

Email Campaigns

Product Use Guide



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EmailCampaign

User Manual



EmailCampaign is now available within the Leadformix application suite. Once you are logged in to LeadFormix, click on the icon for 'Email Campaigns' to access EmailCampaign. Outlined below are some steps outlined for uploading a mailing list, creating an email campaign, sending emails and monitoring responses.



1. Uploading a Mailing List

- a. To begin with click on 'Create Mailing List'
- b. List name - Add a list name that best describes the kind of contacts you will add.
- c. List Owner's Name - appears by default
- d. List Owner's Email - appears by default
- e. Click on 'Next'

EmailCampaign provides 4 different options to create a new mailing list. You can use any one of the below methods:

A. Add Contacts One-by-One

Using this option, you can add contacts manually. This is a better option when creating a mailing list with very few contacts. It is mandatory to add the Email address, First Name and Last Name. You can also choose to add other details like Phone, Company, Industry, Title, Department, Postal Address and Zip Code. Click on 'Add Contact' after each contact is added to save contacts. Click on 'Next' only when you have finished adding all contacts to view the mailing list.

B. Import Contacts

In order to import contacts, you should first create a spreadsheet in .csv format with the column titles listed below. Out of the following Column titles, Email, First Name and Last Name are mandatory. Column titles are case insensitive.

Column Titles:

- | | |
|---|------------------------------|
| a) Name (variant first name, first_name) | h) State |
| b) Last Name (variant surname, last_name, lastname) | i) Street |
| c) Email (variant e-mail) | j) Zipcode (variant pincode) |
| d) Company | k) Country |
| e) Phone (variant landline) | l) Title |
| f) Mobile (variant cell) | m) Department |
| g) City | n) Industry |

Save the spreadsheet as .CSV (Comma delimited). Browse for the file and Import it to EmailCampaign. On importing the file, EmailCampaign provides information on the Total Contacts in the file, number of Duplicate Entries, number of Contacts Imported Successfully and number of Errors. By clicking on the number of Errors, you can download a .csv file that provides the details of errors, like Duplicate entry, Subscriber already exists (in a previous mailing list), Unsubscribed id or Invalid email id. Duplicate entries within a list will be deleted by default while importing a list. In case, a subscriber already exists in any of the previous mailing lists, the error message is shown just to notify; however the contact will be added in the new mailing list. Watch out for Invalid email ids, in most cases there could be a space in the email id or .com missing or @ missing or special characters like quotes ' ' " ". Click on 'Next' to view the mailing list.

C. Add Contacts from Existing Lists

Select the mailing lists that you would like to combine to form a new mailing list and click on 'Next'



D. Add Contacts from Existing Contacts

EmailCampaign displays the entire list of contacts from which you can choose specific contacts to add to your new mailing list. You can sort the list alphabetically (A - Z) by clicking on the column header. Clicking again on the same column header will sort the list in reverse order (Z - A). You can sort the data by First Name, Last Name, Company or Email ID. Select all the contacts before clicking on 'Add Contact'.

You can always edit, add or delete any contact from any of the mailing lists.

2. Setting up an Email campaign

- a. Click on 'Create Campaign'
 - b. Campaign Title- Add a title that best describes the purpose of the email campaign. Plz note, this is not the subject Line of the Email
 - c. From Name- appears by default, but one can choose to add any other suitable From Name, like the Company Name
 - d. From Email- appears by default a YourDomainName@emailforce1.com Do not change the From Email EmailForce1 provides a valid From Email by default, which appears in the format YourDomainName@emailforce1.com It is advised that the default From Email should not be changed for any email Campaign.
 - e. Reply to Email- Add a valid reply-to email. Also, make sure the From Name & Reply-to Email relate to the same person on whose behalf the Emails are being sent.
 - f. From Address- include the sender's valid physical postal address
 - g. Selecting the template- EmailCampaign helps you send both plain text emails and HTML/image based templates. You can choose to start from a blank email Template or use an existing sample template.
 - h. Click on 'Next'
- In the previous step, in case a **Text Template** was chosen,*
- i. The email content can be added manually or by importing a .txt file (Notepad)

In case a Graphical Template was chosen while setting up an email campaign

j. The email content can be added by

- ▶ Importing a .html file
- ▶ In case, you want to add the content by copying the HTML code, follow any one of the ways given below
 - If you are using a .html file, open the file as Notepad and copy the html code. In EmailCampaign, click on 'Source' in the Formatting toolbar and paste the HTML code in the text box. Click on 'Source' again to view the email content
 - If you are using an online html template, copy the HTML code by clicking on View > Page Source. In EmailCampaign, click on 'Source' in the Formatting toolbar and paste the HTML code in the text box. Click on 'Source' again to view the email content
 - You can also copy content from a Word document by clicking on the option ' Paste from Word' in the Formatting Toolbar



Using the formatting toolbar for a graphical template, you can add images from your desktop or by adding the image URL; insert tables, horizontal lines, smileys, buttons, bullets, numbering, hyperlinks; change background and font color and much more. **Explore!**

The following steps remain common to both Text and Graphical templates

- k. You can use the customization codes to customize your content with the recipient's Email Address, First Name, Last Name, Phone, Mobile Number, Contact Address, Comments, Job Title and other Company information. Click on the button 'Personalization Tag' located below the text box to select the code you would like to add.
- l. Add a Subject Line relevant to the content in the email
- m. Move the URL's that you'd like to track clicks on from the Non Tracked Links box to the Tracked Links box
- n. Opt Out Instructions are added by default
- o. Check the box next to 'Forward to your Colleague' (optional)
- p. Click on 'Save'.
- q. 'Preview Campaign'
- r. Click on 'Test Campaign' to check the 'Spam Score'. EmailCampaign also shows the Spam Details so that you can make the necessary changes in the content
- s. Send a 'Test Email' by providing an email id. You can send a test to multiple people by adding the email ids Separated by comma.

Please note, the customized content will not be displayed in test emails.
- t. Click on 'Next'.
- u. Select an Existing Mailing List or add a New List.
- v. Delete some contacts, if so desired (optional). Please note, the contacts deleted will only be removed for the current email campaign and will not be deleted from the Master Mailing List.
- w. Click on 'Confirm and Send Campaign'.

- X. EmailCampaign offers an option to either send emails immediately or to schedule an email campaign to be sent later automatically. To start sending emails, click on 'Send Immediately'.
- y. To schedule an email campaign, set the required date and time. Select the notification options and click on 'Schedule Campaign'
- z. To check how an email would appear to an email recipient, you can send an email to yourself.

3. Monitoring Reports

To view the reports of any mailing list, click on 'Sent Campaigns Report'. You can view campaign reports for a specific date or date range and also by selecting a specific campaign. The email campaign report displays the total number of email sent, emails delivered, opened, single page and multi page visits. To check any report in detail, select a report and click on 'View Details'. The detailed report displays the following:



- a. Opened Emails and the time of visit
- b. Single Page Clicks- Email ids are shown along with the page visited, time spent on that page and the time of visit.
- c. Multi Page Clicks- Email ids are shown along with the pages visited, time spent on each page and the time of visit.
- d. Phrases of Interest- Leadformix tracks all the Phrases of interest and the time spent on each phrase. These phrases relate to specific pages on your website.
- e. Unsubscriber List - These email ids will automatically deleted from your mailing lists
- f. Bounced List- This report consists of the email ids that bounced, the category of bounce and the reason for Bouncing. All hard bounces will automatically deleted from your mailing lists.

All these individual reports can be downloaded in a .csv format, if so desired. The reports page displays the reports of only the latest campaigns. In case you are looking for a specific report, search the reports by selecting a campaign or by searching from a specific date range.

You can subscribe to a summary report of status of email campaigns. In your LeadFormix account click on 'Settings', select 'EF1 Settings' and select the option for 'Daily Report'.

Special Features of EmailFormix

Built-in Email Templates:

Apart from letting you create your own emails, EmailCampaign provides you with some common text email templates and HTML templates based on varied layouts which are proven to work in all major email programs. Just customize the email content to suit your business needs.

Personalization Tags or Mail Merge Fields:

Personalize your emails by using EmailCampaign customization tags to add prospect information like First Name, Company, Designation, Phone, Mobile Number, Contact Address, Comments, Job Title and other Company information. Adding some personalization makes the email appear like a one-on-one messaging and helps to build the prospects interest in your product/service.

Schedule an Email campaign:

EmailCampaign provides the flexibility to set up an email campaign, select a list, but send emails at a future point in time. A notification email will be sent about when the campaign started and ended.

Preview a Mailing List & Delete Contacts for a Specific Email campaign only:

You can choose to delete specific contacts for a specific email campaign; without having to delete them from the mailing list. This feature is helpful when sending a follow up email to only those who Did Not Respond/Open the email/Click on the links.

Time Spent on Phases of Interest:

Leadformix tracks all the Phrases of interest and the time spent on each phrase. These phrases relate to specific pages on your website. This provides information on the most visited or most popular (based on time spent) pages on your website.

Global Unsubscribers:

EmailCampaign automatically removes contacts who have opted to unsubscribe from the entire database. EmailCampaign will also maintain a track of all such unsubscribers and they will be automatically deleted from all mailing lists in added in future, incase they contain any unsubscribed email id. You can also upload a list of unsubscribers to EmailCampaign to make sure they are removed from any of the current or future mailing lists.

List Segmentation:

This feature lets users to create a sub list from any of the existing lists. The reason for creating a sub-list or a segmented list is to address every segment of their audience with a customized message

Forward to a Friend:

EmailCampaign not only has a Forward to a Friend option in the email, but it also calculates forwards and the time spent on the email.

Daily Report:

Daily report feature allows users to subscribe to a summary report of status of email campaigns.



Monitoring Email Campaigns:

What our clients need to know



Here are a few points that must be kept in mind when you want to run an email campaign.

- ▶ All emails have to comply with the CAN SPAM Act of 2003
- ▶ No mass mailing is allowed for any email campaign - including lead generation emails. Emailing more than 20 email addresses for commercial purposes at a time is considered mass mailing
- ▶ You must not be deceptive in the header (return email address, domain name, IP address) or the subject line.
- ▶ You must give a method for the recipient of the email to opt-out or unsubscribe from your list or from receiving any future emails from you. You must process their opt-out within 10 business days. You must maintain this opt-out list. Similarly bounced email IDs need to be removed from your list ASAP.
- ▶ Maintain good email list hygiene practices. If you have doubts, contact your ESP for clarifications
- ▶ You must include your physical mailing address in your emails.
- ▶ The email must be identified as an advertisement. You don't have to put it in the subject, but you must contain the name of the business and/or other identifying information showing that the email is commercial in nature.
- ▶ You cannot harvest email addresses from web sites, directories, membership databases, or any other service/website that prohibit taking of email addresses. You may not guess at email address (for example, send to every info@domain.com email) to send mass emails.
- ▶ Do not send emails to general email addresses like info@, sales@, customerservice@, webmaster@, help@, support@ from EmailCampaign
- ▶ It is important to maintain an open and transparent communication with your ESP. Inform your ESP immediately if you hear of any complaints either from your email receivers or ISPs, so proper action can be taken immediately to ensure email deliverability and retain your email sender reputation

Formal Abuse Complaints

As a premier email infrastructure provider, LeadFormix takes abuse complaints very seriously. Complaints are remediated by the Anti-Abuse team and follow-up includes opting out the recipient from any future sends, notifying the customer of the abuse complaint and working with the customer to improve their list quality.



1. Could not upload/import a mailing list

Check if the file is in .csv format. Next make sure the column headers are the approved ones like Email and not Email ID, etc.

2. Why are images are not showing up in email content?

Check if the image URLs are complete. Use fully qualified links, `` may look fine on your internal servers, but it won't render externally. Also make sure you click on Display Images Below when you receive the email. Image rendering also depends on the Email Service Provider being used; some do not display images.

3. Where to access data of unsubscribers or bounced ids?

In the Email Campaigns dashboard, click on 'Unsubscribed Contacts' in the Contacts menu. You can Re-subscribe contacts from here, in case anyone unsubscribed by mistake.

4. How to edit an already saved email campaign?

Click on 'Manage Campaigns', select the email campaign to be edited and click on 'Edit'.

5. How to add more contacts in a mailing list?

Click on 'Manage Mailing Lists', select the specific mailing list and click on 'Add Contact'.

6. How to edit subscriber contact details?

Click on 'Manage Contacts', select the contact to be edited and click on 'Edit'. A new window opens where you can edit the details, then click on 'Submit' and close the window.

7. Why don't I see previous email campaign reports?

Once you are in the email campaign reports page, select from the drop down menus to view reports based on Campaign Names or a particular time line