

D3Corp Email Marketing System User Guide

Thank you for choosing D3Corp for your Email Marketing solution! The pages below provide an overview of the Email Marketing System and how to use it. If at any time you have a question or concern, please contact your account representative at 410-213-2400.

System Specifications

The D3Corp Email Marketing System works best using Firefox or Internet Explorer 7 or higher.
(If you are using Internet Explorer 6, [please upgrade to the latest version!](#))

First, log in to your account by going to: <http://wems.d3corp.net/>. Enter your user name and password. Click Log On.

Overview

- Messages
- Subscribers
- Segmentation
- Reports
- Assets
- Administration
- Support

Dashboard: provides a summary of recently sent messages and subscriber statistics as shown below. Click Dashboard at any time and it will take you back to this page.

The screenshot shows the D3Corp Email Marketing System Dashboard. At the top left is the D3Corp logo with the tagline 'web solutions that work'. On the top right, the user name 'Tanja Giles' and a 'Logout' link are visible. A green button labeled 'Switch to the legacy UI' is also present. Below the navigation menu, the main content area is titled 'Dashboard' and includes a 'Home' link. The dashboard is divided into three main sections: a 'Welcome' message, a 'Recently Sent Messages' table, and a 'Subscriber Statistics' table.

Date	Subject	Bill Codes	Delivered	Opened	Open Rate
08/19					
08/18					
08/17					
08/16					
08/15					

Date	Total in Database	Removals	Additions
08/19	14	0	0
08/18	14	0	0
08/17	14	0	0
08/16	14	0	0
08/15	14	0	0

Dashboard

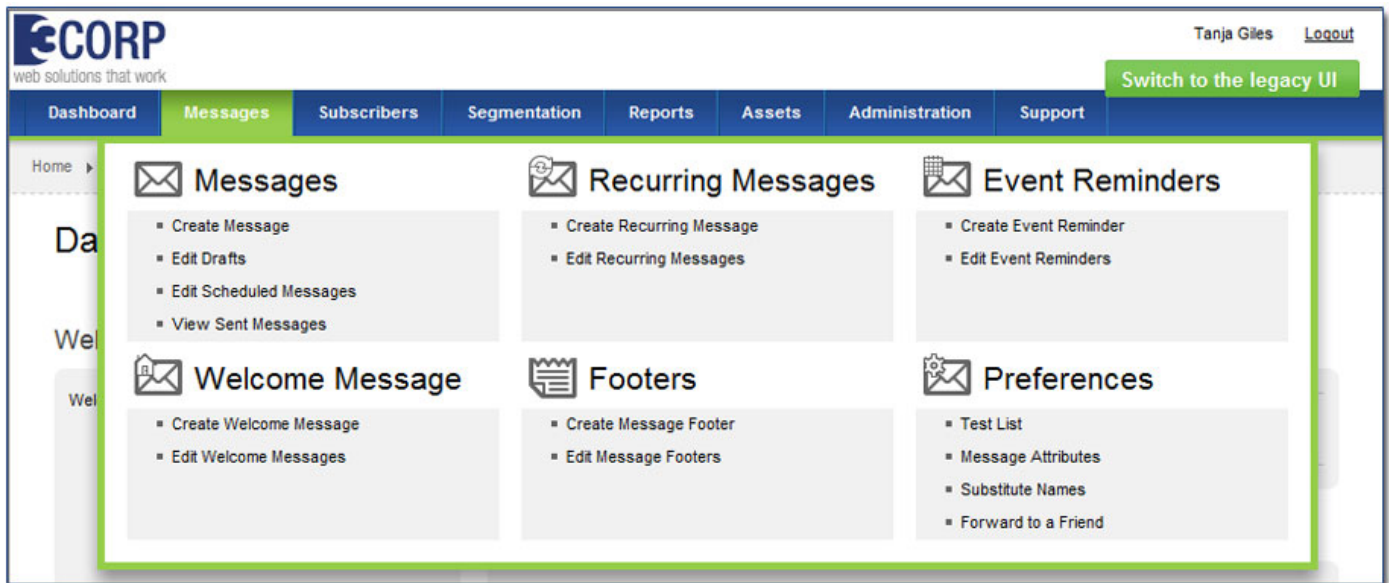
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Messages

Messages: Create a message by clicking “Messages”. From here, you can:

- create a new message
- edit a saved draft message
- set up welcome & recurring messages (*please contact your account representative for assistance with these features*)
- view sent messages
- edit your test list

Messages Menu



(Please Note: not all features shown above are available. Please contact your Account Representative for details.)

Creating a Message Step by Step

To create a message go to Messages > Create Message. The Create Message window will open.

There are 5 steps to creating a message:

- 1. Properties**
- 2. Create**
- 3. Configure**
- 4. Schedule**
- 5. Review & Send**

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Step 1: Properties

The properties section allows you to assign the following internal properties for a message:

- Message Name
- Bill Codes
- Message Notes
- Recipients

- A. Message Name:** the message name field is required but is used for internal purposes only. Think of it as a unique identifier for your message that is **different** from the subject line. *(For example, Message name comes in handy when you are sending multiple emails with the same subject line on different dates.)*
- B. Assign To Campaign:** Assign To Campaign allows you to group a series of emails together for ease of analytics or promotion(s) for an email campaign. You can assign the email you are creating to an existing "campaign," or create a new campaign. To do this, select the existing campaign from the dropdown menu or select create a new campaign and enter the new campaign name in the "create a new campaign" pop up window. Once the name is entered click the save button or cancel to go back and select an existing campaign.
- C. Billing Codes:** Billing Codes is an internal field you can use for internal purposes, such as accounting purposes.
- D. Message Notes:** Message Notes are for any pertinent information about your email. For example, December Press Release, Preferred Customer Email, etc. Message notes are saved so that you can refer to them when you retrieve your sent messages or view statistics for the email. Your subscribers will never see your message notes; the information is for your internal use.
- E. Choose Recipients:** When we talk about addressing your message, we are referring to the process of choosing the recipients who will receive your email.

Addressing your message is the first step to creating a message, so let's get started. Click on "**All Subscribers**", "**Specific Segments (Static & Dynamic Segments)**", or "**Test List**" to select your target audience.

All Subscribers – selecting this option sends your message to all subscribers in your database.

Specific Segments – allows you to easily target your message by suppressing certain segments if needed. When you select specific segments, you will see options to **Include or Exclude Recipients**.

To include specific segments, click on "Include Segments". The "Included Recipients" pop-up window will appear. Here, you'll see a list of all your subscriber segments arranged alphabetically by segment/field name. You can sort each column by clicking on each column's name.

Use the checkboxes to select the segments you want to send your message to. When you have the segments selected, click the blue "**Choose Segments**" button.

To exclude specific segments, click on "Exclude Segments". The "Excluded Recipients" pop-up window will appear. Again, you'll see a list of all your subscriber segments arranged alphabetically by segment/field name.

Use the checkboxes to select the segments you **DO NOT** want your message to go to. When you have the segments checked off, click the blue "**Choose Segments**" button.

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For example, if you want to send an email to only your female subscribers who have indicated that their favorite color is red, include your red segment and exclude your male segment. This will exclude all males who are in your red group. Only female red subscribers will receive the email.

To send a test message, select “Test List” – this option sends a test message to your test list, allowing you and your test recipients to review a message prior to sending a live message to your subscribers.

Note: We do not provide click- thru tracking or other statistics with test messages; we also do not offer opt-outs on test messages. Also, in order to add email addresses to your test list you'll select the test list radio button, and then click "Edit List".

Test List Overview

The Test List allows you to send a test email message immediately to a maximum of 10 people. Ideally, these test list members will have various email clients, such as AOL, Yahoo!, Gmail, Hotmail, Outlook, etc., enabling you to test your email message for proper layout and functionality. It is best to inform your test list members that a "Test Message" will be arriving shortly for them to review. You may want to include testing instructions in a separate message preceding the test message, detailing what items to test and where to send feedback. Keep in mind that test list members cannot opt-out and there are no statistics available for test messages.

Editing your test list

- Select Preferences > Test List from the Messages dropdown menu on the top toolbar.
- Enter Test List Member Information
- Enter the Test List member information (First and Last Name).
- Note that an email address is necessary in order to add a new Test List Member.
- Click Submit
- After reviewing the information you have entered click on Save to enter the new Test List members.

Deleting Test List Members

To delete one or more test member, simply erase their names and email address by using the delete or backspace key on your keyboard, then click the Save button to enter these changes. Test members cannot opt-out.

Sending a Test Message

Once you have your message created and are ready to see how it looks, select the **“Test List”** radio button in the Choose Recipients section. (All other options become grayed out.)

Click **“Next”**. Review the message and scroll down to the bottom and select **“Send Message”**. Your test is sent!

When reviewing the test message in the Review & Send page of the message creation the HTML Consultant, Spam Count, and DC Preview are available.

When you have assigned all required message properties, click the “Next” button.

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Step 2: Create

This is where you will enter the subject line, from name, sender's email, reply email and message content.

A. Message Header & Footer

Subject: The subject is another place where you can make use of your brand. Incorporate it in your subject to spark trust, comfort, and interest, and to maximize the open rate of your message.

Best Practice Tip: *Be sure your subject is not misleading. Steer clear of words like "free" and "discount." Avoid using all caps, dollar signs, and other symbols that might trigger spam filters.*

From name: From name will automatically be populated with your default company name. Your subscriber will see this in the "From" field of their email provider. You are able to change the name of the person or organization but you'll want to keep it something your subscribers will recognize.

Sender's email: Sender's email field will automatically be populated with your default email address. Make sure the default information in your sender's email field is accurate. (e.g. yourcompany@yourcompany.com). It is important that this address remain consistent across all campaigns that you send, so your subscribers can easily identify and begin to expect and recognize your emails.

Reply email: Reply email field will automatically be populated with your default email address. Always make sure the default information in your reply email field is the email address to which you want any replies sent. Change the information as necessary.

Note: *This email address must be a working, monitored email inbox!*

Substitute name (optional): Substitute name is what you can use if the subscriber's name information is missing in the subscriber profile, a substitute salutation can be entered here or selected from the drop down list. If you choose to type a substitute name it will be added to the Substitute Names area in the Messages - Preferences - Substitute Names, where you are able to delete substitute name(s) from the list. This is not required for sending a message.

Message footer: The standard message footer will automatically appear in every new message. You will not need to change this.

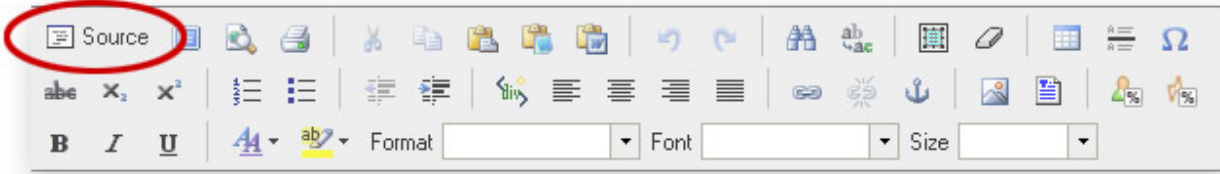
D. HTML Format – Where the Magic Happens!

WYSIWYG editor (in case you're wondering, WYSIWYG stands for "What You See Is What You Get")

When using the WYSIWYG editor a message can be created from scratch. The WYSIWYG editor works much like a regular word processor (such as Microsoft Word). Messages can include graphics, text, and web links using the tools provided in the top toolbar to format your text and insert images. Move your mouse over any icon in the toolbar for a short description of that tool's function.

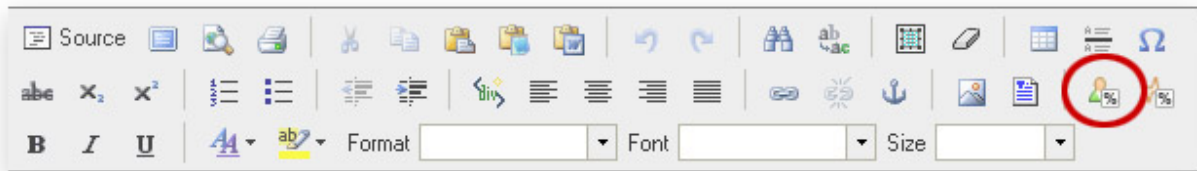
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Users who are familiar with HTML can create the message directly in the WYSIWYG editor. Just click the Source button (circled below) on the toolbar to switch to basic HTML code. You may also copy and paste HTML code into the message body area once the source button has been clicked.

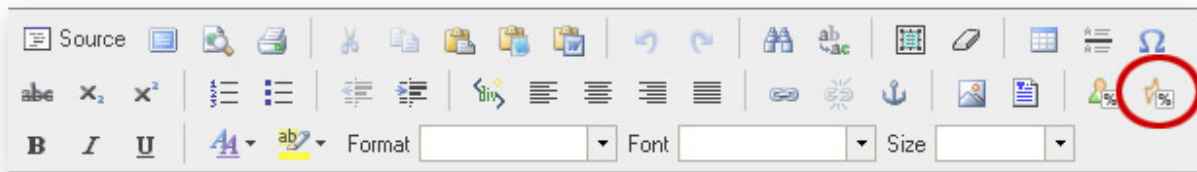


A few important icons within the WYSIWYG editor:

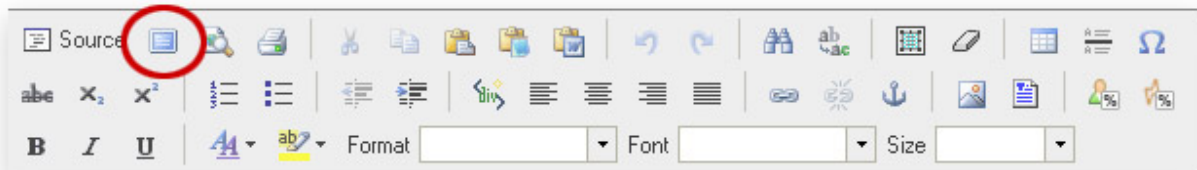
Personalization: Select the area within your message you'd like to add a personalization tag and then click this icon (circled below). Within a pop up window will be a drop down menu of dynamic tags such as email address, first name or custom fields you have created. By adding these tags, you will be able to dynamically pull in subscriber information.



Dynamic Content: Select the area within your message you would like to add dynamic content and then click this icon (circled below). See the dynamic content tutorial for more information, Assets > Dynamic Content.

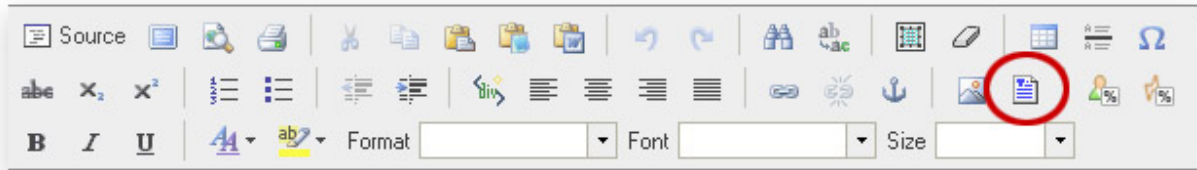


Maximize the editor size to full screen: This helps when you're viewing the source code (circled below).



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Templates: This is where you will load your email template in order to create a new message (circled below).

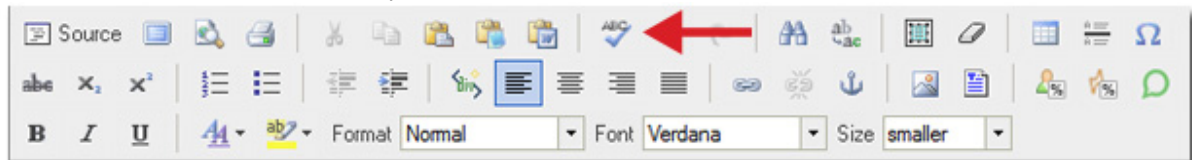


To load a template:

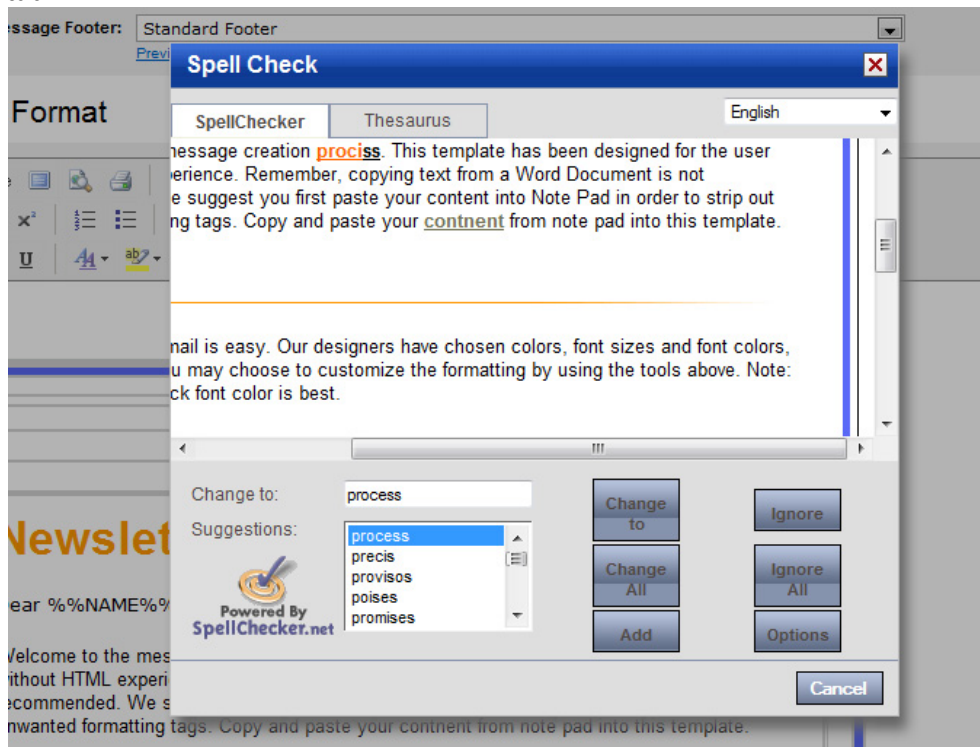
1. Click on the Insert Template icon (circled above). A pop up window will appear.
2. Select your template from the list by clicking the radio button.
3. Click "Select Template".
4. Your template will show up in the WYSIWYG.
5. Replace any existing or placeholder text with the content for your new message.

Spell Check – **NEW!**

There is now a Spell Check function available in the Email Marketing System! Once you have your content entered, click on the "ABC" icon (indicated by the arrow below).



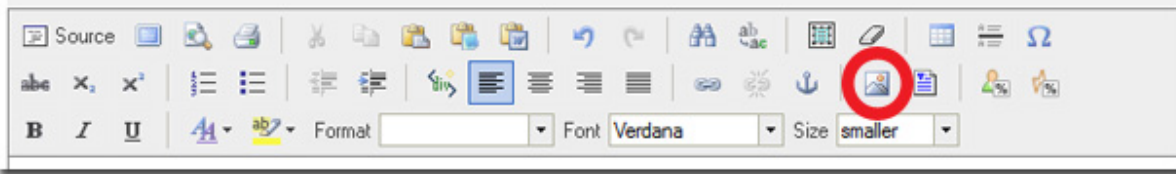
This will launch a pop up window. Any misspelled words will be underlined and highlighted as shown below. The spell checker will automatically give suggestions. To change the word, click "Change to". You may also manually enter the word in the "change to" window. Use the other buttons to change all occurrences of a misspelled word, ignore a word, or add a word to your dictionary. When the spell checker reaches the end of the document, click "Finish Checking". The popup window will close. There is also a Thesaurus option which is accessed by clicking the "Thesaurus" tab.



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Don't forget to save your draft message! Do this by scrolling to the bottom of the screen and clicking Save Draft. (You will have to enter a subject and select your recipients before the system lets you save your draft.)

Images: You can insert and/or replace an image by following the steps below:



To insert an image:

1. Click the Insert Image icon (circled above). A pop up window will appear.
2. If you need to upload a new image, click the "Upload Images" tab. Click the Browse button to search for the images on your computer. (You can upload up to 10 images at once). When you're ready, click Upload.
3. To insert an existing image, go to the Choose Image tab and select your image from Choose Image the dropdown list.
4. Image URL: leave this empty. (This would be used when the image you're inserting is hosted on an external website.)
5. Preview – shows you how your image will display with surrounding text.
6. Alt Text – enter this as a brief description of your image, namely something relevant to the content of your email, e.g. "Save big this weekend at our semi-annual sale!" (This text will show up if/when your subscriber's images are turned off in their inbox.)
7. Spacing – allows you to control the spacing around your image
8. Positioning – allows you to control the positioning of the image in relation to surrounding text
9. Link URL – this is the URL of the page your image is linking to. **(Best Practice Tip: always link your images back to your website!)**
10. Target – select New Window (_blank). This will ensure your image opens in a new window instead of taking the reader away from your message.

Click Insert Image. Repeat above steps as necessary for any images you would like to add to your message.

Don't forget to save your draft message! Do this by scrolling to the bottom of the screen and clicking Save Draft. (You will have to enter a subject and select your recipients before the system lets you save your draft.)

E. Text Format

You will always want to create a text version of your email for those recipients who sign up for text only emails and for compatibility with mobile devices.

Convert HTML to Plain Text Format

Click the Convert HTML to Plain Text Format button for an easy way to convert the HTML version of the message into a plain text version. Pressing the button will take any text that is located in HTML format editor and place a plain text version of that text in the text format message editor.

Note: Remember to review links and text in the Text Version of the message to ensure proper formatting before you proceed. Any text that was in images will not be converted so you'll need to type in this text.

After you've completed the steps above, Click "Next". This will take you to the next screen in the message creation process, Create Message: Track

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Step 3: Track

The next step is to track the links in your message.

Manage & Track - By default, this is set to track all HTML and Text links in your message. Keep all boxes checked in the HTML column

- Easy to Remember Name – allows you to give a name to the links in the message instead of having to memorize a URL.
- Add to Segment –allows you to add recipients who clicked on a particular link to an existing segment within your database.

Once you have your links tracked, Click Next.

Step 4: Schedule

Your message is now ready to be scheduled! You have 2 options:

Send Now: this will send your message now. Please be advised that it may take awhile (sometimes up to a few hours) for your message to send, depending on the time of day and server load.

Schedule to Send at Later Date/Time: use this option to schedule your message to go out at a future date and time. When you click the radio button, you will have the option to select a future date and time you want your message to go out.

IMPORTANT NOTE: The server from which all emails send is on PACIFIC TIME! This means if you want your message to be delivered at 1:00pm, you will need to schedule it for 10:00 a.m. Pacific Time.

After you've selected the send time for your message, click Next. This will take you to the final step, Review & Send.

Step 5: Review

This final step allows you to review all aspects of your message and edit if necessary.

Remember to carefully review each and every section for accuracy!

When finished, click **Send Message** (if you're sending now) or **Schedule Message** (if you're sending later).

Note: Scheduled Messages can be retrieved and edited up until 1 hour before they are scheduled to send.

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Other Message Options

NEW! Consolidated Message Lists

You can view messages pre-filtered by status, but now you have the ability to view multiple statuses on the same list page.

The first thing you'll notice is that the list page for "Edit Drafts", "Edit Scheduled Messages", and "View Sent Messages" are all the same. The same columns and action buttons exists on all pages. Depending on what page you navigate to, the list will be pre-filtered by default to only show those relevant messages.

Messages > View Sent Messages: will display all your sent messages.

Search and Filters ▾ Showing 1 to 18 of 18 items Page 1 of 1

↓ Edit Duplicate Review Preview Stats Compare Stats Delete

1 Message Selected | View Selections

<input type="checkbox"/>	Message Name	Status	Subject	Send Date	Total Sent	Notes	Bill Codes	Campaign Name	Last Modified	SureSend Reports
<input type="checkbox"/>	Fall Incentive #2	Processing	Fall Back With Your Rewards!	Processing	Processing			Fall_Campaigns	2010-09-29 12:30:52	NA
<input checked="" type="checkbox"/>	Fall Incentive #1	Sent	It's That Time: Fall Savings!	2010-09-28 11:30:02	11,340			Fall_Campaigns	2010-09-28 11:30:02	NA
<input type="checkbox"/>	Your Summer Savings Starts Now	Sent	Your Summer Savings Starts...	2010-08-26 08:18:57	9,400			Summer_Campaigns	2010-08-26 08:18:57	NA
<input type="checkbox"/>	Summer Savings Are Here	Sent	Summer Savings Are Here	2010-06-22 11:15:50	1,520			Summer_Campaigns	2010-06-22 11:15:50	Domain Delivery Report
<input type="checkbox"/>	Summer Savings Are Here	Sent	Summer Savings Are Here	2010-06-22 11:11:01	1,533			Summer_Campaigns	2010-06-22 11:11:01	Domain Delivery Report
<input type="checkbox"/>	New Summer Rewards	Sent	New Summer Rewards	2010-06-22 11:08:09	14,543			Summer_Campaigns	2010-06-22 11:08:09	NA

↑ Edit Duplicate Review Preview Stats Compare Stats Delete

You have the ability to view other messages directly from this page. We've added several new options in the "Search and Filters" section, one which includes the ability to filter "Drafts" and "Scheduled" messages. Selecting to include "Draft" messages will update the list page to include your drafts. Select "Draft" and click "Search" to update the list page. You should now see both draft messages and sent messages.

Search and Filters ▲ Showing 1 to 28 of 28 items

Status: Draft
 Scheduled
 Sent

Subject:

Bill Codes:

SureSend Reports: Choose ▾

Last Modified: Between ▾
2010-08-01 [calendar icon]
yyyy-mm-dd (2010-09-20)
2010-09-20 [calendar icon]
yyyy-mm-dd (2010-09-20)

Search

- New filters include: Status, SureSend Reports, Last Modified Date, Message Name, and Campaign Name
- To improve load time on this page, the list will now default to show the last 3 months of sent messages
- Use the filters to change any of the default options

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Edit Drafts

Draft Messages are messages that were previously composed and saved for future use.

The Edit Draft section lists all Draft Messages in the system. Once sent, the system removes them from this section and logs them under View Sent Messages.

A copy of the message is saved to Draft Messages when the Save Draft button in the Create Message window is clicked.

Draft Messages are ordered by default from most recent to oldest based on the date they were last saved and can be re-ordered based on the field heading. To re-order the draft messages, simply click on the field heading.

Note: Ordering is done alphabetically A to Z and numerically smallest to largest. To reverse the order, simply click the field heading again.

To retrieve a draft message, click on the check box to the left of any draft message and click on the Edit button. The message will be retrieved and ready to edit.

To Duplicate or Delete draft message(s), select the check box to the left of the message(s) that you wish to. Once the message(s) is/are selected click on the Duplicate or Delete button. Confirm deletion by clicking on Yes. Click on No to continue browsing saved drafts.

Note: A deleted draft cannot be retrieved!

Edit Scheduled Messages

This section lists all the pending Messages currently scheduled to send. Once sent, the system removes them from this section and logs them under View Sent Messages.

To Edit a Scheduled Message, click on the check box to the left of any scheduled message and click on the Edit button. The message will be retrieved and ready to edit.

If you have used the Schedule to Send at Later Date/Time functionality in the Create Message page, you will have scheduled emails listed on this section (as long as you have not deleted them or they haven't been sent yet).

The Send Date column denotes the day and time you specified that the message will be sent to the sending queue. Keep in mind, once the message is placed in the sending queue, the total delivery time will vary depending on the number of emails being sent, other messages in the queue, and the size of your message.

To delete a Scheduled Message, click on the check box to the left of any Scheduled Message and click the Delete action button. Confirm the deletion by clicking on Yes. Click on No to continue browsing Scheduled Messages.

Note: A deleted Scheduled Message cannot be retrieved!

Note: Due to the heavy volume of email on our server there may be up to a four hour delay from the time the message was set to send and the time it actually is sent.

View Sent Messages

The View Sent Messages section lists all the previously sent messages and shows 50 messages per page.

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To retrieve a **Sent Message**, click on the subject of any Sent Message. The message will be retrieved and ready to be reused.

To retrieve a message from a specific period, select before, after, or between from the dropdown menu and select a date from the calendar.

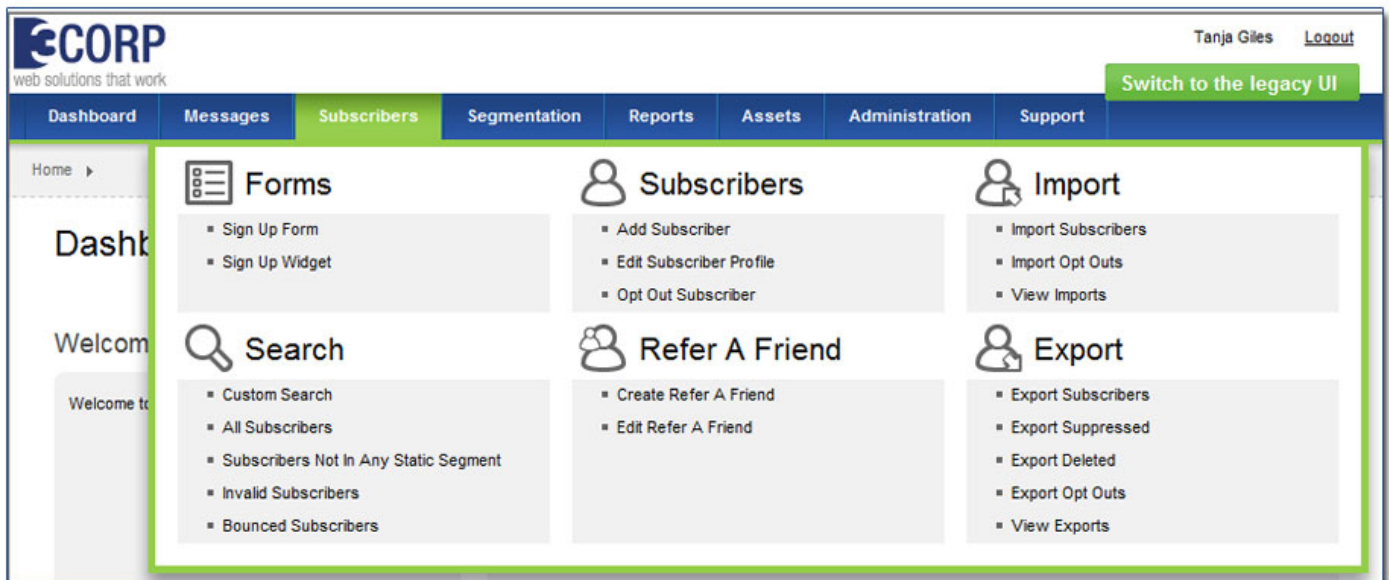
The system will not allow you to delete a sent message, because it has already been sent and serves as record.

If you have any questions, or for additional Messaging Options, please contact your account representative.

Subscribers

Subscribers: allows you to view, edit, search and manage your subscribers.

Subscribers Menu



(Please Note: not all features shown above will be available.)

Add Subscribers Overview

Add Subscribers allows you to manually add subscribers one at a time to your database.

Step-By-Step

To add a **Subscriber**, click on **Add Subscriber** from the Subscribers dropdown list on the toolbar.

Enter Subscriber Information

Enter subscriber information as completely and accurately as possible.

Note that an email address is required to add a new subscriber!

Select Segments

Place your subscriber in the appropriate segments by checking the check boxes.

Add New Subscriber

After reviewing the subscriber's information, click on **Add Subscriber** to add the new subscriber.

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Edit Subscriber Profile Overview

Searching by Subscriber Information

Searching subscribers by subscriber information allows you to return a list of subscribers based on any of the subscriber information in the database. In addition, you can return a list based on date information. You can search based on the date a subscriber joined your system, or when they have last modified their subscriber profile. To search this information, click the **Subscriber History** option to open the available criteria. Click and drag the "Last Modified Profile", select the statement criteria such as "Is Between". Select the date picker for the Start Date and the End Date. For example, you can search to see which subscribers in your system last updated their profile between July 5th, 2009 and August 1st, 2009.

You could also see which subscribers have joined your system in the last month. To accomplish this search, click Subscriber History; drag the "Date Joined" to the search filter area and select "is within" from the dropdown box, which currently reads "Is On". In the next text field, you may enter 30 for the number of days, or specify 1 and select month. Now perform your search by clicking the Submit button, and you will see all subscribers who have joined your system for one month or less.

It is important to note that searching by segment and searching by subscriber information can be used together to produce a targeted list of subscribers. For instance, it is possible to return a list of all users in segments A, B and C who joined on an exact date. By selecting segments A, B, and C and entering a date in "Date Joined is on", a list of subscribers in the selected groups who joined on that date will be displayed.

Sorting the Individual Subscriber Results

You may click on the field heading by which you wish to sort your search results. For example, if you would like to sort your search results by first name, click on the Individual Subscriber Results tab, you may click on the "Name" heading above your subscriber names, and they will be sorted alphabetically by name. To sort in the reverse order, simply click on the heading again.

Segment Exclusions

While you are setting up your search, you may wish to exclude subscribers that are in a certain segments. Say for instance you have customers in your system which purchased multiple products of differing colors. Now you would like to see which of those customers have only made purchases of red products, rather than green or blue.

From the Search Fields page, under Static Segments you can select Exclude Segments. For our example, we would select the "blue" and "green" groups, leaving only subscribers, which are solely in the "red" group. Any subscribers in the "red" group as well as the "blue" or "green" group would then be excluded from our search.

Searching

Search Subscribers allows you to search for subscribers in your database by selecting the segments they belong to and/or specific personal information such as name, email address, city, state, etc. The results for your search will generate a list of subscribers sorted in the order you specify.

The Drag and Drop method

Select the specific Search Field and Click and drag to the Search Criteria area to the right. Once you drop the Search Field into the Search Criteria area you will have the ability to enter in the areas for the criteria such as if a subscriber has or has not clicked a message.

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Wildcard Searching

The % sign is used as a “wildcard” to fill in missing information. It can be used to fill in information before or after the information you are searching for. For example, if you are searching for the last name "welling" you could enter well% or %ger or %elli% to produce a list of results.

The % wild-card can be used in any text field to replace any text. It can be used to find all or part of a line of text. Most commonly, users use this feature to search for email addresses. Here are some more examples of the % wildcard.

If you are searching for the email address someuser@yourcompany.com try using any of these:

- %yourcompany.com
- someuser%
- %user@%
- %@yourcompany%
- %yourcompany%
- Searching by Segment

Searching for subscribers by segments offers you an easy way to view all subscribers contained in the segments you select. It is important to note the use of the “In Any” drop down box.

When “in any” is selected, the search will return results for subscribers who meet any of the search criteria you selected. “**Search all**” only returns subscribers who are in all the selected segments, or meet all search criteria selected.

Opt-Out Subscribers Overview

Use Opt-Out Subscribers when subscribers request to be removed from your mailing list. It deletes subscribers from your system and prevents you from accidentally importing people who have opted-out or requested to be removed from your mailing list. Essentially the system checks the opt-out list against your import list, enabling you to import a subscriber list without concerning yourself about importing subscribers who have already unsubscribed, or have been manually opted-out by you. Enter the subscribers email address in the text box. Click Opt Out Subscriber.

Custom Search Overview

Custom Search allows you to search for subscribers in your database by entering specific profile information such as name, email address, city, state, etc., and/or by selecting the segments to which they belong.

The Drag and Drop Method

Select the specific Search Field and click and drag to the Search Criteria area to the right. Once you drop the Search Field into the Search Criteria area, you will have the ability to enter in more specific information and criteria, such as email address, custom field contents, etc.

Wild Card Searching – see previous section, “Edit Subscriber Profile Overview”

Searching by Segment – see previous section, “Edit Subscriber Profile Overview”

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Date Joined Segment

The “Date Joined Segment” filter allows a user to find when a subscriber was added to a specific static segment. Select an existing static segment, then use the calendar features to choose the timeframe. Only one segment may be selected at a time. A subscriber may be added the following ways:

- Add Subscriber
- Import Subscriber
- API Calls (legacy.manage_subscriber, legacy.add_segment and legacy.bulk_sync)
- Fill a Static Segment (new and existing)
- Sign Up Widget
- Sign Up Form
- Segment Clickers
- Split Static Segments
- Acquisition Surveys (MarketSense)

**A user cannot search for a subscriber who was added to a segment more than 18 months ago.

**Only one “Date Joined Segment” query is allowed at a time.

**The Date Joined Segment will populate beginning on 7-27-2010 and will not be retroactive. As a result, initial search results may be low.

Subscribers by Message Behavior

Within the Custom Search or Create New Dynamic Segment menu area under the category Behavior/Activity a user can query on the following criteria:

Message Sent

Define your query by the specific message options. This step is required.

- Sent Specific Message: select one standard messages
- Sent Recurring Message: select a recurring message
- Sent Message by Campaign: select one or more campaign messages

Sent Timeframe

Three options to filter message types by time frame are available. If “Sent Specific Message is selected the Sent Timeframe selection will be suppressed. Sent Timeframe is an optional step.

- Sent Exactly: returns subscribers who were sent the selected message(s) on a specific date in the past
- Sent Within: returns subscribers who were sent the selected message(s) within the past ‘x’ days
- Sent Beyond: returns subscribers who were sent the selected message(s) after ‘x’ days in the past

**Search results are limited to the last 18 months.

Behavioral Filters

Behavioral filters allow you to limit the results based on a variety of interactions the subscriber may have had with the selected message(s). You can additionally filter these behaviors by specific timeframes. The timeframe parameters applied to Behavioral Filters are the same as those applied to Message(s) Sent.

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- Delivered: returns subscribers whose message(s) were delivered
- Have Opened: returns subscribers who have opened their message(s)
- Have Not Opened: returns subscribers who have not opened the message(s)
- Have Clicked Any Link: returns subscribers who have clicked any link from the message(s)
- Have Clicked A Specific Link: returns subscribers who have clicked a specified link

Note: This option is not available for Sent Recurring Message and Sent Message(s) by Campaign

Have Opened But Not Clicked Any Link: returns subscribers who have opened a message that has a tracked linked, but not clicked it.

**Search results are limited to the last 18 months.

Searching by Subscriber Information

Searching subscribers by subscriber information allows you to return a list of subscribers based on any of the subscriber profile information stored in the database. In addition, you can return a list based on date information. You can search based on the date a subscriber joined your system, or when they have last modified their subscriber profile. To search this information, click the Subscriber History option in the Search Fields section on the left of your screen to open the available criteria. Click and drag the "Last Modified Profile", and select the applicable statement criteria such as "Is Between". Select the date picker for the Start Date and the End Date. For example, you can search to see which subscribers in your system last updated their profile between July 5th, 2009 and August 1st, 2009.

You can also see which subscribers have joined your system in the last month. To accomplish this search, click Subscriber History; drag "Date Joined" to the search filter area and select "Is Within" from the dropdown box, which currently reads "Is On". In the next text field, you may enter 30 for the number of days, or specify 1 and select month. Now perform your search by clicking the Submit button, and you will see all subscribers who have joined your system within the past month.

It is important to note that searching by segment and searching by subscriber information can be used together to produce a targeted list of subscribers. For instance, it is possible to return a list of all users in segments A, B and C who joined on an exact date. By selecting segments A, B, and C and entering a date in "Date Joined is on", a list of subscribers in the selected groups who joined on that date will be displayed.

Segment Exclusions

While you are setting up your search, you may wish to exclude subscribers that are in certain segments. Say for instance you have customers in your system which have purchased multiple products of differing colors. You are performing a search for all customers that live in the state of New York, and you would like to see which of those have only made purchases of red products, rather than green or blue.

From the Search Fields page, under Static Segments you can select Exclude Segments. For our example, we would select the "blue" and "green" groups, leaving only subscribers who are solely in the "red" group. Any subscribers who are in the "red" group as well as the "blue" or "green" group would then be excluded from the search.

Search Results

Once your search results are returned to you, you are given a Summary of Search Criteria, which reviews the search criteria that you specified, and returns a Subscriber Count. The Subscriber Count can be refreshed by clicking on the "Refresh" link next to the number that appears once the count has processed. By default, the Bulk Search Actions tab is shown.

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Bulk Search Actions

This section allows you to take action on the search results that were returned. You can:

- Export all results – Exporting results will allow you to save the results in an excel spreadsheet
- Delete all results – Deleting the subscribers that are returned will remove their information from the system.
- Fill an existing Static Segment – Subscribers will be added to a Static Segment that is already in your system.
- Fill a new Static Segment – The system will ask you to create a segment, and then fill that segment with the results of your search.
- Save the search as a Dynamic Segment – These subscribers will be added to a Dynamic Segment.

Each of these options will be available to you any time you search for subscribers.

Individual Subscriber Results

The Individual Subscriber Results section displays the individual subscribers that match your search criteria. From this page you can edit or delete specific individuals by checking the box next to their name, and selecting either the “Edit” or “Delete From Entire System” action button from the top or bottom of the search results.

Sorting the Individual Subscriber Results

You may click on the field heading by which you wish to sort your search results. For example, if you would like to sort your search results by first name, click on the “Individual Subscriber Results” tab, then click on the “Name” heading above your subscriber names, and they will be sorted alphabetically by name. To sort in the reverse order simply click on the heading again.

Import Subscribers Overview

Import Subscribers allows you to import a list of contacts, complete with their contact information, into the segments of your choice.

Please note: The file being imported MUST BE COMMA OR TAB DELIMITED and in .txt or .CSV format. All dates MUST be in "YYYY-MM-DD" format. You may also import the subscribers within a zipped file but you may not have any spaces in the name of the text file that is inside the zip file. The maximum size of any file that you are uploading is 10 MB. Any file larger than 10 MB will most likely timeout. If you are importing contacts already in your system, their profile will be updated. To raise your upload limit, contact your Account Representative.

To begin an import, navigate to Subscribers - Import - Import Subscribers.

Step-By-Step

(the only required field in this section is “File Delimiter”. Otherwise, you can leave these settings at their defaults.)

Select a File

Select a file to import by clicking on the BROWSE button. Browse to the file on your hard drive and click Open. The path to the file will automatically be displayed in the File To Import text box.

Select File Delimiter

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Choose the file type (comma, TAB, Pipe or Custom) from the File Type drop down menu. File type refers to how the information is stored in the file. If you select the wrong file type the import process will not work properly.

How to get your data from Excel to the System

Open the file you wish to import to the System in Excel. (All dates MUST be in "YYYY-MM-DD" format.) Choose File from the top tool bar and then select Save AS from the list. At the bottom of the window you will see a Save As Type drop down list. Select Text (Tab Delimited) or CSV (Comma Delimited) from the list. When saving the file as a TAB delimited file it is very important to check to make sure that your file does not contain any commas. If it does then Excel will insert double quotes around any field that contains a comma. Double quotes in turn will have an adverse effect on your import. Use the Find and Replace function located on the Edit menu to find and delete all commas. To make absolutely certain your file does not contain any commas or quotes open it in Notepad and do another find and replace. You now have a file that you can import.

Select Number of Fields To Import – leave this set to “Auto” unless you do not need all data in the file imported.

Select the number of fields to import from the Number Of Fields To Import drop-down list. The number of fields is the number of columns of data (from left to right) you wish to include in the file you are importing. For example, if you have a file with 10 columns of data and you only need the first three columns, then you would set the Number Of Fields To Import to be 3. Only the first three columns from the left will be imported. Remember to structure the file you wish to import so that the needed columns are on the left.

Double Opt-In Email and Welcome Letter

If you would like to send the DOI email or the Welcome Letter to the contacts in your import file, choose the appropriate option from the drop-down lists provided. By default, these options are set to "No". It is recommended that you send the DOI email to your contacts. Even though they may have provided their email addresses at some point in time, it is critical that you obtain confirmed consent to send email messages to your contacts, so that you do not face possible spam issues in the future.

Create Invalid Report

When a user does an import any email addresses that are considered not validly formatted will be added to a list. A link will be placed in the import confirmation email that will download a file that contains this list of invalidly formatted email addresses. When the import has no invalidly formatted email addresses the file is still generated and will be empty.

Ignore Existing Subscribers

With this option set to "No" any subscriber you import that already exists in your database will be updated with the information you provide in the import file. This has been the behavior of the import feature in the past.

Now you can set this option to "Yes", which prevents the import process from updating existing subscribers with new data.

This is useful in cases where you are maintaining an offline database of subscribers but not synchronizing it with changes in your subscribers' profiles from the Email Marketing System.

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Import File Has a Header Row

The Import Header Row option allows the user to ignore the header row (1st row) of the file being imported.

Clear Static Segments Before Import

When importing subscribers in to existing group(s) you may select to clear the group(s) prior to the import running. The import process will then be initiated after all selected groups have been emptied. The subscribers that are being imported will fill the now emptied groups that were selected.

Note: This process will remove all subscriber association to the selected group(s) and essentially empty the group(s). The subscribers will not be removed from the system; they will only be removed from the group(s) you have selected.

(the only required field in this section is "File Delimiter". Otherwise, you can leave these settings at their defaults.)

Select Segments

Select the segments you wish to populate with the new imported subscriber information. If subscribers in the import file already exist in the database, their information will automatically be updated when the import file is uploaded. When you have set all the above options, click on "Continue". Choose Date Types Choose the type of information that is in each column from the drop-down list at the top of each column.

For example if the column contains e-mail addresses then select email from the drop down list then press the "Continue" button.

Provide List Source Information

In the event your contacts attempt to view information on how they have been added to your list, provide list source information in the box provided. This information is critical in helping to remind your contacts of how their email addresses ended up on your list, and will be vital in ensuring that you remain free from spam complaints, and in protecting your brand. Be as thorough as possible in explaining where the email addresses on this list came from. The less precise the source information, the harder it will be to argue against any spam complaints that rise against you in the future.

Finish

Once you have selected the data types and pressed the "Continue" button a confirmation window comes up. Enter the email address you wish the import confirmation to be sent to and press the "Confirm Import" button. The email you receive will contain all the information about the import including the number of contacts that were added, how many contacts were updated, the number of invalid email addresses, and the number of users that had previously opted out.

Export Subscribers Overview

Export Subscribers allows you to create and export a file containing your subscriber information. The file generated is a text file in Tab delimited format, viewable in Microsoft Excel.

Note: Exporting subscriber information does not delete or alter in any way the information contained in your database.

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There are two main areas in export subscribers:

1. Prepare and Export File

Preparing an export file allows you to select the information you need and generate a file.

2. Download An Export File.

Download an export file displays all the export files that are available for download. New Deleted/Opted-Out and

All Deleted Opted-Out export files are always available for download.

Step-By-Step: Prepare An Export File

Export File Description

Type a file description that will best describe the data that is to be exported.

Export Schedule - used to schedule the frequency of the export:

- 1. Run Now:** The Export will run immediately with this option.
- 2. Run Later:** Gives you the opportunity to schedule the task for a later date and time.
- 3. Run Daily:** Tells the system to run the export to process daily at a specific time. The Enable feature tells the system when to start the daily exports.

Expire date provides the last date the export will run.

Scheduled Time: provides the system with the time the daily Export will process.

4. Run by day(s) of the week: Tells the system one or more days that the export will process. Along with the day(s) of the week you can tell the system an enable date and an optional expiration date. You may also specify the time that the system will process the export.

5. Run by date(s) of the month: Just as you were able to select one or more days of the week for the export to run the same functionality applies to the date(s) of the month. You also have the Enable and Expire date as well as the scheduled time.

Choose Subscribers to export

Select the segments that contain the subscriber information you wish to export. You can select individual segments or click All Segments to export all subscribers who are in segments. Select All Subscribers to export all contacts in your database. After you have selected the export options you want, click Choose Segments to continue.

Select Fields

Select the standard and custom fields as well as Event Reminder dates you wish to export by clicking on the check box next to the field or event reminder name. Each field selected is displayed as a column in the export file. When you have selected all the fields that you wish to have exported click the **Submit** button at the bottom of the list.

Choose Segment associations

When you selected the segments to export, the system simply chooses all the subscribers from those segments and lumps them all together in one file. You are not able to see who is associated to which segment(s). Segment association will show you which segment(s) a subscriber is associated to by placing an X in the segment column.

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Example: If you export segments A to F and do not choose anything on this step you will simply have a file with all the subscribers in those segments. There is no way to see if a subscriber is a member of one or all of the segments. The segments you select in this step will show you the segments Each Subscriber Belongs To" a new column is added to the file for each segment selected. An X in the column indicates that the subscriber belongs to that segment.

It is important to select only the segments you need!

The more segments you include in an export the larger the file will be. If there are more than 255 columns in the file Excel will not be able to read it. Remember that each field and segment you select adds another column to the export file.

Send Notification

Enter an email address and the system will send an email to you when the system is done generating the export file.

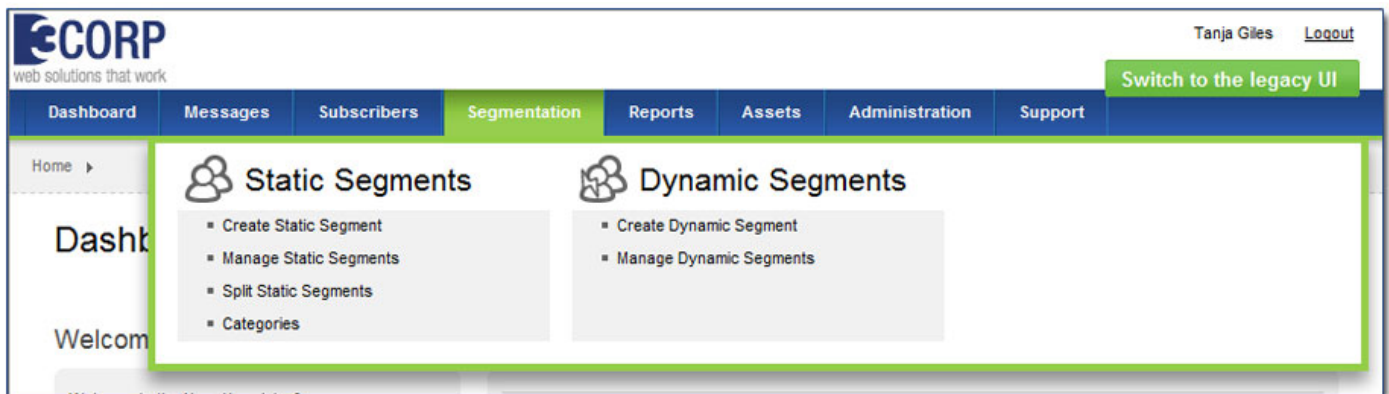
Pick Up the New Export File

Navigate to Subscribers and click on the View Exports in the Subscribers – Export menu. Simply click the Download link next to the Export that you wish to download. Select the file you just created from the list. You can download a file as many times as you need to. After 3 days, the file will show as expired in the system.

Segmentation

Segmentation: Allows you to create, edit and manage static and dynamic segments (also known as “groups”)

Segmentation Menu



Create Static Segment Overview

Create Static Segment allows you to create a new static segment and place it in a category. Segments help organize your subscribers by interest or demographic information.

Step-By-Step

Go to Segmentation > Static Segments > Create Static Segment. Name the new segment(s) in the **‘Segment Name’** text box. Place the new static segment in a category by selecting a category from the Category drop down list. If no category is selected the new static segment will be added to the Uncategorized category by default. Check the Hidden segment check box to make the new static segment hidden. Hidden static segments are not displayed on the sign up form. They are used to organize subscriber information.

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Manage Static Segments Overview

Manage Static Segments displays current segments present in your system. Segments serve to organize subscribers. You may have segments for different geographical regions, segments based on specific product preferences, or segments based on source information. To access the Manage Segments tool, navigate to Segmentation - Static Segments - Manage Static Segments. Segments are first divided into two sections depending on whether the segment is displayed on your sign Up Form. Segments displayed on the sign Up Form will appear on the sign Up Form or update subscriber preferences pages, and subscribers can add or remove themselves from that segment. Within each section, segments can be further divided by category. If you are using categories to organize your segments, you will see each category heading before the listed segments in that category.

Viewing Subscribers in a Static Segment

To view the list of subscribers that are part of a given segment, simply click on the name of the segment you wish to view. A search will be performed for all subscribers in that segment, and you will be directed to the subscribers search results page. For more information on subscriber searches and search results, see the Subscribers > Search > Custom tutorial.

Segment Count

Segment Count allows you to see at a glance how many subscribers exist in each of your segments.

Re-Order Static Segments

You can change the order in which segments appear on your sign Up Form and subscriber preferences page. Click on the Re-Order Segments button underneath any category. A new screen will appear prompting you for the order in which to place the segments. You can specify an order by selecting the appropriate numbers from the drop-down boxes (1 being at the top of the list, and going down) or you can have the system automatically order your segments alphabetically.

Note: This ordering will only have an effect on your sign Up Form or subscriber preferences pages. This will not affect the order in which segments are displayed in your Segmentation-Static Segments - Manage Static Segments page, or when selecting recipient segments for sending messages.

Modify Static Segments

Selecting Modify Segments allows you to change certain features of the segments within that category. To modify a segment within a category, click on modify segments button underneath the category heading. For each segment, you may modify the Segment Name, Category, and Hidden property.

Segment Name

Segment Name indicates the name of your segment. If this segment is not hidden, this segment name will be visible to your subscribers when they view their subscriber preferences page.

Category

Category is the category in which this segment resides. If you modify this property, this segment will no longer be in the segment in which it currently resides.

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Hidden property

Hidden property determines whether this segment is listed on your sign Up Form or subscriber preferences pages. Hidden segments will be invisible to your subscribers, and can be useful for organizing your subscribers internally. Non-hidden segments will be visible to your subscribers, who may be able to add or remove themselves from those segments at their own discretion.

When you have finished making adjustments or corrections to your segments, click on the Modify Segments at the bottom of your segments list to save your changes. If you would like to cancel your changes without saving, click on the back button or select Segmentation - Static Segments - Manage Static Segments in the menu bar above.

Deleting Segments

If you delete segments from your system, your subscribers that were previously in those segments remain in your system. The segments themselves can be thought of as containers that have been discarded. To delete a segment (or multiple segments at once) check the "Delete" checkbox to the right of the segment name. When you have selected all segments you wish to delete, scroll to the bottom of the Static Segments - Edit page, and click on "Submit". You will be asked to confirm your request to delete these segments. To confirm, click on "Yes". If you have made any mistakes or you have changed your mind, click on "No".

Note: If you delete a segment, you cannot recover that segment, and any information linking subscribers to that segment will have been lost.

Static Segment Split

Segment Splitter allows the user to search one or more static segments and select a specific number of users to create 2, 3, or 4 new static segments.

To perform a Static Segment Split navigate to Segmentation - Static Segments - Split Static Segments.

Select the static segment(s) by placing a check to the left of the static segment(s) name that you wish to obtain subscribers from. Select the radio button option to Sample all subscribers from the checked static segment(s) or Specify how many subscribers you would like to sample from these static segments.

Remember to place the number of subscribers that you wish to grab from each static segment. Choose Next. The Split Sample Into New Static segments page opens. Your sample of ### subscribers will be divided evenly across the number of new static segments you create. How many new static segments would you like to create? Select the option of 2, 3, or 4 static segments that you would like to create based on the split sample that was chosen in step 1. Choose Next or Back to change your number of subscribers or segments that you have previously selected. The "Name New Static segments" page opens. Your sample of ### subscribers will be divided into # static segments of approximately ### in each. Name each static segment below and, if needed, associate that static segment with a category.

Categories Overview

Categories organize Segments of subscribers. Categories are divided into two distinct sections. The first section is at the top of the page where you are able to create new categories. A user can create as many as 10 new categories at a time. The bottom section is used to manage preexisting categories. To access the Categories page, navigate to Segmentation > Static Segments > Categories.

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Category Names

The name of the Category will appear in your Manage Static Segments page and should reflect a common trait among those static segments. For instance, you may have a category called "Major Cities" and static segments within that category might be "New York", "Los Angeles" and "Chicago". A category name could also be a question, and static segments within that category could be answers. For instance, the category may be labeled "Do you like to fish?" with static segments within that category labeled "Yes" and "No".

Display Type

Display type is the way in which subscribers view the static segments in your category on the sign up form or subscriber profile preferences pages. The available options are "checkboxes" and "dropdown list". Checkboxes allow subscribers to add themselves to more than one static segment within a category. A dropdown list restricts subscribers to only one static segment per category.

Adding Categories

To create one Category at a time, name the new category in the Add Category text box. Choose the display type for this category. Click on the Add Category button.

To create 10 Categories at a time, click on the Add 10 link, located below the add category title. Name the new categories and choose a display type for each category. When you have finished adding category names, click on the Add Category button. You do not need to add exactly 10 categories at a time. Any blank category fields will be ignored.

Editing Categories

Order Categories

To change the order that the Categories are displayed on the Sign Up Form or subscriber preferences page, select a number in the dropdown list (with the lowest number appearing first).

Note: This ordering will affect the way in which categories are ordered on the sign up form and subscriber preferences pages, not the way in which they are ordered in the Edit Static segments tool.

Type and Category Name

If necessary, modify the Type and Category Name. For reference on each of these fields, please see the appropriate section above. Click the Delete check box to the right of the category if you wish to remove the category. If any categories marked for deletion contain static segments, they will not be deleted.

Note: Delete or move any static segments within a Category prior to attempting to delete the Category itself.

When you have made all the necessary changes, click the Make Changes button at the bottom of the categories page.

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Dynamic Segments Overview

Dynamic Segments are subscriber segments that are compiled by establishing rules for inclusion and exclusion. You can think of a Dynamic Segment as a saved search--every time you view your Dynamic Segment or send a message to a Dynamic Segment, that search is performed automatically. You are always viewing the most up-to-date list of subscribers that match your criteria rules. Since Dynamic Segments are an extension of Search Subscribers, you can use two methods to create them. You may manage your Dynamic Segments in the Dynamic Segment area of the system, or you may create new Dynamic Segments while searching for subscribers using the standard Search Subscribers method.

Step by Step: Create Dynamic Segment

Navigate to Segmentation > Dynamic Segments > Create Dynamic Segment

Here you will be able to create Dynamic Segments or manage existing Dynamic Segments. If this is your first Dynamic Segment, click on the link labeled "**Create New Dynamic Segment**".

The interface for creating a new Dynamic Segment is identical to the Search Subscribers interface. That's because, as mentioned previously, a Dynamic Segment is basically a saved search that runs every time you view the Dynamic Segment or send a message to that Dynamic Segment.

To create your new Dynamic Segment, simply select the search criteria your segment should meet. You may use all functions that are normally available when searching for subscribers: wildcards, recency/frequency information and email account status. When you have entered your desired criteria, click **Continue**. You will now be able to preview your Dynamic Segment.

On this page there are three sections:

1. Dynamic Segment Summary

The Dynamic Segment Summary provides a list of parameters - the criteria you specified to match subscribers to your Dynamic Segment. This summary also shows you a current count of the subscribers who match your parameters.

2. Dynamic Segment Snapshot

The Dynamic Segment Snapshot provides you with a view of the first five subscribers who match your Dynamic Segment parameters. This snapshot is provided to give you a general feel for the results of your Dynamic Segment. To view the profile information for these subscribers, click on their displayed information (subscriber name, email address or date joined). You may also sort this snapshot as you would a full list of subscribers - by clicking on the column heading corresponding to the field you wish to sort by. For example, if you want to sort your Dynamic Segment Snapshot alphabetically by email address, simply click on the title "Email", and your list will be automatically sorted.

3. Dynamic Segment Options.

Dynamic Segment Options allow you to fine tune your Dynamic Segment. Your first available option is to save your Dynamic Segment. You also have the option to associate a description to your Dynamic Segment. If you would like to make modifications to your search parameters, that option is also available. You may also set rules that enable you to further refine your targeting by using exclusions. Select the option labeled "Continue to Exclusion process before completing this "Dynamic Segment" and click "Submit". This takes you to the Segments Exclusion page, where you will be able to choose which static segments to exclude from this Dynamic Segment.

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Once you have customized your Dynamic Segment to your satisfaction, save your Dynamic Segment. Select a name for it, provide a description in the text box provided if desired, and click "**Submit**".

Note: You can also create a new Dynamic Segment while searching for subscribers in the standard Search Subscribers tool. After you perform a search, you should notice a box beneath your Search Subscribers Snapshot with several options to choose from. "Save this query as a Dynamic Segment named:" is one option. If you select this option and provide a name for your new Dynamic Segment, the search parameters you provided for this search will be stored as a new Dynamic Segment. Then, to make modifications to this new Dynamic Segment, simply navigate to Segmentation - Dynamic Segments - Manage Dynamic Segments, and select the list you created by clicking on the "Edit" button to the right of the Dynamic Segment name.

Sending Email Messages Using Dynamic Segments

Using Dynamic Segments You can send email messages to Dynamic Segments just as you would to a normal Segment. When creating a new message, simply click "**Choose Recipients**". Dynamic Segments will appear at the bottom of this list, underneath any static Segments you may have in your system. To send a message to a Dynamic Segment, just check the box next to the Dynamic Segment name. When you have chosen all recipient segments for the message, click "**Submit**". In the Recipients field, you should see your Dynamic Segments listed.

Viewing Dynamic Segments

To view your existing Dynamic Segments, navigate to Segmentation > Dynamic Segments > Manage Dynamic Segments. If you have existing Dynamic Segments, they will be displayed in a table here. You may view current members of any Dynamic Segment by clicking on its name, or by clicking the "View" button above or below the Dynamic Segment. You may also sort to make finding a specific Dynamic Segment easier. By default, Dynamic Segments are sorted alphabetically (A to Z). To sort alphabetically in reverse (Z to A), click on the column heading above your Dynamic Segment names (labeled "Dynamic Segment Name"). You should see a small triangle pointing upward, indicating that lists beginning with the last letters of the alphabet will appear at the top of your Library list. You can also sort your list by the Date Modified field. This field indicates the last day that your Dynamic Segment search parameters were modified. If you click this column heading once, your Library will be sorted oldest to newest, with the most recently modified Dynamic Segments appearing at the bottom of your Library. Clicking on the column heading again will reverse the sorting order so that the most recently modified Dynamic Segments appear at the top of your Library.

Removing a Dynamic Segment

To delete a Dynamic Segment, navigate to Segmentation > Dynamic Segments > Manage Dynamic Segments. Your existing Dynamic Segments will display. Select the one you wish to delete by clicking the check box to the left of the Dynamic Segment name. Now, click the "Delete" button at the top or bottom of the Dynamic Segment table. You will have a chance to confirm the deletion before it occurs.

Note: Deleting a Dynamic Segment will not delete the subscribers that were members of that Dynamic Segment. Those subscribers will remain in your system as members of any segments or other Dynamic Segments to which they currently belong.

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Copying a Dynamic Segment

If you wish to create a copy of an existing Dynamic Segment, navigate to Segmentation > Dynamic Segments > Manage Dynamic Segments. Your existing Dynamic Segments will display. Select the Dynamic Segment you wish to copy by clicking the check box to the left of the Dynamic Segment name. Now, click the "Duplicate" button at the top or bottom of the Dynamic Segment table. Provide a unique Dynamic Segment name in the pop-up window and click "Apply". Your Dynamic Segment copy will be saved, and your Dynamic Segment library will automatically refresh itself. Now you can select the copied version of your Dynamic Segment by clicking the check box to the left of the segment. Make any desired changes to the search parameters by clicking on the "Edit" button.

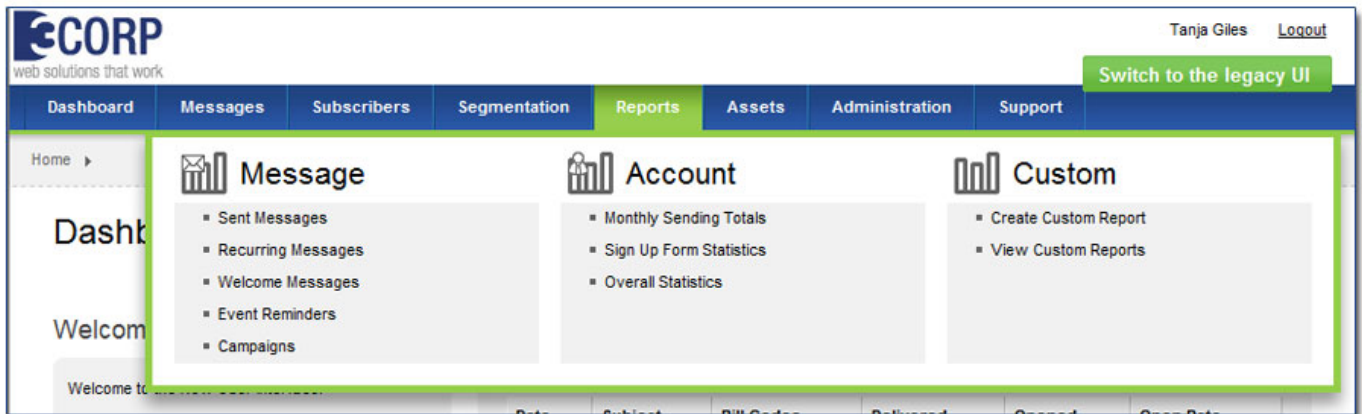
Renaming a Dynamic Segment

To rename a Dynamic Segment, navigate to Segmentation > Dynamic Segments > Manage Dynamic Segments. Your existing Dynamic Segments will display. Select the list you wish to rename by clicking the check box to the left of the Dynamic Segment name. Next, click the "Rename" button, change the name of the Dynamic Segment in the pop-up window, then click the "Apply" button. Your Dynamic Segment Library will automatically refresh itself.

Reports

Reports: Allows you to generate statistical reports for sent messages, etc.

Reports Menu



(Please Note: Not all features shown above will be available.)

Sent Messages

Displays all the sent messages a user can search and filter for a specified time frame or specific content with regards to the message, such as Subject, Bill Codes, etc. All of the messages are displayed by specific date. To view the message statistics you can click on the name of the message or you can click in the check box to the left of the message name.

Email Summary

- The subject of the email
- The groups it was sent to
- The date it was sent
- A preview of the HTML and plain text versions of the email.

Email Details

- Number of emails sent

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- Bounced
- Delivered
- Opened
- Percentage of emails opened

These are all sorted based on HTML and Plain Text email types.

Link Tracking

This displays the number of people that clicked on a specific link based on their email type (HTML and Plain Text).

Changing Months

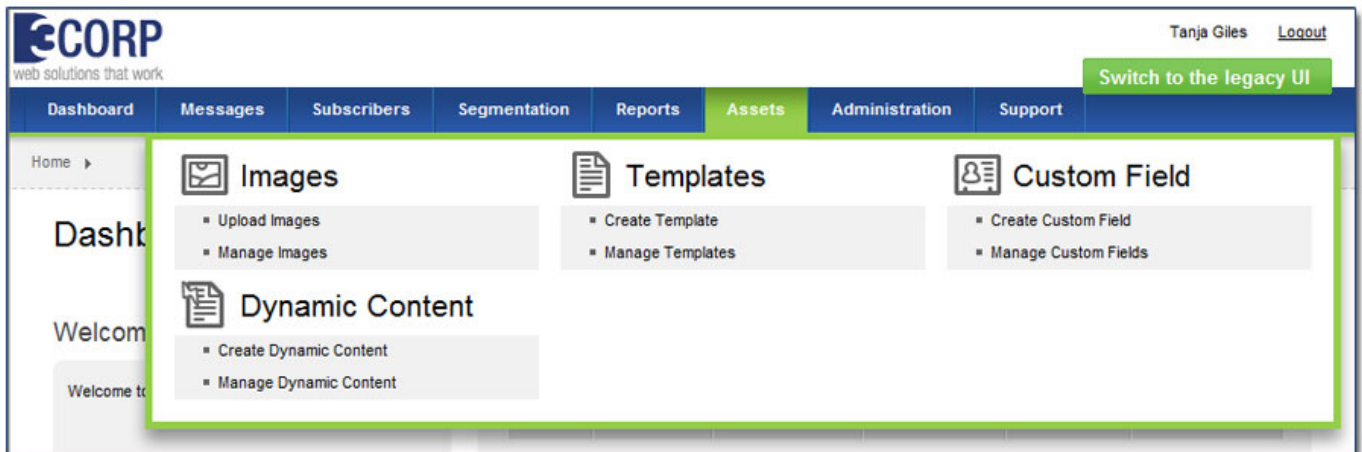
By default the current month's information is displayed. If you would like to view the statistics for another month Click on the drop down Menu to the words "Survey Form Statistics," Exporting statistics will export the current month's information into a Microsoft Excel file.

If you have any questions or concerns, or for additional Reporting Options, please contact your account representative.

Assets

Assets: Allows you to manage your image and template libraries.

Assets Menu



(Please Note: Not all features shown above will be available.)

Images Overview

The Image Library is an online database set up to allow you to easily place the images you upload in your email messages. You have 10MB of storage space to store your images. The storage space meter is present on every image library window. It will always tell you how much space you have used in your image library.

Recommended image specs:

- If the email template includes Image Placeholders, try to use images that are the same size (or at least the same width) as the placeholder images. This will prevent display issues.
- Accepted file types: .gif, .jpg. (Uploading an image in other formats such as .psd, .bmp, etc. may cause errors.)

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- Images should be no more than 600 pixels wide (this will prevent horizontal scrolling.)
- Total file size for each image should be no more than 5K (your email will load faster).
- Maximum image specs per image that you can upload to image library:
 - 800 x 800 pixels
 - 100K size per image.
- Other Guidelines: Avoid dropping an image on top of another image (overlapping) when creating a HTML version message.

Step-By-Step: Image Library Tool

Upload A New Image

To upload a new image to your image library click on the Browse button in the Image View window. Select an image file, (.jpg, .gif) from a folder on your hard drive and click Open. If you know the path to the file you wish to upload you may enter it directly into the Add New Image text box. (Ex. c:\picturespicture.jpg)

Complete the upload by clicking on **Upload**.

Placing an image in a message

Select an Image

Select an image name from the list of uploaded images. When you have selected an image, a preview will automatically be displayed.

Spacing for your image

- Default Space: There will be no space between your image and text.
- Small Space: There will be a small space between your text and image.
- Large Space: There will be a large space between your text and image.

Position the Image

Positioning sets the alignment of the image relative to the text around it.

The values for Positioning can be divided into two groups: **LEFT** and **RIGHT**, which put the image on the left or right side of the page; and all the other values, which concern the vertical placement of an inline image.

Absolute generates an absolutely positioned element, positioned relative to the first parent element that has a position other than static. The element's position is specified with the "left", "top", "right", and "bottom" properties. It is possible to have things overlapping with absolute positioning.

Left & Right: LEFT and RIGHT put the image on the left or right side of the page and cause the text to wrap around it. Text will continue to wrap around the image until it gets past the image, or until you use <BR CLEAR="..."> to cause text to skip down to after the image. If the text looks crowded too close to the image, you may want to check and .

All other values for positioning define the vertical position of the image to the surrounding text. With these other values, text does not wrap around the image.

ABS Bottom: ABSBOTTOM aligns the image and the absolute bottom of the text (including any dangling text like with the letters j and y).

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ABS Middle: ABSMIDDLE does what many people expect MIDDLE to do: align the middle of the text with the middle of the image.

Note: *In some older browsers this meant that the image aligned with the lowest portion of the text, i.e. the low point to which the bottom of j and y dangle. Most browsers understand BOTTOM to mean the baseline of the text.*

Base Line: In most browsers BASELINE means the same thing as BOTTOM: align the image with the baseline of the text. Bottom: Aligns the bottom of the image with the bottom of the text.

Middle: This value has particularly different results in different browsers. In some browsers, ALIGN aligns the middle of the text with the middle of the image. In other, it aligns the bottom of the text with the middle of the image.

Text Top: In some browsers, TEXTTOP aligns the top of the tallest text with the top of the image. In other browsers, TEXTTOP behaves exactly the same as TOP, aligning the top of the theoretically tallest text with the top of the image.

Top: Aligns the top of the image with the top of the text.

Linking an Image

Easily link the image to other points of interest in your site or on the web! Type the full URL in the Link URL box.

Example: <http://www.yourlink.com>

Target gives you the option of how the URL (link) will display.

No Set: This is the default and provides no special features

New Window (Recommended): Will open the link in a new window for the subscriber when the link is clicked.

Same Window: Keeps the user in the same window with the link URL opened in place of the message they were viewing.

Click Insert Image to insert your image. Remember that your image will be placed where the cursor is in the message body. For example, if your cursor is at the top left of your message your image will be inserted at the top left.

Image Library Management View and Delete Images

Your Image Library displays up to 20 images per page in alphabetical order along with the date each image was added to the system. If you have more than 20 images in your image library, click on the next and/or back buttons at the bottom of the page.

Preview any image in your Image Library by clicking on **View**. A window containing the image will pop up and display a preview of the image. Close the window by clicking anywhere on the image.

Delete Image

Delete images by selecting an image from the Image Preview drop-down list and click on Delete. Confirm the deletion by clicking Yes.

Note: *Deleted images cannot be restored!*

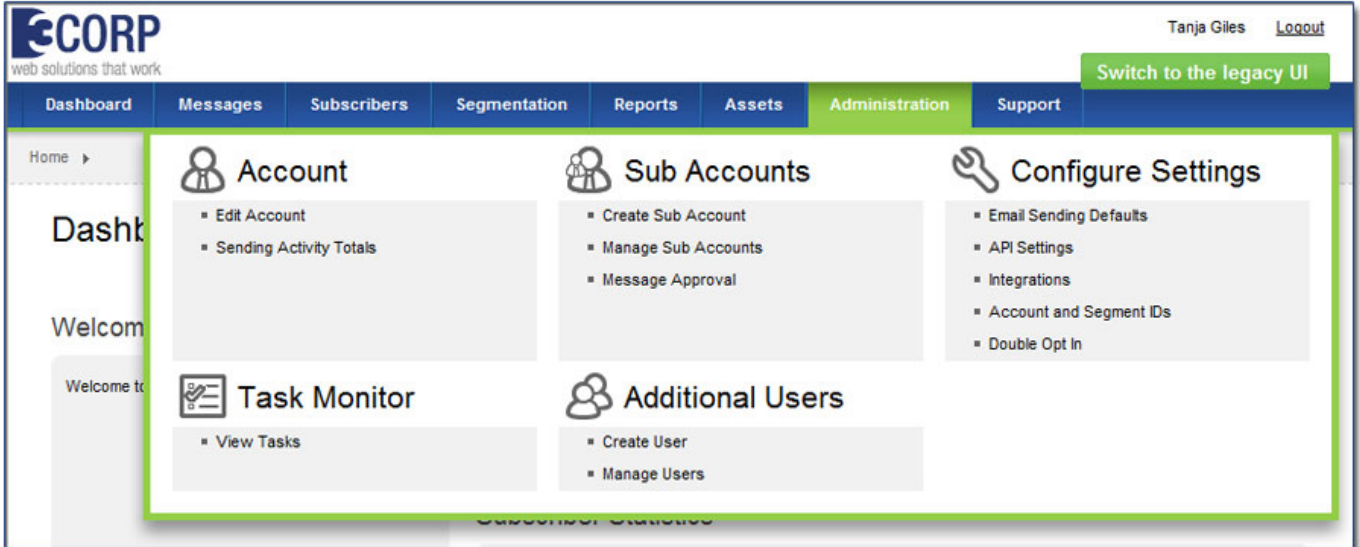
For assistance with the Template Library, Custom Fields and Dynamic Content, please contact your Account Representative.

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Administration

Administration: Allows you to control selected settings within your account.

(Please note: you will need to contact your Account Representative to change certain settings.)

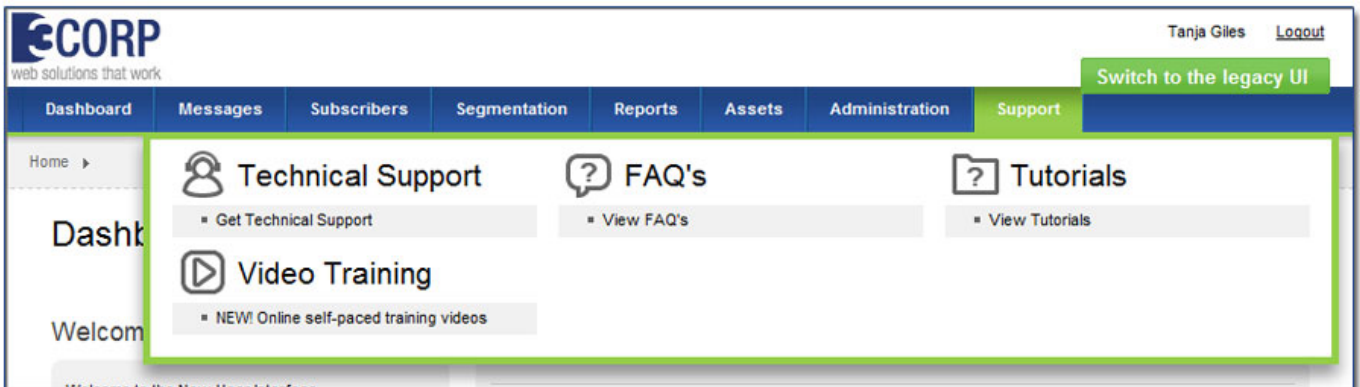


Administration Menu

For assistance with Administrative aspects within your account, please contact your Account Representative.

Support

Support: Allows you to contact support, participate in training and also to check out FAQs, etc.



Support Menu

Simply click on any of the links within the support tab for tech support, FAQs, Tutorials and Video Training! And, of course, don't hesitate to contact us at edits@d3corp.com or 410-213-2400 with any questions or concerns you may have!