



**AppShore Premium Edition
Campaigns How to Guide**

Release 2.1

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Campaigns Overview

This How to Guide will step you through the simple process of creating and delivering a bulk email Campaign. We'll discuss how to create a Campaign Message, create a List, test the Campaign, and deliver the Campaign in bulk to a List of recipients. This document pertains to AppShore Premium Edition V2.1. Please refer to the Professional Edition Campaigns How to Guide for information on V1.1 of Campaigns.

AppShore Campaigns is an HTML, or plain text, bulk email message authoring and delivery application. The primary purpose of the application is to automate the delivery of large numbers of email messages with a single click. When Messages are sent using our Campaigns application the recipient sees only their email address in the 'To:' line. The recipient does not see all the other email addresses of all the other recipients. The recipient sees whatever email address you use in the 'From:' line. There is no AppShore specific email address inserted in the 'From:' line so your recipients do not know the Message was sent using AppShore.

A Campaign is comprised of two components; the Message you want to send and a List. A List can be used any number of times and with any number of different Messages. You may create any number of Lists of recipients and any number of Messages. You may create Messages and Lists in any sequence, but you need both components in place before you can send a Message in bulk.

How to create a Campaign Message

Click on the Campaigns tab. Click on the New Campaign link at the top of the page just below the row of application tabs. You will be presented with what should be a very familiar looking email authoring tool. Depending upon whether or not the application has been customized by your AppShore Administrator, there may be one or more required fields of a Campaign Message. Required fields are those with labels highlighted in red font.

By default, the required fields are; the Campaign name, the 'From' email address, the 'Subject', and the 'From name'. The Campaign name can be whatever you like. Your recipients will never see the name of the Campaign. For your future convenience in recognizing Campaigns by name, we recommend the Campaign name be descriptive of the purpose or nature of the Message being delivered.

The 'From' email address can be whatever you like. The default is the email address in the user profile of the currently logged in user (the person who is creating the Message). You can change the email address in the 'From' line at any time while in edit mode of the Message.

The 'Subject' can be whatever you like as long as it is not misleading (according to FTC/FCC SPAM regulations).

The 'From name' can be whatever you like. It is normally where you enter your first and last name or your company name, or whatever it is you would like the recipient to see in the 'Sender' field of their email client inbox when your Message is received. If your instance of the Campaigns application does not require the 'From name' field to be mandatory, and you put nothing in the 'From name' field, the email address in the 'From' line of your Message will appear in the 'Sender' field when the recipient views your Message in their inbox.

Also, by default, at the top of the form are the 'Status', 'List', and 'Type' fields. These fields may or may not be present depending on whether or not your instance of the application has been customized by your AppShore Administrator. If present, the 'Status' field automatically defaults to 'Set up' when a new Campaign is being created, and is automatically set to 'Sent' once the Campaign has been sent the first time. After a Campaign has been sent the first time, the 'Status' field will maintain the value of 'Sent' until it is manually adjusted by the user. The 'List' field is where you will see the name of the List that has most recently been related to the Message. The 'Type' field is a customizable drop down menu that may or may not be populated with values by your AppShore Administrator. The 'Type' field is normally used to further categorize or specify the purpose or nature of the Campaign.

Below the 'Subject' line of the Message you will find the HTML and other formatting and authoring tool icons. Place your mouse over the icon to view a pop up message describing its functionality. This is also the area where you can select Templates, Signatures, and Dynamic fields to be inserted into the Message.

Template creation is an Administrative function. If you have Administrative rights you can create Templates under Administration>Customization>Templates. Where your cursor is located at the time you select a Template is where the insertion will take place in your Message. You can use any number of Templates in a single Message.

Signatures are created under the Web mail tab. Click on the Web mail tab and the 'Set up' link just below the row of tabs at the top of the page. Then click on the Signatures tab to create your Signature. Where your cursor is located at the time you select a Signature is where the insertion will take place in your Message. You can use any number of Signatures in a single Message. See the section below titled *How to 'single space' text in a Message* for more details on creating Signatures.

Dynamic fields are fields that will be automatically inserted into your Message from the Lead, Account or Contact record when the Message is sent. Dynamic fields can be inserted into the body of the Message and into the 'Subject' line. Where your cursor is located in the HTML body or Plain text body area of the Message at the time a Dynamic field is selected is where the field will be inserted when the Message is sent.

To insert Dynamic fields in the 'Subject' line of the Message you must type it where you want it to appear and it must be typed in the exact format that it appears in the 'Dynamic Fields' drop down menu. For example, if you want the 'Subject' line to read "Dear, Mary", where Mary is the value of the first name field of the Lead, Account or Contact record, you would enter the 'Subject' as follows Dear {First Name}. You must use the exact type of brackets ({ }) and (}), and the words first and name must be capitalized. Likewise for any other dynamic field to be inserted into the 'Subject' line, you must type the Dynamic field into the 'Subject' manually and it must appear exactly as it appears in the 'Dynamic Fields' drop down menu. Placing your cursor into the 'Subject' line and then selecting the Dynamic field does not work. That approach only works in the HTML or Plain text body areas of the Message.

You will also notice two separate body areas where you may craft a Message, an HTML message editor at the top of the page and a plain text message editor at the bottom. You don't need to know anything about HTML to use the HTML editor to craft your Message. Simply type your message as usual and, if you like, use the HTML formatting tools to enhance the appearance. Because most email applications provide a user level configuration option to accept or not accept outside images, and view or not view messages in HTML format, we also provide the plain text body area for you to construct

your Message with no HTML formats and no external images. If you send your Message with both the HTML body and Plain text body, the recipient will see the Message in the most optimal format depending on how they have configured their email client. HTML formatting tools do not apply to the text in the Plain text body area of the Message.

Once you have crafted your Message and are satisfied with the content and formatting, double check to be sure you have entered all the required fields, and click Save to store your Message. If you click on the Search Campaigns link at the top of the page you should see your new Message listed in the search results area.

Now let's create the List of recipients to whom we want to send this Message.

How to create a List

There are two ways to create a List. The first is from the Campaigns tab sub menu labeled 'New List'. Click on 'New List', give the List a name, and click Save. The List has now been created but we still need to add records to it.

The other way to create a List is from the Leads, Accounts, or Contacts search results. Using this method you can create and populate the List at the same time. It is also from the Leads, Accounts, or Contacts search results where Lists created under the Campaigns tab are populated.

A List can be comprised exclusively of Lead, Account or Contact records, or of any combination of Lead, Account and Contact records. To add records to an existing List or to create and populate a List simultaneously, from the Leads, Accounts or Contacts tab use the search and filtering criteria at the top of the form to specify your record selection criteria. Once you have the search results you want, use the 'Apply on' menu of the Bulk operations area at the bottom of the form to add either only the 'Selected lines' - only those records you have checked individually using the check box next to each record, or the 'Current page' - all records on the current page of the search results, or 'All results' - all records that meet the search criteria irrespective of the number of records or number of pages.

Then, from the drop down menu in the Bulk operations area to the right of the 'Apply on' menu, where the menu reads 'Add selection to a Campaign', select from the menu the option to 'Create a new List', if it is a new List you are creating, or click on the List name of the existing List if you are adding records to an existing List. If you select the option 'Create new list' by clicking on it in the drop down menu, a pop up window will be presented giving you the opportunity to name List before it is created. Give the List a name and then click 'OK' within the pop up window. The records selected will automatically be added to the List after you click 'OK'. If you select an existing List by clicking on its name in the 'Add selection to Campaign' drop down menu, as soon as you click on the name of the List the records will be added to the List.

If you would like to add more recipients to the List from another application (Leads, Accounts, Contacts) repeat the process above by navigating to the appropriate application tab, search for the records you want using the search criteria at the top of the page, and add records using the Bulk operations area at the bottom of the page.

Now let's tie it all together by relating your Message to the List.

How to relate a Message to a List

Click on the Search Campaigns link under the Campaigns application tab. From the search results area, open the Message you want to relate to your List in edit mode by clicking on the little green pen icon directly to the left of the Message name (or click on the name of the Message to open it in view mode and then click the 'Edit' button at the top or bottom of the page to get into edit mode). Locate the field labeled 'List'. Click on the magnifying glass icon to the right of the field. A pop up window will be presented containing the Lists available. Select the appropriate List by clicking the radio button next to it. The pop up window will automatically close and the List will be related to the Message. Click Save at the bottom of the page to save the relationship between the Message and the List.

You could send your Message now, but we suggest you test it a couple times first. See our suggestions below regarding testing your Campaign before you send it to your entire List of recipients.

How to send a Campaign

Click on the Search Campaigns link at the top of the page under the Campaigns application tab. Open the Campaign you want to send in View mode by clicking on the name of the Campaign or the magnifying glass icon next to it. Scroll to the bottom of the page and click the Send email button. You will see a message that indicates your email has been sent and how many records of your daily quota have been consumed. There is a limit of 2,000 records sent per user per 24 hour period. The records sent limit is cumulative. This means that if you have a 5 user license up to 10,000 messages (2,000 per user x 5 users) may be sent within a single 24 hour period. All 10,000 could be sent at once by a single user, or a smaller number may be sent by multiple users until your limit has been reached. The owner of the Campaign will get an email informing them of the date and time the Campaign was sent, how many records were sent, and how many were rejected due to invalid email addresses. You can view the history of a Campaign from the Campaigns tab sub menu labeled 'History'.

How to test your Campaign

We strongly recommend you test your Campaign before sending it out to your entire mailing List. To do so, we recommend you create a List (as described above) with only your email address in it. You'll have to create a Lead, Account or Contact record with your email address in it so that you can add it to your List containing only your email address. Send the Campaign only to yourself (as described above) until you are satisfied with the presentation.

We also recommend you carefully inspect the data in your List. Be sure every record has a properly formatted email address. Check the Lead, Account and Contact record data to be sure it is presentable to your customers and prospects, especially if you are using Dynamic fields in your Message. Be sure each record in the List has complete and accurate information in each of the fields to be substituted into a Dynamic field in the text of the Message. Little things like making sure your recipient's business name and first and last names are capitalized, punctuated, and spelled correctly will give your Campaign a very personal and professional touch.

You can double check the data in your List from the Campaigns tab sub menu labeled 'Search List Records'. Search for the List of interest using the 'List' drop down menu and other relevant fields in the search criteria at the top of the form, then click the Search

button. The records of the List selected will appear in the search results area. You can visually inspect the records in summary by viewing them in the search results area or more carefully by opening the record in either view or edit mode to see the entire record.

To edit a record in a List, click on the little green pen icon next to the record, make your changes, and click Save. The record will be updated in the List and in the respective Lead, Account or Contact application.

You can also delete records from the search results of the 'Search List Records' form, Be careful! Under V2.1 of Premium Edition, for which this document was written, if you delete a record from a List it is also deleted from the respective application, Leads, Accounts or Contacts. In other words, do not delete a record from a List unless you want to delete it from the data base altogether.

You can remove a record or multiple records from a List without deleting them from the respective application by using the 'Remove' button in the Bulk operations area under the search results of 'Search List Records'. Use the search and filtering criteria at the top of the form to specify your record selection criteria. Once you have the search results you want, use the 'Apply on' menu of the Bulk operations area at the bottom of the form to remove either only the 'Selected lines' - only those records you have checked individually using the check box next to each record, or the 'Current page' - all records on the current page of the search results, or 'All results' - all records that meet the search criteria irrespective of the number of records or number of pages. Then click the Remove button.

Other features

How to create Templates

You may have noticed a drop down menu labeled 'Templates' in the Campaigns Message authoring tool. By selecting a Template from this menu while in edit mode of a Message, your current email Message will be populated with the contents of the Template you select at the point in the Message where your cursor is located at the time the Template is selected. Templates available from the Templates drop down menu can only be created and saved by a User with the Role of Administrator. Ask your AppShore Administrator to create Templates for you if you would like to use this feature. Templates are also leveraged by the AppShore Web mail application.

How to insert a logo file or other graphical images

While creating an email Message in the HTML editor place your cursor at the place in the Message body where you would like to insert the logo file or graphical image. Click on the 'Add image' icon (the little green tree) from the tool bar. You will be presented with a pop up window where you will be prompted to enter a url that points to a web page where your image file is posted. Enter the full url including the 'http://' header, then click Insert. The file will be inserted at that point in the Message. Speak to your AppShore Administrator or webmaster if your images are not posted on a unique url or if you do not know if the image you want is posted to a unique url.

How to 'single space' text in a Message

When creating or editing a Signature, entering text in a Web mail messages, creating or editing Campaigns, or creating or editing Templates, the default browser behavior is to create a new paragraph (double space), rather than a new line, after the Enter or Return key is pressed.

To override the default behavior of the browser and get single spacing after a line rather than double spacing, press the shift and enter keys (SHIFT+ENTER) simultaneously.

How to insert an active link to email, a web site or an FTP site

It is often convenient to send an active link to a web site, ftp site, or an email address in the body of a web mail or a Campaign.

To do so, enter the web site address such as www.appshore.com or email address such as support@appshore.com, or ftp site into the text of your Message or Template. Then highlight the address or link location and click on the Insert/edit link icon found in the row of formatting icons just above the body of the text (it is the first icon on the left in the last row of icons and looks like a link in a chain).

Where prompted for the Link URL, if it is an email address, enter the address with the 'mailto:' header such as <mailto:support@appshore.net> then click Insert.

If it is a web site address, enter the address as <http://www.appshore.net> then click Insert.

If it is an FTP site (handy for sending a link to download-able file or document) enter the URL as <ftp://server:port/directory>, then click Insert. Note: You may not attach files or documents to a Campaign. The alternative solution is to post files and documents on unique urls or on FTP sites and link to them in the Message.

How to comply with FTC/FCC SPAM regulations

Here is a link to the FCC web site which describes the regulations for compliance with the CAN-SPAM Act.

<http://www.fcc.gov/cgb/consumerfacts/canspam.html>

In summary, the regulations state that

- you may not send a bulk email message to a wireless device without express prior authorization
- bulk email messages must be clearly identified as a solicitation or advertisement for commercial products or services
- a way to reject future offers must be provided
- bulk email messages must have a legitimate return email address and include the sender's postal address
- subject lines must not be misleading or bogus in an attempt to trick recipients into opening the message

To include an opt-out option in your Message add a simple statement to the effect "If you would like to opt-out from receiving any further messages please reply to this message with the words "opt-out" in the Subject line."

When you receive these messages from your recipients you must remember to go to the appropriate Lead or Contact record and check the email opt-out checkbox. You will also

need to remember to recreate your List and filter out the records that have the Email opt-out box checked before you use the List again.

If you would like to provide feedback on the content or value of this document, whether positive or negative, we would like to hear from you. Please feel free to address any comments or questions to support@appshore.com.