

WebDirect Web Mailer Users Guide

Creating Campaigns

Individual Mailers are contained in Campaigns. Campaigns serve as an overarching topic for the Mailers it contains and may have many Mailers. A Campaign named "Announcements" may be used as an organizing container for all Announcement emails issued.

1. Enter a Name for the Campaign
2. Describe the purpose of the Campaign
3. Display to Users: If selected, the Description field for the Campaign will be displayed in each sent Mailer. This field is usually set to "no" as the description field is commonly only used for internal reference.

Building a Mailer

Once a Campaign has been set-up, Mailers may be created, edited and sent within the Campaign. A template for mailers may be created and stored in the Campaign to serve as a basis for future mailings.

1. To create a new Mailer:
 - a. Click the pencil icon to the right of the Mailer header to Create New Mailer, or
 - b. Click the orange envelopes to the left of a Mailer name to duplicate the Mailer. Duplicating a Mailer will copy the Mailer content and Recipient list into a new Mailer.
2. Edit an existing Mailer:
 - a. Open an existing Mailer for editing by clicking on its name.
 - b. Once on the Mailer edit screen, click the pencil icon to the right of the Mailer header to edit the Mailer contents.
3. Name: Title the Mailer. The Name field is not displayed to recipients. Mailers are sorted and displayed by their Name on the Campaign screen.
4. From Address: Enter the email address to be displayed to recipients in the email "from" field. If a recipient responds to a Mailer using "reply", the email will be sent to the address in this field.
5. Testing To Address: The address to send a test Mailer to.
6. Subject: The Topic of the Mailer to be displayed in the email Subject line.
7. Text Body: Some recipients may not be able to, or have chosen not to, receive HTML emails. No HTML tags are allowed in this area. URL's cannot be included as links and must be fully spelled out.
8. HTML Body: The WebDirect Editor toolbar is available to format email messages the same as in Page Builder.
9. Click to save the Mailer.

Adding Recipients

Mailers may be sent repeatedly from within their Campaign to new Recipients but cannot be sent again to a Recipient that has already received the Mailer.

On the Mailer screen, there are two fields: The top field allows you to manage the Mailer. The bottom field allows you to manage Recipients and displays the statistics for a sent Mailer. Click the pencil icon to the left of an address to edit a Recipient. To edit multiple Recipients, use the checkboxes to the left of the Recipient name and then click Edit Selected at the bottom of the screen

1. Click the Plus sign to Add Recipients
2. Add your email address to the Recipient list if you would like to receive the final Mailer.
3. Recipients email addresses may be copy and pasted into this area from Excel, Word, text files, etc.
4. Recipients email addresses may be comma or line separated.
 - EXAMPLE 1: someone@email.com,someonetwoemail.com
or
 - EXAMPLE 2: someone@email.com
someonetwoemail.com
5. The Recipient list from a previous Mailer may be copied into this Mailer by selecting a previous Recipient list from the drop-down menu.
6. Click to add Recipients. Duplicate addresses in the Recipient list will be filtered out by the system.

Sending Mailers

1. To send a test message to yourself, select the orange gear icon in the top right corner of the Recipient list to send a single test message to yourself
2. Click the yellow envelope icon to send the Mailer to all Recipients that have not previously received the Mailer.

Mailer Statistics

Statistics on Recipient response for sent Mailers may be retrieved from the Mailer screen. Available statistics include how many Recipients clicked links from the Mailer, if a Recipient's email address returned the message and how many Recipients viewed the Mailer.

Managing Subscriptions

1. Enter an email address to open a Recipients account for editing.
2. Recipients may be added or removed from individual Campaigns or be removed from receiving all emails from the system.
3. Recipient email addresses cannot be managed from this screen. Email addresses are managed via individual Mailer Recipient lists.

WebMailer FAQ

Should I add myself as a Recipient as well as the Test address so I see the final message, as well?

That's up to you. Please realize the message you send to yourself as a member of the Recipient list will become part of the statistics.

I don't want the From address to appear as an email address. I want it to be my name with the email address hidden.

The From field may be formatted as in regular email. To display a name with a hidden address, use this format (without the quotes): "Desired Name <email@address.com>". Be sure to use a name your intended recipients will recognize so your Mailer won't be deleted as SPAM!

Am I sending SPAM by sending a Mailer?

This depends on how you're using WebMailer. Recipient lists should only be built using people who have asked to receive emails from you. Recipients requesting to be unsubscribed from a list should not be re-added without their permission.

Can Recipients unsubscribe from a Mailer by themselves or do I have to manage all the Recipients myself?

If a Recipient does not wish to receive future emails, they may unsubscribe or manage their account using the links included in each WebMailer. You also have the ability to manage all Recipients via the WebMailer module in the SourceOne Administration System.