

MAIL BLAST USER MANUAL (CRM)

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SUMMARY

This manual is a guide on how to use the new **mail blast programs** in the sales and marketing category that is made of three programs;

1. Mail Blast (main program)
2. Mail Blast Subscriptions
3. Mail Blast Logs

Mail blast is a simple program that can be used to send emails to multiple guests based on selected criteria. The following are the distinguishing features of the programs

1. The email segments i.e email header, body, footer (segments henceforth) can be designed and modified independently using dynamic variables provided
 - a. Previous editions of the segments can be restored from the preview panel
 - b. Dynamic variables can be directly inserted into the segments body
2. Templates can be made using any combination of segments from the list of available options
3. Segments of existing Templates can be replaced any time
4. An attachment of not more than 3MB can be added to each email template and replace or deleted
5. Templates can be sent By Batch or On-Demand
6. Different combinations of guest Criteria can be used to search for email recipients
 - a. Criteria include 8 fixed options and 12 flexible options
 - i. The fixed options are continent, Region, Country, City, Birth day, in-house checkin-checkout, Reservations checkin-checkout, Reservations or inhouse checkin-checkout date ranges
 - ii. The flexible criteria can be modified using the manage criteria option
 - b. A selected number of tables have been selected to be used for retrieving criteria fields
 - i. Agency
 - ii. Agent
 - iii. Accommodation
 - iv. Hotel Guest
 - v. Guest Folio
 - vi. Guest Profile
 - vii. Payment Method
 - viii. Reservation
 - ix. Membership
 - x. Reservation Code
 - xi. Rooms

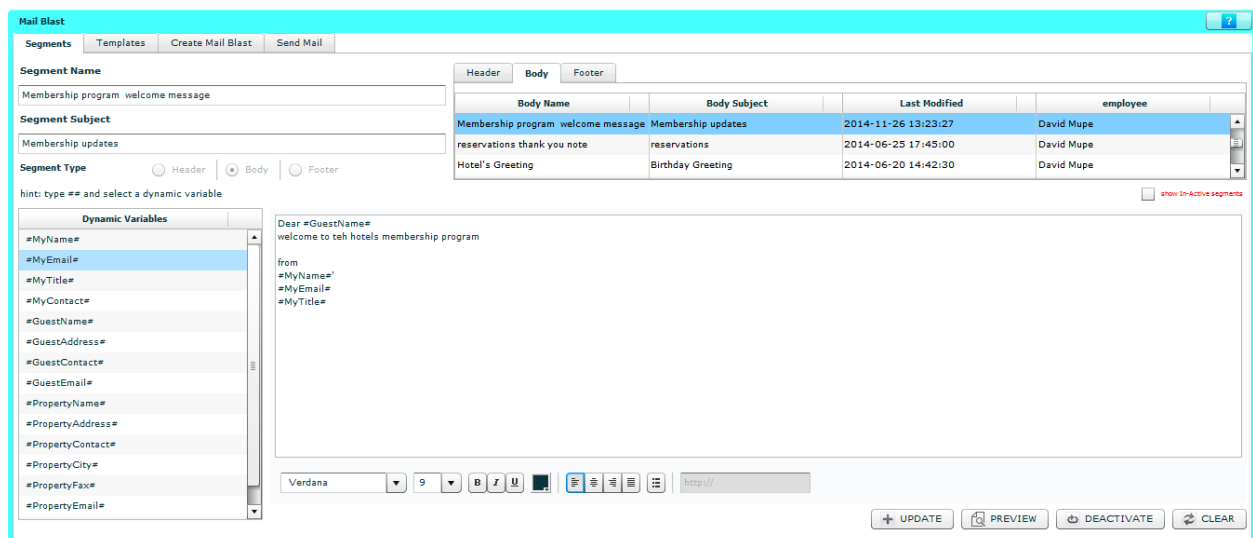
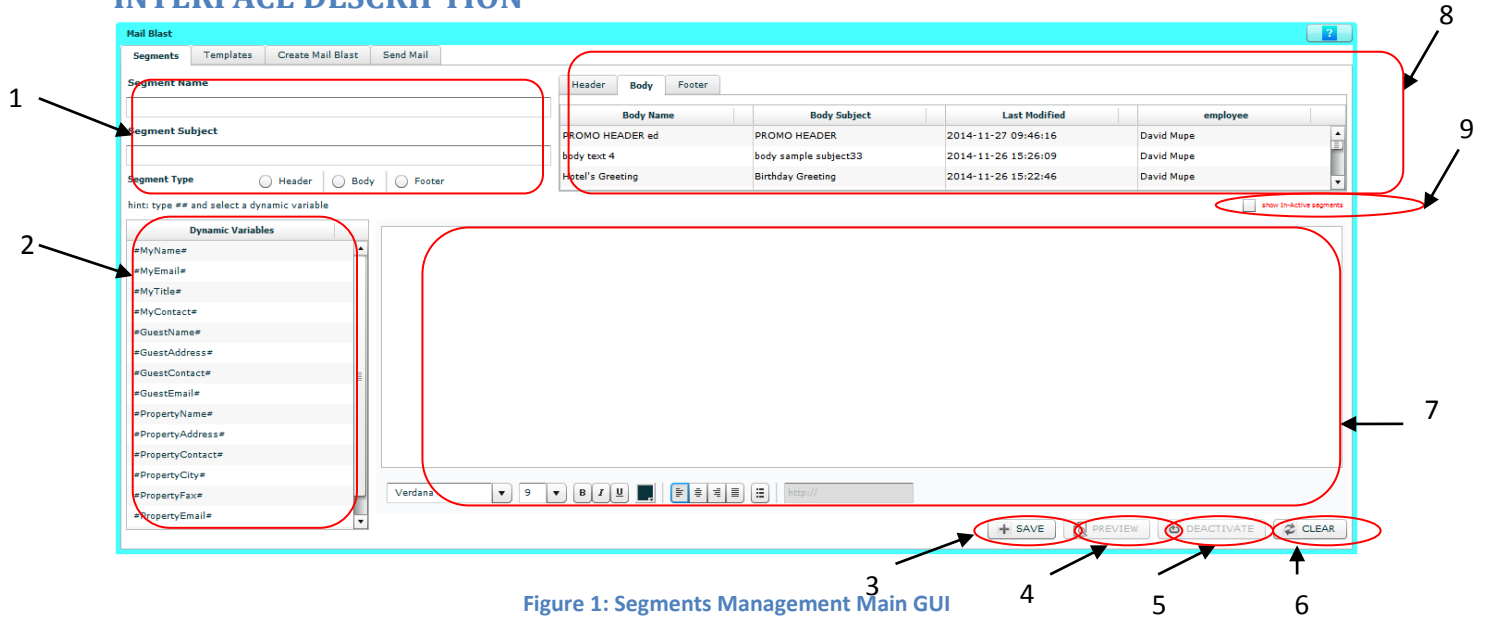
- xii. Title
- xiii. Venue
- xiv. VIP Level

c. Only selected fields can be selected when creating a criteria

7. For batch emails 4 schedules can be selected i.e Daily(hour) , weekly (weekday) , Monthly (calendar date) , yearly (calendar date & month)
8. Recipients based on selected criteria can be previewed while trying out different criteria combinations (guest List is not saved, criteria are saved)
9. Adding a send option (by batch with schedule/On demand), recipients criteria an Email blast is created
10. Running batch email blasts can be manually started and stopped (execution of send depends on batch script settings in the server)
11. The hotel can use the local SMTP server indicating their own host name, port No, local host IP configuration, authentication method and credentials to send certain batch emails.

TAB 1: MANAGING EMAIL SEGMENTS (HEADER, BODY, FOOTER)

INTERFACE DESCRIPTION



KEY:

1. Segments details
 - Used for assigning segment name, type and subject
 - Segment type is un-editable
2. Dynamic variables
 - Used to assign variables in the segment text that can be replaced with guest or hotel details
 - Can be manually types into the text editor panel (7) or by typing ## anywhere in the text and selecting a dynamic variable to replace the ##
3. Commit button
 - Used to add and edit segment details
 - Default label “SAVE”, changes to “UPDATE” when a segment is selected from grid (8)
 - Always enabled
4. Preview button
 - Used to preview segment content **without the dynamic variables**
 - Enabled when segment is selected from grid (8) for editing, default disabled
5. Activate Button
 - Used to deactivate a selected segment
 - Default label is DEACTIVATE, changes to ACTIVATE if an inactive segment is selected for editing
 - Enabled when segment is selected for editing, default disabled.
6. Refresh Button
 - Used to refresh the interface components to default state
 - Always enabled
7. Segments content Rich Text Editor
 - Used for inputting text for the components
 - Always enabled
8. Existing segments options Tab Navigator
 - Always enabled
 - Has 3 tabs, “header”, “Body”
 - By default shows only the **active segments**
9. show inactive segments check Box
 - used to show the hidden inactive segments
 - default enabled, **NOT** selected

PROCEDURE 1: ADDING A NEW SEGMENT

Required fields

- i. Segment Name
- ii. Segment Subject
- iii. Segment Type
- iv. Segment contents

Basic flow

1. Input segment name and Subject , select segment Type at (1)
2. Type in the segment's contents at segment content text area (7), NB: The Dynamic variables is not compulsory
3. Click on the commit Button (3)
4. The interface will refresh and display a confirmation message

PROCEDURE 2: EDITING A SEGMENT

Required fields

- I. Similar to adding segments procedure

Basic flow

- i. Select a segment from the existing segments grids (8)
- ii. The GUI fields will display the contents of the segments including its name, subject, type and content
- iii. Commit button (3) label will change to UPDATE
- iv. Preview (4) and activate (5) buttons will be activated
- v. Modify the desired segments components and click UPDATE
- vi. The interface will refresh and database updated and display a confirmation message

PROCEDURE 3: DEACTIVATE A SEGMENT

Required fields

- NA

Basic flow

- i. Step i, ii, iii, iv Similar to update segment procedure
- v. If the segment is active the label will change to “DEACTIVATE” else “ACTIVATE”
- vi. After clicking the deactivate/activate button. Segments status will be altered and interface refreshed

PROCEDURE 4: PREVIEW A SEGMENT

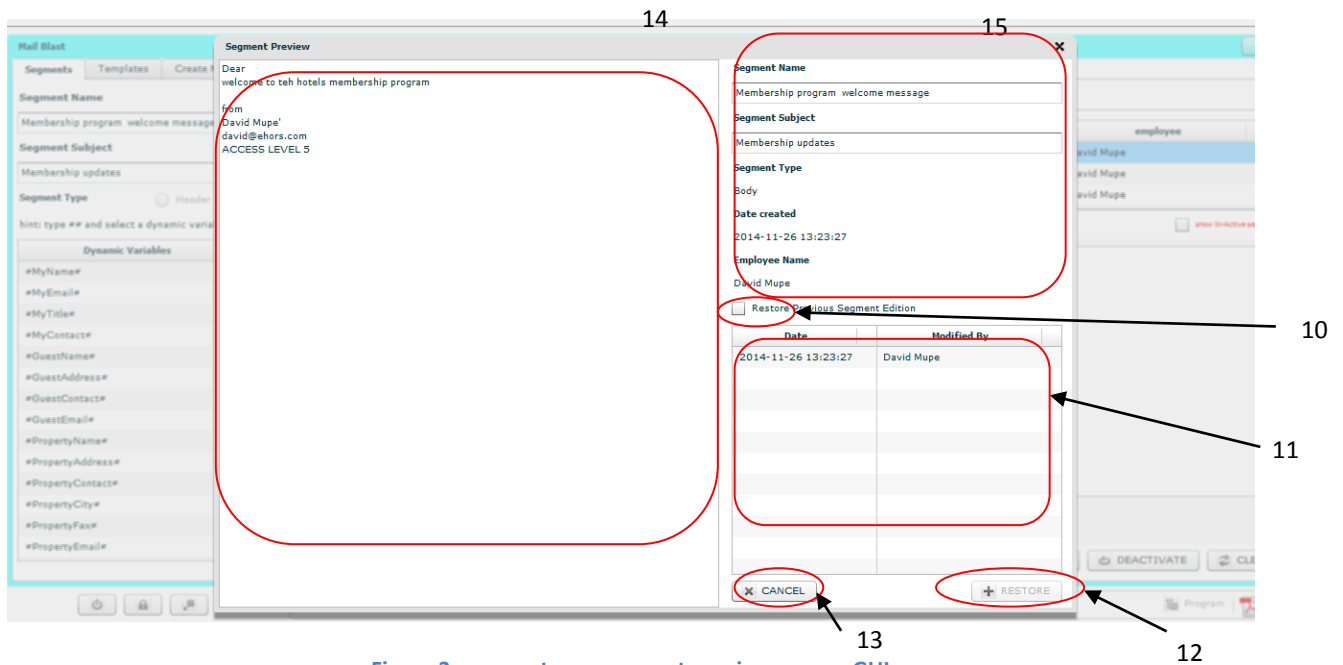


Figure 3: segment management preview pop up GUI

KEY

- 10. Enable Segment Restore check box
 - Used to enable to restore Segment procedure
 - Always enabled
 - Default NOT Selected
- 11. Last Editions grid
 - Contains a list of previous versions of the segments being previewed
 - Default disabled, enabled when check Box (10) is selected
- 12. Restore segment Button
 - Used to execute the Restore segment procedure
 - Default disabled, enabled when item is selected from grid Last Editions grid (11)
- 13. Cancel Preview Button
 - Always enabled, used to close the pop up
- 14. Preview Panel Text Area
 - Displays the segments contents **replacing the dynamic variables with equivalent data**

- Un editable
- 15. Segment Details preview Text Input Fields
 - Input fields used to display a summary of the selected template
 - Default all disabled

PROCEDURE 4.1: RESTORE A SEGMENT

NB: Restore Segment procedure created a copy of a previous version of the segment

Required fields

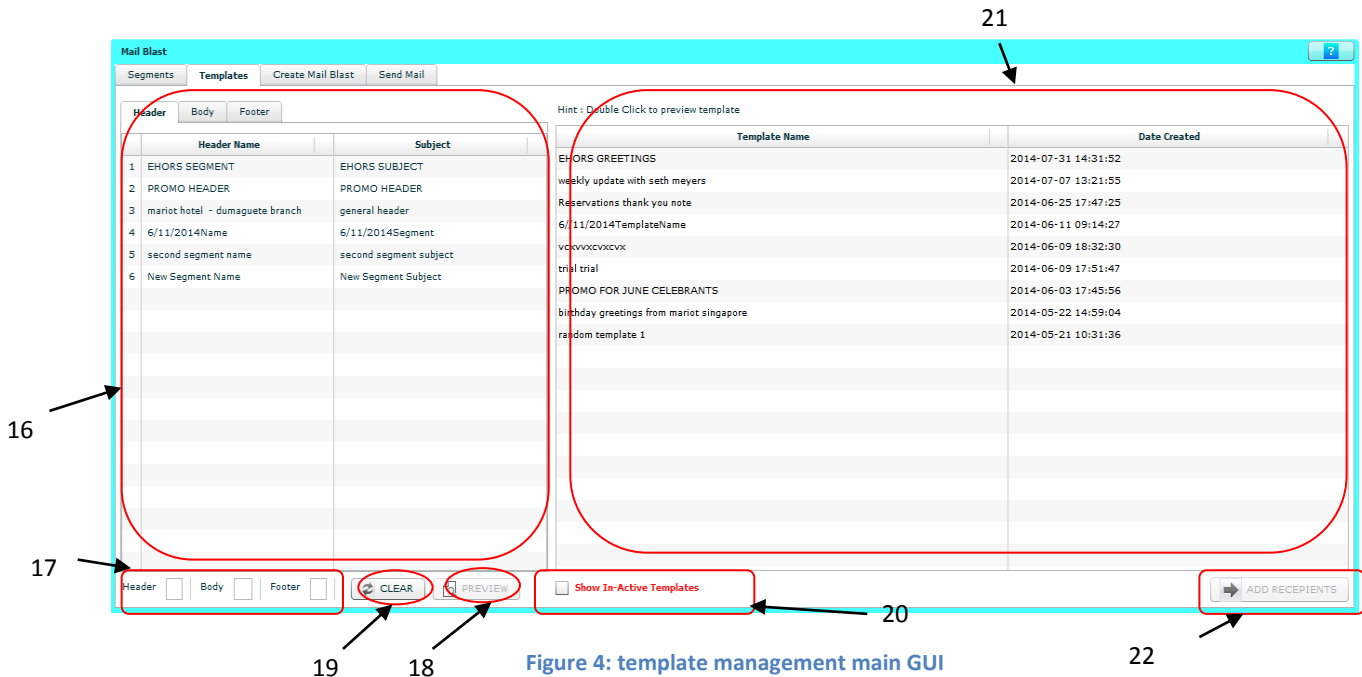
- NA

Basic Flow

- I. Step i, ii, iii, iv Similar to update segment procedure
- v. Click the “restore Previous segment” check box (10)
- vi. Select edition from list of previous editions in the grid (11)
- vii. Click Restore button (12), the pop up will close and the interface will refresh.

TAB 2: MANAGING EMAIL TEMPLATES

INTERFACE DESCRIPTION



Key:

16. List of available Segments options Data Grids (header, Body, Footer)
 - Shows all the available (i.e active) segments that can be used to create a template
 - Grids are always enabled
17. Segment selection indication text Input
 - Un editable
 - Used to show the number of the selected segment from option in grid (16) for template creation
18. Preview New Template button
 - Default disabled, enabled when Selection indication textInput (17) has a value
 - Used to Preview and save a new template
19. Clear Button
 - Used to clear the segment options selection
 - Always enabled
20. Show inactive templates Button
 - Used to show the hidden inactive templates in the available Templates grid (21)
21. Available Mail Templates Data grid

Key:

NB: the other fields are not selected because they are not involved in the preview and saving template procedure. They will all be used in the editing of templates

23. Preview Panel Text Area

- Displays a preview of the mail template **without the dynamic variables**
- Un editable, for preview purposes only

24. Template Name field

- For inputting the name of the template, that will also be used as the email Name when sending
- Always enabled and editable

25. Save template Button

- Used to save a new template to database
- Always enabled

26. Cancel Button

- Used to close the pop up, clicking outside the pop up will also close it.

PROCEDURE 5.1: CREATING A NEW MAIL TEMPLATE (Cont)

Required fields

- Template Name

Basic flow

1. Input a template in text input field (24)
2. Click Save Button (25)
3. The record will be added to the database ,pop up will close and main GUI refreshed

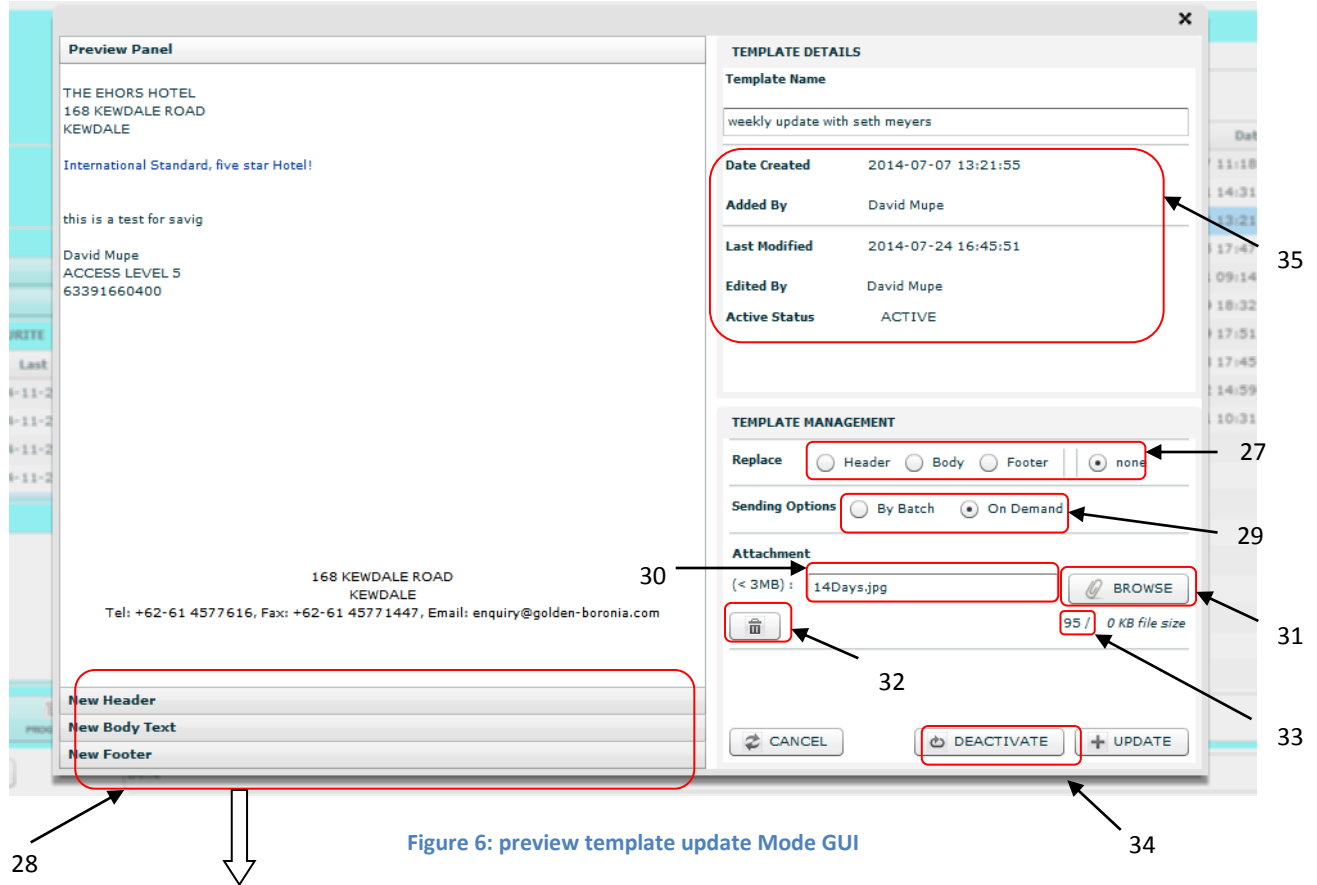


Figure 6: preview template update Mode GUI

Preview Panel		
New Header		
New Body Text		
Body Name	Subject	Date Added
PROMO HEADER ed	PROMO HEADER	2014-11-27 09:46:16
body text 4	body sample subject33	2014-11-26 15:26:09
Hotel's Greeting	Birthday Greeting	2014-11-26 15:22:46
Memberships program welcome	Memberships updates	2014-11-26 13:23:27
reservations thank you note	reservations	2014-06-25 17:45:00
Hotel's Greeting	Birthday Greeting	2014-06-20 14:42:30
PROMO BODY	PROMO BODY	2014-06-03 17:40:03
testing add	test	2014-06-03 09:04:43
body text 44	body sample subject33	2014-05-27 11:34:49
body text header date	body sample subject2	2014-05-27 10:55:56
second body text	body subject	2014-05-07 16:08:13
New Footer		

Preview Panel		
New Header		
Header Name	Subject	Date Added
EHORS SEGMENT	EHORS SUBJECT	2014-10-24 13:10:52
PROMO HEADER	PROMO HEADER	2014-07-02 09:06:04
mariot hotel - dumaguete branch	general header	2014-06-19 09:08:38
6/11/2014Name	6/11/2014Segment	2014-06-11 09:13:19
second segment name	second segment subject	2014-06-10 08:26:42
New Segment Name	New Segment Subject	2014-06-09 11:10:17
New Body Text		
New Footer		

Preview Panel		
New Header		
New Body Text		
New Footer		
Footer Name	Subject	Date Added
mariot hotel - Singapore	standard footer	2014-06-19 09:14:10
PROMO FOOTER	PROMO FOOTER	2014-06-03 09:09:34
mariot hotel - dumaguete ranch	Standard Footer	2014-05-06 13:59:09

Key;

27. Segment Replacement option Radio group

- Used to select a segment to replace with exiting segments in grid 28.1, 28.2, 28.3
- Selecting one of the radio button calls the corresponding grid hidden in the group of grids for segment options (28)
- At first click , MUST be clicked twice to load the data
- Is enabled only when editing an existing mail template

28. Group of segment options grids Accordion

- Always enabled, but contents are disabled when making a new template
- Hidden grids can be called by directly clicking on the accordion or a radio button from the replacement radio button group (27)

28.1. New Headers options Grid

- ◆ Contains a list of available headers for replacement

28.2. New Body Text options Grid

- ◆ Contains a list of available body texts for replacement

28.3. New Footers options grid

- ◆ Contains a list of available footers for replacement

29. Mail Sending options Radio group

- Used to specify how the mail will be sent, either once (On Demand) or by batch (scheduled)
- Default is On Demand

30. Attachment Name Text field

- Used to display the full name(with file type) of the attachment file selected or already assigned previously to the email template
- Each template can have **ONLY ONE** attachment file, of **3MB** maximum
- Upload-able formats are **jpg, png, gif, bmp, docx, txt, pdf**
- Used also to display the attachment uploading progress

31. Browse attachment button

- Used to browse for attachment files stored in the local computer
- Enabled only when editing an existing mail template

32. Delete attachment button

- Used to remove/delete the attachment file currently assigned to the selected mail template
- Enabled only when editing an existing mail template

33. File size indicator Label

- Used to display the file size being uploaded or previously assigned to a mail template

34. Activate/deactivate Button

- Used for deactivating and activating mail templates
- Label reads “ACTIVATE” when previewing an inactive template , “DEACTIVATE” for active templates

- Enabled only when editing an existing mail template
- 35. Template Details summary Labels
 - Displays a summary about the templates latest modifications activity and status

PROCEDURE 6: MODIFYING A MAIL TEMPLATE

NB: to modify a mail template **DOUBLE CLICK** on the list of available templates grid (21) and the preview pop up template will appear with all features enabled (23-35)

Requirements

- Template name (24)

Scenario 1: changing template Name or sending option

1. Manually edit the template Name in Template Name text field (24)
2. Click on By batch or On demand radio Buttons (29)

Scenario 2: Adding/updating attachment

1. Click the browse attachment button (31), a standard browse window will appear
2. The existing assigned attachment will be deleted automatically
3. Select a new attachment file
4. Display (30) and (33) will be updated accordingly

Scenario 3: Replacing a template segment

1. **DOUBLE CLICK** on one of the replacement segment type radio buttons (27)
2. The selected grid option will appear with a list of available replacement options
3. Click on one of the options in the grid (either from 28.1 , 28.2 or 28.3)
4. Main preview panel (23) will be displayed containing changes with the new segment replaced based on step 2 and 3

Scenario 4: Activating/Deactivating a mail template

1. Click on the activate deactivate Button (34)

General exit Procedure:

- For scenario 1,2,3 click on the UPDATE button (25), the pop up will close and the main movie will be refreshed to show the recent changes made to the templates
- For scenario 4, the pop up will close directly after executing the changes and refresh

TAB 3: CREATING A MAIL BLAST

MAIN GUI DESCRIPTION

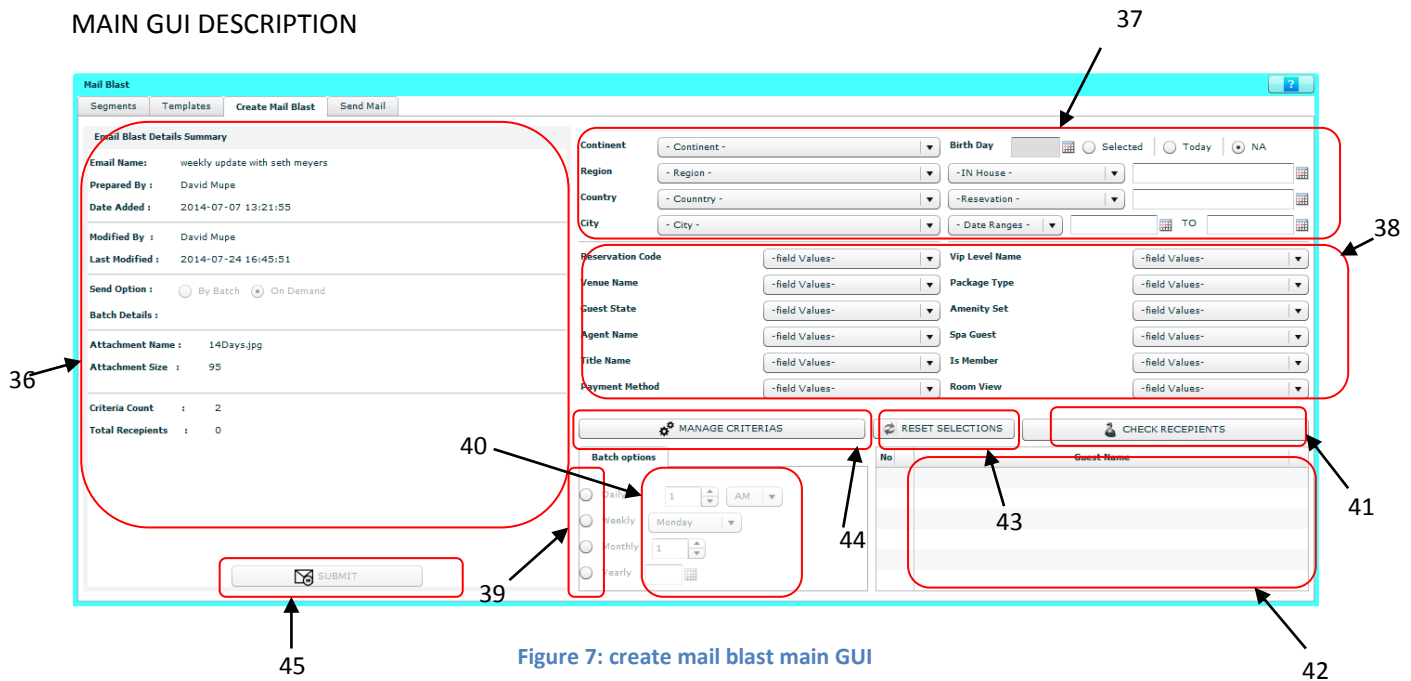


Figure 7: create mail blast main GUI

Key;

36. Email Details Summary label fields
 - Displays a summary of the email blast being constructed
37. Fixed search criteria fields group
 - This group of fields is made up of **fixed** criteria fields
 - The contents, Regions, Country and city names depends on the records of the existing hotel guest records
38. Flexible search criteria fields group
 - This group of fields is made up of the current configuration of recipients criteria, they can be changed any time (method to be explained in the next chapters)
39. Batch option schedule radio button group
 - These are used for selecting the type of batch schedule to be used for a mail blast that is to be sent by batch
 - Enabled only when a template sending option is by batch
40. Batch option schedule details fields
 - Used to specify the batch sending schedule details i.e time, date, weekday, day of the year
 - Each section is enabled as its corresponding batch schedule radio button(39) is selected
41. Check for recipients Button
 - Used for executing the command of fetching the recipient list of hotel guests who fit **ALL** the recipients criteria selected from the filtering criteria options (38,37)
42. Recipients preview data grid

- This displays a list of hotel guests fitting the selected criteria after pressing the check recipients button (41)
- The guest **MUST** have an email address in hotel guest table
- 43. Reset all criteria fields Button
 - Used for refreshing all the selected criteria fields (38,37)
- 44. Manage the flexible criteria fields button
 - This open a pop up window where the 12 flexible criteria (38) can be modified
- 45. Submit Mail Blast Button
 - Used for submitting a mail blast after checking for recipients and modifying the batch schedules
 - Enabled only when the number of recipients is NOT equal to zero
 - This button concludes the mail creation procedure.

NB: button 41, 43 and 44 are always enabled

PROCEDURE 7: CHECKING FOR MAIL RECIPIENTS

Requirements

- At least one criteria must be selected

Basic flow

1. Select one or more criteria from the list of available filtering criteria (37,38)
2. Click on the check recipients button (41)
3. The recipients preview data grid (42) will show the list of guest who fit **ALL** the criteria
4. Process can be repeated multiple times, one or all criteria options can be used simultaneously

PROCEDURE 8: MODIFYING MAIL BLAST BATCH DETAILS

Requirements

- These features are only available to batch email templates

Basic flow

1. Select one of the four batch option radio buttons (39)
2. The corresponding batch option setting (40) will be enabled
3. The user can then calibrate the schedule using the field provided

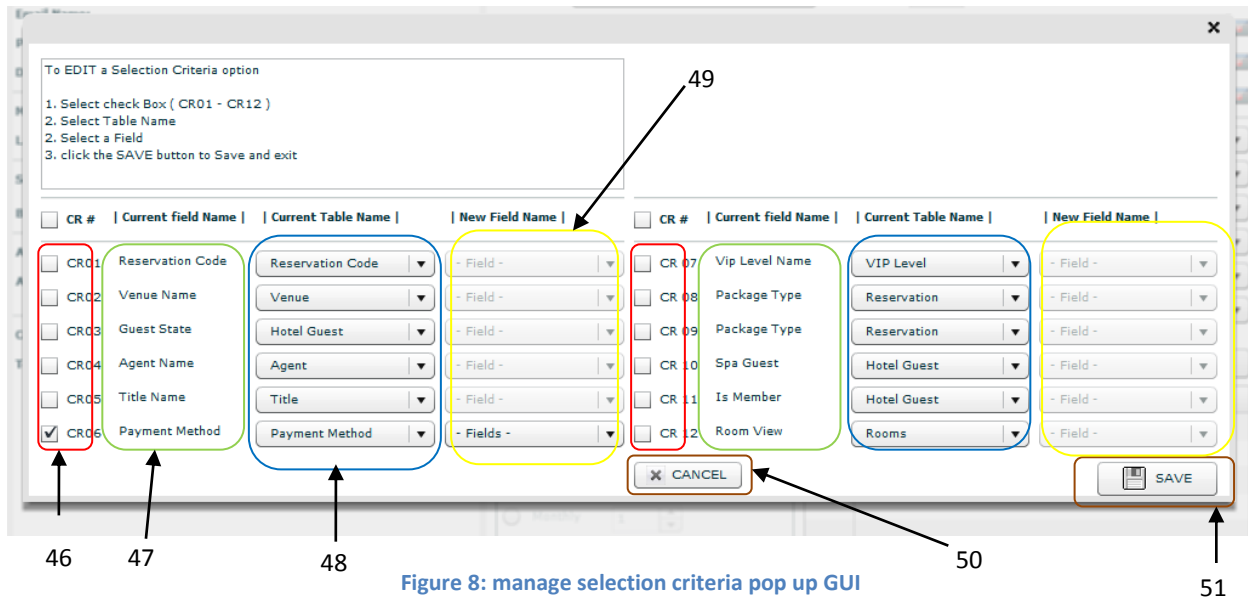


Figure 8: manage selection criteria pop up GUI

Key;

- 46. Criteria Number check box (indicated with red)
 - Used as guide indicating the location of criteria on main GUI (see figure 7, component 38)
- 47. Current selected selection criteria field name labels(indicated with green)
 - This shows the selection criteria currently in use
- 48. Current selected selection criteria table name combo boxes (indicated with blue)
 - This shows the table name from which the selection criteria is retrieved from
- 49. New field name to be used for selection criteria combo boxes
 - This is used to select a new field replacing current selection criteria fields (47)
 - This field options are based on the new table selection (48)
- 50. Cancel button
 - Used to close the pop up and refresh main gui (figure 7)
- 51. Save changes button
 - Saves the selection criteria modifications to database and refresh main gui (figure 7)

PROCEDURE 9: MODIFYING THE FLEXIBLE MAIL CRITERIA OPTIONS

NB: To open the manage criteria pop up, click the MANAGE CRITERIA button from create criteria interface (figure 7, component 44).

Requirements

- NA

Basic flow

1. Select any of the criteria number check boxes (46)
2. This will load the enable the new field name combo box (49) and load the fields based on table name(48) selected
3. The user can change the table name from combo boxes, program will return to step 2 above
4. Select a field name from the list of available fields (49)
5. The user can modify other criteria fields following steps 1 to 4 again
6. Click Cancel to exit or click SAVE to save changes made
7. The pop up will close and the main create mail blast GUI (figure 7, component 38 will be refreshed)

PROCEDURE 10: SUBMITTING MAIL BLAST TO REPOSITORY

Requirements:

NB: The Submit Button (figure 7, component 45) will be enabled only if at least 1 recipient is found in procedure 7: check mail recipient

The guest list will NOT be saved after checking because the list is dynamic

Basic flow

1. click the submit button (45)
2. The create mail blast GUI will be refreshed and all records (criteria names, mail blast details) will be saved in the database.

TAB 4: SEND MAIL TEMPLATES

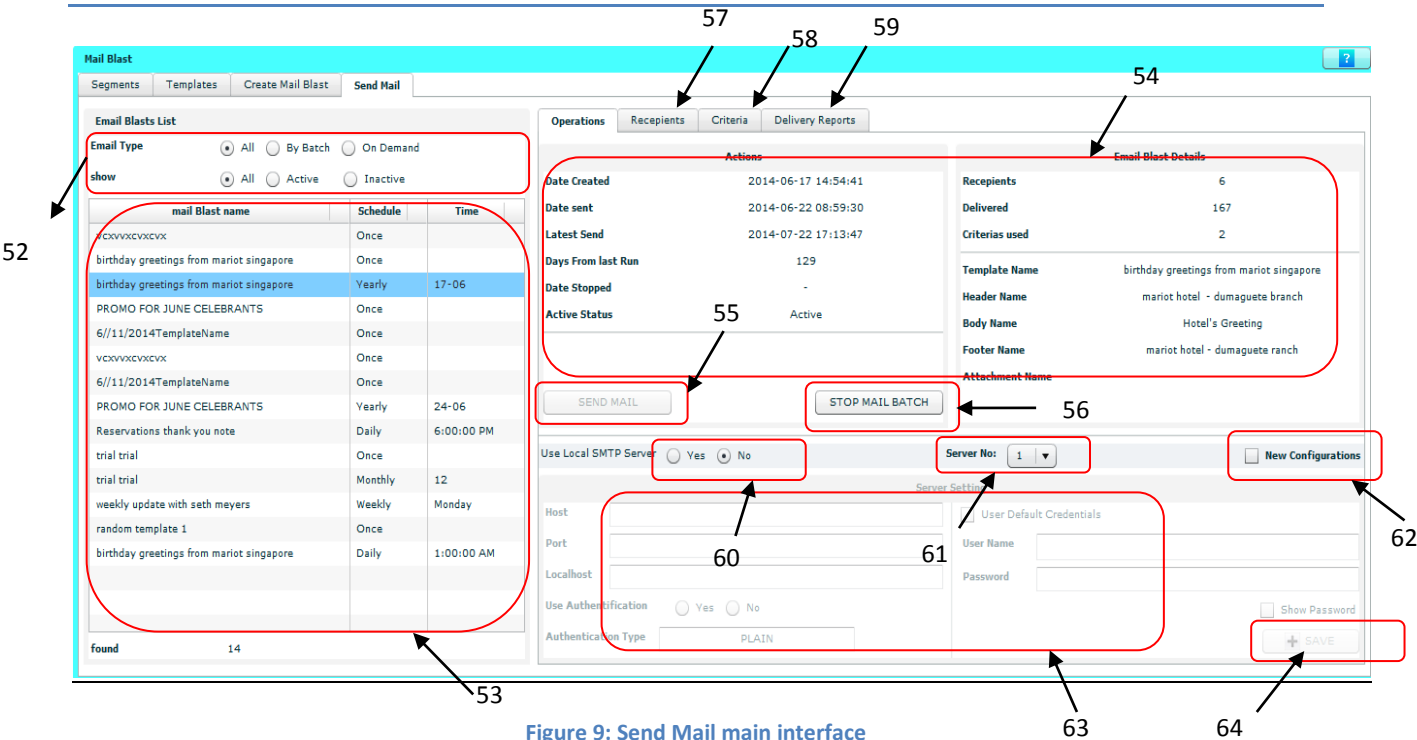


Figure 9: Send Mail main interface

Ref 57

Operations	Receipients	Criteria	Delivery Reports
No	Guest Name	email Address	
1	Dave Nickolson	jack@yahoo.com1	
2	Ben Tenison	benten@ehors.com	
3	David Mupe	dv@ehors.com	
4	Dwayne Wade	wade@ehors.comm	

Ref 58

Operations	Receipients	Criteria	Delivery Reports
Criteria(s) Used		criteria Condition/Value	
Package Type		template	
Room View		Sea view	

Ref 59

Operations	Receipients	Criteria	Delivery Reports
No	Guest Name	Delivered	date delivered

Key;

52. Mail Blast list filter radio buttons

- Used to filter the mail blast list data grid (53)
- Default filters are **All** email types , show **Active** only
- These filters do not refresh the grid from database by simply filters the current items

53. Mail blast list data grid

- Show a list of all available mail blasts based on the radio button filters (52)

54. Selected mail blast details

- These labels shows a summary of the selected mail blast
 - ◆ date it was created (**Date Created**)
 - ◆ the date it was sent for the first time (**Date Sent**)
 - ◆ the date it was last sent (**Latest send**)
 - ◆ days from the last time it was sent (**Days From Last Run**)
 - ◆ The date the batch mail was stopped/deactivated (**date stopped**)
 - ◆ Active status
 - ◆ Current number of recipients (**Recipients**) based on the stored recipient criteria
 - ◆ Number of mail delivered / mail sent ratio (**Delivered**)
 - ◆ Number of criteria used for the mail blast recipient search (**criteria used**)
 - ◆ Email template details

55. SEND MAIL button

- Used to execute SEND MAIL
- Action sends a mail immediately and saves batch mail to mail to repository as active

56. STOP MAIL button

- Stops / deactivates currently active batch mail blasts

57. Mail recipients list data grid tab

- This displays a list of available recipients based on the mail blast's selection criteria
- On clicking SEND MAIL (55) this list will be used as recipients, for batch mail blast the recipient list will be searched again before sending

58. Mail recipients selection criteria data grid tab

- Display the saved selection criteria of the selected mail blast from list grid (52)
- This list of selection criteria is **un editable** submitting mail blast (see procedure 10)

59. Mail delivery report data grid tab

- Displays the delivery report for all mail sent (delivered or not delivered)

60. Use local SMTP server options radio buttons

- Used to specify if the mail blast should be run from the local SMTP server or ehors servers
- Default is No

61. Local SMTP server number options combo box

- The user can select from the list of saved server configurations

62. New SMTP server configurations details check box

- Clear all the SMTP details input fields for adding new server SMTP configurations

- 63. Local SMTP server details input fields
 - Input fields
- 64. Save local SMTP server details button
 - Saves the inputted server details (63)

PROCEDURE 11: SENDING MAIL BLAST

Requirement

- a mail blast must be selected from the grid (52)

Basic flow

1. click on the Send Mail button (55)
2. batch mail will be sent and added to batch mail set as active, or activated if inactive
3. on demand mail will be send, no record will be added to batch repository
4. the mail GUI will be refreshed once the command is executed

PROCEDURE 12: STOPPING MAIL BLAST

Requirement

- a mail blast must be selected from the grid (52)

Basic flow

1. click on the STOP Mail button (56)
2. batch mail will be deactivated/stopped
3. the mail GUI will be refreshed once the command is executed

PROCEDURE 13 : ADDING/UPDATING LOCAL SERVER SMTP SETTINGS

Requirement

- None

Basic flow

- 1 After inputting server smtp configuration details
- 2 The record will be added to database