Lyris ListManager

Using ListManager for the First Time

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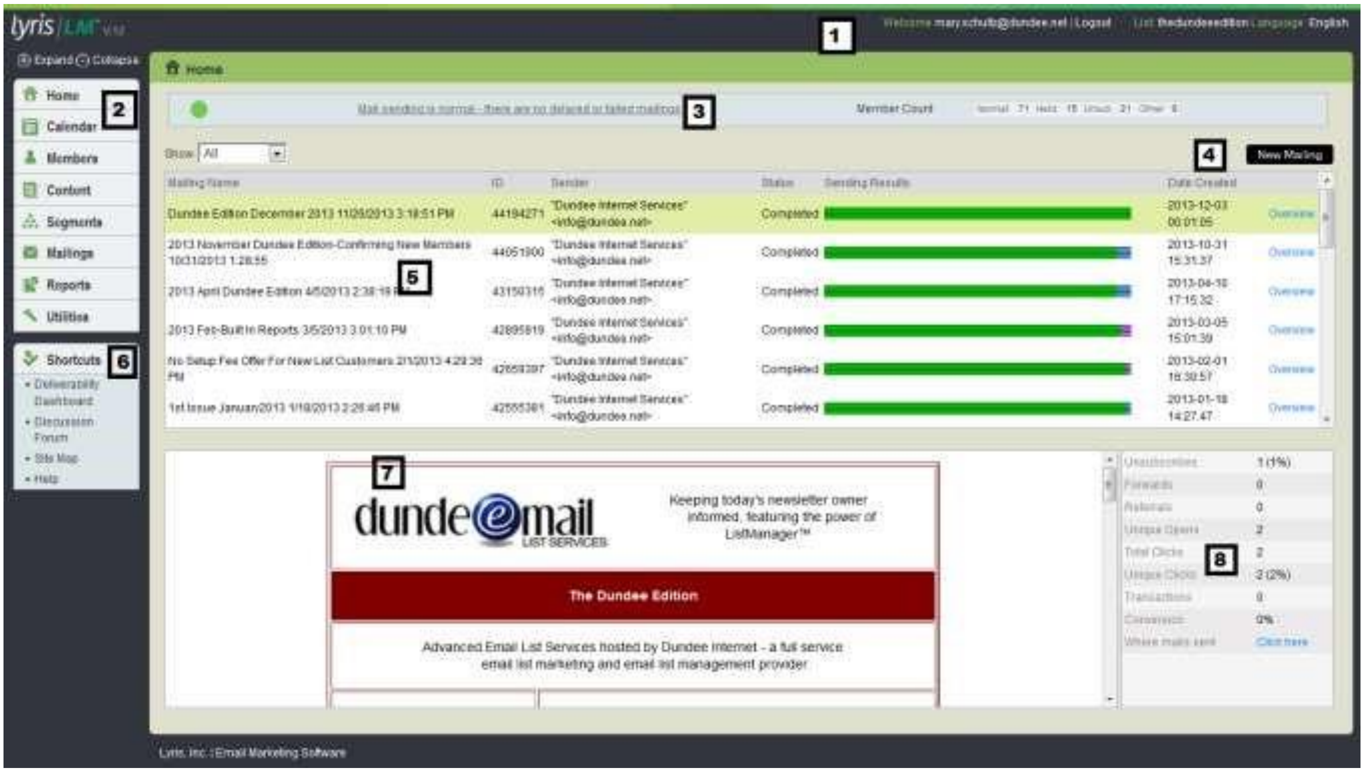
Homepage

The Lyris ListManager™ Homepage will be the first page you see when you log in. It provides links to commonly performed tasks.



1. Login Information

The upper right hand corner displays the list you are logged into, the current language you are using, and who you are logged in as. If you are running multiple lists, click on the list name to switch to another of your lists. **To Logout**, either click on your email address or simply log out.

2. Left Navigation Bar

You can access the features in ListManager™ by clicking an item in the left navigation bar, and then navigate to the feature you want.

- **Home**
  Returns you to the homepage.
- **Calendar**
  Opens a Calendar to view completed mailings. You can also schedule mailings or events.
- **Members**
  Add, import, find, edit, or delete your list members.
- **Content**
  Prior to sending out a mailing: create a message using a template, or create content that uses many of ListManager's customization and tracking features.

- **Segments**
  Segments are subsets of lists that target audiences from a larger list, whose membership is based on some characteristic or criteria that each member meets.
  For example, you can create a list segment from a list of street addresses to contain members who only have a New York City zip code.
- **Mailings**
  From here, you can send your message to your entire list of members, or send a previously created segment. Optionally you can also create mailings without first creating content or segments.
- **Reports**
  Track the progress of your mailing. View opens, bounces, and unsubscribes, referrals and other mailing and member statistics.
- **Utilities**
  Manage your settings; set up auto responders, create web forms, manage the server, and create documents to be sent automatically when people confirm or subscribe.

3. Mailing Status
Provides feedback about your mailing (for example, letting you know there were no delayed or failed mailings).

4. New Mailing Button
Click here to begin creating a new mailing.

5. Recent Mailings
Displays information about your most recent mailings, including the sends, the status, and date sent.

6. Shortcuts
This menu bar displays links to commonly performed tasks. The list of shortcuts and links available here will vary according to your administrative permissions. For example, the link to create a new list only appears for site and server administrators.

7. Preview
Displays a preview of the mailing selected in the Recent Mailings area above.

8. Mailing Statistics: This window displays the statistics for the mailing shown in the preview window.

- **Unsubscribes**
  # - The number of unsubscribes attributable to this mailing. ListManager is able to attribute unsubscribes to a particular mailing if the mailing uses the %%email.unsub%% or %%url.unsub%% tags to unsubscribe members
  % - The number of unsubscribes as a percentage of the number of successful deliveries.

- **Forwards**
  The number of forwards recorded for this mailing. A forward is a message that has been opened on computers with different IP addresses. Forwards tracking requires that you have opens tracking enabled.
- **Referrals**
  The number of referrals recorded for this mailing. Referral tracking requires that you have referred a friend tracking in your mailing. .
- **Unique Opens**
  # - The number of unique opens detected for this mailing. Opens tracking must be enabled for unique opens to be displayed.
  % - The number of unique opens as a percentage of the number of successful deliveries.
- **Total Clicks**
  # - The total number of clickthroughs for this mailing on all links. At least one URL must have been a tracking URL for clickthrough rates to be counted. .
- **Unique Clicks**
  # - The number of recipients who have clicked at least one link in the mailing.
  % - The number of recipients who have clicked at least one link in the mailing as a percentage of the number of successful deliveries.
- **Transactions**
  # - The number of purchases recorded for this mailing. Purchase tracking must be enabled for transactions to be counted.
  $ - The amount purchased as a result of this mailing.
- **Conversion**
  % - The number of recipients who made a purchase as a percentage of the number of successful deliveries.
- **Where Mails Sent**
  Opens the Map Report, which displays a breakdown of results according to state or province.

Calendar

Using the Calendar

The Calendar gives you an **at-a-glance view** of essential information about all your events and mailings.

To open the Calendar, in the left navigation bar, click Calendar.

The following illustration shows the Calendar in the monthly view.

1. **Navigate the calendar**

Use the left or right arrow on the top left of the screen to navigate through the days, weeks or months of the calendar.

2. **Switch between views**

Use the clickable bar **(number 2 on the display**) to change your view from monthly, weekly or daily. By default, the Calendar will open in the monthly view.

3. **Help**

Clicking the Help button **(notated by the? icon upper right hand corner**) will take you directly to the Online Technical Manual for the Calendar.

4. **Unscheduled Mailings**

The Unscheduled Mailings column shows you a list of all the unscheduled mailings; point at a specific mailing to see the name, subject line and status. You can drag any unscheduled mailing onto a day in the Calendar to schedule it.

5. **Events and mailings**

The basic calendar; displays all your events, scheduled mailings and sent mailings for the day, week **or month** as shown in the following illustration.

When Using the Calendar, you can:

- Reschedule any event or unsent mailing by dragging it to another day. Double-click an event or unsent mailing to edit it.

- Double-click a sent message to see the Mailing Overview report.
- Point at an event to see its title, description, and time as shown in the following illustration. For recurring events, you can also see the recurrence frequency and end date, if applicable.
- Point at a mailing to see its name, subject, scheduled time, if any, and status, as shown in the following illustration.

Members

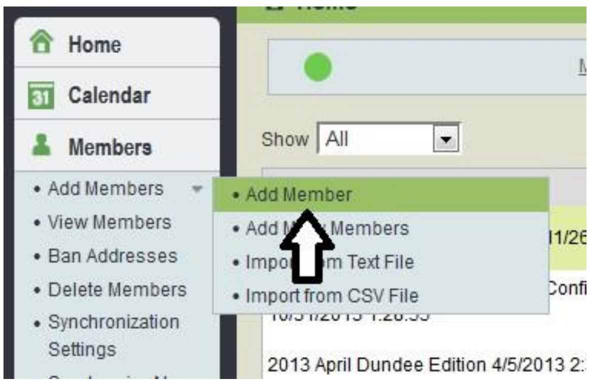
Add Test Members

To test your list, you will find it helpful to add a few email addresses to work with. We recommend having an email account at one of the many free web-based email providers available, so you can test message delivery outside your own domain and get a better idea of how messages are going to look to your list members.

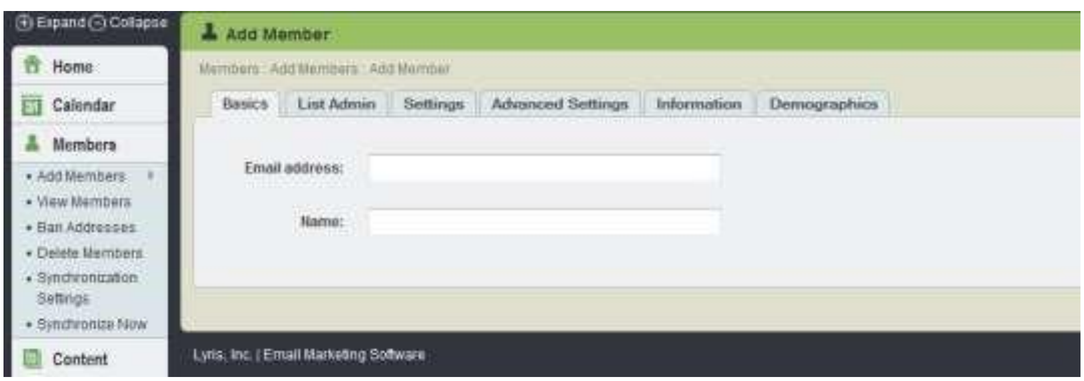
We ADVISE you NOT TO ADD all of your members now! You don't want your members to see your messages until your list is 100% tested and ready.

Creating Test Members

1. On the left Navigation bar, click **Members**, point to **Add Members**, and then click **Add Member**.



2. Enter the email address and name of a test member.



3. Click **Save**.

Repeat the steps above until you have added the members you want. For testing purposes, two or three are enough.

Note: You can also add multiple members at the same time. Instead of clicking **Add Member**, select the next command on the menu, **Add Many Members**.

View or Find Members

To view the members you created, using the left Navigation bar, click **Members**, and then click **View Members**.

The View Members table displays the following:

1. Filter List

By default, the entire list of members is displayed when you **View Members**.
You can elect to filter your members by their membership status using the drop down box located over the members list **(number 1 on the diagram**) To filter the view in order to display only those members with a particular membership status, select it from this dropdown box and click **Go**.

Note: To find a particular member, click **Find Members:** locate a particular member by their name, their email address, segment, status, kind or member ID

2. Members Table

This table displays the email addresses and names of your list's members--the people who may receive mail from this list. Click on an address to see more information about the member.

Ten addresses are displayed at a time. You may view more members by clicking **show more**.

Status

Members with a **status of normal** are active and may receive mail you send through the list; all other statuses are inactive. Some common inactive statuses you may see are:

Confirm: The list requires new members confirm their subscription, and this member has not done so. Once confirmed their status changes **to NORMAL.**
Unsub: The member has unsubscribed, or opted out.
Held: ListManager™ has repeatedly failed to deliver to this member, so it is put on hold. You may see the delivery history by clicking history for the member.

Note: You may see the delivery history by clicking history for the member

3. Download

Click the spreadsheet button  to download your list members. The spreadsheet will be saved to your computer in CVS (comma-separated values) file format.

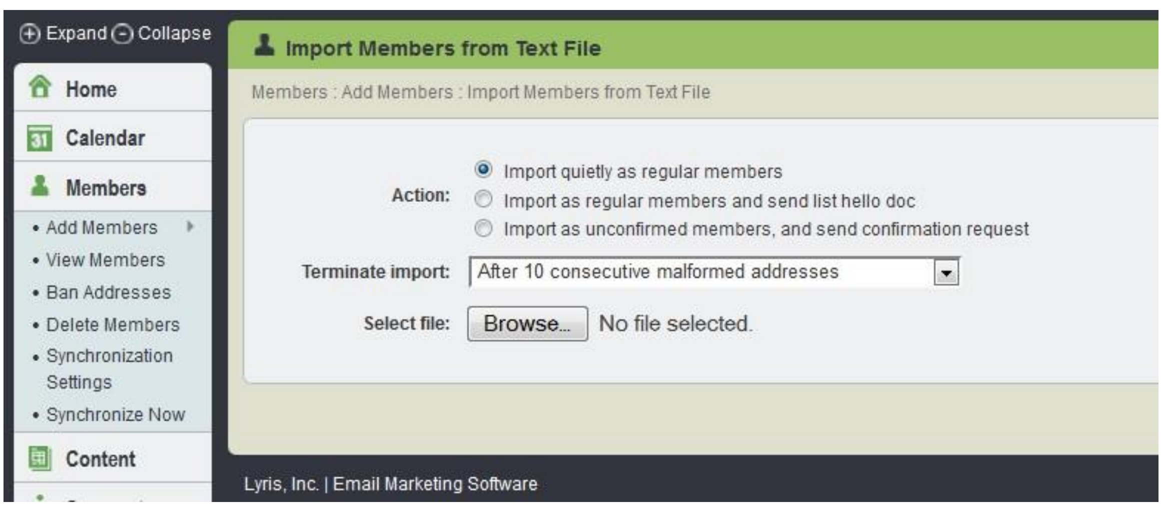
Importing Your Members

If you already have a list of members, you can import them into ListManager™ using **Members**: **Add Members**. You may import members from a text file, or with additional demographic information using a CSV file.

Importing Your Members from a Text File

1. On the left Navigation bar, click **Members**, point to **Add Members**, and then click **Import from Text File**.

2. To import members without notification such as sending a Hello Doc., Confirmation Request etc., in the **Action** section, select **the Import Quietly as Regular Members** option.



3. In the **Select file** box, type the name of the file you want to import, or click **Browse** and navigate to the file you want.

Each email address and name must be on a separate line, and must be in one of the following formats:

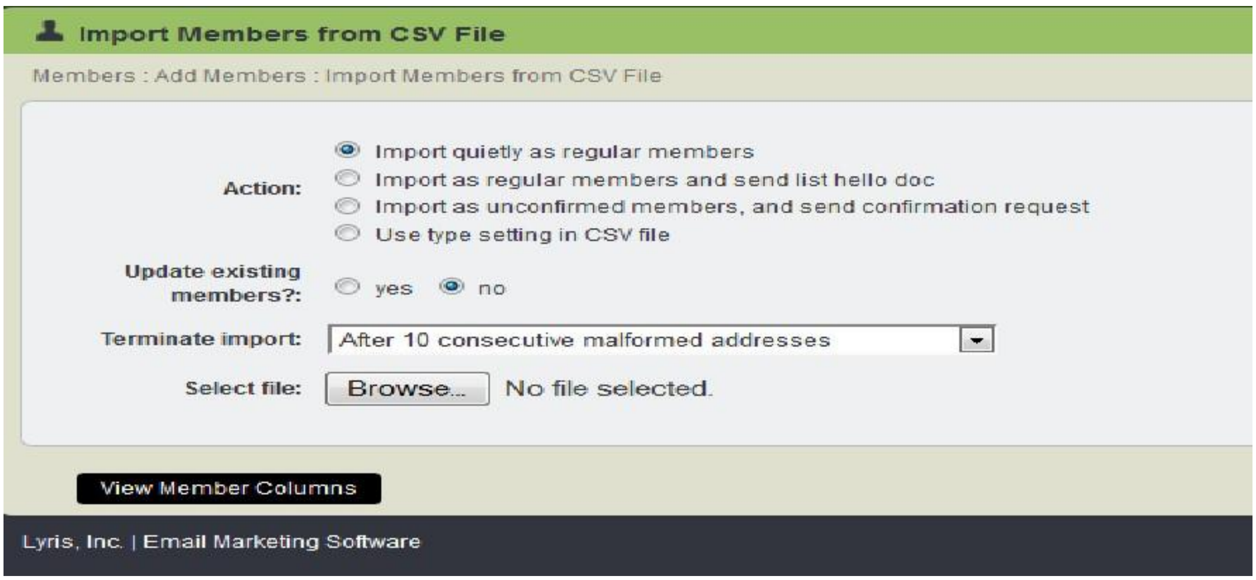
bob@example.com
bob@example.com Bob Shelby
bob@example.com (Bob Shelby) Bob
Shelby <bob@example.com>

4. Click **Import** Follow the information (if any) about your import.

Importing Your Members with Additional Demographic Information

1. On the left Navigation bar, click **Members**, point to **Add Members**, and then click **Import from CVS File**.

2. To import members without notification, in the Action section, **select the Import Quietly as Regular Members option.**



3. Do one of the following:
   - To update ListManager with demographic data from a separate database – Select YES next to “Update existing members?”

     Or

   - Select NO next to “Update existing members?” if you use member profile forms to allow your members to update their own data in ListManager or if the file you are uploading does not contain existing members.

Note: ListManager will not re-subscribe members when you update them.

4. Select the Import Members from CSV file to upload. A CSV file has the information you would like imported in a Comma Separated Values format. The first row of the file tells ListManager™ which field the data in each column should be imported into. For example:

```
 EmailAddr_,FullName_,Company,Phone
bob@example.com,Bob Shelby,Shelby Corp.,555-555-5555
```

In this example, EmailAddr_ and FullName_ correspond to the default database fields in for email addresses and full names. Additional fields called "Company" and "Phone" is added to this members_ table, so this information can also be imported into each member's record.

5. Click **Import** on the lower left hand side of the screen. You will be taken to a screen which will give a report of the status of your import.

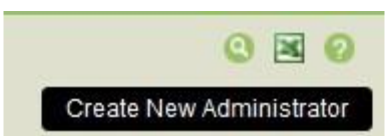
Creating List Administrators

When your list is configured for use, a list administrator is automatically created (most likely yourself). You can alter the list admin's settings, as well as create new and additional List Administrators.
We recommend you create a separate login for each person who will be using ListManager as an administrator.

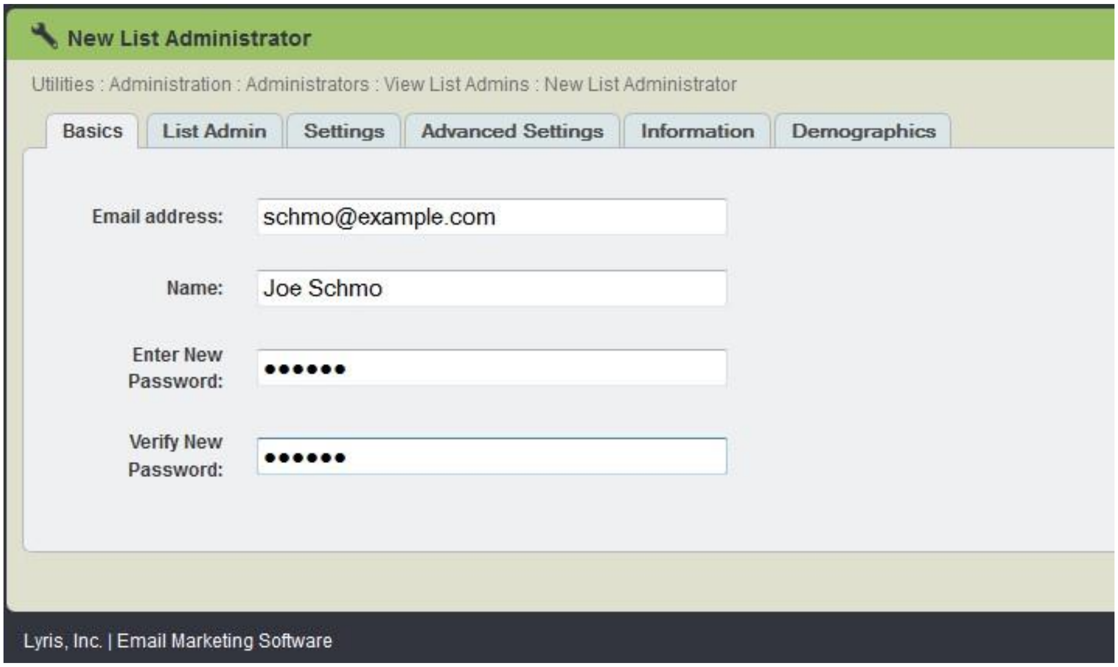
Creating New List Administrators

1. In the left Navigation bar, click **Utilities**, point to **Administration**, then point to **Administrators**, and then click **List Administrators**.

2. Click **Create New Administrator** in the upper right hand corner.



3. Enter the Email Address, **Name** and **Password** of the new admin and **Save.**



Changing the List Administrator's Email Address or Password

1. In the left Navigation bar, click **Utilities**, point to **Administration**, then point to **Administrators**, and then click **List Administrators**.

2. Click the name of the administrator you want to edit.

3. Change the address in the **Email address** box, and then enter and verify a new password.

4. Click **Save**.

Content

What is Content?

A mailing has two parts: the content, or message you want to send, and a segment, or group of recipients who should receive the message. When you create a new mailing, you can either type the content you'd like to send directly into the mailing, or insert content you've already created.

Creating content instead of entering your message into every mailing has many advantages. You can:

- Create a sample of content once **and** then use it in multiple mailings as a template.
- Use ListManager's pre-built templates to assist you in creating content.
- Personalize your message by inserting mail merge fields and conditional text. Add clickthrough tracking URLs, and track how often they've been clicked.

If you are sending out a message only once, and do not want or need to use these features, you may find it easier to skip this step and go to the **Mailings** section.

NOTE we do not recommend skipping the content section if you intend to save and reuse your content or template.

Creating Content

1. In the left Navigation Bar, click **Content**, then click **View Content**, and then click the **Create New** button.

2. Enter the **Content Name** and **Description** to identify the content. These are descriptive, to help you find the content later; they will not be displayed to recipients.

3. Enter the email address of who the message should appear to be **From:** By default, your email address will appear there. Here are some examples of valid entries for the **From:** field:

bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" bob@example.com

4. Enter the **To:** email address. By default, the **To**: field is set with this syntax - %%nameemail%%, which will merge in the name and email address of each recipient from the list or segment you specify. (The **To:** field does not actually select the message's recipients. When building your mailing, you'll specify the segment or lists to which you'd like to send the message.)

Note: We recommend you do not change the default of the **To**. email address.

5. Enter the **Subject:** of the message. Recipients will see this line as the subject of the message they receive.

6. Click the **Text Message** or **HTML Message** tab, and then type the message you want or paste it from another source.

There are two options available when you create a message:

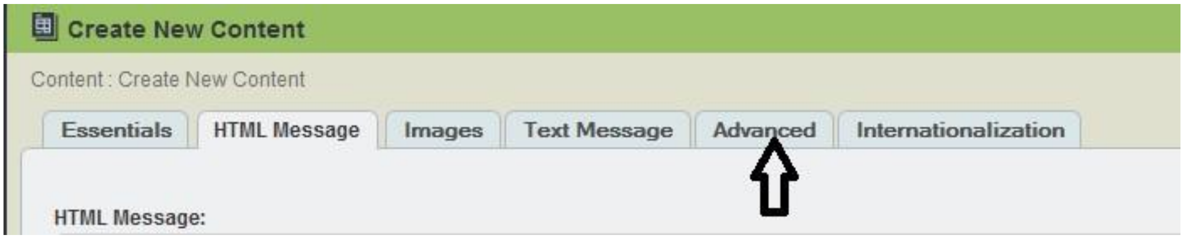
- Select Text **OR** HTML. The recipients will receive the format you have selected.

or

- Select your message **in both** Text and HTML. The recipients will receive the message in both formats. This format, multipart-alternative, allows ListManager™ to create the correct headers and boundaries automatically. Recipients who can see HTML will only see your HTML message; those who cannot, will see the text.

You can customize your message for every recipient by selecting **Insert Field** or **Insert Condition**. To track which URLs recipients select, click Insert URL.

7. To add attachments or headers, click the **Advanced** tab.



8. To create content using a particular character set, click the **Internationalization** tab.

9. To preview your message, click **Save**. This returns you to the View Content page, where you can **Create Mailing: Save and Test**, **Preview**, **Edit**, copy, or delete the content you just created.

Personalizing Content

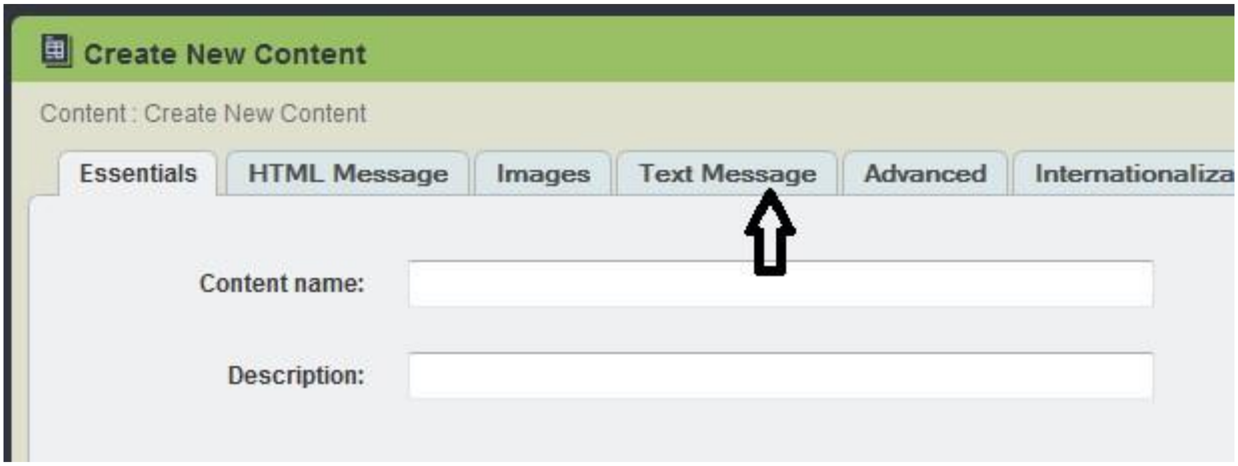
The Content Insert Field Wizard allows you to quickly and easily personalize messages for every recipient. It also allows you to insert frequently used email addresses, such as the unsubscribe email address and email addresses for auto- responders.

In addition, you can merge in further instructions about unsubscribing from your list.
You may add additional database fields and personalize your messages even further (ask our technical department for help to do this.) Also, see **Adding Your Members** for more information.

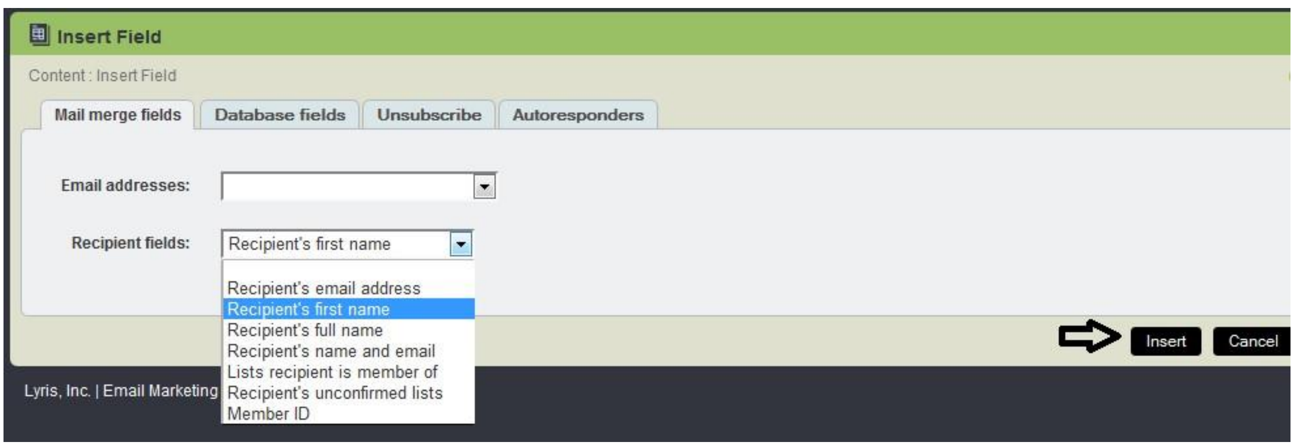
The following example shows you how to use Insert Field to personalize a message—in this case, merging in the recipient's first name:

1. In the left Navigation Bar, click **Content**, then click **View Content**, and then click the **Create New** button.

2. Click the **Text Message** tab, and then click **Insert Field** on the lower right hand side.



3. Click the **Recipient Fields** box, and then select **Recipient's First Name**.



4. Click **Insert**. You will be returned to the message you were composing. The merge field will be included as part of your message:

%%firstname%%

When the message is sent, Ed Kaminsky will see

Ed

If a member doesn't have a name, the email address will be merged in. For example, shirley@example.com didn't sign up with a name. Instead of her name, she'll see: shirley@example.com

Using Templates

In the Content area under View Templates, you can create a new template for your mailings. Your created template can contain fixed, unchanging parts as well as "editable regions", that can be saved and reuse for future mailings.

ListManager also includes a series of built-in templates you may select from.

You can also cut and paste the HTML codes from any (free) template design or purchase templates**.**

1. In the left Navigation bar, click **Content**, then click **View Content**, and then click **Create From Template**.

2. Click the box that currently displays **Your Templates**, and then choose **Built-in Templates**.

3. Click the **Select** command for one of the templates in the list.

4. If you chose a fill-in-the-blank form, type the requested information.

5. Do one of the following

- To generate new content from this template, click **Save**.
- To import directly into a mailing, click **Create Mailing**.

How to create your own Template

ListManager comes with numerous pre-built templates. If you'd like to create and use your own templates, follow these steps.

Creating a Fill-in-the-Blank Template

A fill-in-the-blank template helps users insert text into the right place to make their own content. To make fill-in-the-blank templates, you must insert a template field into your content. Template fields may be put anywhere in your message—the subject line, say, or the From: address. When a user chooses a template, all they will need to do is to fill in the form with the requested information to generate new content.

1. In the left Navigation Bar, click **Content**, then click **View Templates**, and then click the **Create New Template** button.

2. In the **Essentials** tab, fill in the name, description, etc., just as you did for creating content. The steps for adding content in the **HTML Message** and **Text Message** tabs are also the same.

3. Click the **Specify Editable Regions** tab.

When you create a template, you can have sections that will never change (for example, a product description) and other areas that will change periodically (for example, news about special events). In the Specify Editable Regions tab, you can choose to make paragraphs of text or images editable. You would then edit these areas in the Fill in Editable Regions tab when you make new content from a template.

Note: The following tags are the only ones that contain content that can be made editable:

paragraph **<p>** image **<img>** div
<div> headings 1 through 6 **<h1>,**
<h2>, etc.

To specify an editable region

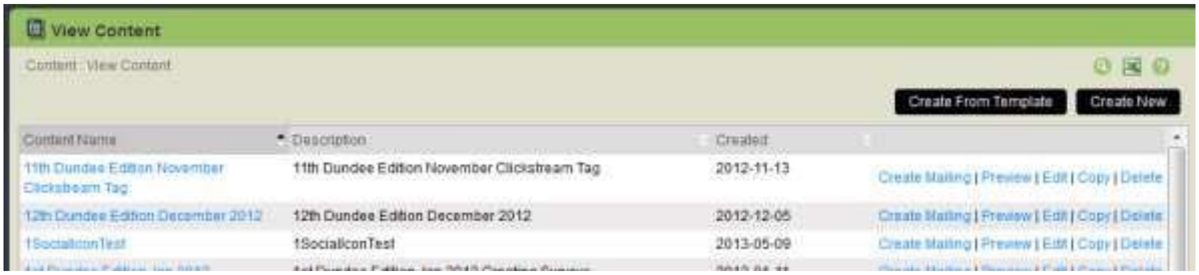
- Move the pointer over the content you want to make editable. A red box appears around the region; its title bar contains the tag name and a message telling you to click to make it editable.
- Click the content. A green box appears around the content telling you it is now editable.

4. Click **Save**.

The View Content page

The View Content page shows you all of the content you've created for a particular list. You can save, edit or reuse content on this page. Think of it as your personal content "library."

1. On the left Navigation bar, click **Content**, and then click **View Content**.



Unsubscribe Directions

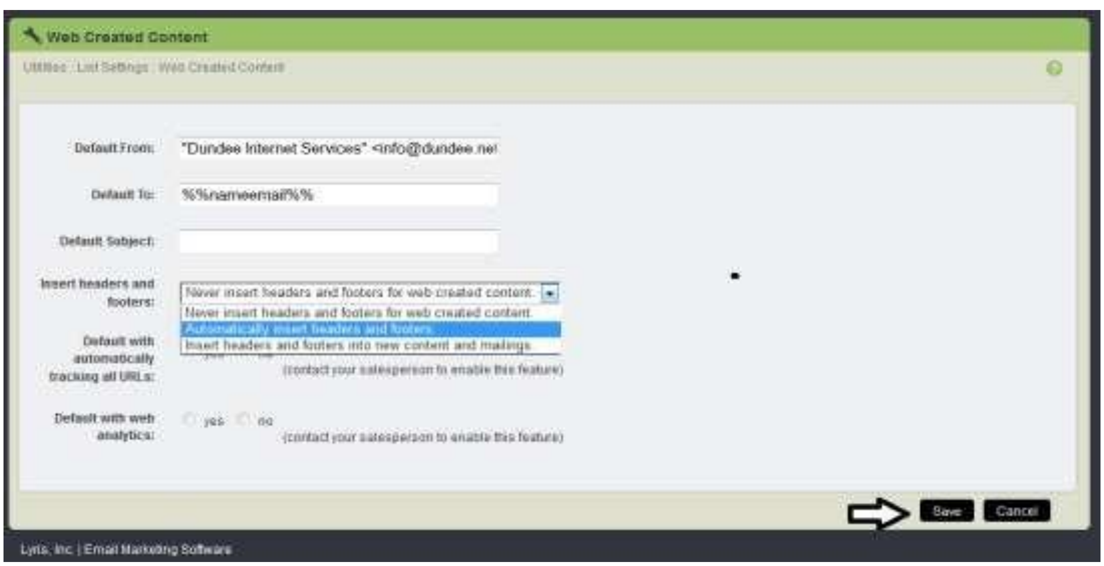
To have unsubscribe directions inserted into your message, you may either configure your list to include them automatically, or add them manually to your messages.

Automatic Email Unsubscribe Instructions

To have ListManager™ always include unsubscribe instructions, follow these steps:

1. In the left Navigation bar, click **Utilities**, point to **List Settings**, and then click **Web Created content**.

2. For **Insert Headers and Footers**, select “Automatically insert headers and footers”: (always include the headers and footers) or “Insert headers and footers into new content and mailings” (includes the headers and footers in the message bodies, which then may be edited by the user).

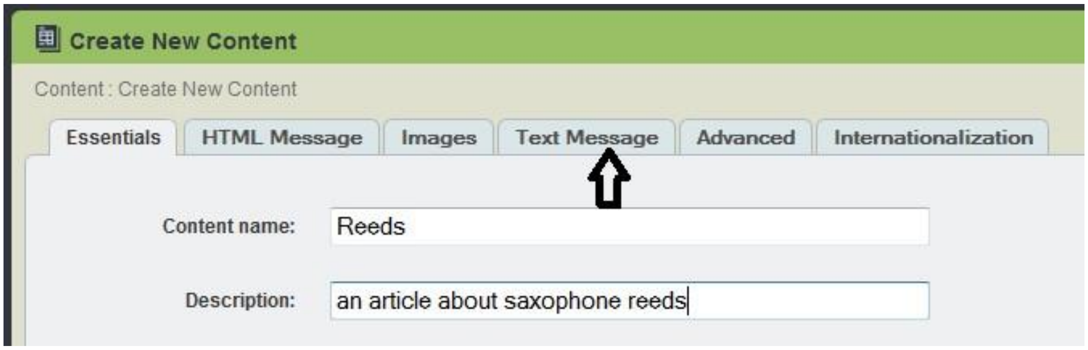


3. Click **Save**.

To edit headers and footers, in the side Navigation bar, click **Utilities**, point to **List Settings**, and then click **Email Submitted Content**.

Email Unsubscribe Instructions

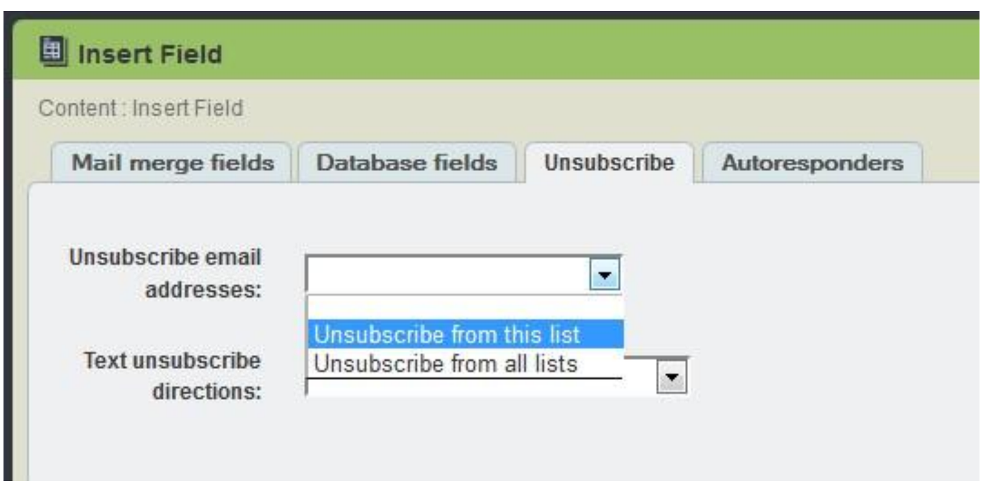
1. On the New Content (Content: View Content: Create New) or Edit Content page, click **Text message**.



2. Click **Insert Field**.

3. Click the **Unsubscribe** tab.

4. Click the box next to **Unsubscribe email addresses**, and then select **unsubscribe from this list**.



5. Click **Insert**. The unsubscribe directions will be inserted at the bottom of your content.

To unsubscribe from this list, send a blank email to %%email.unsub%%

When mailed, the %%email.unsub%% tag merges in a unique unsubscribe email address for each recipient.

6. Repeat for the **HTML Message**, if applicable.

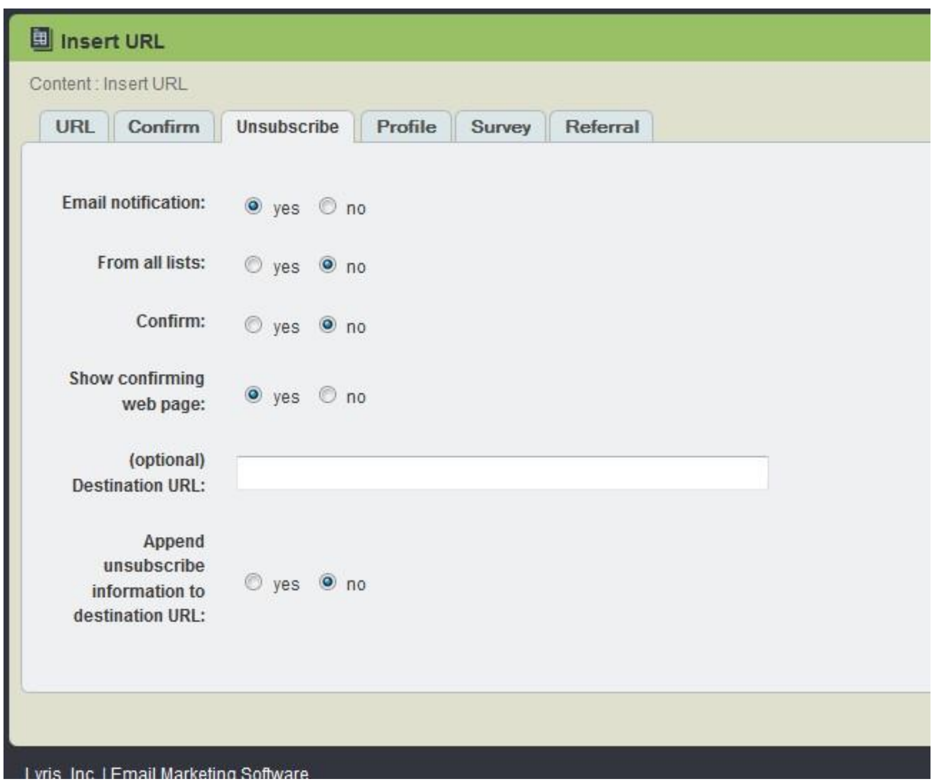
To Insert an Unsubscribe URL:

1. Create new content, or edit existing content (see instructions above).

2. Select the **Text Message** tab.

3. Click **Insert URL**.

4. Click the Unsubscribe tab. You will be taken to the following screen:



5. Specify whether you want members to receive **Email Notification** that they have unsubscribed from your list.

6. Enter an optional **Destination URL** where unsubscribing members will be taken to after unsubscribing from your list.

7. Click **Insert**. The unsubscribe URL will be inserted at the bottom of your content.

http://example.com/u?id=%%memberidchar%%&n=T&c=F&l=your_list

When mailed, this tag will merge in a unique unsubscribe URL for each recipient.

8. Repeat for the **HTML Message**, if applicable.

Segments

Creating Segments (not available in Dundee Silver)

Segments are subsets of your list. They allow you to target specific members of your list based on information you have about them. For example, send a special message to only those list members who:

- live in Canada
- have made a major purchase in the last year
- clicked on a particular link in a message

Note: You can only segment your list based on the information you have about your members. This information must be included when they join or when you import them.

You don't have to create segments for your list. If you don't create and select a segment, your message will simply be sent to your entire list.

Creating a Segment

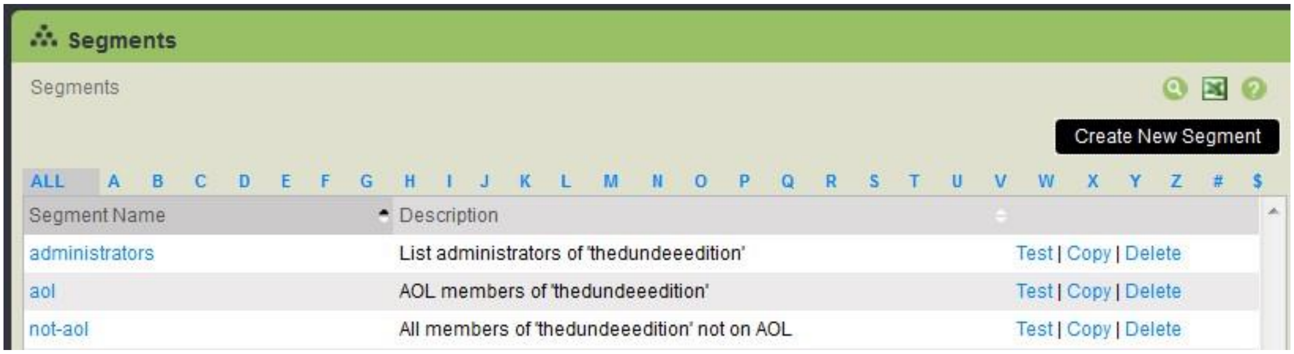
This example shows how to make a segment of all recipients who work in education—they have .edu as their top-level domain.

1. In the left Navigation bar, click **Segments**.

The Main Segments Page

The main Segments page shows you all of the segments you've created for a particular list. You can save, edit or test segments on this page. Like the main Contents page, it is a kind of "library" of your segments.

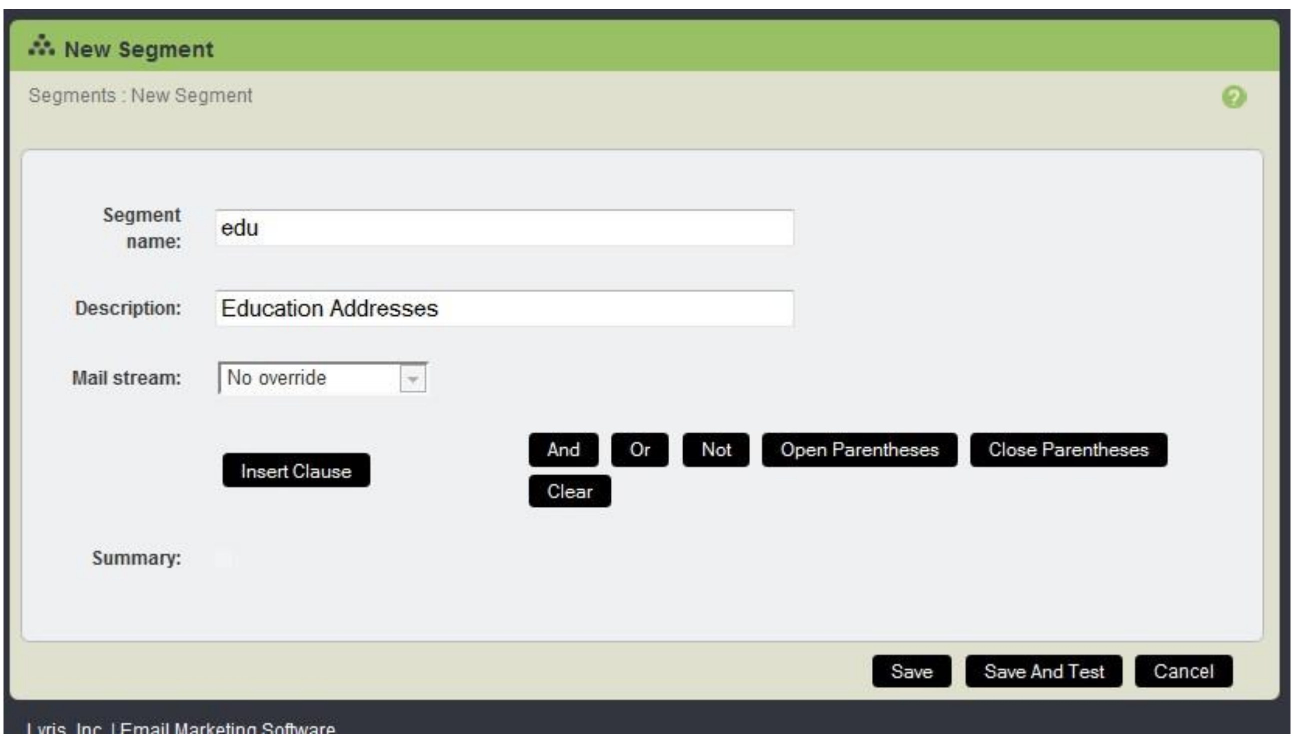
Some segments have been created for you automatically—"administrators", "aol" and "not-aol."



2. Click Create New Segment.

3. Enter **edu** for the segment's **Name**. Note that there can be no spaces in a segment's name.

4. Enter **Education Addresses** for the segment's **Description**.



5. Click **Insert Clause**. We will create a clause that reads:

"If member text field members_.domain_ ends with edu."

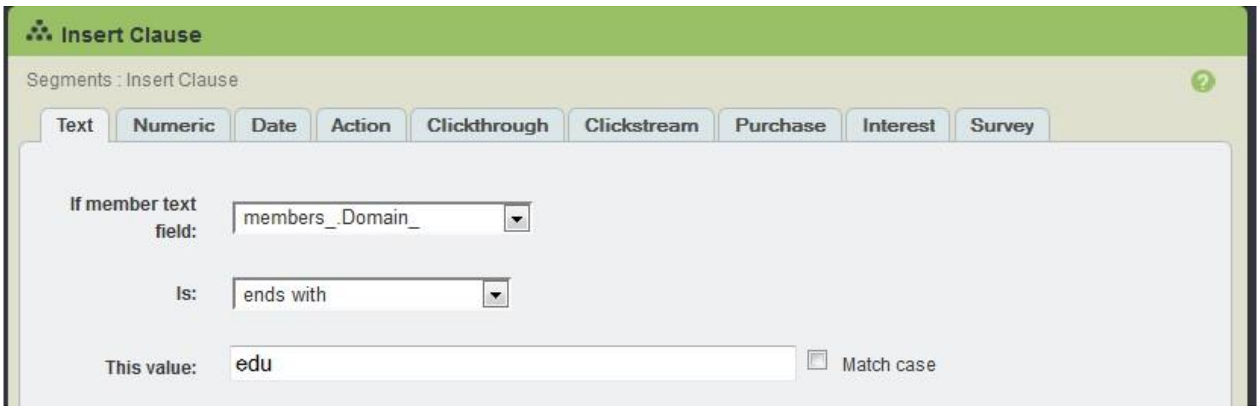
Any members matching these criteria will be included in the segment.

6. Click the **If member text field**: box, and then select **members_.Domain_.**

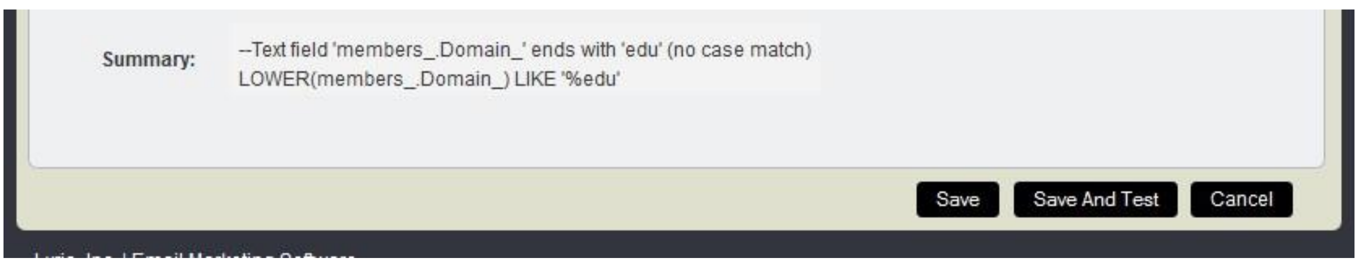
7. Click the **Is**: box, and then select **ends with**.

8. Click the **This value**: box, and then type **edu**.

The screen should look like this:



9. Click **Insert**. The **Summary:** should look like this:



10. Click **Save and Test**. The Test Segment page displays, showing you the generated and a sample of any matching addresses.

Note: If you don't have any addresses ending with .edu, no names will be displayed here.

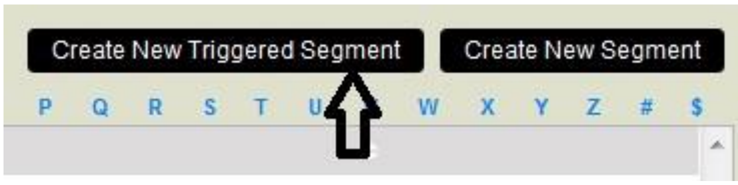
Triggered Segments

Triggered segments are segments that contain one or more trigger clauses. These trigger clauses specify a particular event in time, such as a particular date or anniversary, a clickthrough action, or a purchase. Anything else about the member that does not specify exactly when the mailing is to be sent is not a trigger clause, but a "regular" clause.

The result is that the mailing to the segment will automatically be sent when the trigger clause(s) are met. Triggered segments are used in conjunction with triggered or sequential mailings. These mailings allow you to automatically send an anniversary or birthday message, or follow up when someone clicks on a link.

This example shows how to create a simple triggered segment that will send a message on the anniversary someone joined the list.

1. In the left Navigation bar, click **Segments**, and then click the **Create New Triggered Segment** button.



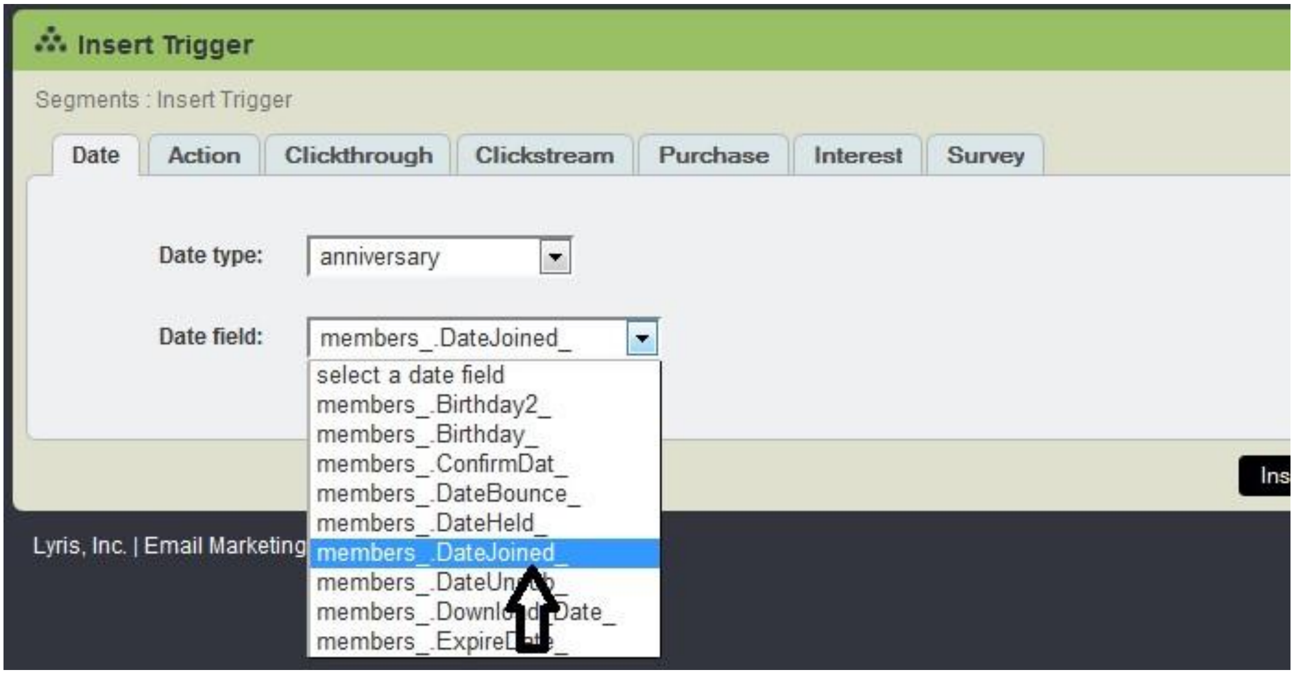
2. In the **Segment Name** box, type anniversary. Note that there can be no spaces in any segment name.

3. In the **Description** box, type join-date anniversary.

4. Click **Insert Trigger**.

5. In the **Date** tab, click the **Date Type:** box, and then select **anniversary**.

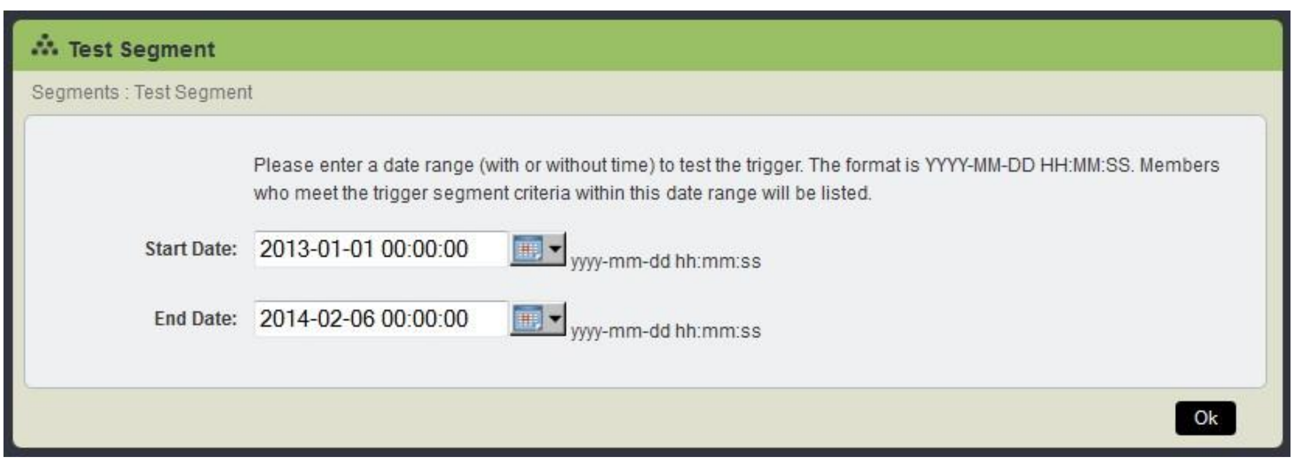
6. Click the **Date field:** box, and then select **members_.DateJoined_**.



7. Click **Insert**. The appropriate query appears in the **Summary:** box.

8. Click **Save and Test**.

9. On the Test Segment page, specify a date range by entering start and end dates. The members who joined between those dates will be included in your test.



10. Click **OK**. The next page displays the text of your query and a sample of the addresses that fit your query choices.

To use your triggered segment, you must create a triggered mailing.

Mailings

Creating Mailings

Now that you've created content and segments, the next step is to put it all together in a mailing.

A mailing is a message you send to either your entire list or particular segments you created. You can create your mailing on the fly or import pre-made content.

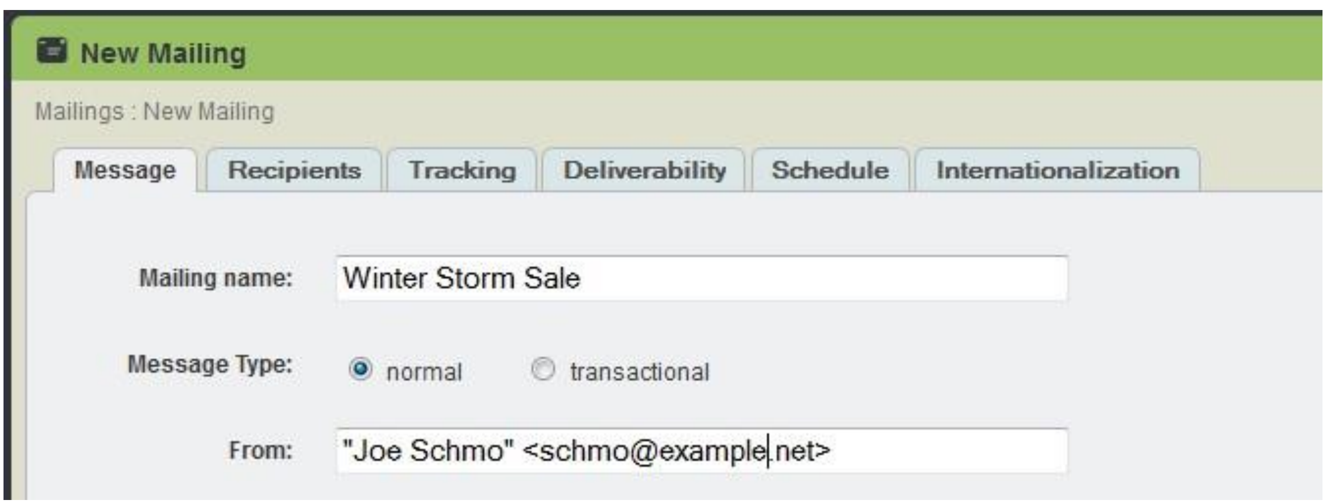
Before sending out your mailing, you can test it to see what it will look like, and schedule when you'd like it to be sent. You may also purge recipients who have received other messages, or send to a sampling of your list or segment.

You can also use tracking to see if recipients open your mailing, and if they can see mailings in HTML. Later, you can see the success of your mailing in Reports.

Creating a New Mailing to Be Sent to Your Entire List

1. In the left Navigation bar, click **Mailings**, and then click **New Mailing**.

2. Edit the **Mailing Name**: field. This name is not seen by message recipients, so label the mailing in a way that will help you to identify it later.



3. Edit the **From:** field. By default, your email address will appear here. Here are some examples of valid entries for the From: field:

bob@example.com
Bob Smith <bob@example.com> bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>

4. Edit the To: field. By default, the To: field is set to %%nameemail%%, which will merge the name and email address of the recipient.

NOTE: The **To:** field does not indicate who receives your message; that is determined by which segment you select.

5. Enter the **Subject:** of the message. Recipients will see this line as the subject of the message they receive.

6. Enter the **Text Message** and/or **HTML Message** you'd like to send.

You can create a text-only message or an HTML-only message. Or, you can create a mailing that has both text and HTML. This format is called multipart-alternative, and ListManager will create the correct headers and boundaries automatically. Recipients who can see HTML will only see your HTML message; those who can't, will see the text.

7. Click **Preview** in the lower left hand corner to preview what your mailing will look like, either for a specific email address or for a random address on the list.

Testing Mailings

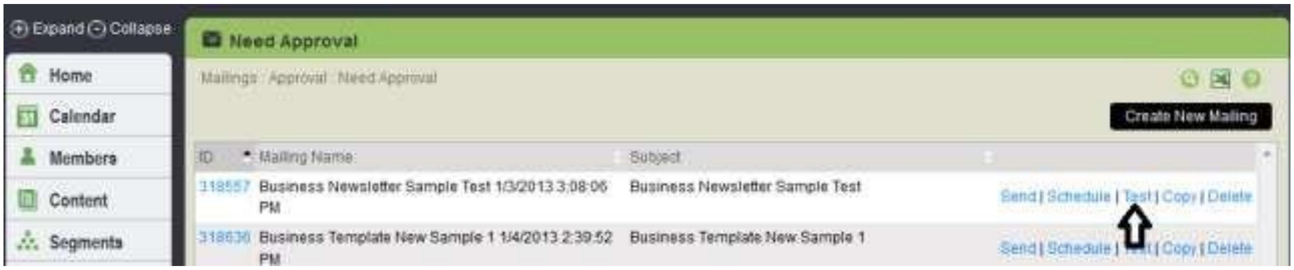
To see what a mailing will look like for sample recipients in your email client, do one of the following:

After creating a mailing, click **Save and Test**.

-Or-

1. Save the mailing, and then in the left Navigation bar, choose **Mailings** > **Approval** > **Need Approval**.

2. Click the **Test** command for the mailing you want to test.



The **Test Mailing** page displays:

1. In the **Send test to:** box, type the email addresses to receive the test messages, separated by commas.

2. In the **Test sample size:** box; specify the number of test messages to send.

Split Test

You can create different versions of your message, test them on small random subsets of your mailing list, and then compare the results to see which message is most effective. This kind of testing, called "split-testing" eliminates any demographic or action-based bias that could alter your results. Once you determine which message gives the best results, you can send it to the rest of your list.

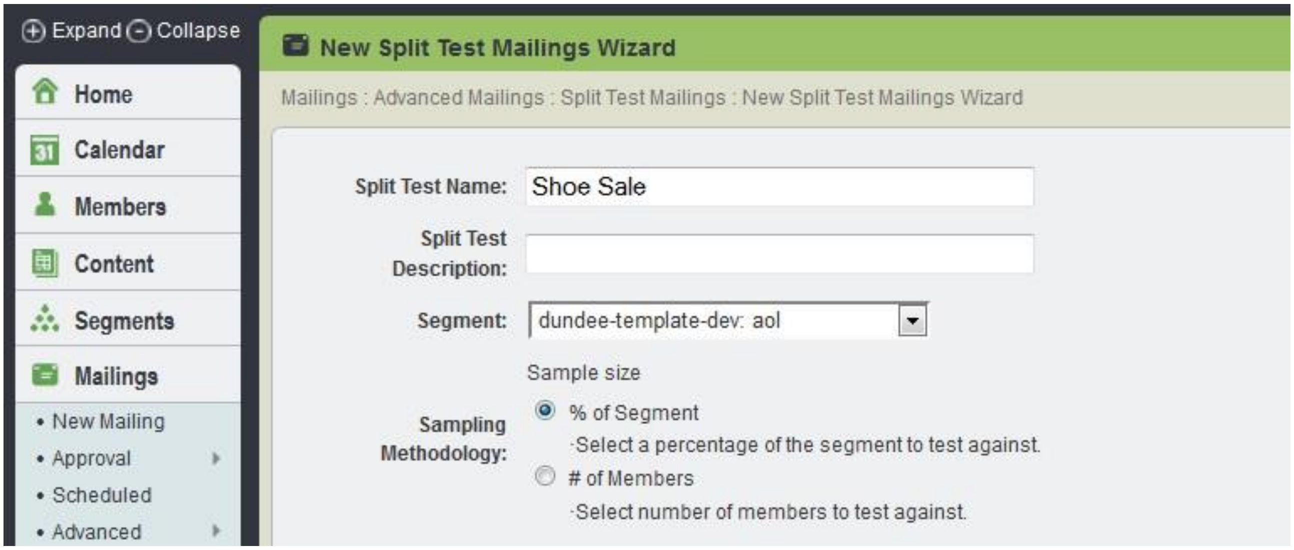
Before you can do a split test, you must first create at least two content items you intend to use in the test.

To go to the Split Test Mailing Wizard

In the left Navigation bar, choose **Mailings** > **Advanced Mailings** > **Split Test Mailings** > **Split Test Mailings Wizard**.

Using the Split Test Mailings Wizard

Split Test Name
Select a name to identify your split test. You can type up to 70 characters.



Split Test Description
Type in a description for your split test.

Segment
The default setting is all the members in your mailing list. To choose a particular segment, click the Segment box and then select the segment you want.

Sampling Methodology
You can choose to send the test message to a percentage either of your mailing list, or a specific number of members in the list.

To send the message to a percentage
Select % of Segment, and then in the Total % to receive test box, type the percentage of the segment you want to send the mailing to.

To send the message to a specific number of members
Select # of Members, and then in the Total # to receive tests box, type the number of segment members you want to send the mailing to.

Content 1
Click the arrow in the **Content 1** box, and then select the content you want to send to the first group.

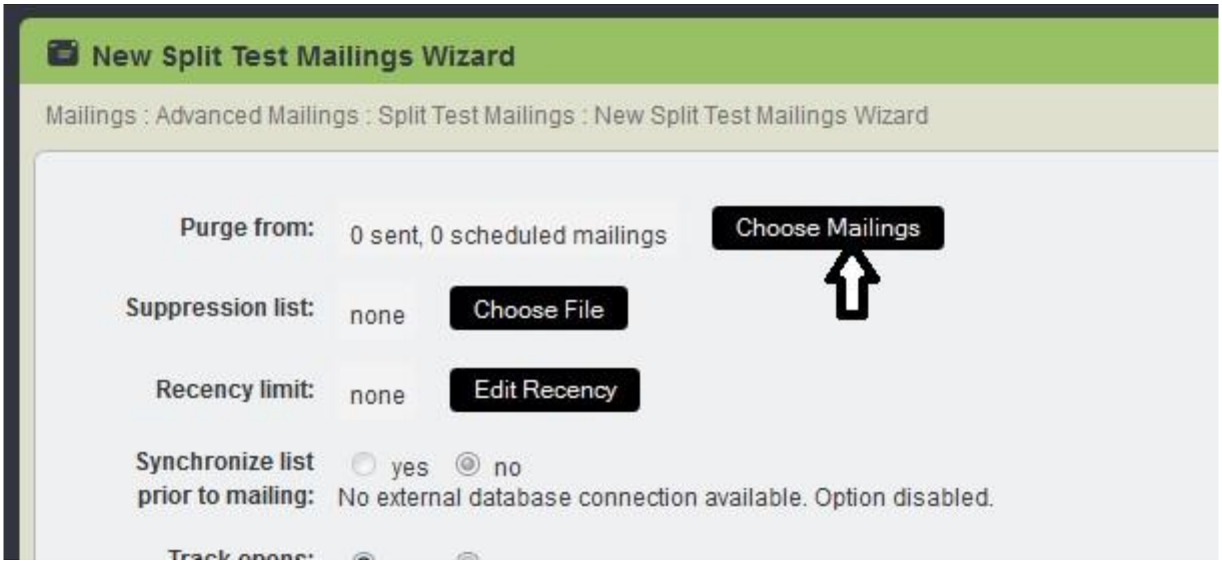
Content 2
Click the arrow in the **Content 2** box, and then select the content you want to send to the second group.

To view the content
Click the **View** button for the content.

To continue, click **Next**.

Screen 2

Purge From
If you want to purge members who have received previous messages, click **Choose Mailings**.



Recency Limit
To purge members who have recently received email from you, click **Edit Recency**.

Track opens
To keep track of the members who open your test email, select this option.

Detect HTML capability
To detect if a member's email software is capable of viewing HTML, select this option.

To go back to the previous screen, click **Go Back**. To continue, click **Next**.

Screen 3
On this screen, you can review the options you chose.

To go back to the previous screens, click **Go Back**.

To send your test messages, click **Send**.

To Save your split test without sending, click **Save**.

To cancel your split test, click **Cancel**.

To view your split test results

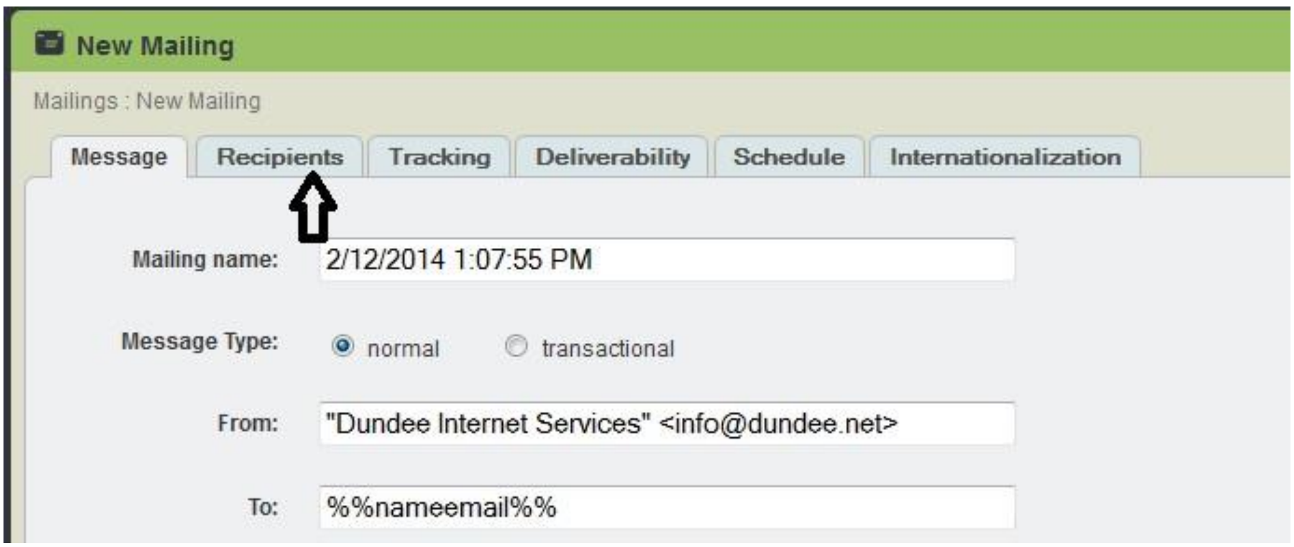
1. In the left Navigation bar, choose **Mailings** > **Advanced Mailings**, the point to **Split Test Mailings** > **Split Test Results**.

2. Click the **View Results** command for the test you want.

Mailing to a Segment

Sending to Different Lists or to Segments

1. Create a new mailing, but before saving your message, click the **Recipients** Tab.



2. Click **Choose Segments**.

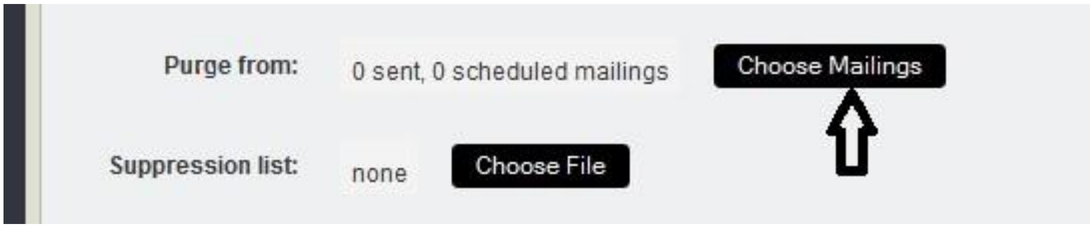
3. Select the segments that should receive this mailing. Only the segments available to you will be displayed here.

4. Click **OK**, and continue composing your message. When you're done, click **Save** or **Save and Test**.

Purging Recipients of Previous Mailings

1. Follow the steps to create a new mailing, but before saving your message, click the **Recipients**Tab.

2. Click **Choose Mailings**.



3. Select the mailings whose recipients should NOT receive this mailing.

4. Click **OK**, and continue composing your message. When you're done, click **Save** or **Save and Test.**

Approving Mailings

There are two methods to approve (or moderate) a message: via the web interface or via email. You can also test or schedule messages through the Mailings: Approval: Need Approval page in the web interface.

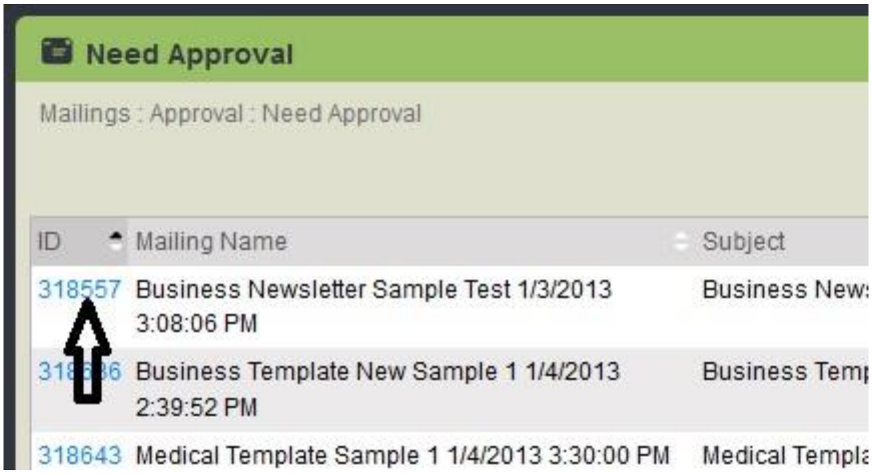
If you are moderating a discussion list (where members submit mailings to the list), the Approval Wizard helps you work quickly as you approve and delete mailings in the order in which they were submitted. You also have the option of deleting mailings with feedback so contributors know why their mailing was rejected.

The Approval Summary gives you an overview of all of your other lists to approve. You are also taken to the Approval Summary once you have completed approving messages for the list you're logged into.

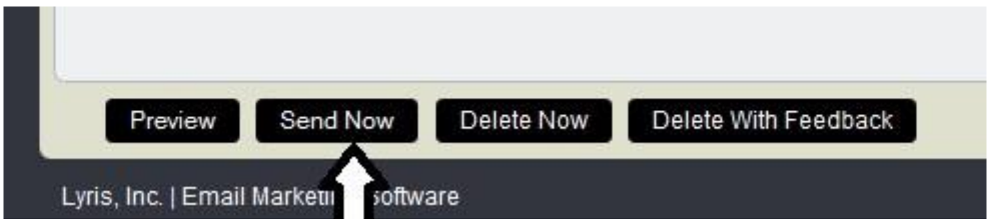
Approving Via the Web Interface

1. In the left Navigation Bar, click **Mailings**, point to **Approval**, and then click **Need Approval**.

2. To review a mailing, click the number to the left of its name.



3. To send it immediately, click **Send Now**.



You can also test it now or schedule it to be sent at a future time.

4. To delete the mailing, click **Delete Now**. To send a message to the sender explaining why a mailing was deleted, click **Delete With Feedback**.

Approving Via Email

If you send messages via email to the list, and your list is set up so that you moderate your own messages (recommended for security reasons), you will receive a modification notification from Lyris ListManager for any messages sent to the list via email.

The message you receive will contain the following (with a different number code, this is just an example):

login yourpasswordmoderate approve 16189

To approve this message reply, delete everything up to where it says "login" and replace "yourpassword" with your password.

To reject the message put your password above the "moderate reject..." line, instead of the approval command.

NOTE Do not replace login with your name or anything, just replace yourpassword with your password above either the approve or reject command. Your response will look something like this:

login yourpasswordmoderate approve 14962

Or

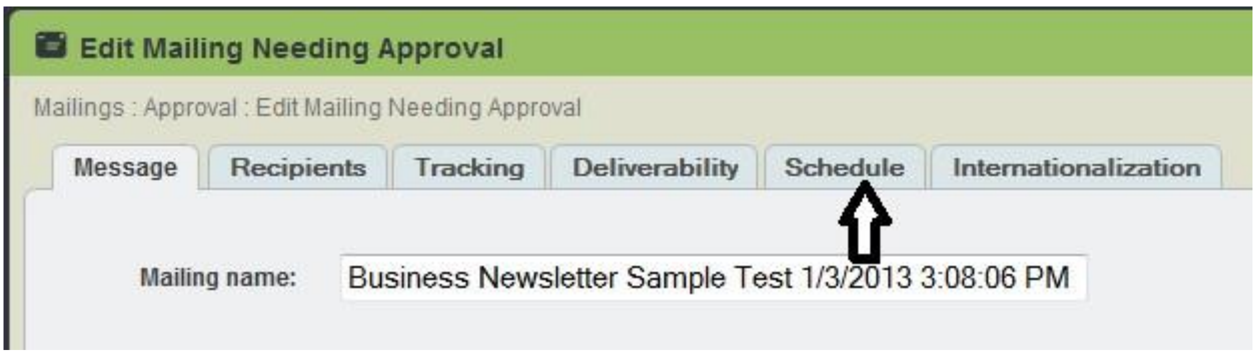
login yourpasswordmoderate reject 14962

Note that these numbers are just an example; the numbers in the messages you receive will always be different. You will receive a message from Lyris ListManager confirming the message was either accepted or rejected.

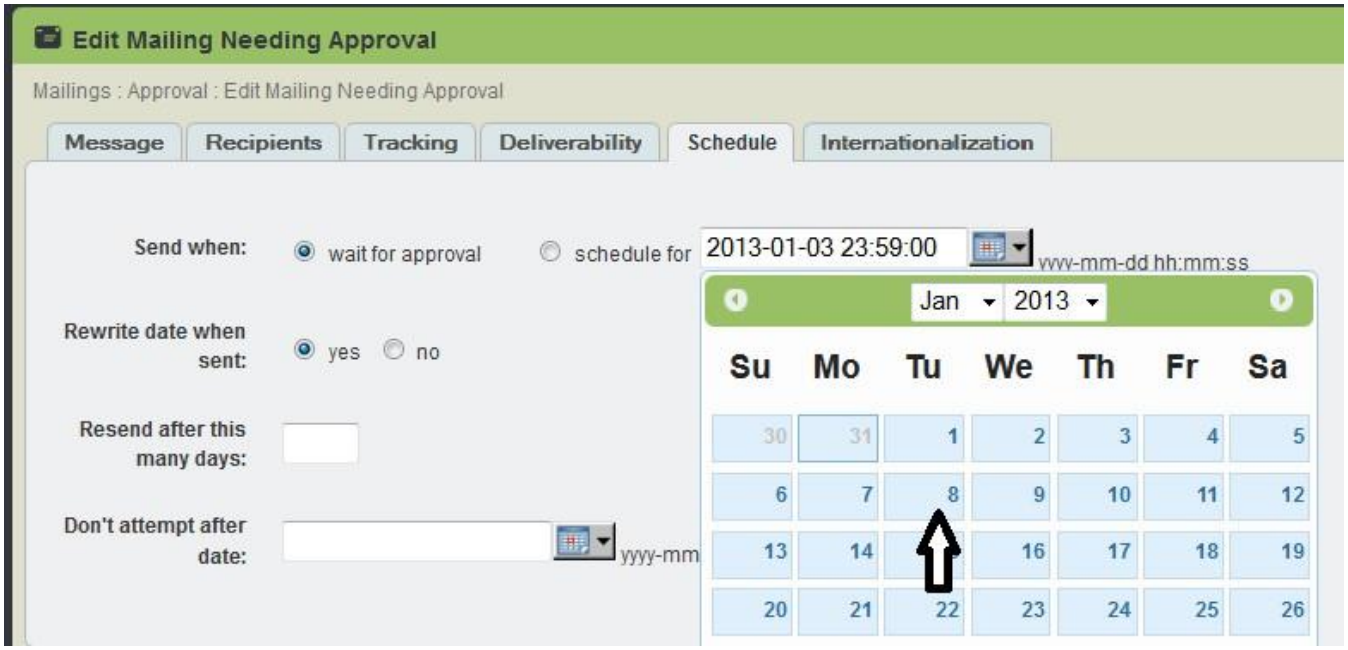
Scheduling a Mailing

By default, mailings wait for your approval to be sent. If you'd like them to be sent at a specific date and time, follow these instructions.

1. Follow the steps to create a new mailing, but before saving your message, click the **Schedule** Tab.



2. In the **Send when**: section, type the date and time, you would like the message to be sent, or click the drop-down calendar and choose a date.



3. By default, the date and time shown in your message showing when it was sent will be rewritten to be the time you schedule it to be sent. If you'd like it to be the date when it was created, change **Rewrite Date When Sent** to **No**.

4. Continue composing your message. When you are finished, click **Save** or **Save and Test**.

Creating a Recurring Mailing

It may be convenient to have the same mailing be resent every day, week or month if you are using conditional content to change the contents of the message sent, or if the message is sent to a segment such as all new members who joined on a certain date. A list FAQ can also be resent regularly, reminding list members of the list's rules.

1. Follow the steps to create a new mailing, but before saving your message, click the **Schedule** Tab.

2. In the **Send when**: section, type the date and time, you would like the message to be sent, or click the drop-down calendar and choose a date.

3. In the **Resend After This Many Days** box, type the number of days ListManager should wait before resending the message. If you enter 1, it will be sent every day; if you enter 7, every week.

4. Continue composing your message. When you're finished, click **Save** or **Save and Test**.

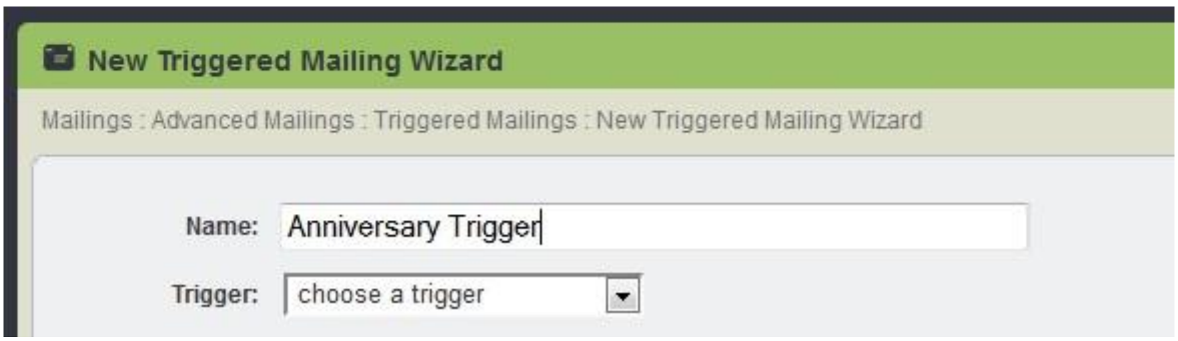
Triggered Mailing

A triggered mailing sends content automatically to recipients based on dates or an action they have performed. For example, you can send a message to recipients when they click a particular link, answer a survey, or make a purchase.

To send a triggered mailing, you need to have created a triggered segment. In this example, we will be sending a message to people thirty days before the anniversary of the date they joined the list.

1. In the left Navigation bar, click **Mailings**, point to **Advanced Mailings**, then point to **Triggered Mailings**, and then click **New Triggered Mailing Wizard**:

2. Type a **Name**.



3. Click the box next to **Trigger**, and then choose the trigger you made earlier ("anniversary").

4. Specify if you would like to **Track Opens** and/or **Detect HTML**.

5. Select **Time After the Trigger Event**. In this example, we are selecting "30 days before."

6. Click the **Content** box, and then select the content you want to send.

7. Click **OK**.

Reports

Viewing Reports

Once you have sent out a mailing, you will want to know how successful it has been. ListManager offers extensive reporting and charting on your mailings and membership. To see the reports available to you, in the left Navigation bar, click **Reports**.

Note that although ListManager limits the number of data points displayed in the charts, all the data for the selected report may be viewed and downloaded by selecting the table option for the report, and then clicking on the disk icon.

Reports are grouped as follows:

Deliverability Dashboard: You can view five different graphs that give you information about deliverability and MailStreams.

Report Dashboard: Gives you a variety of information in graphic format about recent mailings, member lists, and sales resulting from your email marketing.

Mailing Overview: Provides an overview of the success and failure rates of individual mailings or campaigns.

Delivery Statistics: Show you the progress of your mailings, and how successful they have been.

Tracking Statistics: Show you how many people have opened your message, clicked on a tracked URL, or who have gone from one of your mailings through to other pages on your Web site.

All Reports:

Mailings: Who received my mailings? Mailing statistics per mailing, and over time, including opens and clickthroughs.

Members: Who is a part of my list? Member statistics show you subscription trends, and characteristics of your membership.

Web site: How are list members using my Web site after receiving a mailing? Requires that you have Clickstream Tags on your Web site.

Purchases: What have list members purchased as a result of receiving a mailing? Requires that you have Purchase Tags on your Web site.

Interest: What pages have list members shown interest in? Requires that you have Interest Tags on your Web site.

Surveys: Use our survey form builder to create a questionnaire for your members, and then view and analyze the results here.

Sales cycle map: Shows key charts and reports arranged according to their place in the sales cycle; this splits the reports into Awareness, Interest, and Action reports.

Map: Displays all available reports in an outline form.

Custom Charts: ListManager provides you with a wide variety of reports and charts, but if you do not find what you need, you may create your own.

Table and Chart Options

Tables in ListManager display a number of icons that change how you see your data, or act on that row in the table. If you do not understand what you see on a page, just click the help icon to access context-sensitive help. 

Table Options

**Toggle**

Changes the sort order of a table, from a-z to z-a or from most recent to least recent. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Sort options vary depending on the table.

**Spreadsheet Button**

Downloads the current table in CSV (comma-separated values) format. CSV files may be opened and edited with many programs, such as Excel.

Next

Shows the next page of results.

Show more

Shows more results for a table, or increases the size of the field. Repeatedly clicking this button shows increasingly more lines

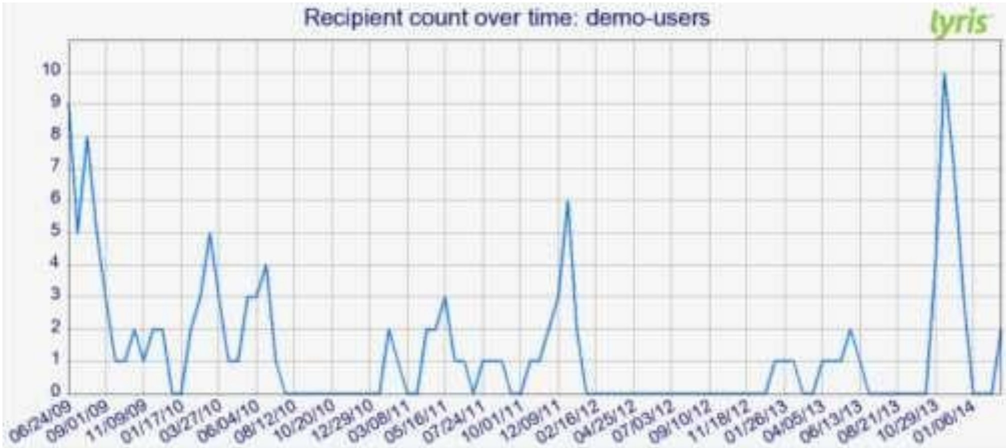
Show fewer

Shows fewer results for a table, or shrinks the size of the field.

Chart Options

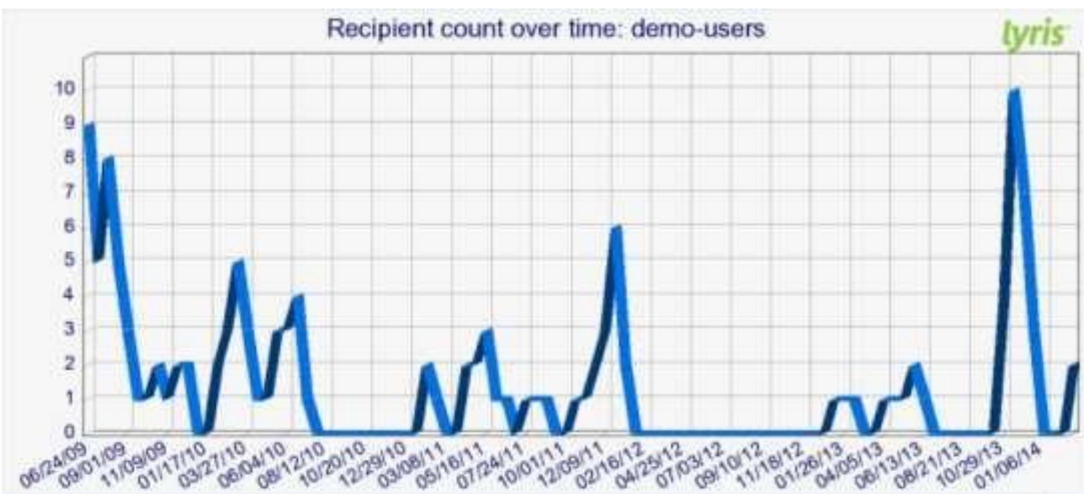
Line Chart

When you click on the Line Chart Icon, this is how you will see your data displayed:



3D Line Chart

When you click on the 3D Line Chart Icon, this is how you will see your data displayed:

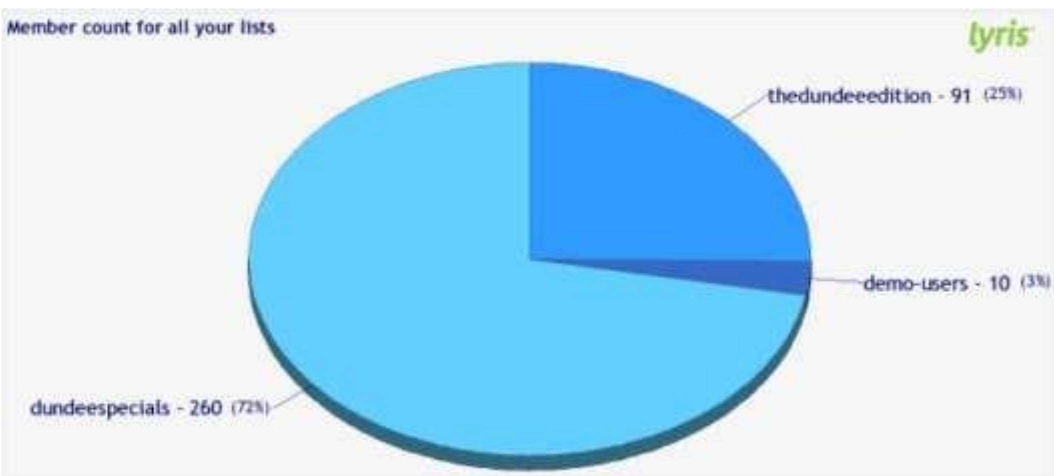


Bar Chart

When you click on the Bar Chart Icon, this is how you will see your data displayed:

Pie Chart

When you click on the Pie Chart Icon, this is how you will see your data displayed:

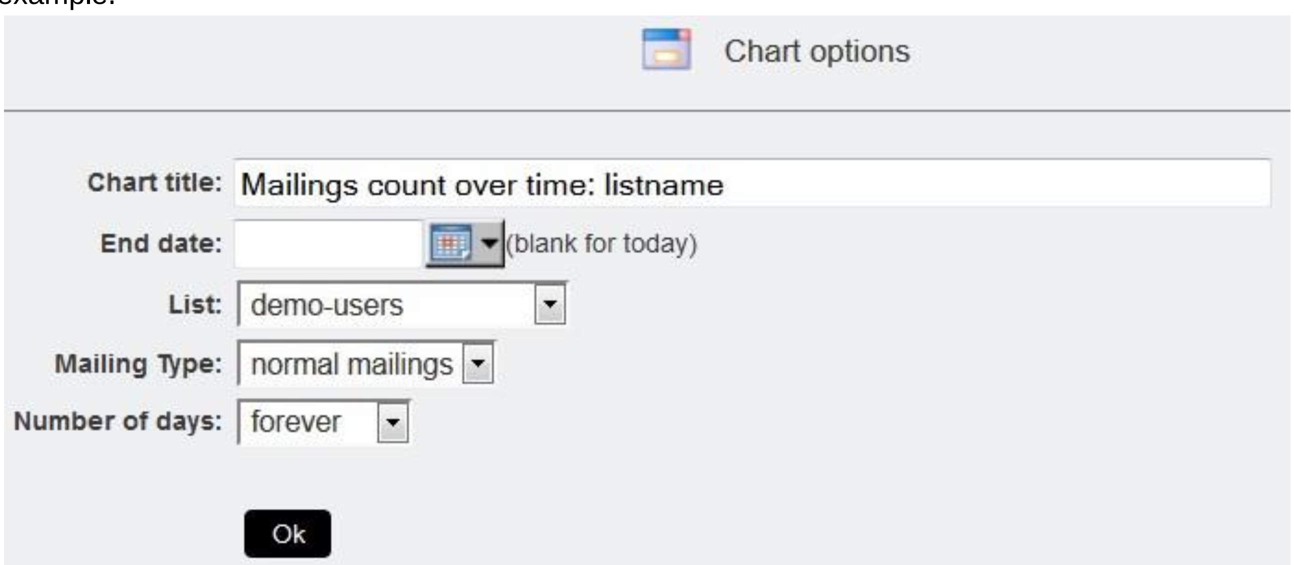


Table

When you click on the Table Icon, this is how you will see your data displayed:

Note that the charts will only display 19 data points, but the chart table will have all the data points for that report. All the data for the selected report may be downloaded as a CSV file by clicking on the disk icon in the upper right hand corner of the table.

Click on the Change Chart Properties to change the parameters of your chart - the dates charted, for example.



Information about the chart including a legend. The legend can be set to appear by default by the server administrator, in Utilities: Administration: Server: Server Settings: Advanced: Enable Features; however even if no legend appears here (it was set to not appear), it can be viewed by clicking the question mark.

Subscriptions

Automated Messages

ListManager sends *automated messages* when subscribers join, leave, or confirm their memberships.

Although the standard automated messages ListManager sends are adequate, you will likely want to create and use automated messages that are more informative and better reflect the character of your organization.

Customizing automated messages requires that you:

1. Create **Document Content**, or the message you want to send.

2. Create a **Document Association**, specifying under what circumstances the document should be sent.

Step A: Create Document Content

1. In the left Navigation bar, click **Utilities**, point to **Automated Messages**, and then click **Document Content**.

2. Click **Create From Template**.

3. Edit the content as you would any other content. See Creating Content for more information about editing content.

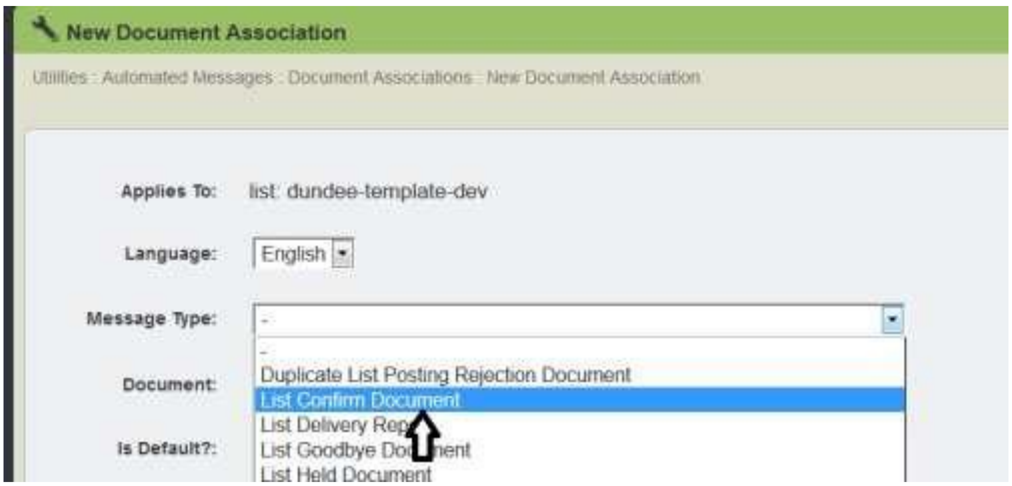
4. Click **Save** to save your new document content.

Step B: Create a Document Association

1. In the left Navigation bar, click **Utilities** > **Automated Messages** > **Document Association**.

2. Click Create **New**.

3. Click the box next to **Message Type**, and then select the type you want. For example, if you are creating a confirmation automated message, select "List Confirm Document" as the message type.



4. Choose the **Document** you want.

5. In the **Is Default** section, select **yes**.

6. Click **Save**.

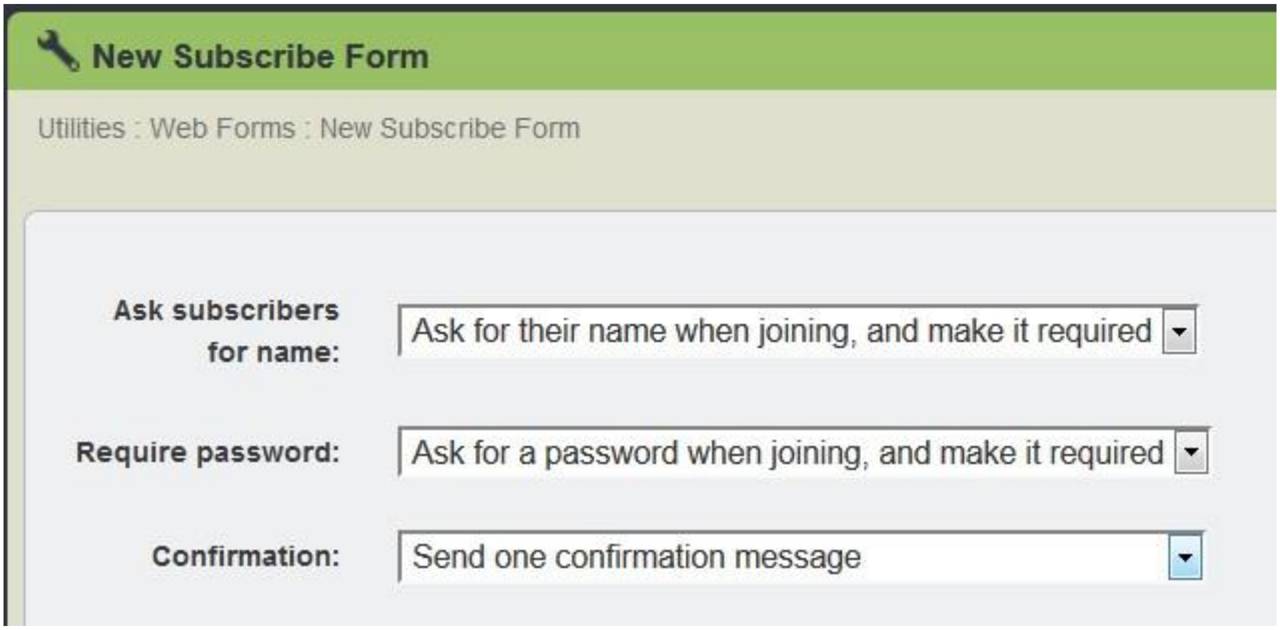
Subscription Forms

Your list will only be successful if people can "opt-in" easily, so you need to help new members join. We recommend you do this by adding a subscription form to your Web site.

Creating a Subscription Form for Your Web Site

1. In the left Navigation bar, click **Utilities** > **Web Forms > New Subscribe Form**.

2. Click the boxes next to **Ask subscribers for name**, **Require password** and **Confirmation**, then select the option you want for each.



Note: If you want your list to be double opt-in, in the **Confirmation**: box, select **Send one confirmation message**.

3. Enter the **Destination URL** you would like new members to be taken to after they fill out your form. This URL is a page on your website.

4. To select the lists you'd like members to be able to subscribe to from this form, click **Choose Lists**.

5. If you would like to gather information about your new members, click **Choose Demographics**.

6. Review your subscribe form. If it contains all the information you'd like, click **Get HTML**.

7. Copy and paste the HTML form generated into a page on your Web site. The HTML may be modified, if desired (for instance, you can change the field lengths or the descriptions for the demographic information).

8. Test your form before going live!

Tracking

Success Tracking

Once you have sent out a mailing, you will want to know how successful it has been. ListManager offers five kinds of success tracking:

1. **Delivery Tracking** - Who got my mailing?

2. **Opens Tracking** - Who opened my mailing?

3. **Forwards Tracking** - Who forwarded my mailing to another email address?

4. **Clickthrough Tracking** - Who clicked on a link from my mailing?

5. **Referral Tracking** - Who invited friends to join my list? How many friends actually joined?

6. **Action Tracking** - Who went to my Web site? What were they interested in, and what did they purchase?

Where is Tracking Enabled?

Different kinds of success tracking are enabled at different points in the process of sending a mailing:

Delivery Tracking - who received a particular mailing - is done automatically every time you send out a mailing. Nothing needs to be enabled; just send out a mailing. ListManager will record who received the mailing, and who failed to receive it. You may view the results in Reports: Mailings: Delivery Statistics.

Opens Tracking - who opened a particular mailing - can be enabled when you create a mailing.

Forwards Tracking - Forwards are automatically detected when opens tracking is enabled. To view them, go to Reports: Mailings: Tracking Statistics.

Clickthrough Tracking - who clicked on a link in a mailing - can be enabled when you create your content.

Referral Tracking - who recommended friends join your list - can be enabled when you send a message with a referral link. This link takes referrers to a web page, where they can enter the email addresses of friends who they think will be interested in your list. Those friends then receive an email message inviting them to join the list.

Action Tracking - who went to my Web site and made purchases - is enabled by adding Action Tags to your Web site. After a clickthrough, these tags can then track which pages a mailing recipient visits, how much interest they show in a particular area, and what they purchase.

How Can Tracking Increase My Mailing Success?

By tracking and recording tracking information in ListManager, you can then better target your customers in future mailings. Based on your tracking data, you may create segments of any group of members who show interest in your mailing, targeting just those who open your message, say, or those who purchased over a particular dollar amount.

Delivery tracking helps you gauge whether or not the email addresses you have are valid or not. Trying to send a mailing to a million recipients is not very impressive if only a few thousand actually received it. Since people tend to abandon email addresses or sign up bogus ones, delivery tracking helps you check the quality of your list of recipients.

Once your message has been received, you'll want to know who actually opened it. If you have a very low open rate, you can fine-tune your message to have a more appealing subject line. In addition, when opens tracking is enabled, you will automatically be able to see who forwarded your messages.

Clickthrough tracking tells you whether recipients were interested enough in the contents your mailing to click on a link and go to your Web site. Monitoring your clickthrough rates can help you see what formatting is most effective for your mailings - do you get a better response if you put a special offer at the top of your message, or at the bottom?

Referral tracking helps you to organically grow your list, and is a sign of how interesting your recipients find your content. If your mailings' recipients find your content interesting, chances are they will want to tell their friends about it - and that their friends will find it interesting, too.

Once you have gotten your recipients interested in your newsletter, you'll want to know how they become buying customers. Action tracking allows you to see how potential customers progress through your Web site, so you can later target those who show a certain level of interest or who have purchased particular products.

Delivery Tracking

ListManager automatically tracks who received your message.

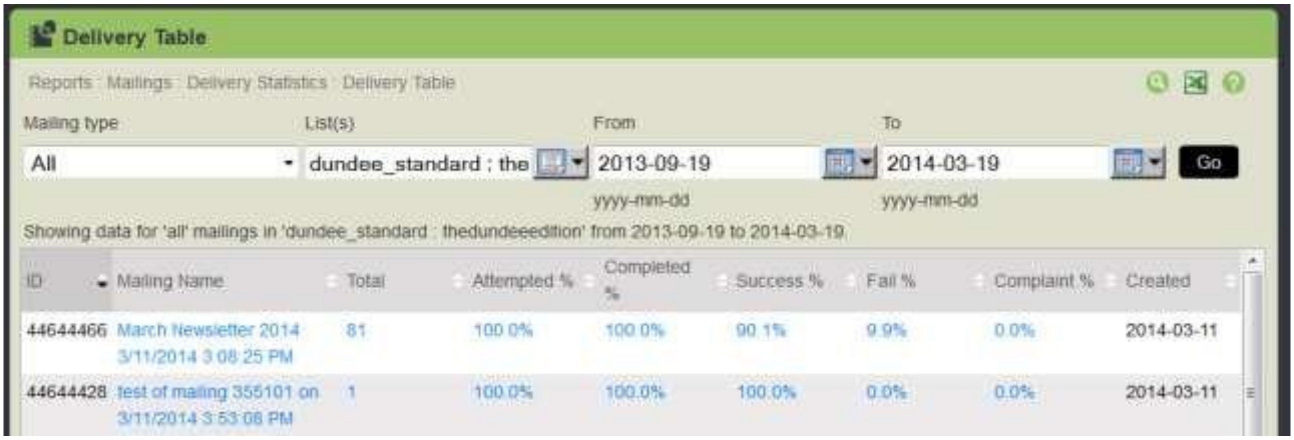
To see how many and what percentage of your recipients received your message

- In the left Navigation bar, click **Reports** > **All Reports** > **Mailings** > **Mailing Overview**.

To view a table of outgoing mailings

- In the left Navigation bar, click **Mailings** > **Mailing Status** > **All Outgoing Mailings by Date**.
  -Or-

- In the left Navigation bar, click **Reports** > **All Reports** > **Mailings** > **Deliver Statistics, and then click Delivery Table**.



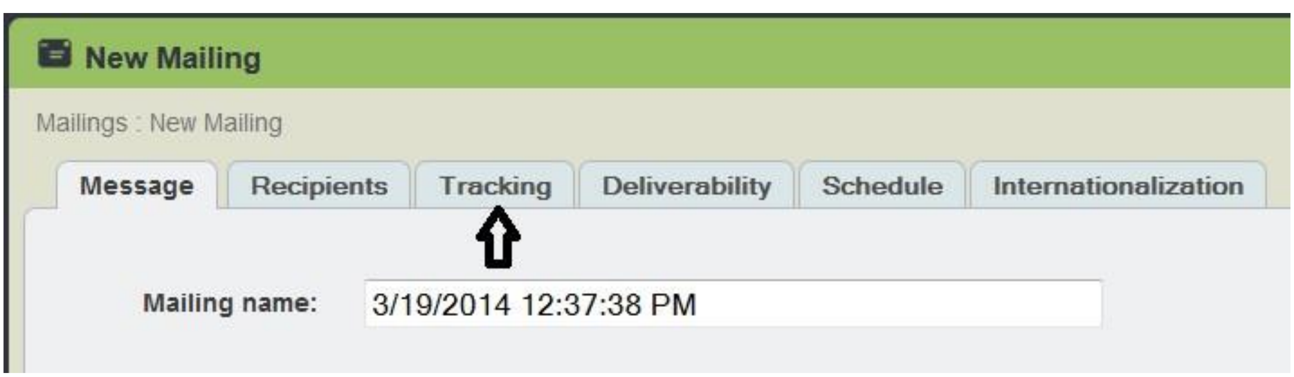
You can view more detailed information about a mailing by click the mailing's number in the **Total** column.

Opens/Forwards Tracking

You may see how many of your members opened your HTML or multipart message if you enable opens tracking when you create your mailing. You may also detect who has HTML capability at the same time.

ListManager is able to detect opens and HTML capability by inserting a 1x1 invisible gif in the HTML portion of your message. When a recipient opens the message, ListManager can register that they did so and that they have HTML capability. If a user can only read text, or if their email client or ISP prevents gif files from being retrieved automatically, you will be able to detect opens for that user only if the user clicks through on a link.
Note that if you create a text body only and select this tracking, your mailing will be sent in multipart alternative, meaning a text and HTML body will be sent. Otherwise, opens and HTML capability could not be tracked. If you dislike the appearance of the automatically generated HTML, create an HTML section for your mailing.

1. Create a new mailing, but before saving your message, click the **Tracking** Tab.



2. To track how many people open your message, select **yes** for **Track Opens**. If opens are tracked, forwards will be automatically tracked as well.

3. To track whether recipients can receive HTML, select **yes** for **Detect HTML Capability**.

4. Continue composing your message. When you're finished, click **Save** or **Save and Test**.

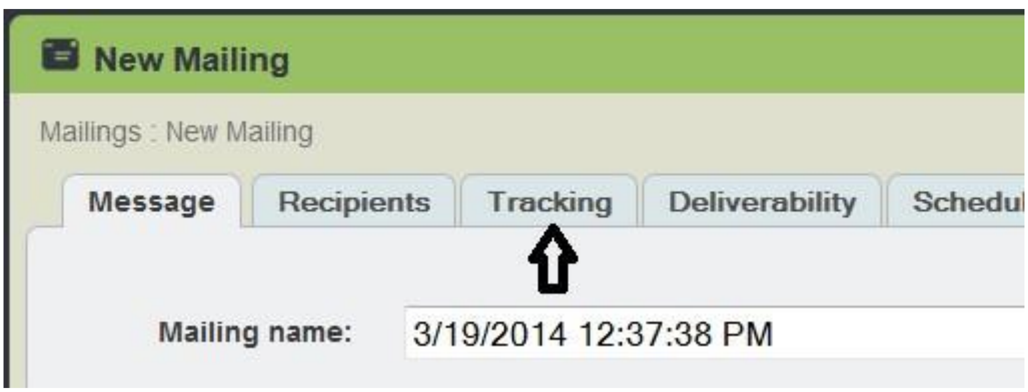
Clickthrough Tracking

You can see how successful your mailing has been by seeing how many recipients clicked on URLs in the message. To keep track of those clicks, you must first make a clickthrough tracking URL, and insert it into your mailing. You'll then be able to view the clicks in Reports: Mailing Reports: Tracking Statistics.

ListManager will encode the URL, so that the clicker will be taken first to the ListManager web server, and then redirected to the final destination URL.

Track All URLs in Content

1. While you are creating or editing your message, click the **Tracking** tab.



2. For **Track all URLs**, select **yes**.

Automatically Track All URLs

ListManager can automatically make all URLs in your web created content tracking URLs.

1. In the left Navigation bar, click **Utilities** > **List Settings** > **Web Created Content:**

2. Set **Default with automatically tracking All URLs** to **yes**.

3. Click **Save**.

Action Tracking

Action tracking allows you to track what actions your mailing recipients have taken after they've received your mailing and gone to your Web site. There are four kinds of action tracking:

Clickstream tracking allows you to detect what other pages your list members visited after clicking on a link.

Interest Tracking gauges a recipient's level of interest, based on the pages they have visited.

Purchase Tracking gives information back to ListManager about a recipient's purchase.

Member updates changes a database field for a member when they visit particular pages. For example, if a customer visits a particular page with a contest on it, you may update a database field to indicate the customer is interested in contests.

Offline events allow you to record and track interest, purchase, or any other event, such as a phone call or clickthrough, which occur outside of ListManager. These events are then incorporated into the database so they can be viewed in reports.

To use action tracking, you must first create an Action Tag in Utilities: Other: Action Tags. The resulting tag must be pasted in the source code for any web page you'd like to track.

You must include a clickthrough link in your message to use any action tracking. When a member clicks on a link, the browser is passed a cookie that identifies the member on tracked pages.

Clickstream Tracking

1. On the left Navigation bar, click **Utilities** > **Other** > **Action Tags** > **Clickstream Tags**.

2. Enter a name to help you identify this tag in reports.

3. Click **OK**. ListManager will provide you with a page tracking tag.

4. Copy the text in the **Your tag**: box, and then and paste it into the source code in any web page for which you'd like to track message recipients' visits.

Interest Tracking

1. On the left Navigation bar, click **Utilities** > **Other** > **Action Tags** > **Interest Tags**.

2. Click **Choose Event**.

3. Click the **Select** command for the tag that most closely matches the interest you'd like to track.

4. Edit the **Interest Stage**, if desired.

5. Edit the **Interest Points**, if desired.

6. Click **OK**. ListManager will provide you with an Interest Tracking tag.

7. Copy the Interest Tracking tag, and paste it into the source code in any web page for which you'd like to track message recipients' interest.

Purchase Tracking

1. On the left Navigation bar, click **Utilities** > **Other** > **Action Tags** > **Purchase Tag**.

2. In the **Name this Tag** box, enter a name.

3. To change the fields being tracked by this tag, click **Choose Fields**.

4. Enter the **Unit Price**. You may want to enter a variable here (e.g., $price) that a script on your web server can update with the correct quantity.

5. Enter the **Quantity**. You may want to enter a variable here (e.g., $quantity) that a script on your web server can update with the correct quantity.

6. Enter the **Product/SKU#.** You may want to enter a variable here (e.g., $sku) that a script on your web server can update with the correct quantity.

7. Enter the **Interest Stage**.

8. Enter the **Interest Points**.

9. Click **OK**. ListManager will provide you with a Purchase Tracking tag.

10. Copy the Purchase Tracking tag, and paste it into the source code in any web page for which you'd like to track message recipients' purchases.

Member Updates

1. On the left Navigation bar, click **Utilities** > Other > Action Tags > **Member Update Tags**.

2. Select the **Field Name** you'd like to update. Or, click **Create New Field** to create a new field for member updates.

3. Enter the **Value** that should be updated to this field when a member visits this page.

4. Click **OK**. ListManager will provide you with a Member Update Tag.

5. Copy the Member Update Tag, and paste it into the source code in any web page for which you'd like to update member records when members visit that page.

Offline Events

1. On the left Navigation bar, click **Utilities** > **Other** > **Offline Events**, and then click either **Offline Event**, **Offline Interest Event**, or **Offline Purchase Event**.

3. Enter the event name, member email address, and select a mailing to associate it to.

4. For interest and Purchase Tracking, enter interest stage and points, quantity, and any optional fields.

5. Click OK. ListManager will update the events.

Referral Tracking

Referrals allow your list members to invite their friends to join your list. You may track how many friends were referred by list members, how many opened or clicked on a tracking link in the invitation, and how many ultimately joined the list.

This is how it works:

1. You send out a mailing to your list with a referral link asking members to invite their friends to join the list.

2. List members click on the link and enter the email addresses of those they'd like to invite. They can also include an optional message.

3. The invited members receive an email message telling them how to join the list. If they follow the instructions in the invitation, they become a list member.

To use the referral feature, you must first create an invitation—a message that will be sent to those referred telling them how to join the list. This can be accomplished easily using the Invitation Template in Content, which can be customized to fit your needs. Next, you must create a referral form—the web page members are taken to when they want to invite a friend to join the list. Finally, you must insert a referral link into your mailing (or into the mailing content).

Create an Invitation

The invitation is sent to those who are invited to join your list by your members. Referrers can optionally add their own message (if your referral form allows it). Note that you can include clickthrough links in the invitation message.

1. In the left Navigation bar, click **Content** > **View Content**, and then click the **Create from Template** button.

2. Click the **Your Templates** box, and then select **Built-in Templates**.

3. Click the **Select** command for the **Invitation Template**.

4. Enter the **Content Name**.

5. Click **Text Message**, and then edit the text body.

6. Click **Save**. You have now created your invitation that will be sent by referrers to others to join the list.

Create a Referral Form

The referral form is a web page where your list members will enter in the email addresses of people they would like to invite to join your list. Only members can refer others to join a list.

1. In the left Navigation bar, click **Utilities** > **Web Forms** > **Referral Forms**.

2. To use a pre-existing referral form template, click **Create From Template**.

3. Click the **Choose a Template** box, select **Referral Form Template**, and then click **OK**.

4. Enter a **Title** and **Description** for the referral form, and enter the **HTML** for the form.

5. Click the **Applies To** box, and then select the list, site, or server you want the Referral Form to apply to.

6. To preview the form, click **Preview**.

7. When you are finished, click **Save**.

Create a Referral Link

In order for your members to be able to invite friends to join your list, you must insert a referral link into your mailing.

1. Create content as you normally would for a mailing. While on the New Content page, click **Text Message or HTML Message**.

2. Click **Insert URL**, and then click the **Referral** tab.

3. Select the **Invitation Content—**the message you created in the "Create an Invitation" procedure above that should be sent to those invited by your members.

4. Select whether or not you want the invitation to track opens and detect HTML capability.

5. Select the **Referral Form**—the form you created in the "Create a Referral Form" procedure above that member's should go to when they want to invite members.

6. Enter the **Destination URL**—the URL your members should be taken to after inviting members. If blank, they will be taken to a default web page thanking them for inviting members.

7. Click **Insert**. This will create a link at the bottom of the message. You can then move this link to wherever you want it in your content.

8. Continue to create your content as usual. When you are finished, click **Save**.

9. Create a mailing, and insert the content you created with the referral link.

You can view the results in Reports: Mailings: Referral Statistics.

Discussion Lists

If your list is configured to be a discussion list, list members may post to the list if they send to the list email address. That address is the listname@yourserver. For example, if your list name is "discussion" on the "mars.example.com" server, the email address of the list would be discussion@mars.example.com.

Discussion list members may view and post messages or changes their subscription status by going to the discussion forum interface. The discussion forum interface for your list is:

http://yourserver.example.com/read/?forum=yourlistname