Volume

1

FIRST WALKTHROUGH

The 10-Minute Guide to Using Newsletter Services

First Walkthrough:

the 10-Minute Guide

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Getting Started

In this walkthrough we will be creating a newsletter campaign that demonstrates important features of the service and gets you started with email marketing.

This exercise is designed so that you can follow these steps from start to finish. You will add your contacts, select and edit a template, schedule your email delivery and finally monitor the status of the campaign. There are many options or advanced features that we may not explore in this walkthrough. For more details, tutorials you may please visit the learning center.

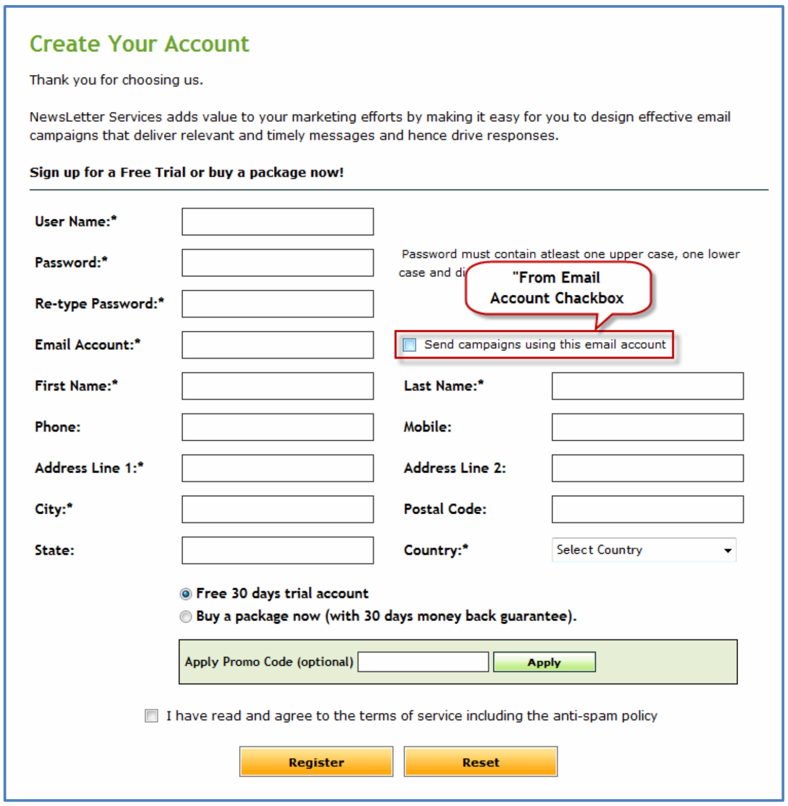
Here are a few tips or requirements to consider before performing this exercise:

1. Login details of the designated email account are required from which you plan to send email messages. (The *"from email id"*).
2. List of targeted contacts. For bulk upload you may use an excel sheet in the prescribed format.
3. Optionally you may need your organizations logo, a template or a designed html email if you wish to use your own (a wide variety of pre-designed HTML email templates are available online in the system for your use).
4. Your message – whatever you wish to communicate…

Step - 1

Sign-up for an account

To create a user account and use the service, [Click here](#) to Sign-up. Or visit our website at www.newsletterservices.in and click on Sign up. Follow instructions on the next screen to create your account.



Instructions:

1. Fill in your contact details.
2. Password should be a minimum of 6 characters and must contain at least one upper case, one lower case and digits. **(e.g. : aB12de)**
3. To use your contact email id as your designated email id for sending email select the following checkbox <u>"Send campaigns using this email account"</u>
4. Agree to the terms of service, click on the register button.
5. Check your email account; you will receive a confirmation email containing your login details.

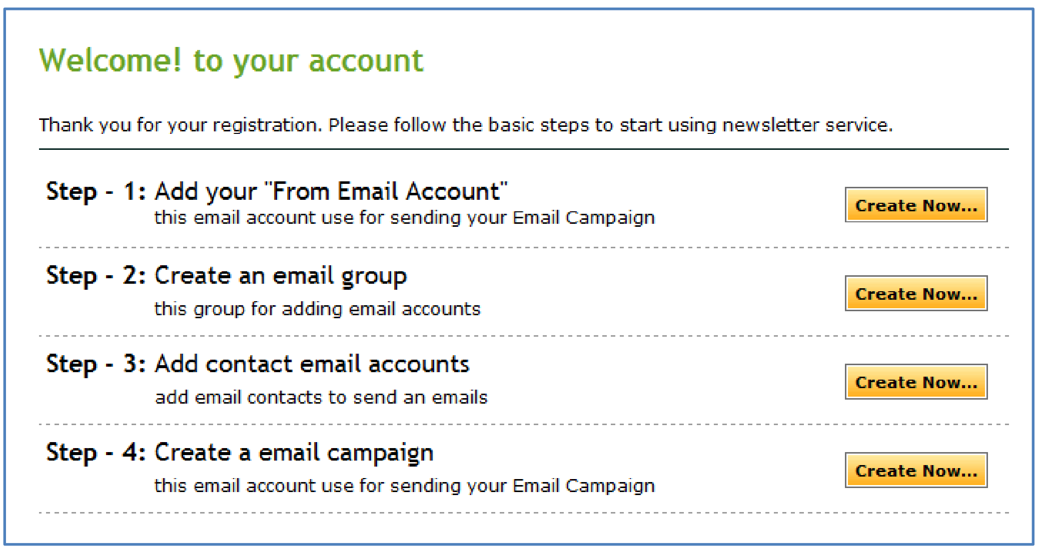
Step – 2

Authenticate your "from" email address.

On the successful completion of the registration process you should receive an email containing your login details as mentioned in step-1above. Using these login details you can now login to your account and get started.

To make things easier for you, we have included on the welcome screen a four step wizard. Using this wizard you can get started with creating your first campaign in less than a few minutes.

On your first login you will be presented with the following welcome screen:



To start sending email campaign you should have at least one authenticated email account configured as the "from address". You will also need to add your contacts to a group. These steps will be explored in later sections.

On the above screen, click on the "Create Now" button for Step – 1 or on the menu bar click on **Add >> New "From" Email Account,** Follow on screen instructions to add the "from" email account. This address is used all your email campaigns and the recipients of your emails will see this address as the senders address.

"This step is optional if during registration you selected to use your contact email id as the "from" address. However you would still receive an authentication email which you will need to process."

Note:

The steps mentioned in this walkthrough can be performed using the welcome screen. Later on the same can be performed using the menu bar shortcuts.

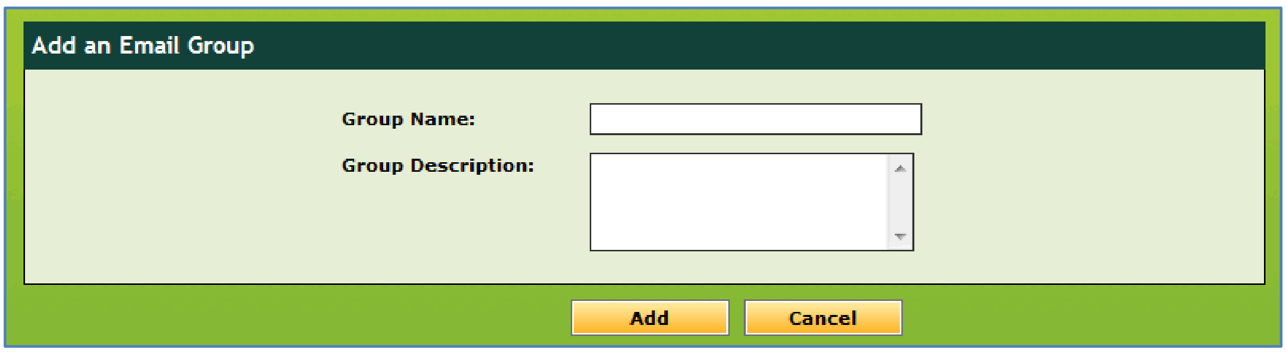
Step - 3

Create a contact group and add contacts

Create a contact group:

Organizing contacts using groups helps you classify contacts according to their relevance and send them targeted email campaigns. To add contacts in to the system you need to first create a group.

1. To create a group, on the menu click on **Add > New Group**



2. Add a group name and description (for e.g. Group name: Business Partners and Description: Partners for a Service / Product)
3. Click the Add button.

Note:

Adding descriptive name and descriptions will help you manage your customer lists and groups better.

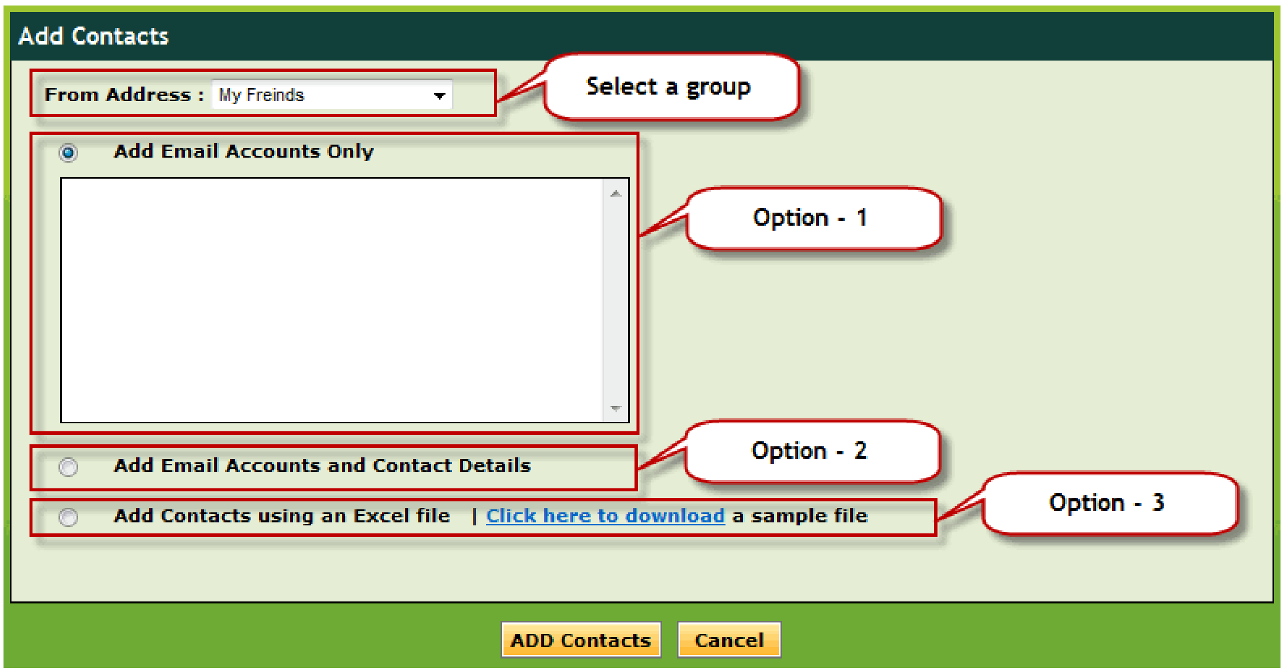
Once you have created groups, you can add contacts…

To add contacts, on the menu bar click on **Add >New contact**

There are three options available to add contacts; you may choose any of them as per your requirements

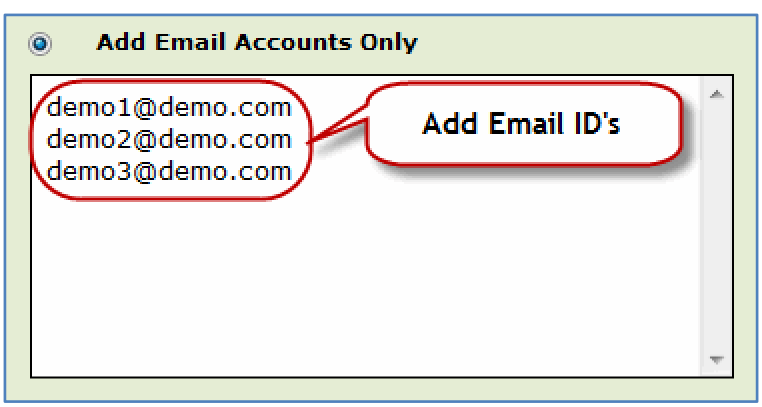
The options available for adding contacts are:

- **Option-1:** You can add only email accounts as your contacts
- **Option-2:** You can add email accounts along with selected details (e.g. First Name, Last Name, etc.)
- **Option-3:** For bulk uploading of contacts you can use an excel sheet containing contact details (Please see the prescribed format)



Option -1

Using this option you can add only email accounts to your contact database. You can type or paste email accounts in the textbox and click the "**Add Contacts**" button. (You may paste / type one email account on each line).

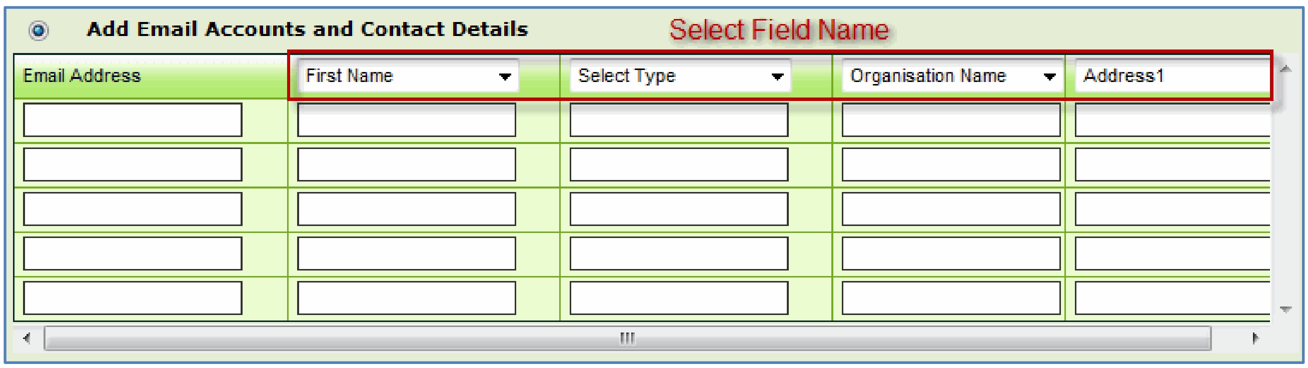


Note:

This is quick method for adding email accounts to your contact database, However since no additional details (name etc) are stored in your contact database this method is most useful only for generalized emails. Personalized emails are more effective and we recommend that you add personal / organization details to the contacts database for better results.

Option -2

In this option you can add your contact's email accounts along with personal or organization details as per requirement. You can enter details in the screen presented. Select the fields from the drop box as shown below and enter the relevant data:

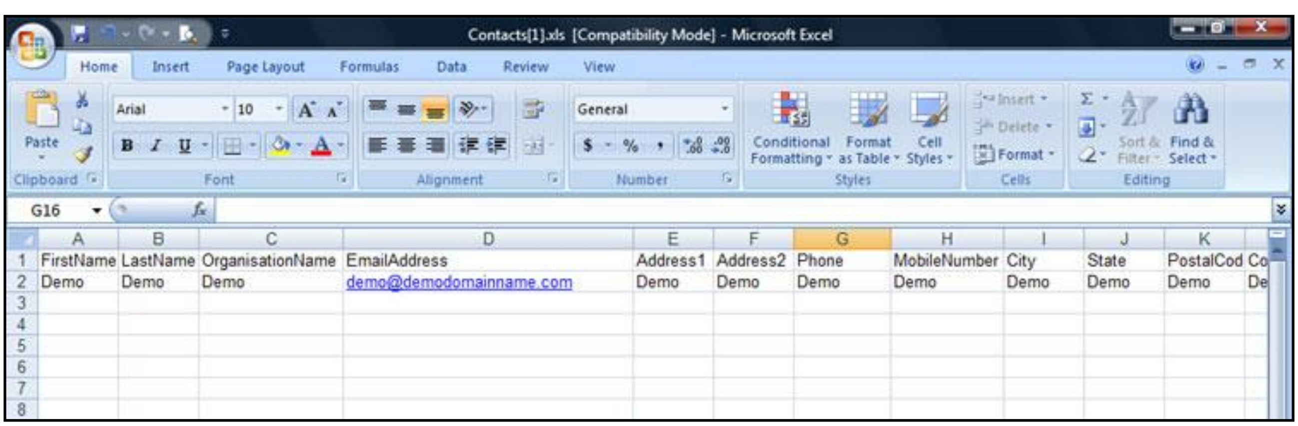


Note:

In this option you can add only 5 contacts at a time in the database. But if you have large number of contacts then you can use **option-3**.

Option -3

Using this option you can add a large number of email ids with their names and other details very quickly in to your contacts.. You may simply download the excel sheet, organize your data in the prescribed format and then import the same.



Using the excel sheet you can add multiple email id with their names and other details. Refer to the demo data in the excel sheet on how to organize your data. Remember to clear the demo data before uploading the excel sheet.

Note:

Email Address is a mandatory column, and a file with incomplete or incorrect details in this column will not be processed. Please also note you cannot change the column headings.

Once your sheet is ready upload the same by clicking on the browse button and the click on "**Add Contacts**" button.

Note:

This method is useful for adding a large number of contacts to your contacts database, also please note that except for the email address field other data is not mandatory.

Step - 4

Create a campaign

Since the basic steps of authenticating the "from address" and adding contacts are completed we can now proceed to creating a campaign.

1. To create a campaign click on **Add > New Campaign**
2. On the screen presented type in a **campaign name**

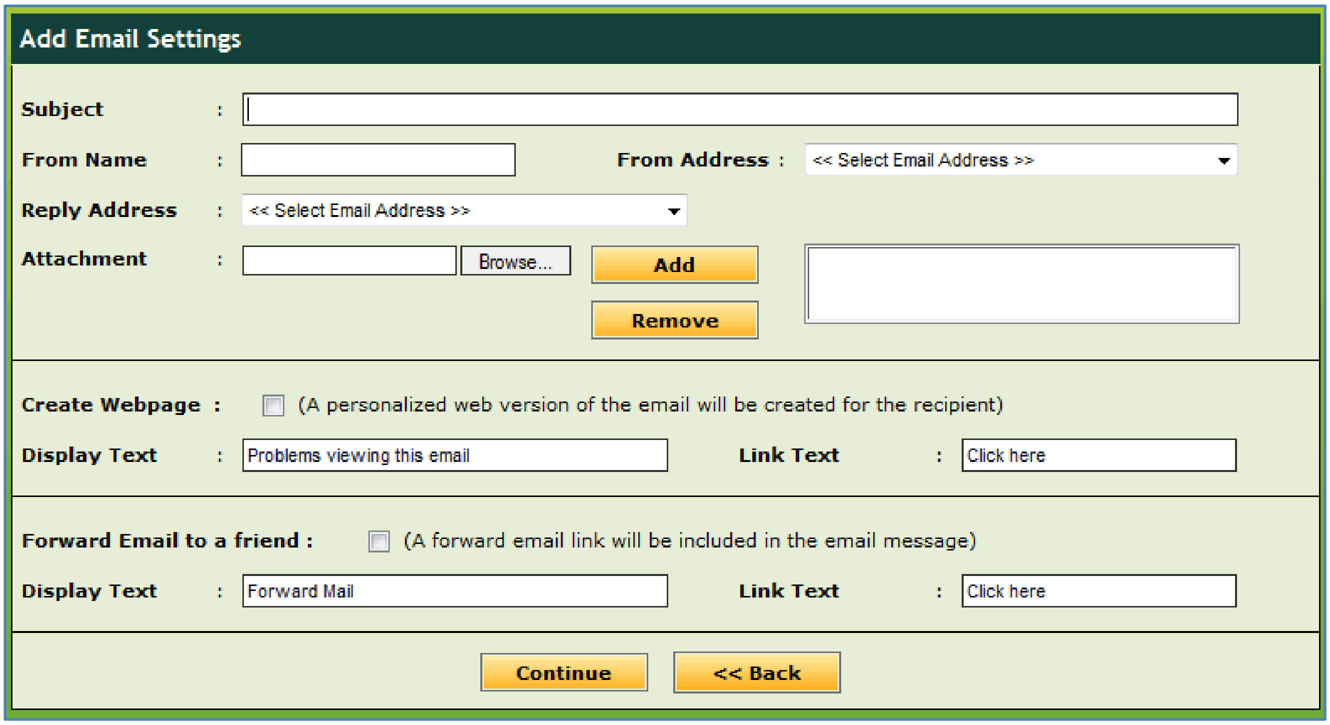
3. Select any one template from below given pre-designed templates and then click on the "**Save & Continue**" button.

Step - 5

Add email details

After creating a campaign name and selecting a template, you need to add email details for sending emails.

On the screen presented please enter the following details as shown below:



Explanation:

- **Subject:** Type the subject line of the email; this is the subject line that your contacts will see for this email.
- **From Name:** Type the senders name in this field.
- **From Address:** Select an authenticated email address for sending this email.
- **Webpage Version:** Selecting this option creates an HTML page of this email and includes a link to the same in the email, which your contacts can view in case they are unable to view the email correctly.
  - Text line: include the display information for the HTML Version of the email

  - Link line: include the link to the html version of the email

- **Forward Email to a friend:** Select this checkbox to include a forward email option in to the email. when a recipient clicks on this option he will be presented with an web page asking for the forwarding details.

- Text line: include the display information for the "**Forward Email to a friend**" page .

- Link line: include the link to the **Forward Email to a friend**" page.

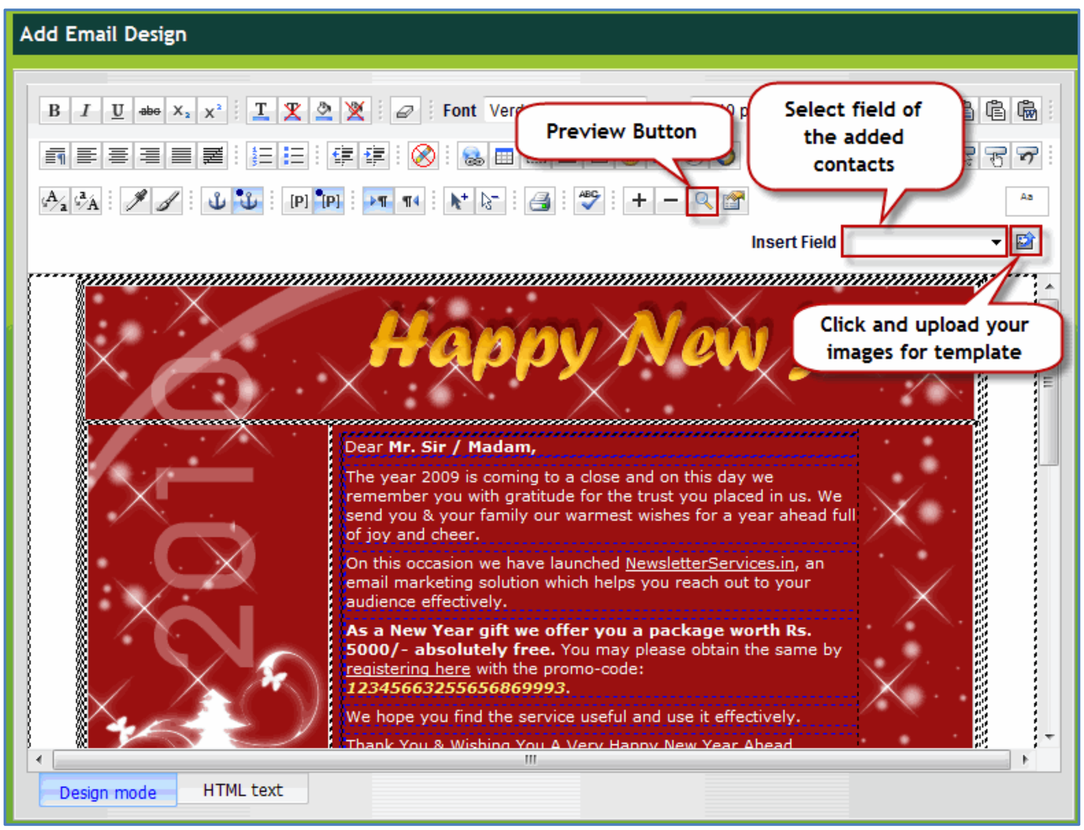
Enter the above mentioned information and click on the "**Save & Continue**" button.

Step - 6

Modify the selected template

On the next screen presented, you will have the option to edit the template, add your message, insert your company logo or any other images (an option to upload your images is also provided) and modify the look and feel of the template. This screen presents to you a full featured WYSIWYG HTML editor which enables you to make changes you desire. You may preview the changes to view the final look of the message.

Do remember to add the contact fields (for e.g. First Name, Last Name of the Contacts etc) in your message to personalize the same.

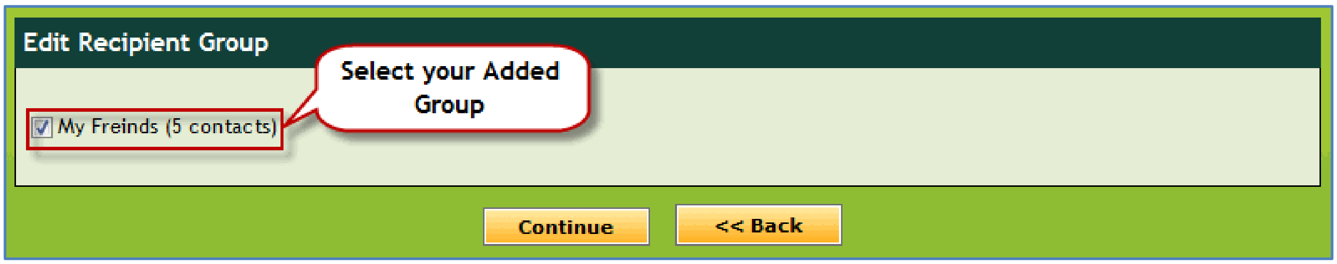


After you are done with the changes click on the "**Save & Continue**" button.

Step - 7

Select your targeted contact group.

Select the targeted contact group to which you wish to send the emails; you may select multiple groups based on your choice.



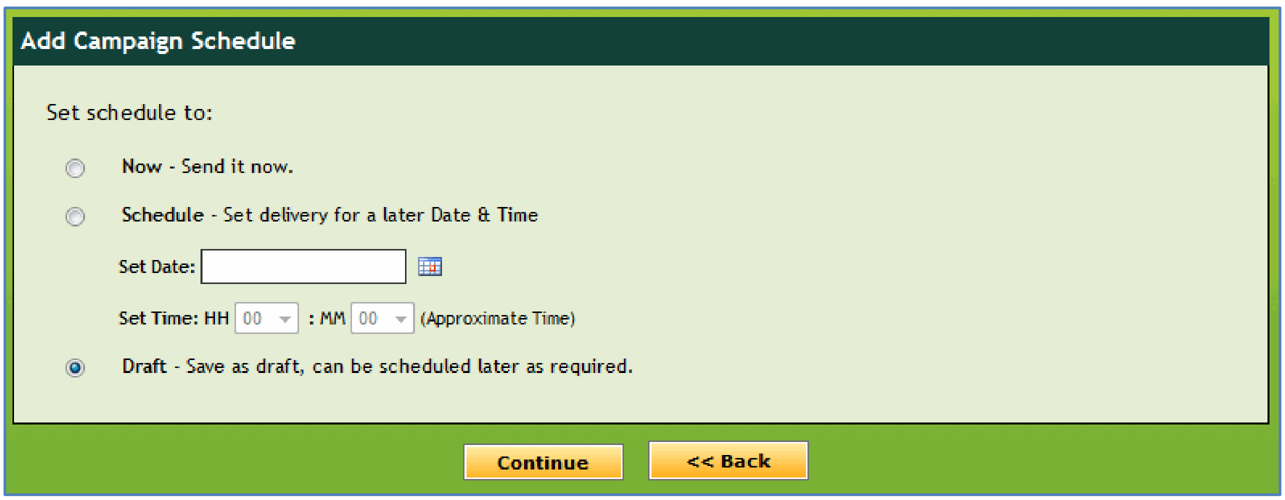
Select the email group(s) and click on the "**Save & Continue**" button.

Step - 8

Schedule your email campaign.

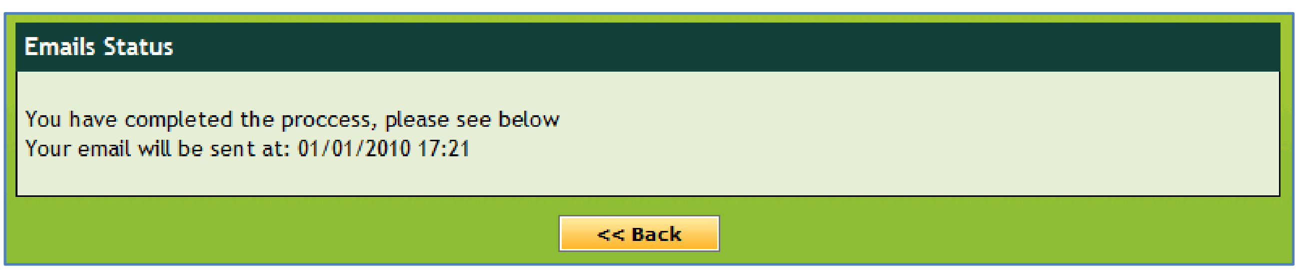
Congratulations! Your email campaign is ready to send. You now you have three options:

1. Send the same immediately,
2. Schedule it for later at a date and time of your choice or
3. Save it as a draft for reviewing later.



Select the option of your choice and click on the **Continue** button

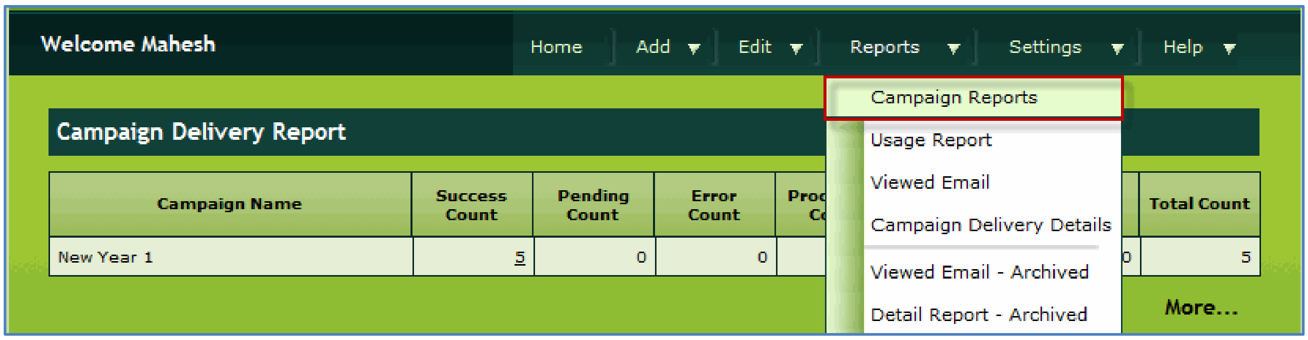
On the final screen presented you are presented with a confirmation message.



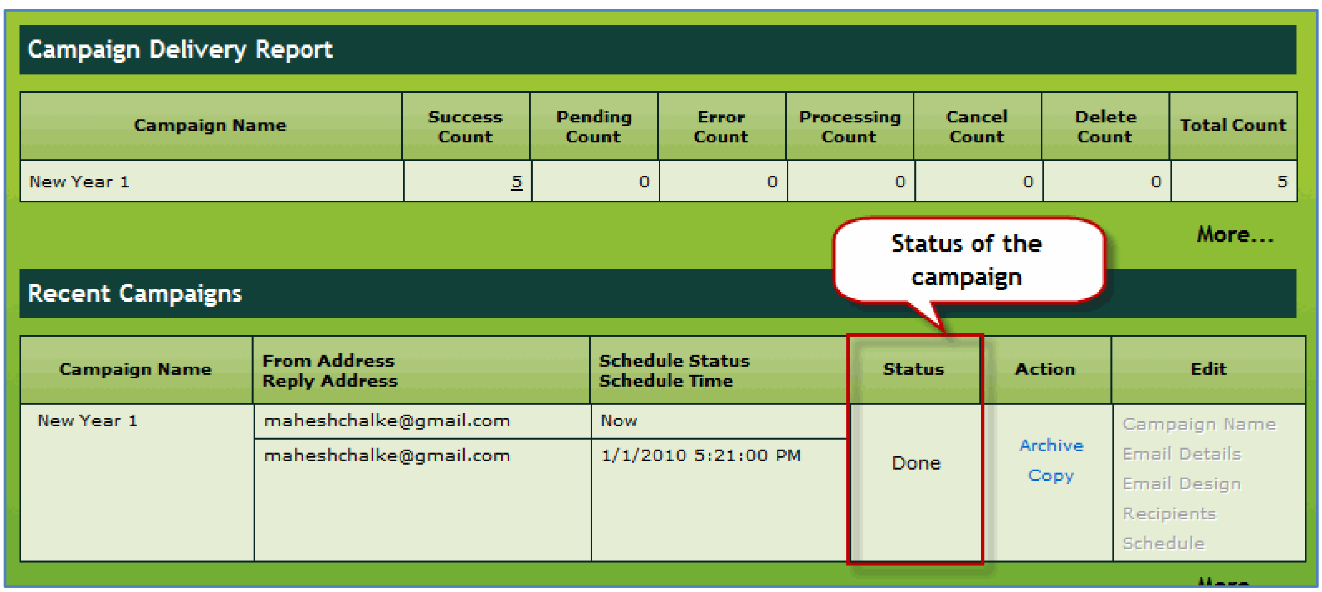
Step - 9

Check the status of your campaign.

To view the current campaign status, on the Menu bar click on **Reports > Campaign Reports**



On the screen presented check the status column, it should display the status of the email campaign.



Note:

If Campaign status is shown as "**Pending**", it means that the email are being sent and are in queue or that the campaign has been scheduled for a later time or that it is saved as a Draft. Campaigns with the status marked as "Done:" mean that they have been completed and delivered.

This completes the Walkthrough, Thank you.