



Havit Showcase Eblast System User Guide

Version 2.0

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Revision History

Date	Version	Reason for Change	Author
4/11/2008	0.0	Initial Version	
4/15/2008	0.1	Minor Content Revisions	
7/15/2008	2.0	Added Functionality	

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Overview

This document will provide you with detailed instructions on how to interact with the Havit Showcase Eblast System. The Havit Showcase Eblast System allows you to create, import and edit email distribution groups, and create and send Eblasts. You also have the option to view reports on Eblasts after they have been sent.

Navigation

Once you have logged into the Email Campaign Management area, you will have access to a navigation menu along the top of the screen, which will always be present and includes the following options:

- **Home** – Return to the homepage
- **Addresses** – Create, edit and delete email addresses from specific groups
- **Import** – Import an Excel document with email addresses to specific groups
- **Groups** – Create, edit and delete groups
- **Eblasts** – Create, edit and delete eblasts
- **Reports** – View statistics of sent eblasts
- **Preferences** – Adjust general email list properties
- **Logout** – Exit the system

On the homepage, these options will also be listed as hyperlinks in the body of the page, with a short description below them.

Addresses

Clicking on the **Addresses** link on the homepage or in the main navigation menu opens the **Email Address Management** page. On this page, you can search the database for specific email addresses or add individual email addresses.

Search

The **Search** feature allows you to enter all or part of an email address or name to locate information within the database. By default, the search string entered in the search field includes wildcards both before and after the string. In addition, a search checks first name, last name and email address for matches. For example, if you entered **ryan** in the **Search** field, your results

would include R. Jones (email: **ryanjones@yahoo.com**), Cathy **Bryant** (email: **cathyb@gmail.com**) and **Bryan** Smith (email: **bsmith@smithcorp.com**).

If you would like to include a wildcard *within* a search string, use **%**. For example, you might enter **joe%smith@%.com** in the **Search** field if you wanted to locate all email addresses that include the name Joe Smith (e.g., joe.smith, joe.g.smith, mrjoesmith, etc.) and have a .com ending (e.g., @hotmail.com, @yahoo.com, @comcast.com, etc.).

When you complete a search by entering criteria in the **Search** field and clicking the **Search** button, results will be presented in a table. If there are a large number of results, they will automatically paginate, limiting the number of records presented per page. Results include the first and last name (**Name**), email address (**Email**), the date and time they joined the distribution list (**Joined**) and the distribution group name (**List**) for each record that meets the search criteria. Each result also includes the option to edit (pencil icon) or delete (red X icon) the record. Clicking the **Edit** icon allows you to modify the name and email information for the record. Clicking the **Delete** icon removes the record from the database. In addition, clicking the hyperlinked email address will allow you to send an individual email to the selected person.

NOTE: When a record is deleted from the database, it is removed from any group in which it was included. In addition, if the deleted email address is in the queue for an eblast, the email address will be removed from the queue.

Add

The **Add** feature allows you to add a single record to the database. Clicking the **Add** button opens the **Add Email Addresses** page. On this page you can enter the first and last name and email address for a single record and can also assign the record to a **Group**.

Click the **Save** button to save the new record.

Import

Clicking on the **Import** link on the homepage or in the main navigation menu opens the **Import Email Addresses** page. On this page, you can import previously created mailing lists.

NOTE: In order to import a list, it must first be saved as a CSV (Comma Separated Values) file.

Click the **Browse...** button to select the file you would like to import. To assign all of the records in the imported file to a specific distribution group, select a **Group** from the dropdown list.

NOTE: If the group you would like to assign the records to is not listed in the dropdown, you will need to add the group first. See the **Group** section for details on how to do this.

If the file you are importing includes column headers (i.e., First Name, Last Name, Email Address), you will need to check the **First Row Contains Column Headers?** check box.

NOTE: If you do not include column headers, records will not include first and last names, and therefore To addresses will not include a name. This may negatively influence how the eblast is received and flagged by mail servers.

When using the **Import** option to update groups that have been previously imported, the email addresses in the new file will be checked against the email addresses in the current database records. Only new records that are not currently in the database and have not been previously unsubscribed will be added to the group.

Once you have selected a file to import, click the **Save** button to save the records and/or group to the database.

Groups

Clicking on the **Groups** link on the homepage or in the main navigation menu opens the **Email Group Management** page. A table is presented on this page listing all available groups (**Title**), as well as the number of people associated with the group (**# subscribed**) and the date and time the group was created (**Created**). You can view all members in a group by clicking the hyperlinked number in the **# subscribed** column. In the **Actions** column, each result also includes the option to export the group to a CSV file (page with green arrow icon), edit the group (pencil icon) or delete the group (red X icon). Clicking the **Edit** icon allows you to modify the title of the group. Clicking the **Delete** icon removes the group from the database.

NOTE: If you delete a group from the database after an eblast has been scheduled for distribution to the group, any email addresses remaining in the queue that belonged to the deleted group will be removed from the queue and the eblast will not be sent to these email addresses.

You can also add a new group by clicking the **Add** button and entering a new group name. Click **Save** to save your new group. Once a group has been added, it will appear in the **Groups** dropdown list in all areas where you can assign records to a distribution group.

Eblasts

Clicking on the **Eblasts** link on the homepage or in the main navigation menu opens the **Eblast Management** page. On this page, you can view information about all eblasts, including the eblast **Subject**, date and time **Created**, and **Status**. An eblast can have one of four statuses: **Pending** (actively being created); **Scheduled** (a time and date has been set, but sending has not begun); **Sending** (indicates the number remaining to be sent); and **Sent**.

To view a web version of any eblast in the list, click the *link* in the **Subject** column for that eblast. In the **Actions** column, each eblast listed also includes options to **Create a Copy** (duplicate pages icon), **Edit** (pencil icon), or **Delete** (red X icon) the eblast. In addition, when an eblast has been saved but has not yet been scheduled, a **Schedule** option (calendar icon) is available in the **Actions** column for that eblast. Alternatively, when the status for an eblast is

indicated as **Sent**, a **Report** option (notebook icon) is available in the **Actions** column for that eblast.

Clicking the **Edit** icon allows you to modify the eblast content. Clicking the **Delete** icon removes the eblast from the database and removes from the queue any email addresses to which the eblast has not yet been sent. Clicking the **Create a Copy** icon for an eblast copies the eblast, adding the copy in a new table row at the bottom of eblasts list and appending “Copy of” to the subject of the duplicated eblast. The copy can then be modified by clicking the **Edit** icon for the copy. Clicking the **Schedule** icon, if available, will open the **Schedule** page for the selected eblast. Clicking the **Report** icon, if available, will open a **Reports** page for the selected eblast.

New Eblasts

To create a new eblast, click the **Add** button to access the **Eblast Templates** page. On this page you can select a template by clicking one of the template images. The **Create Eblast** page will open and you can enter the various information and images necessary for each section of your eblast.

In the **Group** section, select from the dropdown list a group to receive the eblast and click the **Add** button. You can select multiple groups by choosing additional groups from the dropdown list and clicking the **Add** button for each one. To remove a group from the distribution list, click the **Delete** (red X) icon beside the group name.

In the **Email Subject** section, enter the subject of the eblast email. In the remaining sections (**Header, Content, Child Creative** and **Secondary**), enter the content and image paths you would like to include. You can also make any necessary modifications to the **Disclaimer** section, which is automatically populated with a pre-written disclaimer.

NOTE: You do not need to enter the newsletter@havitshowcase.com email address in the secondary section, as it is automatically generated and placed in the eblast.

In the **Child Creative Section**, you can modify the number of child sections that will be included in your eblast. New fields will be dynamically generated or removed according to the number you selected.

NOTE: If you decrease the number of child sections, you will receive a confirmation message with options to continue (**OK**) or **Cancel**. If you confirm that you would like to remove sections by clicking **OK** in the confirmation dialog box, you will lose any information entered into the removed child sections.

The **Save** button at the bottom of the **Create Eblast** page saves your work without sending a preview email.

The **Preview** button saves your work and sends an email to the email address of the administrator that is creating the eblast.

Scheduling

The **Schedule** button saves your work and opens the **Schedule** page. On the **Schedule** page, you can select a time and date for your eblast to be sent. To schedule the eblast to be sent on a future date, use the calendar selector to choose a send date. (Using the calendar selector ensures that the date is formatted correctly.) To schedule the send time, select an hour and minutes from the time dropdown lists. The minute options are listed in 15-minute increments.

NOTE: The scheduled time will default to the next 15-minute interval on the current day unless you modify the time and date options. For example, if you click the **Schedule** button at 3:21PM, the schedule interface will default the scheduled send time to 3:30PM.

Clicking the **Schedule** icon on the **Eblast Management** page will also open the **Schedule** page for the selected eblast.

Reports

Clicking on the **Reports** link on the homepage or in the main navigation menu opens the **Reports** page. On this page, you can view information about all ebcasts. The table includes the eblast **Subject**, **Date** (and time) **Sent**, the number **Sent**, the number of **Bounces**, the number of **Clicks** and the number of **Unsubscribes**. If the numbers listed in the **Bounces**, **Clicks** or **Unsubscribes** columns are greater than zero, they will be hyperlinked. Clicking these numbers will open a separate **Reports** page for the individual eblast, providing additional information for the specific eblast, including a list of pages that have been accessed, a list of email addresses that have bounced the eblast, and the email addresses of anyone who has unsubscribed.

NOTE: Each time an eblast is bounced, an email is sent to errors@havitshowcase.com. The system automatically checks this email account for bounces and records the number of bounces in the **Reports** section every five minutes.

In addition, any available reports can be exported as a CSV file using the **Export Report as CSV** link above the desired report. This link will open a popup window with **Save** options allowing you to specify the location where you would like to save the file.

Clicking the hyperlinked subject of the eblast on the **Reports** page, or clicking the **Reports** icon on the **Eblast Management** page, will also open the **Reports** page for the selected individual eblast.

Preferences

Clicking on the **Preferences** link on the homepage or in the main navigation menu opens the **Preferences** page. On this page, you can view and modify the account email address and password information. You can also modify the **From Email Address** and **From Name** from which any eblast you create will be sent. Click the **Save** button to save your changes.

Additional Information

Sending commercial emails can create a number of potential problems. The following information on industry **Best Practices** and the additional resources included in the **Links** section will assist you in reaching your desired audience with as few problems as possible.

Best Practices

- Always specify a return path.
- Include an unsubscribe link in your eblast. This link should provide immediate, across the board removal of the subscriber's email address and should not require a wait period before deletion from the mailing list.
- The From email address should be legitimate.
- Offer an alternative method for viewing the email (e.g., include a link to view the email as a web page).
- Do not include any JavaScript or forms within your eblast.
- Including headers (first and last names) in your email lists gives your eblasts more credibility and helps avoid being sent straight to the junk email folder.

Links

The following links will provide you with additional information on industry best practices and legal issues regarding commercial emails:

- Enter your IP Address at <http://www.mxtoolbox.com/blacklists.aspx> to determine if your company has been blacklisted.
- Enter your IP Address at <http://www.spamcop.net/bl.shtml> to determine if your company has been flagged by the SpamCop Blocking List.
- The site <http://postmaster.aol.com> includes a variety of useful information. You can also sign up for the feedback loop, which will notify you if a user puts your email in the junk mail. This way you can unsubscribe the customer, instead of risking being blacklisted.
- For specific best practices when sending email to Yahoo email users, visit <http://help.yahoo.com/l/us/yahoo/mail/postmaster/postmaster-15.html>.
- For legal information specific to commercial email systems, visit <http://www.ftc.gov/bcp/online/pubs/buspubs/canspam.shtm>.