

Ethical Comms

A Handbook

Prepared by

Helen Aquinol-Tobin & Anne-Marie Neligan

October 2010

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1. HOME

This is the Home Screen of the Ethical Comms emailer:



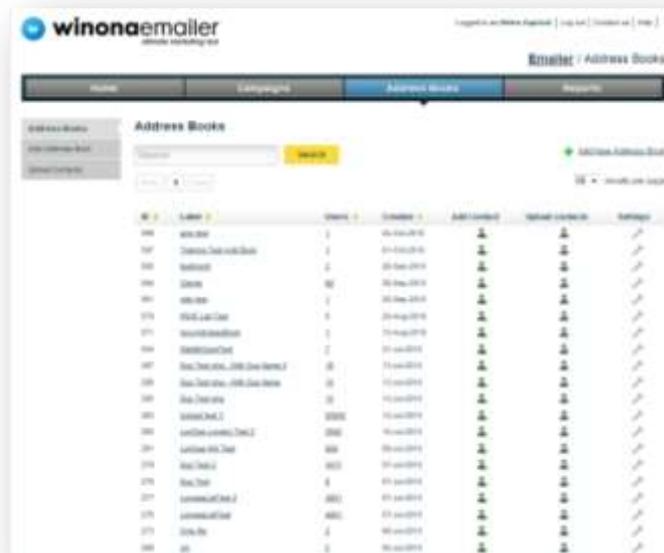
From here you can see your recent activity, such as campaigns you have sent or address books you have created.

2. ADDRESS BOOKS

The address book feature allows you to define and create groups of contacts. You can set up and maintain several address books within your organisation's account. Contacts can be saved in multiple address books and there is no limit to the amount of contacts in each book.

2.1 CREATING A NEW ADDRESS BOOK

Step 1. Click on the 'Address Books' tab, then click on a 'Add New Address Book' link:



Step 2. On the next page you are asked to give your new address book a title and provide an optional description. The title is important as you will need this to recognise the content of your address book. The description is also useful as you might need to save the same address book multiple times but with slight variations.



Step 3. You will also be asked to fill in the 'Unsubscribe Text' box. This gives you the option of writing bespoke unsubscribe message on each email you send. It is possible to edit this text

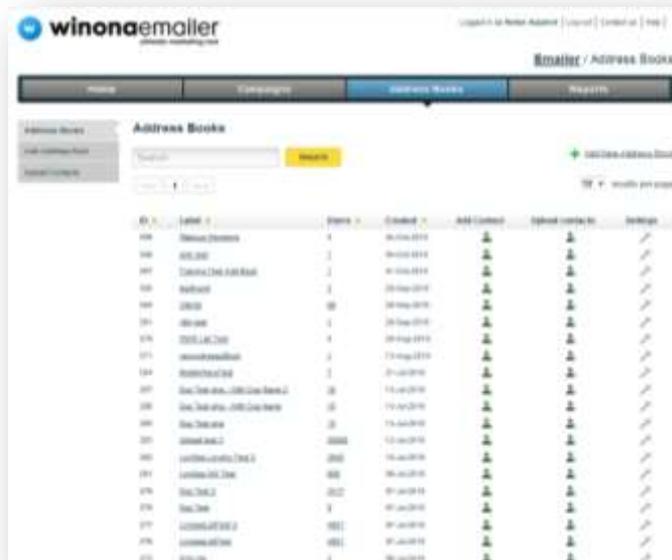
at a later date but you are required to enter something into the box. When you have completed the fields click the 'Add New' button.

- Step 4. You will then be returned to the Address Books and will see your new address book in the listing. You can sort your address books by 'ID' (an automatically generated number), 'Users' (number of contacts), 'Label' (title) or date 'Created'.
- Step 5. You can click on the underlined title of your address book to go back and edit it at any time.

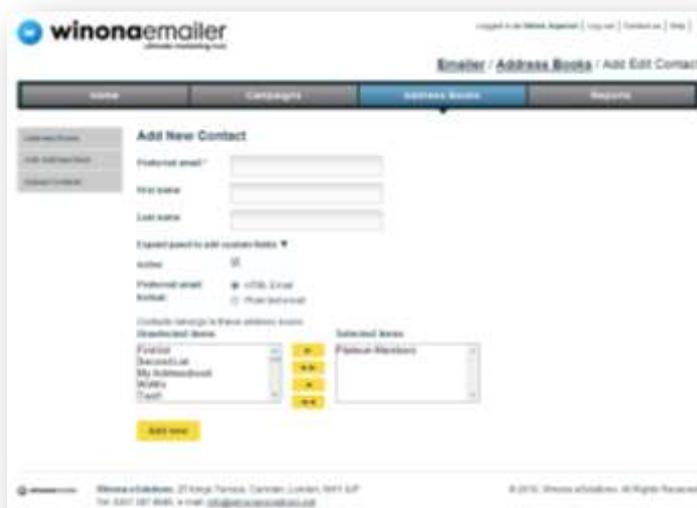
2.2 ADDING A SINGLE CONTACT

To add contacts to your address book you have two options. You can either add a single contact, or upload a list of contacts.

- Step 1. Click the headshot icon with a green + sign next to your address book.



- Step 2. On the next screen you can enter the details of your contact. You can enter their preferred email address, name, and select whether they should receive plain text or HTML emails. You can also add them to your other address books.



Step 3. If you click ‘expand panel to add custom fields’ you can also enter custom fields. These fields are defined by the user and can be used when creating content for your campaigns, which will be discussed in the next chapter.

winonaemailer
Ultimate marketing tool

Logged in as [Three Rivers](#) | [Log out](#) | [Contact us](#) | [Help](#)

[Emailer](#) / [Address Books](#) / [Add Edit Contact](#)

Home Campaigns **Address Books** Reports

Address Books
Add Address Book
Expand Contacts

Add New Contact

Preferred email *

First name

Last name

Expand panel to add custom fields ▲

Maximum length 20 characters
Please note: custom fields will be truncated if they are longer than 20 characters

Extract

Extract

Extract

Extract

Extract

Extract

Active

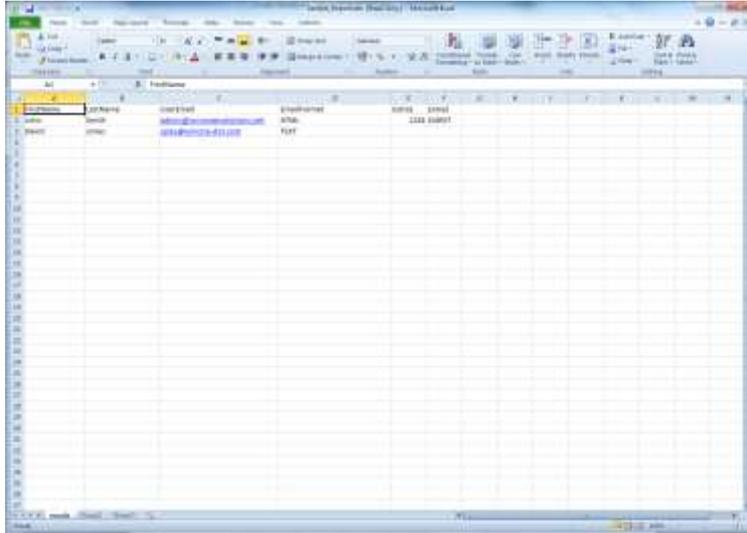
Preferred email format
 HTML Email
 Plain text email

Contact belongs to these address books
Unselected Items Selected Items

NOTE: If you have previously added a contact to one of your other address books you will get a message telling you the email address already exists in your account. It will then take you to the contact’s details page and ask you to confirm they are correct.

2.3 UPLOADING A LIST OF CONTACTS

- Step 1. If you would like to add a group of contacts from an excel spread sheet you can do it using this method. If it is your first time importing contacts then you should click on 'What you need to know before you upload a list of contacts'.
- Step 2. Firstly follow the link to download the sample export list. If you open the download the following file will open in excel:



- Step 3. Row 1 contains the header fields. Your file must contain exactly the same field names – if the data is not correctly formatted the import will fail. It is suggested that you save a copy of the file and copy and paste your data into it (removing the first two example rows).

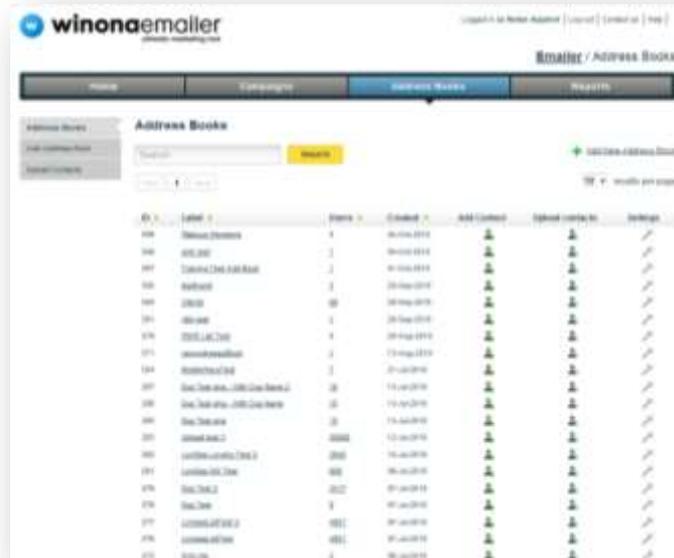
NOTE: Do not re-name the worksheet. The worksheet name should always be "emails"

- 'Firstname' and 'Lastname' are text fields.
- 'EmailFormat' should be 'HTML' or 'TEXT'.
- 'UserEmail' is a unique valid email address.
- The 10 Extra fields can contain any alphanumeric character.

The maximum file upload size is 20MB. It is recommended that you use excel 2007 or later to create your list as excel 2003 can only hold about 60,000 rows. The time it takes to upload and process your list will depends on how big your list is and the speed of your internet connection.

If you do have a big list, please separate them into several files which have about 100,000 rows each and upload them one by one, this way it will perform faster and it will be easier to resume if the import fails.

- Step 4. Once you have created your excel file using the correct format go back into the address book page and click the headshot icon with a blue arrow icon next to the relevant address book.



- Step 5. On the next page you will be asked to select the excel file (called 'address book' here) you want to upload from the drives on your computer. You will also be able to choose the address book you want to upload the contacts into. Click the 'Import Contact List' button when you're ready.

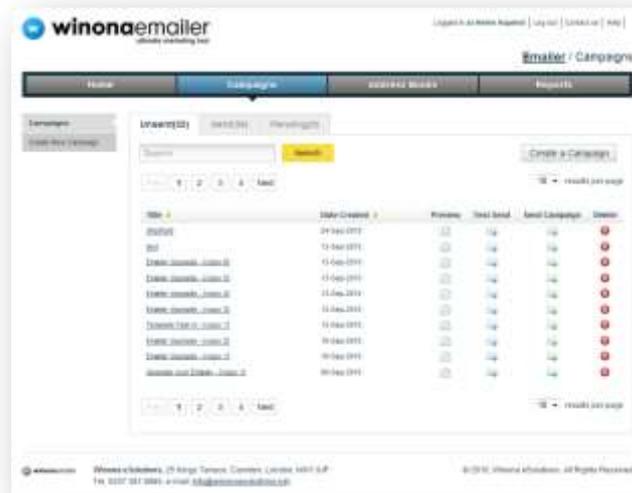


- Step 6. If your upload is successful you will be returned to the upload page, giving you the opportunity to upload more excel files. If you do not wish to upload more contacts at this time, click the 'Address Books' tab to go back to the address book listing.

3. CAMPAIGNS

From the Homepage click the 'Campaigns' tab which will take you to the Campaigns subhome. From here you can create new email campaigns. You can view and modify your unsent, sent and pending campaigns and create a new campaign from an old one.

To create a new campaign, click on the 'Campaigns' menu item on the main menu and click 'Create a Campaign'.



Once you have clicked 'Create a Campaign' you will be given two options for creating your campaign. You can either:

- Create New - create a completely fresh campaign using a template
- Copy Previous - create a copy of a campaign you have already sent



3.1 CREATE A NEW CAMPAIGN

- Step 1. To create a new campaign click the 'Create New' icon or an open envelope.
- Step 2. Select the relevant template from the existing template gallery and click 'Continue to Next Step'

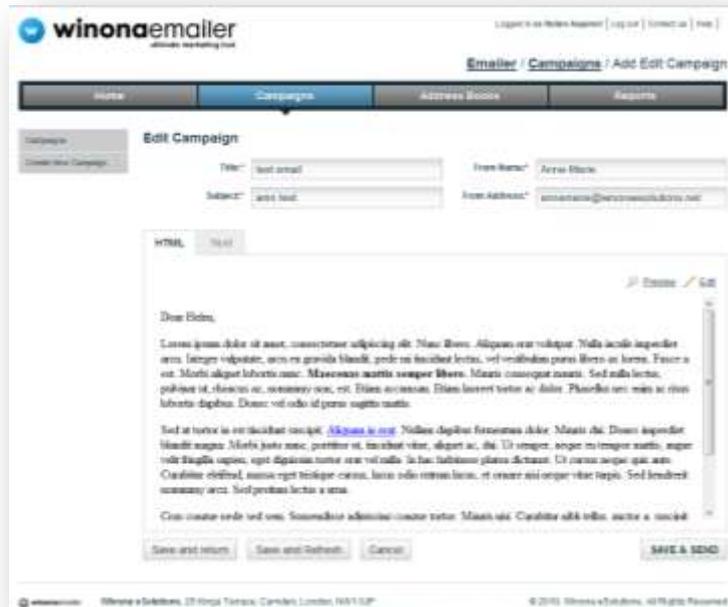


- Step 3. Here you are asked to enter the following information:
- 'Campaign name' - this is so you can find it easily later on
 - 'Subject' - this is what will appear in the email subject line
 - 'From name' - this is the sender's display name. It doesn't have to be linked to the email address the mailer comes from. You can have a name (e.g.: Tom Smith) or a company name (Winona eSolutions) and so on.
 - 'From Email Address' - this is the address you want the emails to come from (e.g. tom.smith@winonaesolutions.net)



- Step 4. Once you have finished these settings, click 'Create' and you will progress to the Edit Campaign screen.
- Step 5. Using the tabs here you can see both the HTML and the plain text versions of your email template.

NOTE: You must have something under both the HTML and Text versions of your email in order to accommodate both types of contact.



Step 6. To make changes to the template, click Edit to open the content editor. Here you can edit the content of your email to suit the needs of the campaign:



Step 7. You can also add your custom fields to the email using the content editor. 'FirstName' and 'LastName' are already there and the 'Extra' fields refer to the optional extra information

you added when you created the excel spread sheet or added an individual contact. If the contact has no Extra information, this will not show up on the email.

Step 8. When you have finished editing, click 'Save'. Your email will now reflect the changes you have made.

NOTE: Remember to make the same changes to the Text version of the email.

Step 9. You now have three options:

- Click 'Save and Return' to save and go back to your list of campaigns.
- Click 'Save and Refresh' to save and remain on the 'Edit your Campaign' page
- Click 'Save and Send' to save and be taken to the next step

Unless you are absolutely certain your campaign is ready, it is highly recommended you click 'Save and Return'.

3.2 USING A COPY OF A PREVIOUS CAMPAIGN

Step 1. On the Create Campaign page, click 'Copy Previous'



Step 2. The next page will display a list of your previous campaigns.



Step 3. From here you can select the campaign you would like to copy, preview it, send a test or copy and send. If you click 'Copy and Send' you will be taken to the Edit Campaign screen (Step 5 in Creating a New Campaign)

3.3 SENDING A CAMPAIGN

When you are completely satisfied with your campaign, you are ready to send it.

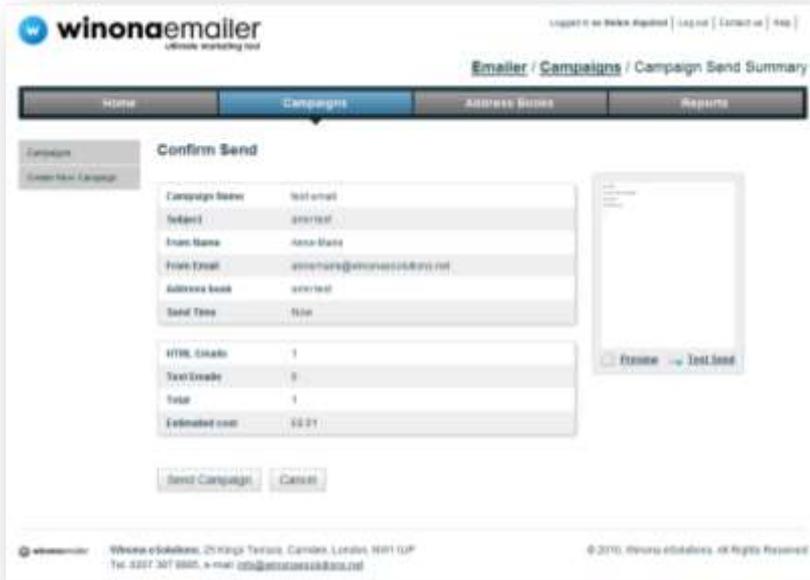
- Step 1. From the Campaigns screen, click the icon for Send Campaign alongside the campaign you wish to use.



- Step 2. You will now be asked to select an address book to send to, as well as specify when you would like to send the campaign. You can either send right away or specify a date and time.



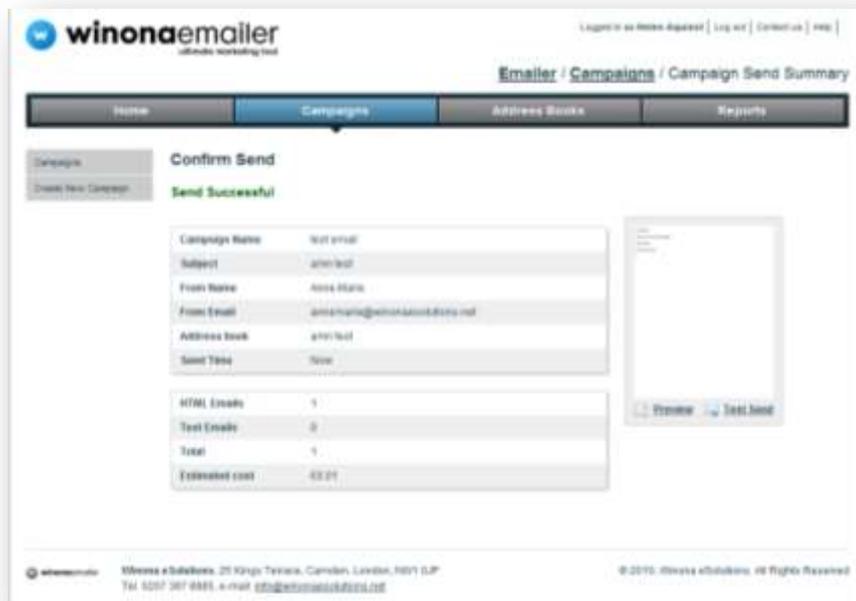
- Step 3. To change the date, click the calendar icon to the right of the date field. To change the time, use the drop down box. When you are done, click 'Continue'.
- Step 4. You will come through to the Confirm Send page, which looks like this:



Step 5. Here you have the option to preview and test send, should you wish to (see section 3.3).

Step 6. If all the details listed are correct and you are happy with the email, click 'Send Campaign'. You will be asked to confirm again. If you are sure, click 'OK'.

Step 7. A message reading 'Send Successful' will appear



3.4 PERFORMING A TEST SEND

It is highly recommended that you check your email looks good and functions well by performing a Test Send.

- Step 1. On the campaigns sub home, click the Test Send icon for the campaign you would like to test.



- Step 2. This will open the following pop up screen. From here you can select up to 10 of your organisation's pre-entered test contacts. When you have selected who you want to send the test to, click 'Send Test'.

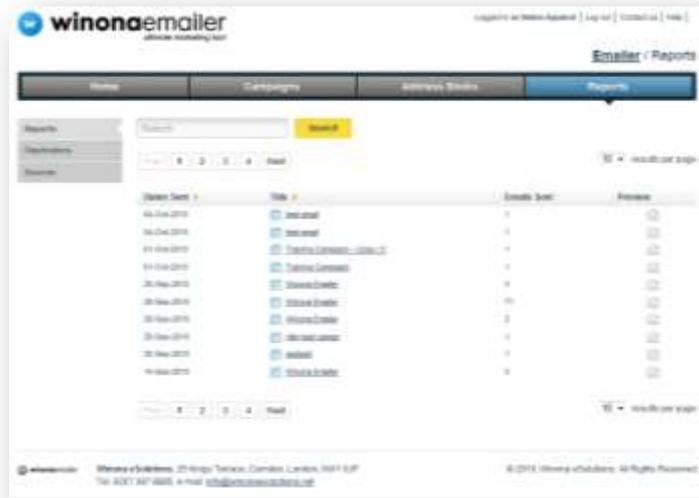


- Step 3. Once you (or the tester) receive the email, check your text looks right, your images are displaying and that any links are working correctly.
- Step 4. You can now close this window. If you are happy with your email, you can now send it.

4. REPORTS

Reporting can be used within Ethical Comms to find out how successful your email campaigns are. The 'Reports' page will show you a list of every email you have sent and you can sort this list by date or title. It displays how many emails were sent in the third column and you are also given the option of previewing the email to make sure you are examining the correct one.

4.1 VIEW CAMPAIGN STATISTICS



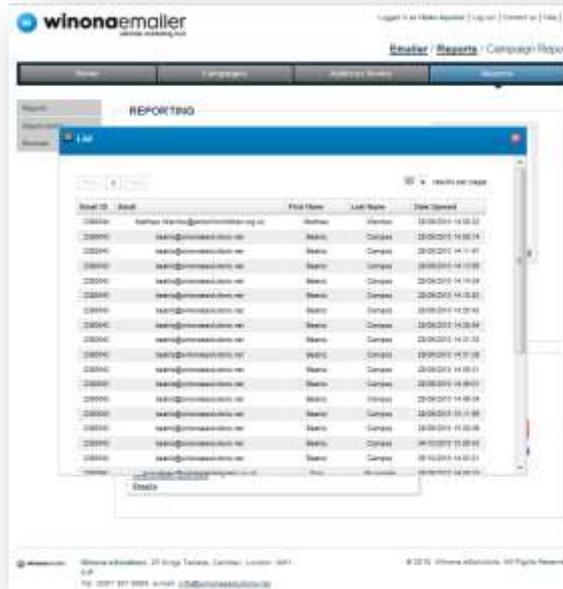
The screenshot shows the WinonaMailer 'Reports' page. At the top, there is a navigation bar with 'Home', 'Campaigns', 'Advanced Search', and 'Reports'. Below this is a search bar and a table of reports. The table has columns for 'Open Date', 'Title', 'Emails Sent', and 'Preview'. The 'Title' column is underlined, indicating it is a link to a detailed report page.

Open Date	Title	Emails Sent	Preview
04-Oct-2015	Welcome!	1	
04-Oct-2015	Welcome!	1	
01-Nov-2015	Campaign Campaign - Campaign	1	
01-Nov-2015	Campaign Campaign	1	
20-Nov-2015	Campaign Campaign	1	
20-Nov-2015	Campaign Campaign	11	
20-Nov-2015	Campaign Campaign	2	
20-Nov-2015	Campaign Campaign	1	
20-Nov-2015	Campaign Campaign	1	
19-Nov-2015	Campaign Campaign	1	

Step 1. If you select an email from the underlined 'title' column you will be taken to the following Reporting page:

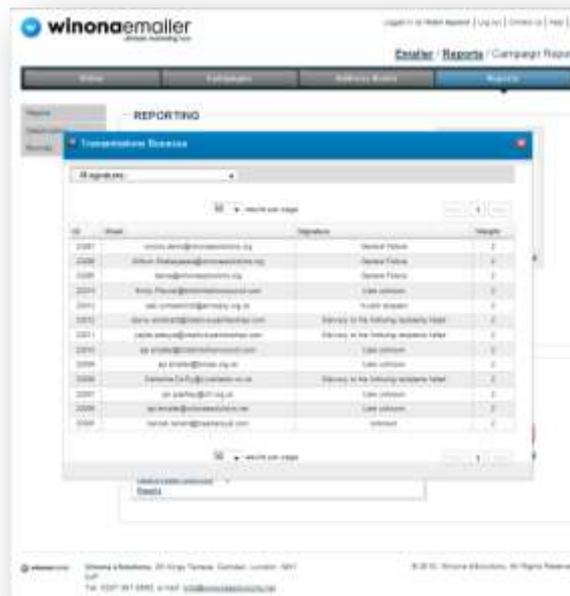


- Step 2. From this screen you can see the details of your email campaign (how many, how much etc.) and also view the statistics attached to the send which are displayed in various formats. A summary of these statistics are also displayed on this screen as a pie chart to give you a quick view of how successful the campaign was.
- Step 3. You are also able to produce your own charts out of the Opened Emails and Bounced Emails data which you can export as a csv file which opens in excel.
- Step 4. You can also view a list of everyone who opened the email and when if you click on the 'Opened Emails' link:



4.2 VIEW BOUNCED EMAILS

- Step 1. Details of the 'Bounced Emails' can be exported as mentioned previously, as a csv file. This is done by clicking on the excel icon alongside the bounced email link.
- Step 2. Clicking the 'details' link beside 'Bounced Emails' will open a pop-up window displaying all the bounced email addresses. You can sort this data to show the reasons why the email has bounced by selecting an option from the 'all signatures' drop down box:



The screenshot shows the Winona Mailer Reporting interface. A pop-up window titled 'Reporting' is open, displaying a table of bounced emails. The table has the following columns: ID, Email, Signature, Reason, and Count. The data is as follows:

ID	Email	Signature	Reason	Count
2207	winona@winona.com	Winona Mailer	Spam Filter	2
2208	winona@winona.com	Winona Mailer	Spam Filter	4
2209	winona@winona.com	Winona Mailer	Spam Filter	2
2210	winona@winona.com	Winona Mailer	Spam Filter	2
2211	winona@winona.com	Winona Mailer	Spam Filter	2
2212	winona@winona.com	Winona Mailer	Spam Filter	2
2213	winona@winona.com	Winona Mailer	Spam Filter	2
2214	winona@winona.com	Winona Mailer	Spam Filter	2
2215	winona@winona.com	Winona Mailer	Spam Filter	2
2216	winona@winona.com	Winona Mailer	Spam Filter	2
2217	winona@winona.com	Winona Mailer	Spam Filter	2
2218	winona@winona.com	Winona Mailer	Spam Filter	2
2219	winona@winona.com	Winona Mailer	Spam Filter	2
2220	winona@winona.com	Winona Mailer	Spam Filter	2
2221	winona@winona.com	Winona Mailer	Spam Filter	2
2222	winona@winona.com	Winona Mailer	Spam Filter	2
2223	winona@winona.com	Winona Mailer	Spam Filter	2
2224	winona@winona.com	Winona Mailer	Spam Filter	2
2225	winona@winona.com	Winona Mailer	Spam Filter	2
2226	winona@winona.com	Winona Mailer	Spam Filter	2
2227	winona@winona.com	Winona Mailer	Spam Filter	2
2228	winona@winona.com	Winona Mailer	Spam Filter	2
2229	winona@winona.com	Winona Mailer	Spam Filter	2
2230	winona@winona.com	Winona Mailer	Spam Filter	2

- Step 3. 'Bounced Emails' statistics can also be viewed quickly in a bar graph which is displayed in a pop up window if you click on the 'Bounced Email' link:



- Unsubscribers: Which opens a pop up window which will display a list of the people who have unsubscribed after receiving the latest email:



- Deactivated Bounced Emails: These will also appear in a pop up window for you to view:

