- Specific characters are removed from the start and end of email addresses:
  - 'at' sign (@)
  - period (.)

  - hyphen or minus sign (-)
  - comma (,)
  - less-than and greater-than signs (< and >)
  - number/pound sign (#)
  - dollar sign ($)
  - percent sign (%)
  - caret (^)
  - ampersand (&)
  - asterisk (*)
  - backslash (\)
  - slash (/)
  - open and close parentheses ()
  - plus sign (+)
- A period (.) is inserted before any common top-level-domain that does not already have a period preceding it (for example, edu becomes .edu). Top-level-domains include, com, net, org, edu, and ca.
- All occurrences of .@ (a period followed by an 'at' sign) and @. (an 'at' sign followed by a period) are replaced with a single 'at' sign (@).
- All occurrences of !@ (an exclamation mark followed by an 'at' sign) and @! (an 'at' sign followed by an exclamation mark) are replaced with a single 'at' sign (@).
- If no period is found in the domain-name portion of the email address, the default top-level-domain specified by the user is appended. (See Default Top Level Domain Name below.)
- Display names are removed from email addresses.

Correct Errors in Popular Email Domains

This criterion corrects common misspellings of popular domains due to extra, incorrect, missing, transposed, or appended characters. For example, the following misspellings would be changed to **hotmail.com**:

- hottmail.com
- hormail.com
- hotail.com
- htomail.com
- hotmail.com.fr

To import domain names that differ in spelling from popular domains but which are valid domain names (for example, apl.com, hoymail.com, and yahoo.com.hk), a configurable exception list is maintained by DREAMmail.

Default Top-Level Domain Name

This criterion enables you to specify a top-level domain name that is appended to email addresses that do not have a period in the domain-name portion of the address. You can enter up to 32 characters.

Allow Multiple Consecutive Periods (..) in Email Address

Enabling this criterion allows multiple periods to appear in email addresses.

Reject Records with Invalid Email Address

This criterion rejects records that do not comply with the RFC 822 standard, which defines the format of electronic mail message headers. This criterion also rejects records that do not comply with AOL requirements for valid email addresses. This criterion is automatically selected for the hygiene rule and cannot be changed.

Reject Records with Invalid Top-Level Domain

This criterion rejects records with email addresses whose top-level-domains are not in DREAMmail's list of valid top-level-domains.

Reject Duplicate Email Address

This criterion removes duplicate instances of the same email address (case-sensitivity of email addresses is disregarded). The de-duplication process occurs after the correction and rejection rules have been applied. The first instance of the record is kept and subsequent records with identical email addresses are discarded and are written to the Rejected file.

Format Date Field

This criterion converts the date and time field into the format required by DREAMmail:

yyyy-mm-dd hh:mm:ssPM

where **hh** represents hours based on a 12-hour clock. PM can be replaced by AM. If a time is not included in the source file, 00:00:00 is automatically appended to the record.

Date Format in Source File

This criterion indicates the format of the date and time field as it exists in the incoming source file. If the format of the date and time field for an individual record does not match the format that you specify for this criterion, the record is rejected.

Note: In addition to the criteria above, you can also specify a suppression file for purging individual records from the source file that you are importing into a mailing list.

A suppression file contains the records of subscribers that you do not want to import into DREAMmail. As part of the data hygiene process, DREAMmail compares the individual records of the suppression file to those in the source file that is being imported. If there is a match, the record is removed from the source file and is not imported into DREAMmail. The Rejected file in the 6_Reports folder on the FTP server contains the email addresses that have been suppressed.

The suppression file must have the same format as the source file. You cannot use wildcards in the suppression file to reject entire domains.

Editing Hygiene Rules

To edit hygiene rules:

Step	Action
1	Click **Data** > **Hygiene Rules**. The **Hygiene Rules List** window opens.
2	Click the **View Actions** icon next to the rule you want to edit.
3	Select **Open**. The **Hygiene Rule Information** and the **Hygiene Rule Criteria** windows open.
4	Edit the information for the rule. **Note**: When editing a rule, you cannot change its name or the level (client or site) at which the rule is available to users.
5	Click **Save**.

Deleting Hygiene Rules

To delete hygiene rules:

Step	Action
1	Click **Data** > **Hygiene Rules**. The **Hygiene Rules List** window opens.
2	Select the checkbox next to the rule that you want to delete. **Note**: To select multiple rules, click multiple checkboxes.
3	Click the **Delete** icon  . **Note**: When you delete a hygiene rule, all import jobs that use the rule will no longer be able to access it. The **Delete** confirmation message appears confirming that you want to delete the hygiene rule.
4	Click **Delete**.

Enabling Hygiene Rules

To be able to create hygiene rules or view the criteria of a hygiene rule, you must have a DREAMmail administrator enable this feature for your user account. If the Hygiene Rules icon is not displayed on the Data tab, ask your administrator to enable this feature.

Note: Any DREAMmail user can select a hygiene rule when defining an FTP import job, regardless of whether the hygiene rules feature has been enabled for the user.

Viewing Hygiene Rules

To view hygiene rules:

Step	Action
1	Click **Data** > **Hygiene Rules**. The **Hygiene Rules List** window opens.
2	Click the **View Action** icon next to the rule that you want to view.
3	Select **Properties**. The **Hygiene Rule Information** and the **Hygiene Rule Criteria** windows open.
4	View the information for the rule.
5	Click **OK**.

DREAMmail Reports

This chapter includes the following information:

Using Reports

This section includes the following information:

- **Why Use DREAMmail Reports?**
- **Example of Using a DREAMmail Report**
- **Accessing DREAMmail Reports**
- **Available Reports in DREAMmail**
- **Printing, Exporting, Generating Lists, and Other Tasks**

Why Use DREAMmail Reports?

Using the DREAMmail reports to capture and analyze data about the messages you have sent to subscribers is the final step of deploying a campaign. **"Available Reports in DREAMmail" on page 161** provides detailed information on available reports and **"Deploying Campaigns" on page 20** provides detailed steps on deploying campaigns. DREAMmail reporting enables you to assess the overall efficiency of your campaigns and plan for future campaigns. By analyzing your reports regularly, you can study subscriber response to past campaigns and anticipate responses to future campaigns.

Specifically, DREAMmail reports can help you:

- Effectively target segments of your clientele based on prior campaign data
- Update mailing lists by identifying undeliverable addresses
- Create new mailing lists on the basis of subscribers' purchases
- Better understand your customers

Example of Using a DREAMmail Report

If you notice in the Delivery and Response report that a specific message in a campaign generated a significant number of purchases, you might decide to send a related offer to the email addresses of subscribers who made a purchase after receiving the original message. **"Delivery and Response" on page 163** provides detailed information.

To do this, drill down on the Purchases metric at the message level. DREAMmail displays the email addresses of the subscribers who made a purchase in response to the original message. Click Generate List to create a new mailing list of these email addresses that you can use to target a new offer.

Accessing DREAMmail Reports

When you access the Reports module, DREAMmail launches a new browser window to display the reports. You access the individual reports in the new browser window by clicking their titles in the Reports menu.

When you access most DREAMmail reports, the client and site of the report match the client and site that were active when you accessed the Reports module. The exceptions are the Delivery and Response and RTM reports, which enable you to specify a different client and site when you define the scope of the report.

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

Available Reports in DREAMmail

You can use the following reports to analyze and summarize data about the messages that you send to subscribers:

- **Delivery and Response** — DREAMmail's main reporting tool for analyzing key campaign metrics from the client level to the email level as well as on the basis of domain. **"Delivery and Response" on page 163** provides detailed information.
- **RTM Reporting** — The reporting tool for Real-Time Messaging; similar to the Delivery and Response report. **"RTM Reporting" on page 186** provides detailed information.
- **Delivery Monitoring** — Reports on how delivered messages are handled by recipients' Internet Service Providers. **"Delivery Monitoring Report" on page 201** provides detailed information.
- **Active Tracking** — Monitors the deployment of messages and the immediate response rate. The data in this report is refreshed every 15 seconds. **"Active Tracking Report" on page 206** provides detailed information.
- **Response Curve** — Displays a graphical representation of the response rate to individuals or all messages in a campaign. **"Response Curve Report" on page 207** provides detailed information.
- **Message Layout Report** — Analyzes the click-through rate of tracked URLs according to the placement of the URLs in a message. **"Message Layout Report" on page 209** provides detailed information.
- **List Reporting** — Reports that provide analysis of mailing lists in terms of size, performance, subscription and unsubscription rates, and import history. **"List Reporting" on page 211** provides detailed information.
- **Customer Reports** — Reports that quantify customer activity, helping you to develop new mailing lists based upon frequency, recency, and monetary value. **"Customer Reports" on page 219** provides detailed information.
- **Exports** — Tools that enable you to export and download report data. **"Exports" on page 221** provides detailed information.

Printing, Exporting, Generating Lists, and Other Tasks

You can perform the following functions in DREAMmail reports by clicking the icons shown below. These icons are located in the upper right corner of DREAMmail reports.

Icon	Function
	Generates a new mailing list.
	**Help** — Displays a context-sensitive help page for the report.
	**Print** — In Data view, displays a full-page view of the current data that you can print from your browser; in Graph view, displays a full-page view of the current graph.

Icon	Function
	**Download/export** —Exports the content of the report to My Data. **"Understanding Ad Hoc Exports" on page 225** and **"Accessing Exported Data from the My Data" on page 221** provide additional information.
	**Zoom** —In Data view displays a full-page view of the current data; in Graph view it displays a full-page view of the current graph.

When the function of an icon is not relevant to a specific page in DREAMmail reports, the icon does not appear or is grayed out to indicate that it is not available. For example, when you access the Customize view, the Print, Download, and Zoom icons are not available.

Delivery and Response

This report is the main campaign analysis tool in DREAMmail. You use it to obtain delivery, response, and Spotlight data for campaigns that have been deployed. This highly customizable report allows you to create up to 14 queries or versions of the report that are known as report views. Each report view lets you specify the metrics, display format, scope, and time span that you want to include in the report. You can generate new mailing lists from the email addresses of subscribers that are displayed in a report view by drilling down to the email-address level of the report.

The three views of this report are Customize, Data, and Graph. You customize the report by specifying its scope and metrics in the Customize view. You display the report output in a tabular format in Data view or as a graph in Graph view.

Using the Report

To use the Delivery and Response report:

Step	Action
1	Click **Reports** > **Reports** > **Delivery and Response**. The **Selected View** of the report appears. If you want to use a different report view or create a new one, click **My Views**. **"Response" on page 172** and **"My Views" on page 178** provide additional information.
2	Specify the report view's scope and metrics in the **Customize** view.
3	Click the **Data** and **Graph** tabs to display report data in tabular and graphical formats.
4	View, print, or export report data. **"Printing, Exporting, Generating Lists, and Other Tasks" on page 161** provides additional information.
5	Generate a new mailing list in the Data view if you plan to target subscribers in the report with a new message.

Customizing the Report

You can:

- Set the scope
- Select metrics

Setting the Scope of the Report

To set the scope of the report:

Step	Action
1	Click the **Customize** tab.
2	Click the **Scope** expansion control (the plus sign).

Step	Action
3	Select **All** or an individual client name from the **Client** drop-down list. If you select an individual client, the **Site** drop-down list box changes to display the sites that belong to that client. **Note:** You can only select All if you have access to multiple clients in DREAMmail.
4	Select **All** or an individual site from the **Site** drop-down list. If you select an individual site, the **Campaign** drop-down list box changes to display the campaigns that are part of the selected site. **Note:** You can only select **All** if you have access to multiple sites in one client.
5	Select **All** or an individual campaign from the **Campaign** drop-down list. If you select an individual campaign, the **Mailing groups** and **Messages** drop-down lists change to display the messages and mailing groups that are part of the selected campaign. **"Accessing the Messages Window" on page 100** and **"Creating a New Message Group" on page 86** provide additional information.
6	If there are mailing groups in the campaign, select **All** or an individual mailing group from the **Mailing Groups** drop-down list. If there are no mailing groups, the only available option is **None**. If you select a mailing group, the **Messages** drop-down lists changes to display the messages that are part of the selected mailing group.
7	Select **All** or an individual message from the **Messages** drop-down list.
8	Hide data at the campaign, site, or client level that you want to exclude from the report.
9	Click **Save**. The Data view appears.

Selecting Metrics

To select metrics:

Step	Action
1	Click the **Customize** tab.
2	Click the expansion control (the plus sign) next to the category of metrics that you want to select (for example, **Delivery**, **Response**).
3	Select the checkboxes of the metrics that you want to include in the report view. Any metric that you select is displayed in the Data view and can also be displayed in the Graph view.
4	In the **Display Options** section, use the selector arrows to arrange the metrics in the order you want them displayed in the Data view.
5	Click **Save**.

Displaying Data in the Data View

When displaying data in the Data view, you can:

- Set the time span value
- Group and subgroup data
- Expand groupings
- Drill down on a grouping
- Drill down on a subgrouping
- Drill down on a value of a metric
- Sort data
- Generate mailing lists

Setting the Time Span Value

Use the Time span drop-down list in the Data view to specify the time period during which you want summarize data. The default time span is the past 365 days.

After you have selected a value in the Time span drop-down list, use the date range selector to scroll through report data on the basis of time period.

To set the time span:

Step	Action
1	Click the **Time span** drop-down list in **Data** view and select one of the time periods: ▪ **Past 60 days** — All messages sent in the past 60 days. ▪ **Past 365 days** — All messages sent in the past 365 days (default setting). ▪ **Day** — All messages sent on today's date. ▪ **Week** — All messages sent from the beginning of the current week (starting Sunday) to today's date. ▪ **Month** — All messages sent from the beginning of the current calendar month to today's date. ▪ **Quarter** — All messages sent from the beginning of the current calendar quarter to today's date. ▪ **Year** — All messages sent from the beginning of the calendar year through today's date. ▪ **Custom** — All messages sent during the date range that you specify in the Start and End fields. The maximum date range you can specify is 365 days.
2	If you select **Custom**, enter dates into the **Start** and **End** text boxes.
3	Click **Go**. The date range you specify is displayed at the top of the report view and data in the report is recalculated.

Grouping and Subgrouping Data

Use the Group-by drop-down list to change the grouping and subgrouping of the report view. The drop-down list displays all the available groupings and subgroupings that you can select in the current scope.

To specify the grouping and subgrouping for a specific scope:

Step	Action
1	In the Data view, select a group/subgroup option from the Group-by drop-down list (for example, **Client**: **Site**).
2	Click **Go**. The report view regroups the report data according to the grouping and subgrouping options that you selected.

Note: Grouping and subgrouping settings are not saved. Each time you access a report view, the default grouping and subgrouping are used.

Expanding Groupings

Click the expansion control (the plus/minus sign in the first column of the Data view) to expand an individual grouping to display its subgroupings in the rows below the grouping.

For example, if you expand a campaign, DREAMmail displays the messages, lists, calendar quarters, months, message formats, or URLs that comprise the campaign's subgrouping.

Note: Expanding a grouping is not equivalent to drilling down on a grouping. When you drill down, you click the grouping itself and this results in a change of scope or date range.

Drilling Down on a Grouping

In the Data view, click the specific grouping on which you want to drill down.

Drilling Down on a Subgrouping

To drill down on a subgrouping:

Step	Action
1	Click the expansion control to the left of the first column heading. or Click the expansion control (the plus/minus sign) to the left of the grouping of the subgrouping on which you want to drill down.
2	Click the subgrouping.

Drilling Down on a Value of a Metric

To drill down on a value or a metric:

- In **Data** view, click the value of the metric on which you want to drill-down.

  You can drill-down on any numeric value that is displayed in blue font (and is underlined when you place the cursor over it). You can drill-down to access information about the value at the summary-level and email-address levels of the report.

Sorting Data

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

Step	Action
1	Click the heading of the column that you want to sort. DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.
2	Click the triangle to toggle between the ascending and descending order. If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns display in the Data view, enabling you to sort on either column heading.

Generating Mailing Lists

You can generate new mailing lists from reports that display data at the email level, such as the Delivery and Response and RFM reports and at the transaction level in the RTM report.

To generate a new email list:

Step	Action
1	Drill-down on a value of the metric for which you want to get a more detailed level of reporting.
2	Click **Generate** list when you access the email level or transaction level of the report.
3	Enter a name for the new list into the **List Name** text box.
4	Click **Done**. DREAMmail creates a new mailing list that consists of the email addresses that were displayed after you drilled down. You can access the new mailing list in the Mailing Lists module.

Note: In the Delivery and Response and RTM reports, the Generate List button is available if the scope of the report is Site or lower. If you access an email address-level report that has a Client scope, the Generate List button is not available.

Displaying Data in the Graph View

To display data in the Graph view:

Step	Action
1	Click the **Customize** tab.
2	Enter a name and description of the report, set the scope of the report, and specify the metrics to be included in the report.
3	Click **Save**. The output of the report is displayed in Data view.
4	Click the **Graph** tab. Initially no graph is shown. To display the graph, you must select the metrics that you want to include and specify the graph format.
5	Select the **Line** or **Bar** option button to determine the format of the graph.
6	Select the **Number**, **Percentage**, or **Currency** option button to determine the types of metrics that you want to graph.
7	Select the required metrics in the **Available** list box and click the right arrow to move your selection(s) to the **Selected** list box.
8	Select a time span from the **Time span** drop-down list if you do not want to use the default value of the past 365 days.
9	Click **Go**.

Exporting Report Data

You can export tabular data and graphs from DREAMmail reports and save the export file to your computer. This type of exporting, which you do on an as-needed basis, consists of two steps:

Step	Action
1	Click  to generate an export file that DREAMmail saves in the My Data folder. When the export file has been saved, DREAMmail sends you an email informing you that the report is ready to be downloaded from the My Data folder.
2	After the file has been saved, access the My Data folder and click the export file name to save the file to your computer.

You can specify the format (PDF, HTML, Excel, and Delimited) of the exported file. The PDF, HTML, and Excel formats are limited in the amount of rows they display. Use the CSV and Delimited formats for data sets that have a large amount of rows.

For Delivery and Response and RTM reports, the data in the exported file is determined by the scope, grouping and subgrouping, and sorting of the report.

Exporting Tabular Data

To export tabular data:

Step	Action
1	Click ⬇, which is located in the upper right corner of the report.
2	Specify the export options in the Export Report section.
3	Click **Save**. DREAMmail exports the report as a Zip file to My Data.
4	To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Exporting Graphs

To export graphs:

Step	Action
1	Click ⬇, which is located in the upper right corner of the report.
2	Enter a file name for the exported file.
3	Click **Save**. DREAMmail exports the graph as a JPEG image in a Zip file to My Data.
4	To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Definitions of Metrics

If the DREAMmail administrator does not set cookies for a client, the way in which data is recorded for certain metrics for the sites under the client will be affected. Similarly, when DREAMmail subscribers opt out of the DREAMmail response-tracking cookie, certain metrics in DREAMmail are also affected.

This section defines the following metrics:

- **Delivery** — **"Delivery" on page 170** provides additional information.
- **Response** — **"Response" on page 172** provides additional information.
- **Spotlight Purchases** — **"Spotlight Purchases" on page 176** provides additional information.
- **Spotlight Events** — **"Spotlight Events" on page 177** provides additional information.

Delivery

The table below defines the Delivery metrics:

Metric	Definition
Start date/time	The date and time at which DREAMmail pushed the first message to the first subscriber. The time is determined by the time zone of the DREAMmail server.
End date/time<Delivery and Response>	The date and time at which DREAMmail finished sending the message to the last recipient. The time is determined by the time zone of the DREAMmail server.
Pushed<Delivery and Response>	The number of email addresses to which DREAMmail attempted to send a message, determined by the number of member IDs queued.
Total delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered the message. **Calculation**: [Member IDs queued – (Total bounced + Delivery errors + Invalids)]
Total delivered%<Delivery and Response>	The proportion of pushed messages that were successfully delivered. **Calculation**: [(Total delivered / Pushed) * 100]
HTML delivered<Delivery and Response>	The number of HTML-capable email addresses to which DREAMmail successfully delivered HTML content. **Calculation**: [HTML-capable member IDs queued – (Total bounced + Delivery errors + Invalids)]
HTML delivered%<Delivery and Response>	The proportion of HTML messages delivered out of the total delivered. **Calculation**: [(HTML delivered / Total delivered) * 100]
Text delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered text content. **Calculation**: [Text-enabled member IDs queued – (Total bounced + Delivery errors + Invalids)]
Text delivered%<Delivery and Response>	The proportion of text messages delivered out of the total delivered. **Calculation**: [(Text delivered / Total delivered) * 100]
AOL delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered AOL content. **Calculation**: [AOL-enabled member IDs queued – (Total bounced + Delivery errors + Invalids)]

Metric	Definition
AOL delivered%<Delivery and Response>	The proportion of AOL messages delivered out of the total messages delivered. **Calculation**: [(AOL delivered / Total delivered) * 100]
Autosense delivered<Delivery and Response>	The number of unknown email addresses to which DREAMmail successfully delivered an autosense message. **Calculation**: [Format-unknown member IDs queued – (Total bounced + Delivery errors + Invalids)]
Autosense delivered%<Delivery and Response>	The proportion of autosense messages delivered out of the total messages delivered. **Calculation**: [(Autosense delivered / Total delivered) * 100]
Not delivered<Delivery and Response>	The number of messages that were not delivered due to bounce backs, delivery errors, and invalid email addresses. **Calculation**: Total bounced + Delivery errors + Invalids
Not delivered%<Delivery and Response>	The proportion of messages that were sent but could not be successfully delivered. **Calculation**: [(Not delivered / Pushed) * 100]
Total bounced<Delivery and Response>	The number of pushed messages that resulted in a bounce back. **Calculation**: Total number of bounce backs, regardless of type.
Total bounced%<Delivery and Response>	The proportion of messages sent that resulted in any type of bounce back. **Calculation**: [(Total bounced / Pushed) * 100]
Hard bounced<Delivery and Response>	The number of messages sent that resulted in a hard bounce back. **Calculation**: Number of hard bounce backs
Hard bounced%<Delivery and Response>	The proportion of messages sent that resulted in a hard bounce back. **Calculation**: [(Hard bounced / Pushed) * 100]
Soft bounced<Delivery and Response>	The number of messages sent that resulted in a soft bounce back. **Calculation**: Number of soft bounce backs

Metric	Definition
Soft bounced%<Delivery and Response>	The proportion of messages sent that resulted in a soft bounce back. **Calculation**: [(Soft bounced / Pushed) * 100]
Invalid<Delivery and Response>	The number of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: Number of invalid addresses.
Invalid%<Delivery and Response>	The proportion of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: [(Invalid / Pushed) * 100]
Delivery errors<Delivery and Response>	The number of messages that could not be delivered because of an internal system error. **Calculation**: Number of delivery errors.
Delivery errors<Delivery and Response>	The proportion of messages that could not be delivered because of an internal system error. **Calculation**: [(Delivery errors / Pushed) * 100]

Response

The table below defines the Response metrics:

Metric	Definition
HTML opened<Delivery and Response>	The number of unique subscribers who opened HTML-format messages (including messages previewed in Microsoft Outlook as well as autosense messages opened in an HTML-capable email application). **Note:** At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she opens the same HTML-format message more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
HTML opened%<Delivery and Response>	The proportion of HTML-format messages opened by subscribers. **Calculation**: [(HTML opened /(HTML delivered + Autosense delivered)) * 100]

Metric	Definition
AOL HTML opened<Delivery and Response>	The number of unique subscribers who opened AOL HTML format messages (including autosense messages opened in an HTML-capable AOL email application). **Note:** At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she opens the same AOL HTML-format message more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
AOL HTML opened%<Delivery and Response>	The proportion of AOL HTML-format messages opened by subscribers. **Calculation**: [(AOL HTML opened / AOL delivered) * 100]
Unique clicks<Delivery and Response>	The number of unique subscribers who clicked through on at least one link in a message. **Note:** At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she clicked more than one link. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
Unique clicks%<Delivery and Response>	The proportion of unique subscribers who clicked through at least one link in a message (sometimes referred to as "click-through rate”). **Calculation**: [(Unique clicks / Total delivered) * 100]
Pass along recipients<Delivery and Response>	The number of recipients who clicked through a message after it was forwarded to them. **Note:** If multiple subscribers forward the same message to a single recipient, the recipient is counted each time.
Pass along referrers<Delivery and Response>	The number of unique subscribers who passed a message along (sometimes referred to as "evangelists" or "passers"). **Note:** At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she passes message along more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.
Total clicks<Delivery and Response>	The total number of click-throughs for all message formats. **Note:** Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)

Metric	Definition
Total clicks%<Delivery and Response>	The proportion of all click-throughs to all delivered messages. **Calculation**: [(Total clicks / Total delivered) * 100]
HTML clicks<Delivery and Response>	The total number of click-throughs for HTML-format messages. **Note**: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
HTML clicks%<Delivery and Response>	The proportion of all click-throughs in HTML-format messages to all delivered HTML-format messages. **Calculation**: [(HTML clicks / HTML delivered) * 100]
Text clicks<Delivery and Response>	The total number of click-throughs for text-format messages. **Note:** Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Text clicks%<Delivery and Response>	The proportion of all click-throughs in text-format messages to all delivered text-format messages. **Calculation**: [(Text clicks / Text delivered) * 100]
AOL clicks<Delivery and Response>	The total number of click-throughs for all types of AOL messages. **Note:** Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
AOL clicks%<Delivery and Response>	The proportion of all click-throughs in AOL-format messages to all delivered AOL-format messages. **Calculation**: [(AOL clicks / AOL delivered) * 100]
AOL HTML clicks<Delivery and Response>	The total number of click-throughs for AOL HTML-format messages. **Note:** Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
AOL legacy clicks<Delivery and Response>	The total number of click-throughs for legacy AOL-format messages. **Note:** Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)

Metric	Definition
Autosense clicks<Delivery and Response>	The total number of click-throughs for autosense-format messages. **Note:** Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Autosense clicks%<Delivery and Response>	The proportion of all click-throughs in autosense-format messages to all delivered autosense-format messages. **Calculation**: [(Autosense clicks / Autosense delivered) * 100]
Total Unsubscriptions<Delivery and Response>	Number of recipients of a message who performed an unsubscription from the message.
Total Unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription. **Calculated as**: (Total unsubscriptions / Delivered) * 100
Reply unsubscriptions<Delivery and Response>	Number of recipients of the message who performed an unsubscription by replying to the message.
Reply unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription by replying to the message. **Calculated as**: (Reply unsubscriptions / Delivered) * 100
Pref. Center unsubscriptions<Delivery and Response>	Number of recipients of the message who performed an unsubscription through a preference center.
Pref. Center unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription through a preference center. **Calculated as**: (Pref. Center unsubscriptions / Delivered) * 100
Unsub Address unsubscriptions<Delivery and Response>	Number of recipients of a message who performed an unsubscription through the Unsubscription address.
Unsub Address unsubscriptions %<Delivery and Response>	The proportion of message recipients who performed an unsubscription through the Unsubscription address. **Calculated as**: (Unsub Address unsubscriptions / Delivered) * 100

Spotlight Purchases

The table below defines the Spotlight Purchases metrics:

Metric	Definition
Purchases<Delivery and Response>	The total number of transactions tracked by Spotlight where type = sale (multiple transactions from one purchaser are counted individually). **Note:** Orders that originate from the same person with the same order ID, but include different Spotlight categories or sub-categories (for example, Shoes and Socks), are considered as part of the same purchase.
Number of items<Delivery and Response>	The sum of the Quantity as reported from the Spotlight tag.
Purchasers<Delivery and Response>	The number of unique subscribers who made a purchase. At the message level, this number represents unique recipients; that is, a recipient is counted only once, even if he or she made more than one purchase after opening a specific message. However, at the campaign level (or higher) a subscriber might be counted more than once.
Average no. of items<Delivery and Response>	Average number of items purchased in each purchase transaction. **Calculation**: [No. of items / Purchases]
Purchasers %<Delivery and Response>	The proportion of subscribers who performed a purchase to all subscribers who received the message. **Note:** This metric is displayed as "Response Rate" in the Data tab. **Calculation**: [(Purchasers / Total delivered) * 100]
Value of items<Delivery and Response>	The total value of all purchases associated with the message (where the type of the Spotlight tag = sale).
Purchase conversion<Delivery and Response>	The proportion of subscribers who clicked a link in a message and then made a purchase. **Calculation**: [(Purchasers / Unique clicks) * 100]
Average value<Delivery and Response>	The average value of all orders associated with the message. **Calculation**: [Value of items / Purchases]

Spotlight Events

The table below defines the Spotlight Events purchases metrics:

Metric	Definition
Responses<Delivery and Response>	The number of events recorded on Spotlight-tagged web pages. **Calculation**: Number of Spotlight transactions where type = count for the message for the standard report and for the transaction for the RTM report. (Multiple transactions from one person are counted individually.)
Responders<Delivery and Response>	The number of subscribers who encountered a Spotlight counter tag. **Note:** At the campaign level or higher, this number is the sum of the message-level counts within the applicable scope.
Responders %<Delivery and Response>	The proportion of subscribers who performed a specific activity tracked by Spotlight to all subscribers who received the message. **Note:** This metric is displayed as "Response Rate" in the Data tab. **Calculation**: [(Responders / Total delivered) * 100]
Event conversion<Delivery and Response>	Proportion of users who clicked a link that converted to a count event. **Calculation**: [(Responders / Unique clicks) * 100]

About the Selected View

The Selected View is a report view that is displayed when you access the Delivery and Response or RTM report. In My Views, the Selected View is always indicated by an asterisk in the first column. You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View and remains so until you specify a different report view as the Selected View. **“Delivery and Response” on page 163** and **“RTM Reporting” on page 186** provide additional information.

To change the Selected View:

Step	Action
1	Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2	Select the radio button of the report view that you want to make the new Selected View.
3	Click the **Default** button.

My Views

My Views is a library in which you can store up to 14 report views for each report. When you access My Views, DREAMmail displays a table that contains:

- The Selected View (indicated by an asterisk in the first column)
- The system default report view (entitled “default”)
- All the report views that you have created and saved

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View.

Creating a Report View

When you create a report view, the system default report view is used as the template.

To create a report view:

Step	Action
1	Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2	Click **Create**. The **Customize** view displays.
3	In the **Customize** view, enter a name and description for the report view. **Note:** You cannot use any of the following characters as part of the report view name: * | / . ? " > < :
4	Select a default time span.
5	Change the scope of the report (for example, client, site, campaign) if you do not want to use the default scope settings.
6	Use the **Hide** text boxes to exclude specific messages, campaigns, sites, or clients from the report output.
7	Add or remove metrics if you do not wish to use the default set of metrics from Delivery, Response, Spotlight purchases, and Spotlight events.
8	Click **Save**.

You can now access the new report view from My Views.

Note: You can also create a report view by accessing the system default report view, entering a name, making the changes and clicking Save as new.

Deleting a Report View

You can delete any report view except the system default report view and the Selected View.

To delete a report view:

Step	Action
1	Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2	Select the option button of the report view that you want to delete.
3	Click **Delete**.

Customizing a Report View

You can customize a report view by specifying the scope and metrics in the Customize view and by setting options in the Data view (for example, grouping and subgrouping data, and so forth). Changes made in the Customize view are saved after you exit the report. Options set in the Data view are not saved.

Sorting Data in a Report View

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

Step	Action
1	Click the heading of the column that you want to sort. DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.
2	Click the triangle to toggle between the ascending and descending order. If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Specifying the Selected View

You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

To specify the Selected View:

Step	Action
1	Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2	Select the radio button of the report view that you want to make the Selected View.
3	Click the **Default** button.

Domain Performance

Use this report to obtain delivery and response data that is based on domain. For example, you can find out how many messages were sent to the ABC domain and how many messages bounced. You can display data for up to 100 domains.

Using the Report

To use the report:

Step	Action
1	Go to **Reports** > **Reports** > **Delivery and Response** > **Domain Performance**.
2	Select a client name from the **Client** drop-down list.
3	Select **All** or an individual site from the **Site** drop-down list. **Note:** You can select All only if you have access to multiple sites in the specified client.
4	Select **All** or an individual campaign from the **Campaign** drop-down list.
5	Select **All** or an individual message from the **Message** drop-down list.
6	Select the number of domains you want to display from the **Top** drop-down list.
7	Select the metric on which the report is to be based from the **Top On** drop-down list.
8	Click **Go**.

Definitions of Metrics

If the DREAMmail administrator does not set cookies for a client, certain metrics for the sites under the client are affected. Similarly, when DREAMmail subscribers opt out of the DREAMmail response-tracking cookie, certain metrics in DREAMmail are also affected.

This section defines the following metrics:

- Delivery — **"Delivery" on page 182** provides additional information.
- Response — **"Response" on page 183** provides additional information.
- Spotlight Purchases — **"Spotlight Purchases" on page 184** provides additional information.
- Spotlight Events — **"Spotlight Events" on page 185** provides additional information.

Delivery

The table below defines the delivery metrics for the Domain Performance reports:

Metric	Definition
Pushed<Delivery and Response>	The number of email addresses to which DREAMmail attempted to send a message, determined by the number of member IDs queued.
Not delivered%<Delivery and Response>	The proportion of messages that were sent but could not be successfully delivered. **Calculation**: [(Not delivered / Pushed) * 100]
Hard bounced%<Delivery and Response>	The proportion of messages sent that resulted in a hard bounce back. **Calculation**: [(Hard bounced / Pushed) * 100]
Invalid%<Delivery and Response>	The proportion of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: [(Invalid / Pushed) * 100]
Total delivered<Delivery and Response>	The number of email addresses to which DREAMmail successfully delivered the message. **Calculation**: [Member IDs queued – (Total bounced + Delivery errors + Invalids)]
Total bounced<Delivery and Response>	The number of pushed messages that resulted in a bounce back. **Calculation**: Total number of bounce backs, regardless of type.
Soft bounced<Delivery and Response>	The number of messages sent that resulted in a soft bounce back. **Calculation**: Number of soft bounce backs.
Delivery errors<Delivery and Response>	The number of messages that could not be delivered because of an internal system error. **Calculation**: Number of delivery errors.
Total delivered %<Delivery and Response>	The proportion of pushed messages that were successfully delivered. **Calculation**: [(Total delivered / Pushed) * 100]

Metric	Definition
Total bounced%<Delivery and Response>	The proportion of messages sent that resulted in any type of bounce back. **Calculation**: [(Total bounced / Pushed) * 100]
Soft bounced%<Delivery and Response>	The proportion of messages sent that resulted in a soft bounce back. **Calculation**: [(Soft bounced / Pushed) * 100]
Delivery errors<Delivery and Response>	The proportion of messages that could not be delivered because of an internal system error. **Calculation**: [(Delivery errors / Pushed) * 100]
Not delivered<Delivery and Response>	The number of messages that were not delivered due to bounce backs, delivery errors, and invalid email addresses. **Calculation**: Total bounced + Delivery errors + Invalids
Hard bounced<Delivery and Response>	The number of messages sent that resulted in a hard bounce back. **Calculation**: Number of hard bounce backs.
Invalid<Delivery and Response>	The number of messages sent that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: Number of invalid addresses.

Response

The table below defines the response metrics for the Domain Performance report:

Metric	Definition
HTML opened<Delivery and Response>	The number of unique subscribers who opened HTML-format messages (including messages previewed in Microsoft Outlook as well as autosense messages opened in an HTML-capable email application). **Note**: At the message level, this number represents unique subscribers; that is, a subscriber is counted only once, even if he or she opens the same HTML-format message more than once. However, at the campaign level (or higher) this number does not represent unique subscribers; that is, a subscriber might be counted more than once.

Metric	Definition
HTML opened%<Delivery and Response>	The proportion of HTML-format messages opened by subscribers. **Calculation**: [(HTML opened /(HTML delivered + Autosense delivered)) * 100]
Total clicks<Delivery and Response>	The total number of click-throughs for all message formats. **Note**: Multiple click-throughs from one person are counted individually. (Click-throughs from people to whom the message was passed are included in this count.)
Total clicks%<Delivery and Response>	The proportion of all click-throughs to all delivered messages. **Calculation**: [(Total clicks / Total delivered) * 100]

Spotlight Purchases

The table below defines the Spotlight purchases metrics for the Domain Performance report:

Metric	Definition
Value of items<Delivery and Response>	The total value of all purchases associated with the message (where the type of the Spotlight tag = sale).
Spotlight Purchases % <Domain Performance - Delivery and Response>	The proportion of purchases to delivered messages. **Calculation**: [(Purchases / Delivered) * 100]
Spotlight Purchases<Domain Performance>	The total number of transactions tracked by Spotlight where type = sale (multiple transactions from one purchaser are counted individually). **Note:** Orders that originate from the same person with the same order ID, but include different Spotlight categories or sub-categories (for example, Shoes and Socks), are considered as part of the same purchase. For the RTM report, this is the total number of Spotlight purchases record for the transactions.

Spotlight Events

The table below defines the Spotlight events metrics for the Domain Performance report:

Metric	Definition
Spotlight Responses<Domain Performance>	The number of events recorded on Spotlight-tagged web pages. **Calculation**: Number of Spotlight transactions where type = count at the message-level for the standard report and at the transaction-level for the RTM report. (Multiple transactions from one person are counted individually.)
Spotlight Responses %<Domain Performance>	Proportion of users who clicked a link that converted to a count event. **Calculation**: [(Responders / Unique clicks) * 100]

RTM Reporting

This report is the main campaign analysis tool in DREAMmail for Real-Time Messaging (RTM). **"Managing Campaigns" on page 73** provides additional information. You use it to obtain delivery, response, and Spotlight data for campaigns that consist of RTM messages. Like the Delivery and Response report, this highly customizable report allows you to create up to 14 queries or versions of the report that are known as report views. Each report view lets you specify the metrics, display format, time span and scope, that you want to include in the report. You can generate new mailing lists from the email addresses that are displayed in a report view by drilling down to the transaction level of the report.

Because an RTM message can be sent to the same email address multiple times, data in RTM reports can be analyzed down to the transaction level; that is, the RTM report can show how many times a single message has been sent to an individual address. Consequently, duplicate email addresses are not removed from RTM reports.

The two views of this report are Customize and Data. You customize the report by specifying its scope and metrics in the Customize tab. You display the report output in a tabular format in Data view.

Using the Report

To use the report:

Step	Action
1	Go to **Reports** > **Reports** > **RTM Reporting**. The Selected View of the report displays. If you want to use a different report view or create a new one, access **My Views**. **"About the Selected View" on page 198** and **"My Views" on page 198** provide additional information.
2	Specify the report view's scope and metrics in **Customize** view.
3	Click the **Data** view to display report data in a tabular format. **Note**: There is no **Graph** view in the RTM report.
4	View, print, or export report data. **"Printing, Exporting, Generating Lists, and Other Tasks" on page 161** provides additional information.
5	Generate a new mailing list in the **Data** view if you plan to target subscribers in the report with a new message.

Customizing the Report

You can:

- Set the scope
- Select metrics

Setting the Scope

To set the scope:

Step	Action
1	Click the **Customize** tab.
2	Click the **Scope** expansion control (the plus sign).
3	Select **All** or an individual client name from the **Client** drop-down list. If you select an individual client, the **Site** drop-down list box changes to display the sites that belong to that client. **Note:** You can only select **All** if you have access to multiple clients in DREAMmail.
4	Select **All** or an individual site from the **Site** drop-down list. If you select an individual site, the **Campaign** drop-down list box changes to display the campaigns that are part of the selected site. **Note:** You can only select **All** if you have access to multiple sites in one client.
5	Hide data at the campaign, site, or client level that you want to exclude from the report.
6	Click **Save**. The **Data** view displays.

Selecting Metrics

To select metrics:

Step	Action
1	Click the **Customize** tab.
2	Click the expansion control (the plus sign) next to the category of metrics that you want to select (for example, **Delivery**, **Response**).
3	Select the checkboxes of the metrics that you want to include in the report view. Any metric that you select is displayed in the **Data** view and can also be displayed in the **Graph** view.
4	In the **Display Options** section, use the selector arrows to arrange the metrics in the order you want them displayed in the Data view.
5	Click **Save**.

Displaying Data in the Data View

When displaying data in the Data view, you can:

- Group and subgroup data
- Expand groupings
- Drill down on a grouping
- Drill down on a subgrouping
- Drill down on a value of a metric

Grouping and Subgrouping Data

Use the Group-by drop-down list to change the grouping and subgrouping of the report view. The drop-down list displays all the available groupings and subgroupings that you can select in the current scope.

To specify the grouping and subgrouping for a specific scope:

Step	Action
1	In the Data view, select a group/subgroup option from the Group-by drop-down list (for example, **Client**: **Site**).
2	Click **Go**. The report view regroups the report data according to the grouping and subgrouping options that you selected.

Note: Grouping and subgrouping settings are not saved. Each time you access a report view, the default grouping and subgrouping are used.

Expanding Groupings

Click the expansion control (the plus/minus sign in the first column of the Data view) to expand an individual grouping to display its subgroupings in the rows below the grouping.

For example, if you expand a campaign, DREAMmail displays the messages, lists, calendar quarters, months, message formats, or URLs that comprise the campaign's subgrouping.

Note: Expanding a grouping is not equivalent to drilling down on a grouping. When you drill down, you click the grouping itself and this results in a change of scope or date range.

Drilling Down on a Grouping

In the Data view, click the specific grouping on which you want to drill down.

Drilling Down on a Subgrouping

To drill down on a subgrouping:

Step	Action
1	Click the expansion control to the left of the first column heading. or Click the expansion control (the plus/minus sign) to the left of the grouping of the subgrouping on which you want to drill down.
2	Click the subgrouping.

Drilling Down on a Value of a Metric

To drill down on a value or a metric:

- In Data view, click the value of the metric on which you want to drill-down.

  You can drill-down on any numeric value that is displayed in blue font (and is underlined when you place the cursor over it). You can drill-down to access information about the value at the summary-level and email-address levels of the report.

Sorting Data

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

Step	Action
1	Click the heading of the column that you want to sort. DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.
2	Click the triangle to toggle between the ascending and descending order. If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Exporting Report Data

You can export tabular data and graphs from DREAMmail reports and save the export file to your computer. This type of exporting, which you do on an as-needed basis, consists of two steps:

Step	Action
1	Click to generate an export file that DREAMmail saves in **My Data**. When the export file has been saved, DREAMmail sends you an email message that informs you the report is ready to be downloaded from **My Data**.
2	After the file has been saved in **My Data**, click the export file name to save the file to your computer.

You can specify the format (PDF, HTML, Excel, and Delimited) of the exported file. The PDF, HTML, and Excel formats are limited in the amount of rows they can display. Use the CSV and Delimited formats for data sets that have a large amount of rows.

For Delivery and Response and RTM reports, the data in the exported file is determined by the scope, grouping and subgrouping, and sorting of the report.

Exporting Tabular Data

To export tabular data:

Step	Action
1	Click , which is located in the upper right corner of the report.
2	Specify the export options in the **Export Report** section.
3	Click **Save**. DREAMmail exports the report as a Zip file to **My Data**.
4	To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Exporting Graphs

To export graphs:

Step	Action
1	Click , which is located in the upper right corner of the report.
2	Type a file name for the exported file.
3	Click **Save**. DREAMmail exports the graph as a JPEG image in a Zip file to **My Data**.
4	To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Definitions of Metrics

If the DREAMmail administrator does not set cookies for a client, the way in which data is recorded for certain metrics for the sites under the client is affected. Similarly, when DREAMmail subscribers opt out of the DREAMmail response-tracking cookie, certain metrics in DREAMmail are also affected.

This section defines the following metrics:

- **Delivery** — **"Delivery" on page 191** provides additional information.
- **Response** — **"Response" on page 194** provides additional information.
- **Spotlight Purchases** — **"Spotlight Purchases" on page 196** provides additional information.
- **Spotlight Events** — **"Spotlight Events" on page 197** provides additional information.

Delivery

The table below defines the FTM Reporting delivery metrics:

Metric	Definition
Start date/time<RTM Reporting>	The date and time the first transaction was sent. The time is determined by the time zone of the DREAMmail server.
End date/time<RTM Reporting>	The date and time of the last transaction. The time is determined by the time zone of the DREAMmail server. **Note:** Even though the RTM Delivery and Response report does not include dropped transactions, this date is updated for these transactions.
Triggered<RTM Reporting>	The sum of the RTM transactions that were sent and RTM transactions that were not sent due to the suppression of recipients' email addresses in the DREAMmail database. **Calculation**: (Pushed + Total Suppressed)
Pushed<RTM Reporting>	The number of RTM transactions at the scope specified in the report. (This metric differs from the Triggered metric, which consists of RTM transactions that were delivered plus RTM transactions that were not delivered due to the suppression of recipients' email addresses.)
Pushed%<RTM Reporting>	The proportion of RTM transactions. **Calculation**: [(Pushed / Triggered) * 100]
Total delivered<RTM Reporting>	The number of times that an RTM message was delivered.
Total delivered %<RTM Reporting>	The proportion of RTM transactions that were successfully delivered. **Calculation**: [(Total delivered / Pushed) * 100]
HTML delivered<RTM Reporting>	The number of times that an HTML-formatted RTM transaction was delivered.

Metric	Definition
HTML delivered %<RTM Reporting>	The proportion of HTML-formatted RTM transactions that were delivered. **Calculation**: [(HTML delivered / Total delivered) * 100]
Text delivered<RTM Reporting>	The number of times that a text-formatted RTM message was delivered.
Text delivered%<RTM Reporting>	The proportion of text-formatted transactions that were successfully delivered. **Calculation**: [(Text delivered / Total delivered) * 100]
AOL delivered<RTM Reporting>	The number of times that an AOL-formatted RTM message was delivered.
AOL delivered%<RTM Reporting>	The proportion of AOL-formatted RTM transactions that were delivered. **Calculation**: [(AOL delivered / Total delivered) * 100
Autosense delivered<RTM Reporting>	The number of times that an autosense RTM transaction was delivered.
Autosense delivered%<RTM Reporting>	The proportion of autosense RTM transactions that were delivered. **Calculation**: [(Autosense delivered / Total delivered) * 100]
Not delivered<RTM Reporting>	The number of RTM transactions that could not be delivered. **Calculation**: (Total bounced + Delivery errors + Invalid) **Note:** This metric does not include transactions that were suppressed because of site unsubscription, deferral timeout, and addresses identified as invalid in the DREAMmail database. These metrics are represented by the Total suppressed metric. They are also included in the Not Delivered report in the RTM Export Manager.
Not delivered%<RTM Reporting>	The proportion of RTM transactions that could not be delivered. **Calculation**: [(Not delivered / Pushed) * 100]
Total bounced<RTM Reporting>	The number of times that RTM transactions bounced (hard or soft).
Total bounced%<RTM Reporting>	The proportion of RTM transactions that resulted in any type of bounce back. **Calculation**: [(Total bounced / Pushed) * 100]
Hard bounced<RTM Reporting>	The number of times that an RTM transaction resulted in a hard bounce.

Metric	Definition
Hard bounced%<RTM Reporting>	The proportion of RTM transactions that resulted in a hard bounce back. **Calculation**: [(Hard bounced / Pushed) * 100]
Soft bounced<RTM Reporting>	The number of times that RTM transactions resulted in a soft bounce.
Soft bounced%<RTM Reporting>	The proportion of RTM transactions that resulted in a soft bounce back. **Calculation**: [(Soft bounced / Pushed) * 100]
Invalid<RTM Reporting>	The number of times that RTM transactions could not be delivered because the email address was incomplete or syntactically invalid.
Invalid%<RTM Reporting>	The proportion of RTM transactions that could not be delivered because the email address was incomplete or syntactically invalid. **Calculation**: [(Invalid / Pushed) * 100]
Delivery errors<RTM Reporting>	The number of RTM transactions that could not be delivered because of an internal system error.
Delivery errors %<RTM Reporting>	The proportion of RTM transactions that could not be delivered due to delivery errors. **Calculation**: [(Delivery errors / Pushed) * 100]
Total suppressed<RTM Reporting>	The number of RTM transactions that could not be delivered due to the suppression of recipients' email addresses in the DREAMmail database. **Calculation**: (Unsubscribed + Flagged invalid + Deferral passed time + Other reason)
Total suppressed%<RTM Reporting>	The proportion of RTM transactions that could not be delivered due to the suppression of recipients' email addresses in the DREAMmail database. **Calculation**: [(Total suppressed / Delivery errors) * 100]
Unsubscribed<RTM Reporting>	The number of RTM transactions that were not delivered due to recipients having unsubscribed from the DREAMmail site or client that is sending the message.
Unsubscribed%<RTM Reporting>	The proportion of transactions that were not delivered due to recipients having unsubscribed from the DREAMmail site or client that is sending the message. **Calculation**: [(Unsubscribed / Delivery errors) * 100]
Flagged invalid<RTM Reporting>	The number of RTM transactions that were not delivered due to the email addresses of the recipients being identified as invalid in the DREAMmail database.

Metric	Definition
Flagged invalid<RTM Reporting>	The proportion of RTM transactions that were not delivered due to the email addresses of the recipients being identified as invalid in the DREAMmail database. **Calculation**: [(Flagged invalid / Delivery errors) * 100]
Deferral passed time<RTM Reporting>	The number of RTM transactions that were not delivered due to the RTM message not being sent because the XML message request had specified not to send the message after the waiting period had passed.
Deferral passed time%<RTM Reporting>	The proportion of RTM transactions that were not delivered due to the RTM message not being sent because the XML message request had specified not to send the message after the waiting period had passed. **Calculation**: [(Deferral passed time / Delivery errors) * 100]
Deferral passed time%<RTM Reporting>	The proportion of RTM transactions that were not delivered due to the RTM message not being sent because the XML message request had specified not to send the message after the waiting period had passed. **Calculation**: [(Deferral passed time / Delivery errors) * 100]
Other reason<RTM Reporting>	The number of RTM transactions that could not be delivered due to reasons other than the suppression of the message, unsubscription of the subscriber, invalid message, or expiration of the deferral time.
Other reason%<RTM Reporting>	The proportion of transactions that could not be delivered due to reasons other than the suppression of the message, unsubscription of the subscriber, invalid message, and expiration of the deferral time. **Calculation**: [(Other reason / Delivery errors) * 100]

Response

The table below defines the FTM Reporting response metrics:

Metric	Definition
HTML opened<RTM Reporting>	The number of HTML messages opened, or autosensed messages opened in an HTML-enabled email application. **Note:** This is de-duplicated by email address at the transaction level, not the message level. This is not deduced for any subscribers that have opted out of receiving the response tracking cookie.
HTML opened%<RTM Reporting>	The proportion of HTML-format transactions opened. **Calculation**: (HTML opened / HTML delivered) * 100

Metric	Definition
AOL HTML opened<RTM Reporting>	The number of times that an AOL HTML-format message was opened (including autosense messages opened in an HTML-capable AOL email application). **Note:** This metric is de-duplicated by email address at the transaction level not at the message level. This metric is not de-duplicated for any subscribers that have opted out of receiving the response tracking cookie.
AOL HTML opened%<RTM Reporting>	The proportion of HTML-format transactions that were opened. **Calculation**: (HTML opened / HTML delivered) * 100
Unique clicks<RTM Reporting>	The number of recipients who clicked at least one tracked link in a transaction. **Note:** This is not deduced for any subscribers that have opted out of receiving the response tracking cookie.
Unique clicks%<RTM Reporting>	The proportion of recipients who clicked a tracked link (sometimes referred to as "click-through rate"). **Calculation**: (Unique clicks / HTML delivered) * 100
Pass along recipients<RTM Reporting>	Number of pass alongs recorded for the transaction.
Pass along referrers<RTM Reporting>	The number of recipients that passed along the transaction at least once.
Total clicks<RTM Reporting>	The total number of click-throughs for all message formats.
Total clicks %<RTM Reporting>	The proportion of all click-throughs to all delivered transactions. **Calculation**: (Total clicks / Total delivered) * 100
HTML clicks<RTM Reporting>	The total number of click-throughs for HTML-format transactions.
HTML clicks %<RTM Reporting>	The proportion of click-throughs in HTML-format transactions to delivered HTML-format transactions. **Calculation**: (HTML clicks / HTML delivered) * 100
Text clicks<RTM Reporting>	The total number of click-throughs for text-format transactions.
Text clicks %<RTM Reporting>	The proportion of click-throughs in text-format transactions to delivered text-format transactions. **Calculation**: [(Text clicks / Text delivered) * 100]
AOL clicks<RTM Reporting>	The number of AOL click-throughs.

Metric	Definition
AOL clicks %<RTM Reporting>	The proportion of AOL click-throughs to delivered AOL-format transactions. **Calculation**: (AOL clicks / AOL delivered) * 100
AOL HTML clicks<RTM Reporting>	The number of AOL HTML click-throughs.
AOL legacy clicks<RTM Reporting>	The number of legacy AOL click-throughs.
Autosense clicks<RTM Reporting>	The number of click-throughs for autosense-format transactions.
Autosense clicks %<RTM Reporting>	The proportion of click-throughs in autosense-format transactions to delivered autosense-format transactions. **Calculation**: (Autosense clicks / Autosense delivered) * 100

Spotlight Purchases

The table below defines the FTM Reporting Spotlight purchases metrics:

Metric	Definition
Purchases<RTM Reporting>	The number of individuals who encountered a Spotlight tag where type = sale. This metric is calculated at the transaction level. **Note:** At the message level or higher, this number is the sum of the transaction-level counts within the applicable scope. Orders that originate from the same person with the same order ID, but include different Spotlight categories or sub-categories (for example, Shoes and Socks), are considered as part of the same purchase.
Purchasers<RTM Reporting>	The number of unique subscribers who made a purchase. At the transaction level, this number represents unique recipients; that is, a recipient is counted only once, even if he or she made multiple purchases after opening a specific message one or more times. However, at the message level (or higher) a subscriber might be counted more than once.
Purchasers %<RTM Reporting>	The proportion of subscribers who made a purchase to all subscribers who received the message. **Note:** This metric is displayed as "Response Rate" in the Data tab. **Calculation**: [(Purchasers / Total delivered) * 100]

Metric	Definition
Purchase conversion<RTM Reporting>	The proportion of subscribers who clicked a link in a message and then made a purchase. **Calculation**: [(Purchasers / Unique clicks) * 100]
Number of items<RTM Reporting>	The total number of items purchased. **Note:** Multiple items purchased by one person are counted individually.
Average no. of items<RTM Reporting>	Average number of items purchased in a purchase that was tracked by Spotlight. **Calculation**: [No. of items / Purchases]
Value of items<RTM Reporting>	The total value of all purchases associated with the message (where the type of the Spotlight tag = sale).
Average value<RTM Reporting>	The average value of all orders associated with the transaction. **Calculation**: [Value of items / Purchases]

Spotlight Events

The table below defines the FTM Reporting Spotlight events metrics:

Metric	Definition
Responses<RTM Reporting>	The number of events recorded on Spotlight-tagged web pages. **Calculation**: Number of Spotlight transactions where type = count for the message for the standard report and for the transaction for the RTM report. (Multiple transactions from one person are counted individually.)
Responders<RTM Reporting>	The number of individuals who encountered a Spotlight counter tag. This metric is calculated at the transaction level. **Note:** At the message level or higher, this number is the sum of the transaction-level counts within the applicable scope.
Responders %<RTM Reporting>	The proportion of subscribers who performed a specific activity tracked by Spotlight to all subscribers who received the message. **Calculation**: [(Responders / Total delivered) * 100]
Event conversion<RTM Reporting>	Proportion of users who clicked a link that converted to a Spotlight counter event. **Calculation**: [(Responders / Unique clicks) * 100]

About the Selected View

The Selected View is a report view that is displayed when you access the Delivery and Response or RTM report. In My Views, the Selected View is always indicated by an asterisk in the first column. You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View and remains so until you specify a different report view as the Selected View. **“Delivery and Response” on page 163** and **“RTM Reporting” on page 186** provide additional information.

To change the Selected View:

Step	Action
1	Go to **Reports** > **Reports** > **RTM Reporting** > **My Views**.
2	Select the radio button of the report view that you want to make the new Selected View.
3	Click the **Default** button.

My Views

My Views is a library in which you can store up to 14 report views for each report. When you access My Views, DREAMmail displays a table that contains:

- The Selected View (indicated by an asterisk in the first column)
- The system default report view (entitled “default”)
- All the report views that you have created and saved

When you access the Delivery and Response or RTM report for the first time, the system default report view is the Selected View.

Creating a Report View

When you create a report view, the system default report view is used as the template.

To create a report view:

Step	Action
1	Go to **Reports** > **Reports** > **RTM Reporting** > **My Views**.
2	Click **Create**. The **Customize** view displays.
3	In the **Customize** view, enter a name and description for the report view. **Note:** You cannot use any of the following characters as part of the report view name: * | / . ? " > < :
4	Select a default time span.
5	Change the scope of the report (for example, client, site, campaign) if you do not want to use the default scope settings.
6	Use the **Hide** text boxes to exclude specific messages, campaigns, sites, or clients from the report output.

Step	Action
7	Add or remove metrics if you do not wish to use the default set of metrics from Delivery, Response, Spotlight purchases, and Spotlight events.
8	Click **Save**.

You can now access the new report view from My Views.

Note: You can also create a report view by accessing the system default report view, entering a name, making the changes and clicking Save as new.

Deleting a Report View

You can delete any report view except the system default report view and the Selected View.

To delete a report view:

Step	Action
1	Go to **Reports** > **Reports** > **Delivery and Response** > **My Views**.
2	Select the option button of the report view that you want to delete.
3	Click **Delete**.

Customizing a Report View

You can customize a report view by specifying the scope and metrics in the Customize view and by setting options in the Data view (for example, grouping and subgrouping data, and so forth). Changes made in the Customize view are saved after you exit the report. Options set in the Data view are not saved.

Sorting Data in a Report View

The default sorting order in report views is alphabetical, based on the data in the first column. However, you can sort data in a report view by clicking any column heading.

Note: You cannot sort data at the email-address level or transaction level of a report.

To sort data within a column:

Step	Action
1	Click the heading of the column that you want to sort. DREAMmail sorts the groupings and the subgrouping items within each grouping. A small triangle is displayed to the right of the column heading, indicating whether the sort order is ascending or descending.
2	Click the triangle to toggle between the ascending and descending order. If you want to sort by date in the Delivery and Response report, select the **Start date/time** and **End date/time** metrics in the Delivery section of the Customize view. The **Started Time** and **Finished Time** columns will display in Data view, enabling you to sort on either column heading.

Specifying the Selected View

You may change the Selected View at any time, but you cannot delete a report view while it is designated as the Selected View.

To specify the Selected View:

Step	Action
1	Go to **Reports** > **Reports** > **RTM Reporting** > **My Views**.
2	Select the radio button of the report view that you want to make the Selected View.
3	Click the **Default** button.

Delivery Monitoring Report

Use this report to find out how standard DREAMmail messages are handled when they are delivered to their recipients. The report indicates if a message has been placed in a recipient's inbox or junk mail folder, or if the message has been blocked entirely.

The spam-filtering policies of a recipient's Internet service provider (ISP) determine the way in which the delivery of a message is handled. The information in this report helps you to determine what impact the spam-filtering policies of individual ISPs has on your email messages.

You can set the scope of this report to display data for an individual message, or for multiple messages aggregated at the campaign, site, or client level. At the campaign level, you can display the ISPs to which a message has been sent by clicking individual messages in the report. Then you can click individual ISPs to display the addresses in the ISP to which the message has been sent.

This report has two views:

- **Data** — Displays the report in a tabular format. The scope that you set in the Customize view determines what data is displayed.
- **Customize** — Enables you to set the scope of the report to all or individual clients, a site, a campaign, or an individual message.

Understanding How Data is Collected

When a message is sent by DREAMmail, a copy of the message is sent to a set of seed email addresses that Epsilon has created among the most popular ISPs for the sole purpose of analyzing the delivery of messages. Each time a message is sent, DREAMmail monitors the inboxes and junk mail folders of each seed address to determine how each ISP handled the message.

Note: DREAMmail does not monitor the inboxes and junk mail folders of actual DREAMmail subscribers.

Setting the Scope of the Report

To set the scope of the report:

Step	Action
1	Click **Reports** > **Reports** > **Delivery Monitoring**.
2	Click the **Customize** tab.
3	Select an individual client or all clients that you have access to on the current DREAMmail server from the **Client** drop-down list.
4	Select an individual site or all sites within the current client from the **Site** drop-down list.
5	Select an individual campaign or all campaigns within the current site from the **Campaign** drop-down list.
6	Select an individual message or all messages within the current campaign from the **Message** drop-down list.
7	Click **Go**.

Setting the Time Span of the Report

Use the Time span drop-down list in the Data view to specify the time period during which you want summarize data. The default time span is the past 365 days.

After you have selected a value in the Time span drop-down list, use the date range selector to scroll through report data on the basis of a time period.

To set the time span:

Step	Action
1	Click the Time span drop-down list in Data view and select one of the time periods: ▪ **Past 365 days** — All messages sent in the past 365 days (default setting). ▪ **Day** — All messages sent on today's date. ▪ **Week** — All messages sent from the beginning of the current week (starting Sunday) to today's date. ▪ **Month** — All messages sent from the beginning of the current calendar month to today's date. ▪ **Quarter** — All messages sent from the beginning of the current calendar quarter to today's date. ▪ **Year** — All messages sent from the beginning of the calendar year through today's date. ▪ **Custom** — All messages sent during the date range that you specify in the Start and End fields. The maximum date range you can specify is 365 days.
2	If you select **Custom**, enter dates into the **Start** and **End** text boxes,
3	Click **Go**. The date range you specify is displayed at the top of the report view and data in the report is recalculated.

To move between time periods:

- Click the Previous icon (left arrow) to go back one time span.
- Click the Next icon (right arrow) to go forward one time span.
- Click the End icon (right arrow and bar button) to go to the present time.

Note: When the time period is set to Past 365 days, the right arrows become inactive.

Understanding Report Metrics

Metrics at the farm, client, site, campaign, and message scopes are defined below:

<table>
<tr><th>Metric</th><th>Definition</th></tr>
<tr><td>Client<Delivery Monitoring></td><td>The names of the clients on a specific DREAMmail farm.</td></tr>
<tr><td>Bulk %<Delivery Monitoring></td><td>The percentage of messages delivered to a recipient's junk mail folder. This metric can be calculated at the site, client, and farm levels.

Calculation:
(Bulk / (Delivered + Bulk + Missing)) * 100
where, at the site, client, or farm level:
▪ Bulk — Messages delivered to a recipient's junk mail folder.
▪ Delivered — Messages delivered to a recipient's inbox.
▪ Missing — Messages that were not delivered to a recipient's inbox or junk mail folder.</td></tr>
<tr><td>ISP</td><td>The name of the Internet service provider to which the specified message was delivered. When you drill down on a specific ISP, the email-address level of this report is displayed.

Note: This metric is displayed only when you drill down on a message at the campaign level.</td></tr>
<tr><td>Site<Delivery Monitoring></td><td>The names of sites in a specific client.</td></tr>
<tr><td>Missing %</td><td>The percentage of messages that were not delivered to a recipient's inbox or junk mail folder. This metric can be calculated at the site, client, and farm levels.

Calculation:
(Missing / (Delivered + Bulk + Missing)) * 100
where, at the site, client, or farm level:
▪ Bulk — Messages delivered to a recipient's junk mail folder.
▪ Delivered — Messages delivered to a recipient's inbox.
▪ Missing — Messages that were not delivered to a recipient's inbox or junk mail folder.</td></tr>
<tr><td>Status<Delivery Monitoring></td><td>Final destination of the delivered message. Possible values:
▪ Inbox
▪ Bulk
▪ Missing</td></tr>
<tr><td>Campaign<Delivery Monitoring></td><td>The names of the campaigns in a specific site.</td></tr>
</table>

Metric	Definition
Duplicates<Delivery Monitoring>	Duplicates can occur if a user pauses, edits a message, and then resumes sending the message during a campaign. At the email-address level of the report, this metric is calculated as the number of times a message is delivered to a specific address minus one. For example, if a message is delivered to an email address three times, the value of the Duplicates metric would be two. At the campaign, site, client, or farm level, this metric is calculated as the sum of all duplicates for all email addresses within the scope. For example, suppose a mailing entitled Spring2005 is sent to two email addresses and the first address has two duplicates and the second address has three duplicates. In this case, the Duplicates metric would be five.
Email Address<Delivery Monitoring Report>	Email address to which the message was sent.
Message<Delivery Monitoring>	The subject lines of messages in a specific campaign.
First Seen<Delivery Monitoring>	At the site, client, or farm level this metric represents the date and time when all of the messages within the scope were first seen in the inboxes of the seed addresses. At the campaign level, this metric applies to individual messages and represents the first time at which a message in the campaign was seen in the inboxes of the seed addresses. At the email-address level of this report, this metric indicates when a specific message was first seen in the inboxes of the seed addresses.
Region <Delivery Monitoring>	You can view deliverability by Region. Click a region in the Region column to drill down and view reporting by domain. You will see the report displaying the ISP associated to the region. When viewing this report you will also be able to see the aggregate total of all the seed lists selected and deployed to.
Inbox %<Delivery Monitoring>	The percentage of messages delivered to a recipient's inbox. This metric can be calculated at the site, client, and farm levels. **Calculation**: (Delivered / (Delivered + Bulk + Missing)) * 100 where, at the site, client, or farm level: ▪ **Bulk** — Messages delivered to a recipient's junk mail folder. ▪ **Delivered** — Messages delivered to a recipient's inbox. ▪ **Missing** — Messages that were not delivered to a recipient's inbox or junk mail folder.

Metric	Definition
Most Recent<Delivery Monitoring>	At the site, client, or farm level this metric represents the date and time when all of the messages within the scope were first displayed in the inboxes of the seed addresses. At the campaign level, this metric applies to individual messages. It represents the time at which a specific message was first seen in the inboxes of the seed addresses.

Active Tracking Report

Use this report to monitor the deployment and immediate response rates to individual messages. Because the message-tracking data in this report is refreshed every 15 seconds, you can monitor the progress of a message as soon as it is deployed. The report also provides you with an immediate, high-level view of responses to the message.

The report displays the 15 most recently sent messages per campaign. This includes messages that have been deployed to proofing and approval lists. If a campaign has more than 15 messages, the report includes a row labeled Others that totals the data for all non-displayed messages.

Using the Report

To use the report:

Step	Action
1	Click **Reports > Reports** > **Active Tracking**.
2	Select a campaign from the **Tracking report for campaign** drop-down list.
3	Click **Go**.

Understanding the Report Metrics

The table below defines the report metrics:

Metric	Definition
Message<Active Tracking Report>	The names of messages in a specific campaign. The 15 most recently sent messages are displayed in addition to a row labeled Others that totals the data for all other non-displayed messages.
Clicks<Active Tracking Report>	The number of click-throughs that resulted from the message.
Value of items<Active Tracking Report>	The total monetary amount of purchases recorded by Spotlight.
Pushed<Active Tracking Report>	The number of email addresses to which DREAMmail attempted to send the message, determined by the number of member IDs queued.
Pass along recipients<Active Tracking Report>	The number of unique recipients who clicked through the message after it was forwarded to them.
Delivered<Active Tracking Report>	The number of email addresses to which DREAMmail successfully sent the message.
Responses<Active Tracking Report>	The number of events recorded on Spotlight-tagged web pages.
Not delivered<Active Tracking Report>	The number of email addresses to which DREAMmail could not send the message.
Purchases<Active Tracking Report>	The number of Spotlight purchases.

Response Curve Report

Use this report to display a time-based, graphical representation of the response rate to an individual message or all messages in a campaign (including messages that have been deployed to proofing and approval lists). The report enables you to determine the peak response period and when the majority of responses have been received, up to two weeks after the message is sent. You specify the time period over which data is analyzed and you select the types of data to be included in the report such as number of click-throughs, pass along recipients, and purchases.

There are three views of this report:

- **Customize** — Enables you to specify the response data to be displayed in the Data and Graph views.
- **Data** — Displays the report metrics in a tabular format. The metrics displayed are determined by the options that you select in the Customize view.
- **Graph** — Displays a graphical representation of the report metrics that you select in the Customize view. This data is graphed on the X axis in hourly increments over the time interval that you specify in the Interval drop-down list. You can change the data that is displayed by selecting different metrics in the Metrics list box.

Displaying the Report in a Graphical Format

To display the report in a graphical format:

Step	Action
1	Click **Reports > Reports** > **Response Curve**.
2	In the **Customize** view, set the following options: ▪ Campaign ▪ Message ▪ Interval ▪ Date ▪ Metrics ▪ View As ▪ Format
3	Click **Go**. The **Graph** view of the report appears.
4	In **Graph** view, select the metrics in the **Metrics** list box that you want to display (for example, **Clicks** and **Purchases**). You can select multiple metrics by pressing the **CTRL** key as you click each item in the **Metrics** list box.
5	Click **Go**.

Displaying the Report in a Tabular Format

To display the report in a tabular format:

Step	Action
1	Follow the instructions in **"Displaying the Report in a Graphical Format" on page 207**.
2	Click the **Data** tab to display the metrics of the report in a tabular view.

Definitions of Metrics

Data view metric definitions are defined below:

Metric	Definition
Interval<Data View in Response Curve>	The hourly increments over which data for an individual message or a campaign is analyzed. Each hourly increment is labeled in relation to the time that the message or messages were sent (for example, Day 6 Hour 10). This metric is included in the report only when you set the Date option to Relative in the Customize view. **Note:** If you specify a campaign as the scope of this report (by selecting All in the Message drop-down list), the data for each hourly increment is the sum of the data for all of the messages in the campaign during the specified hour.
Value of items<Response curve>	The value of Spotlight purchases attributed to this message.
HTML opened<Response Curve Report>	The number of unique messages in an HTML format that were opened (includes the autosense messages that were opened in an HTML-capable email application).
Pass along recipients<Response Curve>	The number of unique recipients who clicked through the message after it was forwarded to them. Pass along recipients by message type are also displayed.
Clicks<Response Report Curve>	The total number of click-throughs. (Click-throughs by message type are also displayed.)
Responses<Response Curve>	The number of event recorded on Spotlight-tagged web pages.
Purchases<Response Curve>	The total number of Spotlight purchases.

Message Layout Report

Use this report for analyzing and refining the layout of a message to optimize consumer impact. This report analyzes the click-through rates of tracked URLs based upon their placement in the content of a message. The report displays the content of the message and color-codes each tracked URL in the content according to how often the URL is clicked.

There are two views of this report:

- **Customize** — Enables you to specify the message to be displayed in the report.
- **Data** — Displays the text of the message and metrics that summarize the number of delivered messages, click-throughs, and the proportion of subscribers that clicked on at least one link in the message.

Using the Report

To use the report:

Step	Action
1	Click **Reports > Reports** > **Message Layout Report**.
2	In the **Customize** view, select a campaign and a message from the **Campaign** and **Message** drop-down lists.
3	Click **Go**.
4	Choose the message format that you would like to view by clicking the appropriate button: ▪ View AOL ▪ View Text ▪ View HTML A **Display Options** window appears and DREAMmail displays the message and color-codes the URLs in the message. You can also choose report metrics from the **Select Metrics** drop down list. The various options are: ▪ ClickThrough ▪ Unique Clicks ▪ % Unique Clicks of Delivered ▪ % Unique Clicks of Unique Opens ▪ % Unique Clicks of all Unique Message Clicks

Definitions of Metrics

Metric definitions are provided for the following views:

- Customize View
- Data View

Customize View

Customize view metric definitions are defined below:

Metric	Definition
Campaign<Message Layout Report>	A drop-down list of campaigns.
Message<Message Layout Report>	A drop-down list of individual messages within the campaign selected from the Campaign drop-down list.

Data View

Data view metric definitions are defined below:

Metric	Definition
Format<Message Layout Report>	The format of the message (Text, AOL, or HTML).
Delivered<Message Layout Report>	The number of email addresses to which DREAMmail has successfully delivered the message.

Data view click metric definitions are defined below:

Metric	Definition
No. of clicks<Message Layout Report>	The number of click-throughs for the message.
Response<Message Layout Report>	This field contains two metrics: ▪ The number of unique subscribers who clicked a link in the message. ▪ The proportion of subscribers who clicked at least one link in the message.
% Unique Clicks of Unique Opens <Message Layout Report>	This is Unique Clicks as a percentage of the unique number of emails opened.

List Reporting

List reporting consists of a group of five reports that provide detailed information about DREAMmail mailing lists. The list reports include the:

- **List Status Report** — Summarizes list characteristics such as size, the date of the most recent import, the date of the most recent message sent to the list, and the number of subscribers who will receive each message format.
- **List Churn Report** — Provides data on a list's growth and decline in size over time because of subscriptions and unsubscriptions.
- **List Subscription Report** — Provides counts of subscription and unsubscription requests for all mailing lists in a given site.
- **Import History Report** — Provides a history of the transactions of recurring import jobs for a specific site and a list of import transactions for all mailing lists on the site.
- **List Mailing History Report** — Enables you to view all messages that have been sent to subscribers of a given list.

List Status Report

The List Status report provides data about all active mailing lists for a specific site. This data includes the:

- Size of each list in the current site
- Number of subscribers in each list to whom mail can be sent
- Number of subscribers in each list to whom mail cannot be sent
- Number of subscribers in each list who will receive a message in a specific format (Text, AOL, or HTML)
- Date of the last import into the list
- Date of the last message sent to subscribers in the list

Exporting Lists in this Report

You can export the subscriber records of any list in the report to My Data.

Note: If you click in the upper-right part of the view, you export the high-level List Status report data as it is displayed in the Data view.

To export lists in this report:

Step	Action
1	Click **Reports > Reports** > **List Reporting** > **List Status**.
2	Click the folder next to the list that you want to export. The **Export List** panel appears.
3	Enter a file name in the **File name** text box. The name you enter is displayed in **My Data** when the export process is completed.

Step	Action
4	Select **CSV**, **Tab**, **Pipe**, or **Double pipe** to delimit the values in the exported list.
5	Click **Save**. You can access the exported list in **My Data**.

Definitions of Metrics

List Status report metric definitions are defined below.

Metric	Definition
List<List Status Report>	The name of the mailing list.
Total Mailable<List Status Report>	The total number of email addresses in the list to which mail can be sent. This is the number of member IDs on the list, minus any addresses that have been identified as list-unsubscribed, site-unsubscribed, invalid (including the Suppressed count), or unconfirmed.
Date last imported<List Status Report>	The ending date and time of the most recent import for this list, including batch imports. Subscription and unsubscription activity that originates from preference centers or Subscription and Unsubscription addresses in DREAMmail is not included.
Site unsub<List Status Report>	The number of email addresses on the list that have been unsubscribed from the current site. This is the number of member IDs on the list where the Site Unsubscribe field = 1 in the DREAMmail database.
Date last mailed<List Status Report>	The date and time of the most recent message that was sent to this list where Status in the Message Manager equals Finished.
Invalid<List Status Report>	The number of email addresses that are on the list that are identified as invalid or suppressed for the current site. This is the number of member IDs on the list where the Valid field = 0 in the DREAMmail database. **Note:** The Mailing List Manager in DREAMmail also displays the Invalid metric. However, unlike the Invalid metric in the List Status report, which includes only suppressed and invalid email addresses, the Invalid metric in the Mailing List Manager includes invalid, suppressed, and email addresses that have been unsubscribed from a site.
Size<List Status Report>	The number of email addresses on this list. This is the number of member IDs on this list minus any addresses that are list-unsubscribed, but which are still in the list tables.
Unconfirmed<List Status Report>	The number of email addresses on the list that have not provided sufficient confirmation to meet the requirements of the current active CLC policy and settings. These email addresses will not receive a message from the current site.

Metric	Definition
Text, AOL, HTML, Unknown<Mailable List Status>	The number of active, addressable email addresses on the list to which a message can be sent, categorized by the message format associated with the email address. This is the number of member IDs on this list minus any addresses that are list-unsubscribed, site-unsubscribed, invalid (including the Suppressed count), or unconfirmed.
Total Unmailable<List Status Report>	The total number of email addresses in the list to which email cannot be sent. This is the number of member IDs on the list that cannot be mailed to because they have been identified as site unsubscribed, invalid (including the Suppressed count), or unconfirmed.

List Churn Report

Use this report to measure the growth or decline in size of a mailing list over time because of subscriptions and unsubscriptions. The List Churn report provides a list's total size, subscription and unsubscription requests, and the number and proportion of list subscribers to whom email can be sent. The Data and Graph views of this report display metrics in a tabular and graphical format, respectively. The date range for this report defaults to 365 days but you can set your own date range.

Each row of the List Churn report consists of a weekly summary of the list within the date range that you set. For example, if you use the default date range of 365 days, the report displays up to 52 rows of data — a row for each week.

Using the Report

To use this report:

Step	Action
1	Click **Reports > Reports** > **List Reporting** > **List Churn**.
2	Click the: ▪ **Data** tab to display data in a tabular format. ▪ **Graph** tab To display data in a graphical format.
3	Select an email list from the drop-down list.
4	Enter a date range using the **Start date** and **End date** text boxes if you do not want to use the default date range of 365 days.
5	Click **Go**.

Note: Any changes you make in the Data view automatically carry over to the Graph view and vice versa.

Definitions of Metrics

List Churn report metric definitions are defined below.

Metric	Definition
Date<List Churn>	The date and time of the weekly report snapshot of the list data. The report displays all weekly snapshots that fall in the date range that you set. The snapshot is taken on Sundays.
Mailable list size<List Churn>	The total number of active, addressable email addresses that were on the list at the time of the report snapshot. This is the number of member IDs on the list minus any addresses that were list-unsubscribed, site-unsubscribed, invalid, or unconfirmed (in accordance with the active closed loop confirmation policy settings) at the time of the report snapshot.
List size<List Churn>	The number of email addresses that were on the list at the time of the report snapshot. This is the number of member IDs on the list minus any addresses that were list-unsubscribed, but which were still in the list tables at the time of the report snapshot.
Proportion mailable<List Churn>	The proportion of subscribers on the list to whom mail could be sent at the time of the report snapshot. **Calculation**: [(Mailable List Size / List Size)*100]
Subscriptions<List Churn>	The total number of subscriptions to the list during the week that the report snapshot summarizes. This is the number of member IDs that were added to this list during the week.
Unsubscriptions<List Churn>	The total number of unsubscriptions from the list during the week that the report snapshot summarizes. This is the number of member IDs that were removed from this list during the week.

List Subscription Report

Use this report to obtain the number of subscription and unsubscription requests made to mailing lists for a specific site. Subscriptions occur when a subscriber asks to be added to one or more mailing lists. Unsubscriptions occur when a subscriber asks to be removed from a mailing list by sending email to an Unsubscription address in a message or by making an unsubscribe request in a preference center.

The List Subscription report categorizes subscription and unsubscription requests by list and the source of the transaction request: email or preference center. Knowing where the majority of subscription requests originates for a mailing list can assist you in refining your overall campaign strategy. The report also displays the total number of unsubscription requests at the site and client levels.

There are two views of this report:

- **Data** — Displays report data in a tabular format. The time period summarized in the report defaults to the life of the list. You can click the values of specific metrics in the Data view to access the List Subscriptions Details Report.
- **Graph** — Displays report data in a graphical format. You can customize the graph to include metrics for subscriptions or unsubscriptions, or both.

Customizing the Content of the Graph View

To customize the content of the Graph view:

Step	Action
1	Click **Reports > Reports** > **List Reporting** > **List Subscription**.
2	In the **Graph** view, select one of the following options: ▪ Subscriptions ▪ Unsubscriptions ▪ **Both** (as separate bars)
3	Select one of the following options: ▪ Email requests ▪ Preference center ▪ Both
4	Click **Go**.

Definitions of Metrics

List Subscription metric definitions are defined below:

Metric	Definition
List<List Subscription>	Active and inactive lists are displayed.
Subscriptions<Email List Subscription>	Number of subscription requests made to the list by email.
Unsubscriptions (list-level)<Email List Subscription>	Number of unsubscription requests made to the list by messages sent to an Unsubscription email address in a message.
Unsubscriptions (client-level and site-level)<Preference Center List Subscription>	The total number of client-level and site-level unsubscriptions that came from a preference center. These numbers are displayed at the bottom of the Preference center Unsubscriptions column.
Subscriptions<Preference Center List Subscription>	Number of subscription requests made to the list that came from a preference center.
Unsubscriptions (list-level)<Preference Center List Subscription>	Number of unsubscription requests made to the list that came from a preference center.
Unsubscriptions (client-level and site-level)<Preference Center List Subscription>	The total number of client-level and site-level unsubscriptions that came from a preference center. These numbers are displayed at the bottom of the Preference center Unsubscriptions column.

List Subscription Details Report

This report displays the email-addresses of people who made subscription and unsubscription requests. You access this report by clicking the values of specific metrics in the Data view of the List Subscription report.

List Subscription Details report metric definitions are defined below:

Metric	Definition
Email Address<List Subscription Details Report>	The subscriber's email address.
Method<List Subscription Details Report>	The source of the subscription or unsubscription request: email or preference center.
Source<List Subscription Details Report>	The email address from which the subscription or unsubscription request came. This field is displayed only if the request came from an email address.
Transaction date<List Subscription Details Report>	The date and time that the list member subscribed or unsubscribed.

Import History Report

Use this report to summarize all activity for a specific mailing list and to describe all of the FTP jobs for a specific site. **"Managing Mailing Lists" on page 50** and **"Creating an FTP Import Job" on page 60** provide additional information.

There are two types of Import History reports:

- **Import History by list** — Displays all the import transactions that were completed for a specific list. This report provides the number of records that were processed and the import method (automated FTP, one-time FTP, interactive upload, or ODBC) used to import the records through the DREAMmail user interface. The report does not list any import activities that are in progress.
- **Import History by job** — Provides all the active FTP jobs for a specific site. The report includes the job name, the number of times that the job has been run, and the date and time of the job that was last run. This report does not associate the import job with the corresponding list names.

Viewing All Import Transactions for a Specific Mailing List

To view all import transactions for a specific mailing list:

Step	Action
1	Click **Reports > Reports** > **List Reporting** > **Import History**. The **List** view appears.
2	Select a mailing list from the drop-down list.
3	Click **Go**.

Viewing All FTP Jobs for a Specific Site

To view all FTP jobs for a specific site:

Step	Action
1	Go to **Reports > Reports** > **List Reporting** > **Import History**. The **List** view appears.
2	Click the **Job** tab.

Definitions of Metrics

Import History report metric definitions are defined below.

List Tab Metrics

List tab metrics area defined below:

Metric	Definition
Started<List View of the Import History Report>	The date and time that the import request started.
Finished<List View of Import History>	The date and time that the import finished (or stopped in the case of failure).
Method<List Tab Import History>	The method of import (automated FTP, one-time FTP, interactive upload, or ODBC) and job name (for automated and one-time FTP).
Source<List View of the Import History Report>	The number of records that were in the source import file, regardless of whether they were imported.
Rejected<List Tab Import History>	Total number of records in the source file that could not be properly parsed (according to the import definition) or which have email addresses that do not conform to the RFC822 standard for email addresses.
Imported<List View in Import History>	Total number of records that were imported minus rejects.

Job Tab Metrics

Job tab metrics are defined below:

Metric	Definition
Job<Job View of the Import History>	The name of the import job.
Date last run <Job View of the Import History Report>	The ending date and time of the most recent import for this job.
No. of times run<Job View of the Import History>	The number of times that this import job has run since it was created.

List Mailing History Report

Use this report to view the list of all messages that have been sent to subscribers of a specific mailing list, including messages that have been sent to proofing and approval lists. The report provides the list size at the time that each message was sent and the proportion of subscribers on the list that received the message.

Note: Messages that are in the process of being sent are not included in this report.

Using this Report

To use this report:

Step	Action
1	Click **Reports > Reports** > **List Reporting** > **Mailing History**. The **Data** view appears.
2	Select an email list from the drop-down list.
3	Click **Go**.

Definitions of Metrics

Mailing History report metric definitions are defined below.

Metric	Definition
Started<Mailing History>	The date and time that DREAMmail started sending the message.
Campaign<Mailing History>	The name of the campaign to which the message belongs.
Message<Mailing History>	The name of the message.
Recipients from this list<Mailing History>	The number of subscribers on this list to whom the message was pushed.

Customer Reports

Customer reports consist of the:

- **Most Active Customers (MAC) report** — The MAC report provides data regarding the frequency of customer activity such as click-throughs and purchases tracked by Spotlight. The report also identifies the customers who spent the most money in a given period of time.
- **Recency, frequency, and monetary value (RFM) reports** — The RFM reports tell you how recent and how often customers made purchases and how much they spent on the purchases. The RFM reports also track the recency and frequency of transactions by subscribers that do not result in a purchase.

MAC Report

This report provides the email addresses of customers who, for a specified time period during a campaign, performed the most transactions. This report enables you to generate new mailing lists of these customers. You use the Customize view of this report to specify the type, scope, and time period of the report. The Data view displays the output of the report.

There are three types of MAC reports that provide data at the site, campaign, or message level:

- **Most Frequent Clicking Customers** — A list of the customers who clicked most frequently on links.
- **Most Frequent Purchasers** — A list of the customers who purchased most frequently. The report enables you to generate a new mailing list on the basis of Spotlight category and sub-category.
- **Highest Value Purchasers** — A list of the customers who spent the most money after opening a message. The report enables you to generate a new mailing list on the basis of Spotlight category and sub-category.

Using the Report

To use this report:

Step	Action
1	Click **Reports > Reports** > **Customer Reports** > **Most Active**. The **Customize** view is displayed by default.
2	Use the **Campaigns** and **Messages** drop-down lists to set the report at one of the following scopes: ▪ **Site** — Select **All** in the **Campaigns** and **Messages** drop-down lists. ▪ **Campaign** — Select a campaign from the **Campaigns** drop-down list and select **All** in the **Messages** drop-down list. ▪ **Message** — Select a campaign from the **Campaigns** drop-down list and a message from the **Messages** drop-down list.
3	Use the option buttons and text boxes in the **Period** section to specify the time period for the report.

Step	Action
4	Use the **Categories** and **Subcategories** drop-down lists if you want to select a category and a sub-category in Spotlight. **Note:** These drop-down lists are available only if you select **Number of purchases** or **Value of items** in the **Criteria** section.
5	In the text box of the **Criteria** section, enter the number of customer records that you want displayed in the report.
6	Use the option buttons in the **Criteria** section to choose the type of Most Active Customers report: ▪ Clicks ▪ Number of purchases ▪ Value of items
7	Click **Go**. The output is displayed in the **Data** view.

Understanding the Report Metrics

Most Active Customers report metric definitions are defined below.

Metric	Definition
Email address<Most Active Customers Report>	The email address of the most frequent clicker, most frequent purchaser, or highest value purchaser, depending on the option you selected in the Criteria section of the Customize view.
Clicks<Most Active Customers Report>	Number of click-through transactions recorded for the email address within the scope and date range of the report. **Note:** Multiple clicks from one person on the same message or even the same link are counted independently. Clicks from people to whom the message was passed are not counted.
No. of purchases<Most Active Customers Report>	Number of purchases recorded by Spotlight for the email address within the scope and time period of the report.
Value of items<Most Active Customers Report>	Total value of purchases recorded for the email address within the scope and time period of the report.

Exports

The Exports components in DREAMmail reports enable you to export data and retrieve data from DREAMmail reports. The Exports components consist of the following:

- **My Data** — A repository for data that was exported from DREAMmail reports on an ad hoc basis.
- **Export Manager and RTM Export Manager** — Tools that enable you to schedule recurring report exports for automatic download to the DREAMmail FTP server.
- **Export Campaign** — A tool for exporting data from campaigns and individual messages.

Understanding the My Data Component

The My Data component is file space allocated to every DREAMmail user on the DREAMmail server. My Data is a repository for data that you export from DREAMmail reports on an ad hoc basis. In addition to exported report data, you can also export campaigns and mailing lists to My Data.

Once a file has been exported to My Data, you can download the saved file to a local or network directory. Files in My Data are stored in a zip format. When you unzip the file, it is saved in the format in which you originally exported the report data (for example, PDF, HTML, Excel, or delimited).

When you download a file from My Data that has been created as part of a recurring export job, DREAMmail appends the time and date stamp that appears in the Last Modified column to the downloaded file. Appending the date ensures the uniqueness of the file name.

Note: DREAMmail purges export files in My Data after seven days.

Accessing Exported Data from the My Data

To access exported data from My Data:

Step	Action
1	Click **Reports > Reports** > **Exports** > **My Data**.
2	Click the name of the file that you want to download. **Note:** Ensure that the **Status** column is set to **Finished** before downloading the file.
3	Click **Save File** in the **File Download** dialog box.
4	Click **OK**.

Understanding the Export Manager Report

Use this component to schedule recurring exports to a client's FTP site on the DREAMmail FTP server. You specify the type of report and profile data that you want to be included in the export report along with the start date of the export report. Export Manager uses the same FTP server that is used by the FTP Import Manager, so you do not need additional new FTP credentials. Export files are stored on the FTP server in the Report Exports subfolder.

Note: The FTP feature must be enabled in your DREAMmail user privileges before you can use Export Manager. FTP usage must also be enabled at the site level.

Types of Reports in Export Manager

There are different types of reports that you can export with Export Manager. These reports are available at both client and site level and contain the following data:

- Client
- Site
- Date
- Profile fields

The reports include data for the last 24 hours. However, if the report is run on Monday, it includes data from Friday, Saturday, and Sunday.

The different types of export reports consist of:

- Profile changes
- Invalid addresses
- Email address change
- Subscriptions
- Unsubscriptions
- Bounce backs
- Clicks
- HTML opens
- Spotlight transactions

Frequency of Reports in Export Manager

You can select one of the following frequencies to determine how often the reports are exported in the Export Manager:

- **Daily** — Runs once a day Monday through Friday. The report data is based on activity during the 24-hour period after the last daily report run, except on Mondays when the report includes data for the previous 72 hours.
- **Weekly** — Runs every seven days, starting on the date specified in the Start Date field. The start date cannot be a Sunday or Saturday. The report data is based on activity during the previous seven days.
- **Every 4 Weeks** — Runs every four weeks starting on the date specified in the Start Date field. The start date cannot be a Saturday or Sunday. The report data is based on activity during the previous four weeks.

Creating Export Jobs

To create export jobs:

Step	Action
1	Click **Reports > Reports** > **Exports** > **Export Manager**.
2	Click **Create**.
3	Type a name and description for the job.
4	Specify the type of report you want to export.
5	Use the **Export scope** drop-down list to indicate the scope of the export report. **Note:** Select **Client** to include data for all of the client's sites; select **Site** to include data only for the site.
6	Enter the file name of the export. This is the name of the file that will appear in the **Report Exports** folder on the FTP site. **Note:** This file name is used every time a report is exported for this job. The file is overwritten each time the report is exported.
7	Select the export format from the **Format** drop-down list.
8	Select the **Zip** option if you want to compress the file. **Note:** Compressing a file reduces the time required to send the file to the FTP site.
9	Enter the email address of the person to be notified when the job is complete. If you enter an invalid email address, DREAMmail displays an error message.
10	Click **Add** to enter email address. **Note:** You can enter multiple email addresses.
11	Click **Next**.
12	Select the profile fields that you want to include in the export file from the **Available** list and move them to the **Selected** list. By default, the email address profile field is included in the export file. Depending on the type of data that you specify, other profile fields are included by default as well. You can also include user-created profile fields in the export file.
13	Use the **Frequency** option buttons to specify how often you want this report to be generated.
14	Enter a date in the **Start date** field. **Note:** This is the starting date for running the report — not for generating the data in the report. The start date cannot be on Saturday or Sunday.
15	Enter a time in the **Start time** field.
16	Enter a number of days in the **Expire in** field to specify a limit to the number of days that the job should run.

Step	Action
17	Click **Save**. DREAMmail displays a confirmation indicating the date and time at which the next report will be exported.
18	Click **Go**.

Understanding the Export Campaign Report

Use this report to export data regarding individual messages or all messages in a campaign. This data is exported to My Data.

Exporting Data from a Campaign

To export data from a campaign:

Step	Action
1	Click **Reports > Reports** > **Exports** > **Export Campaign**.
2	Select the campaign that contains the message or messages that you want to export from the **Campaign** list box.
3	Select the message from the **Mailing** list box that you want to export.
4	Select the metrics in the **Export details** section that you want to include in the export.
5	Enter a name in the **Report name** field.
6	Click **Save**. The report name displays in **My** Data.
7	When the status for the report is **Finished**, click the report to view its contents. **Note:** If RTM is enabled, TransactionID is included for all campaign exports.

Definition of Metrics

RFM Response Recency report metric definitions are defined below.

Metric	Definition
Clicks<Export Campaign>	The email address, message name, URL, date and time of click, and Hit From (that is, the format of the message in which the click-through occurred).
Spotlight<Export Campaign>	A post-click analysis tool that enables you to measure a subscriber’s response to specific sections of a website by tracking that subscriber’s activity. In order for Spotlight to track activities, you insert a Spotlight tag into the sections, or pages, of the website where you want to track activity.
Pass along recipients<Export Campaign>	The email address, message name, URL, date and time of the pass along, and Hit From (that is, the format of the message that was clicked).

Metric	Definition
Soft bounced<Export Campaign>	The email address, message name, date and time of bounce, and message format.
Invalid<Export Campaign>	The email address, message name (from which the invalid address came), date and time that the message became invalid, and message format.
Hard bounced<Export Campaign>	The email address, message name, date and time of bounce, and message format.
Delivery Errors<Export Campaign>	The email address, message name, date and time of error, and format of the message that was not delivered.
Opened<Export Campaign>	The email address, message name, date and time that the message was opened.
Unsubscribed<Export Campaign>	The number of emails that were not delivered due to recipients having unsubscribed from the DREAMmail site or client that is sending the message.

Understanding Ad Hoc Exports

You can export tabular data and graphs from DREAMmail reports and save the export file to your computer. This type of exporting, which you do on an as-needed basis, consists of two steps.

Step	Action
1	Click  to generate an export file that DREAMmail saves in **My Data**. When the export file has been saved, DREAMmail sends you an email message informing you the report is ready to be downloaded from **My Data**.
2	After the file has been saved in **My Data**, click the export file name to save the file to your computer.

You can specify the format (PDF, HTML, Excel, and Delimited) of the exported file. The PDF, HTML, and Excel formats are limited in the amount of rows they can display. Use the CSV and Delimited formats for data sets that have a large amount of rows.

For Delivery and Response and RTM reports, the data in the exported file is determined by the scope, grouping and subgrouping, and sorting of the report.

Export Formats

When report data is exported, its values must be separated, or delimited by a special character. You can specify one of the following formats to delimit the data in an export file:

- CSV (comma separated values)
- Tab
- Pipe (that is, a vertical line)
- Double pipe (a double vertical line)

Exporting Tabular Data

To export tabular data:

Step	Action
1	Click , which is located in the upper right corner of the report.
2	Specify the export options in the **Export Report** section.
3	Click **Save**. DREAMmail exports the report as a Zip file to **My Data**.
4	To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Exporting Graphs

To export graphs:

Step	Action
1	Click , which is located in the upper right corner of the report.
2	Type a file name for the exported file.
3	Click **Save**. DREAMmail exports the graph as a JPEG image in a Zip file to **My Data**.
4	To access the exported file, go to **Reports** > **Reports** > **Exports** > **My Data**.

Understanding the RTM Export Manager Report

Use this report to schedule daily exports to a client's FTP site on the DREAMmail FTP server. You specify the type of report and profile data that you want to include in the export report. RTM Export Manager uses the same FTP server as FTP Import Manager, so you do not need additional FTP credentials. Export files are stored on the FTP server in the RTM Exports subfolder.

Note: The FTP feature must be enabled in your DREAMmail user privileges before you can use RTM Export Manager. FTP usage must also be enabled at the site level.

Types of Reports in RTM Export Manager

There are different types of reports that you can export with RTM Export Manager. These reports are available at both client and site level and contain the following data:

- Client
- Site
- Date
- Profile fields

The reports include data for the last 24 hours. However, if the report is run on Monday, it includes data from Friday, Saturday, and Sunday.

The different types of RTM export reports consist of:

- Delivered
- Not Delivered
- Clicks
- HTML opens
- Spotlight Transactions

Creating RTM Export Jobs

To create RTM export jobs:

Step	Action
1	Click **Reports > Reports** > **Exports** > **RTM Export Manager**.
2	Click **Create**.
3	Type a name and description for the job.
4	Specify the type of report you want to export.
5	Use the **Export scope** drop-down list to indicate the scope of the export report. **Note:** Select **Client** to include data for all of the client's sites; select **Site** to include data only for the site.
6	Enter the file name of the export. **Note:** The filename displayed in the RTMExports folder is the name concatenated with the date and time the export was run, in the format name_yyyymmddTtimestamp. For example: RTMExport_20030912T164545678.
7	Select the export format from the **Format** drop-down list.
8	Select the **Zip** option if you want to compress the file. **Note:** Compressing a file reduces the time required to send the file to the FTP site.
9	Enter the email address of the person to be notified when the job is complete. If you enter an invalid email address, DREAMmail displays an error message.
10	Click **Add** to enter email address. **Note:** You can enter multiple email addresses.
11	Click **Next**.
12	Select the profile fields that you want to include in the export file from the **Available** list and move them to the **Selected** list. By default, the email address profile field is included in the export file. Depending on the type of data you specify, other profile fields will be included by default. You can also include user-created profile fields in the export file.
13	Enter a date in the **Start date** field. **Note:** This is the starting date for running the report — not for generating the data in the report. The start date cannot be on Saturday or Sunday.

Step	Action
14	Enter a time in the **Start time** field.
15	Enter a number of days in the **Expire in** field to specify a limit to the number of days that the job should run.
16	Click **Save**. DREAMmail displays a confirmation indicating the date and time at which the next report will be exported.
17	Click **Go**.

Appendix A: Supported Character Sets

The following table shows each *DREAMmail* certified character set and the languages that are based on the character set:

Character Set	Languages Supported
UTF-8	All languages
US-ASCII	English
ISO-8859-1	Dutch, French, German, Italian, Portuguese, Spanish, Swedish, English, Afrikaans, Albanian, Basque, Catalan, Danish, Faroese, Finnish, Icelandic, Irish, Norwegian, Rhaeto-Romanic, Scottish, and Swahili
ISO-8859-2	Croatian, Czech, Hungarian, Polish, Romanian, Slovakian, Slovenian, and Sorbian
ISO-8859-3	Esperanto and Maltese
ISO-8859-4	Estonian, Greenlandic, Lappish, Latvian, and Lithuanian
ISO-8859-5	Bulgarian, Byelorussian, Macedonian, Russian, Serbian, and Ukrainian
KOI8-R	Russian
Cyrillic-Windows	Russian
ISO-8859-7	Greek
ISO-8859-9	Turkish
ISO-2022-JP	Japanese **Note:** DREAMmail supports EUC-JP encoding for data imports, content submission, and message composition. At the deployment stage, DREAMmail ensures that mailings are deployed in the ISO-2022-JP encoding, an encoding standard more widely accepted by mail servers.
GB2312	Simplified Chinese
Big5	Traditional Chinese

Character Set	Languages Supported
EUC-KR	Korean
ISO-8859-11	Thai
Windows 1256	Arabic **Note:** The ISO encoding standard is not supported for Arabic.
Windows 1255	Hebrew and Yiddish **Note:** The ISO encoding standard is not supported for Hebrew and Yiddish.
Windows 1257	**Note:** This is currently only displayed in EDC user interfaces. This functionality remains specific to EDC.
Windows 1252	English and Some Western European languages
ISO-8859-15	Western European languages