

Harris Email Marketing

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Create & Manage Lists

Create & Manage Lists allows administrators with proper access level to create, upload, or combine recipient lists.


Upload a recipient list

Upload a recipient list allows administrators with the proper access level to upload a list of unique IDs or upload a tab-delimited text file containing email address, first name, and last name.

IMPORTANT!

The file to be uploaded for use with Email Marketing is expected to be a plain text file containing your unique ID's (client 10 Digit ID) only, one entry per line. Each ID record line should be terminated by a carriage return/line feed (CR/LF or 13/10 ASCII).

How to upload a list of IDs

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. On the **Create and Manage Lists** tab click the **Upload a recipient list** button (). The Upload a list of IDs page displays. See figure 1.
4. Enter the **list name**.
5. Click the **Browse** button to search for the text file of Unique IDs to upload.
6. Click **Begin upload**, or **Cancel** to abort. The **Create & Manage List** page will display with the newly uploaded list at the top of the list. See figure 2.

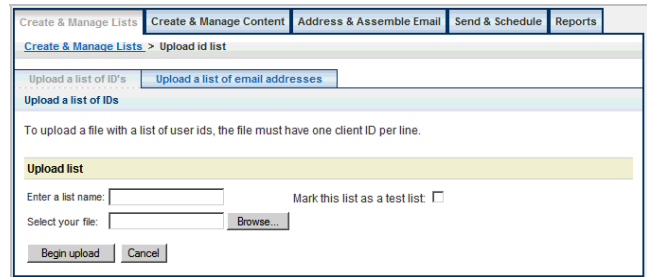


Figure 1

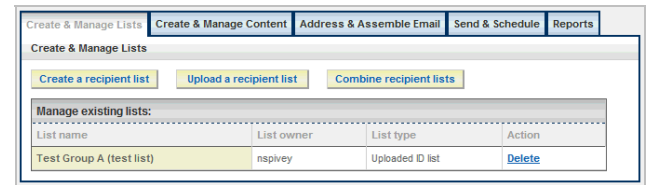



Figure 2

How to upload a list of email addresses

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. On the **Create and Manage Lists** tab click the **Upload a recipient list** button (). The **Upload a list of IDs** page will display.
4. Click the **Upload a list of email addresses** tab. The **Upload a list of email addresses** page will display. See figure 3.
5. Enter the **list name**.
6. Click the **Browse** button to search for the text file of Unique IDs to upload.
7. Click **Begin upload**, or **Cancel** to abort. The **Create & Manage List** page will display with the newly uploaded list at the top of the list.

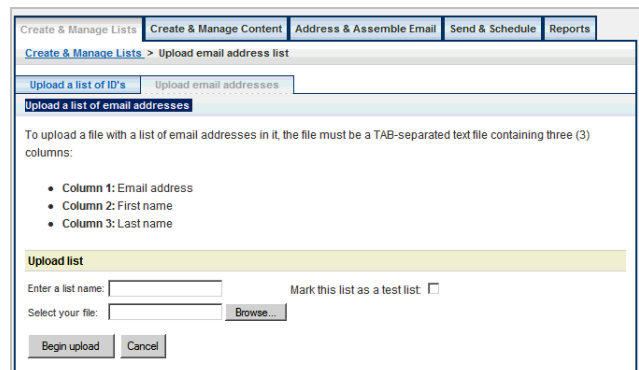






Figure 3

Combine recipient lists

Combine recipient lists allows administrators with the appropriate access level to create a composite list using existing lists.

How to combine lists of recipients

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. On the **Create and Manage Lists** tab click the **Combine recipient lists** button (). The **Create composite list** page will display. See figure 4.
4. Enter the **list name**.
5. Select the **combination method** (add, take the intersection with, or subtract).
6. Select an available list. The list type will display next to the list.
7. Click the **Add** button (), click **Remove** button () to remove the list, and click the **Insert** button () to insert a new list and combination method.
8. Click **Check List** to verify the new list is valid.
9. Click **Save list**, or **Cancel** to abort. The **Create & Manage List** page will display with the newly saved list at the top of the list.

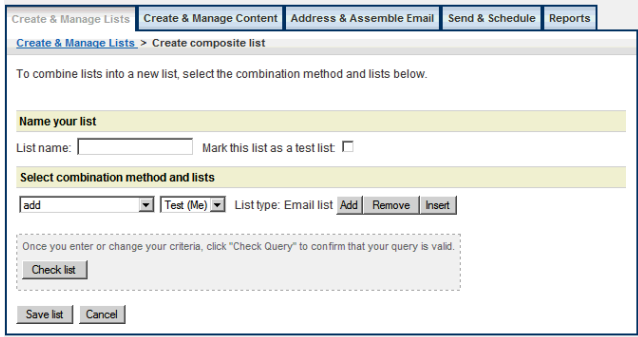


Figure 4

Add

The Add method will combine the elements in all selected lists.

Intersection

The Intersection method will combine only the set of elements that are in the selected lists.

Subtract

The Subtract method will subtract the elements found in all selected lists.

IMPORTANT!

When combining any type of list with an Email List, the newly created list is saved as an Email List. When merging content with an Email Address list, certain data tags such as Registration Link are considered invalid. Email Address lists should be targeted to non-members of the Harris database; therefore, the Registration Link, which links members to the 3rd step of the registration process, is not needed. The following data tags are valid for an email list: First Name, Last Name, Email Address, Open Count, Mailing Address tags, and Unsubscribe Link.

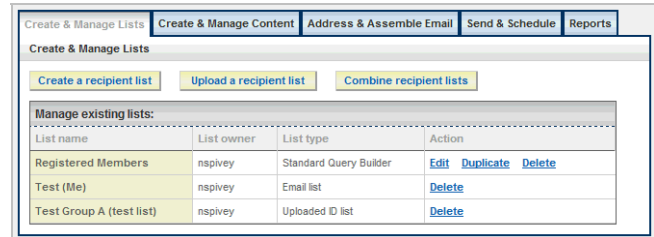
Delete

Standard and Advanced Query Builder lists can be edited, duplicated, and deleted. Uploaded ID and Email Lists can only be deleted. An administrator must have appropriate access controls setup in the Campaign Manager tool in order to successfully manage recipient lists.

How to delete a recipient list:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. The **Create and Manage Lists** page will display. Click the **Delete** link next to the appropriate recipient list. See figure 5.

IMPORTANT!
Deleting a list associated to a scheduled email will cause an error, and prevent the email from going out.



The screenshot shows the 'Create & Manage Lists' page with a navigation bar at the top containing 'Create & Manage Lists', 'Create & Manage Content', 'Address & Assemble Email', 'Send & Schedule', and 'Reports'. Below the navigation bar are three buttons: 'Create a recipient list', 'Upload a recipient list', and 'Combine recipient lists'. A section titled 'Manage existing lists:' contains a table with the following data:

| List name | List owner | List type | Action |
|--------------------------|------------|------------------------|---|
| Registered Members | nspivey | Standard Query Builder | Edit Duplicate Delete |
| Test (Me) | nspivey | Email list | Delete |
| Test Group A (test list) | nspivey | Uploaded ID list | Delete |

Figure 5

Calculate

Calculate allows administrators to calculate the number of records in the list. *Unknown* displays until the administrator clicks the **Calculate** link. The number of records must be re-calculated after the list has been edited.

Note: *The recipient count for Standard and Advanced Query lists include all records that match the query. This count includes blank emails, emails with null values, lost, deceased, and opt-outs. All will be removed on the Address and Assemble Email tab.*

Display

Display allows administrators to view the newly saved list on screen.

Create & Manage Content

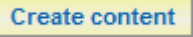
Create & Manage Content allows administrators with proper access level to create, modify, and upload content.

Create Content

Create content gives administrators with proper access level the ability to create and save content for the email communication. Administrators also have the ability to save content as templates to share with other administrators in order to create a library of ready-to-use messages available for the communications sent most.

Note: *Only the owner can edit a template. Other users must duplicate the template and then make modifications.*

How to create content:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. Select the **Create and Manage Content** tab. The **Create and Manage Content** page will display.
4. Click the **Create content** button (). The **Edit email content** page will display. See figure 6.
5. Enter the **content name**.
6. Enter **HTML Content**.
7. Enter **Text Content**.
8. Click **Save content** or **Cancel** to abort. The **Create & Manage Content** page will display with the newly saved content at the top of the list.

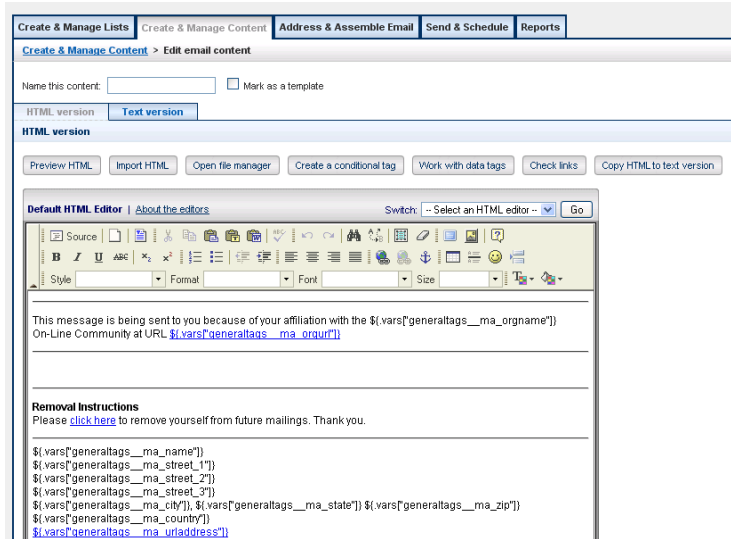


Figure 6

WYSIWYG HTML Editors

WYSIWYG HTML editors provide an editing interface, which resembles how the HTML content will be displayed in the recipients email client. WYSIWYG stands for *What You See Is What You Get*. Because WYSIWYG editors do not require the user to have any HTML knowledge, they are easier for an average computer user to get started with.

Xinha Editor

Xinha (pronounced like Xena, the Warrior Princess) is a powerful "WYSIWYG" HTML editor that works in Mozilla based browsers as well as in MS Internet Explorer. For more information on how to use the Xinha editor view the **Appendix A**.

Simple Editor

Email Marketing also offers a Simple editor, which is essentially an open text box that accepts HTML tags. This editor requires the user to have an understanding of HTML and any other web technologies they wish to use, such as CSS.

Data Tags

Data Tags allow administrators to display data from the database within the email message.

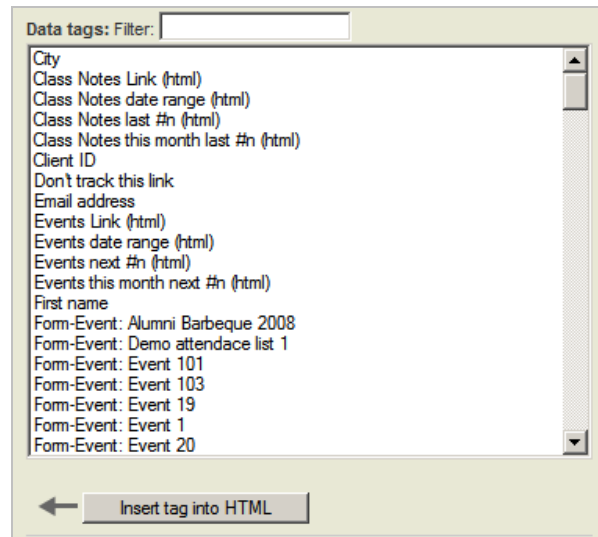
For example, you can include the member's first and last name in the salutation: **Dear Natasha Spivey**. In addition, you can use these tags to include deep links directly into the registration process (**Registration Link**), the online directory update process (**Update Link**) or the web-based opt-out process (**Unsubscribe Link**).

- **Class Note Link** – Inserts a link to the Class Notes page of the Online Community.
- **Class Notes date range** – Inserts most recent 5 Class Notes submitted between Jan. 1, 1990 to Jan. 1, 2020. Administrators may edit the number of Class Notes and the date range.
- **Class Notes last #n** – Inserts the last 5 Class Notes submitted. Administrators may edit the number of Class Notes.
- **Class Notes this month last #n** – inserts the last 5 Class Notes submitted for the current month. Administrators may edit the number of Class Notes.
- **Client ID** – Inserts the member's Client ID from the database.
- **Email Address** – Inserts the member's Email Address from the database.
- **Events Link** – Inserts a link to the Event Calendar on the Online Community.
- **Events date range** – Inserts next 2 upcoming events between Jan. 1, 1990 to Jan. 1, 2020. Administrators may edit the number of events displayed and the date range.
- **Events next #n** – Inserts the next 2 upcoming events. Administrators may edit the number of events displayed.
- **Events this month next #n** – inserts next 2 upcoming events for the current month. Administrators may edit the number of events displayed.
- **First Name** – Inserts the data contained in the First Name field of the database.
- **Form:** <Form Name> - Inserts a link to the Donation/Membership form listed. Campaign Reports will track every time a member clicks on the Form link, and whether the member made a donation or joined.

IMPORTANT!

The form must reside in the Harris Donation or Membership Builder tool.

- **Forward to a friend** – Inserts a link for the recipient to forward the email to a friend.
- **HPC ID** - Inserts the member's HPC ID (Harris ID) from the database.



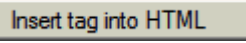
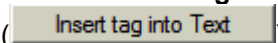
- **Last name** – Inserts the data contained in the Last Name field of the database.
- **Mailing address city** – Inserts the city stored in the Harris database.
- **Mailing address country code** – Inserts the country code stored in the Harris database.
- **Mailing address country** – Inserts the country stored in the Harris database.
- **Mailing address fax** – Inserts the fax number stored in the Harris database.
- **Mailing address name** – Inserts the name stored in the Harris database.
- **Mailing address phone** – Inserts the phone number stored in the Harris database.
- **Mailing address state** – Inserts the state stored in the Harris database.
- **Mailing address Street 1** – Inserts the data stored in the Street 1 field in the Harris database.
- **Mailing address Street 2** – Inserts the data stored in the Street 2 field in the Harris database.
- **Mailing address street 3** – Inserts the data stored in the Street 3 field in the Harris database.
- **Mailing address URL address** – Inserts the URL stored in the Harris database.
- **Mailing address zip** – Inserts the zip stored in the Harris database.
- **Open Count** – Tracks when a member initially opens the HTML version of the email message.

- **Preferred class year** – Inserts class year contained in the Preferred Class field of the online database.
- **Registration link** – Inserts a link to the Registration page of the Online Community. Broadcast Reports will track every time a member clicks on the Registration link, as well as if he/she actually registered at that time.
- **Security Info** – Inserts the security info contained in the online database. The Security Info (Access Code) is required to validate a member's record on step 3 of the registration process.
- **Unsubscribe link** – Inserts an unsubscribe/opt-out link. Campaign Reports will track when a member clicks on this link and if he/she actually unsubscribed.
- **User update link** – Inserts a link to the MyPage. Member will be prompted to login. Campaign Reports will track when a member clicks on this link and if he/she actually updates his/her profile information.

IMPORTANT!

When merging content with an Email Address list, certain data tags such as Registration Link are considered invalid. Email Address lists should be targeted to non-members of the Harris database; therefore, the Registration Link, which links members to the 3rd step of the registration process, is not needed. The following data tags are valid for an email list: First Name, Last Name, Email Address, Open Count, Mailing Address tags, and Unsubscribe Link.

How to insert data tags:

1. Place your cursor where you want the **Data tag** to appear with the HTML or Text content.
2. Select the desired tag from the **Data tags** list.
3. Click the **Insert tag into HTML** button () or the **Insert tag into Text** button (). The tag will appear in the content area.

Data Tag Filter

Administrators can quickly find data tags by typing in a keyword into the Data Tag Filter field. The data tag list will update with only the matching tags. *See figure 7.*

To return to the full list of available data tags:

1. Highlight the Keyword.
2. Click the [**Delete**] button on the keyboard. The original list of data tags will display.

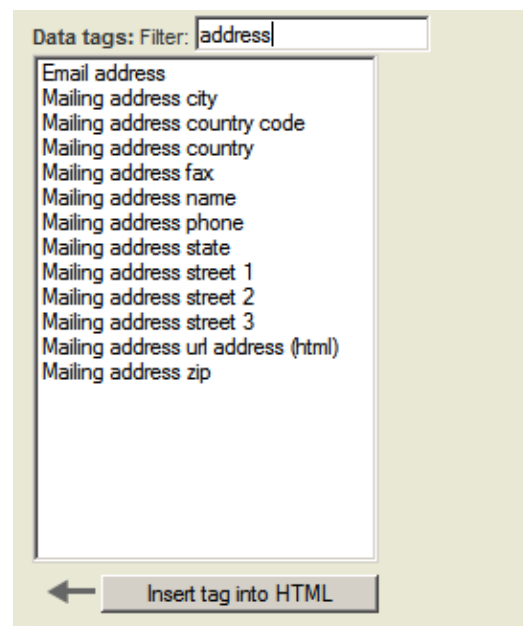
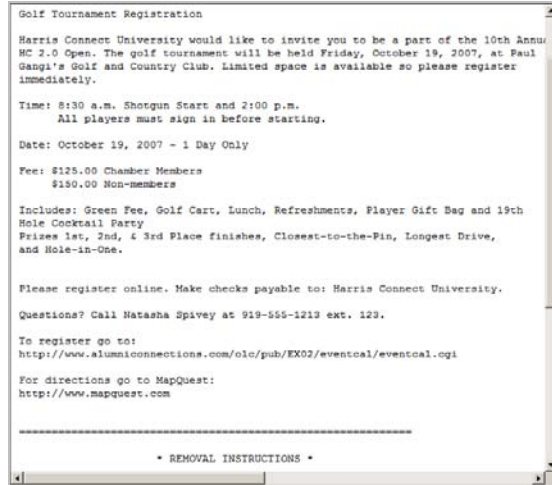
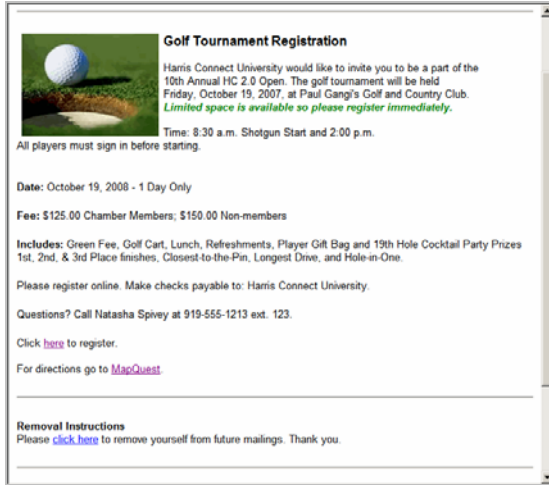


Figure 7

Preview HTML/Text

Administrators can capture a quick preview of what the email message will look like for the end-user. Personalized data is replaced with the administrator's data based on the login used. It is important NOT to completely rely on the Preview version of an email. A test email should be sent via the Send & Schedule tab.



Notes: The Forward To A Friend link is inactive in the Preview HTML window. An administrator must send a live email to himself and/or select test recipients to properly test this feature.


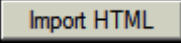
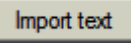
Copy this HTML into Text Content or Copy above HTML into Text Content

Administrators can copy the HTML message into the text content window below. All HTML data tags will be converted to Text data tags. However, the Open Count tag will need to be removed from the text content.

Import HTML/Text

Administrators with proper access level can import HTML or Text on the Edit Content page.

How to import HTML/Text

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. Select the **Create and Manage Content** tab. The **Create and Manage Content** page will display.
4. Click the **Create content** button (). The **Edit email content** page will display.
5. Enter the **content name**.
6. You may **Mark this content as a template for others** by checking the checkbox.
7. Select an editor, if the appropriate editor is not already selected.
8. Click the **Import HTML** button () or the **Import Text** button () located under the Data Tags dropdown menu. See *figure 8*. The import window will display. See *figure 9*.
9. Click the **Browse** button to locate the appropriate HTML/Text file.
10. Click **Begin upload**, or **Cancel** to abort. The **Edit Email Content** page will display with the HTML/Text file loaded in the content area.

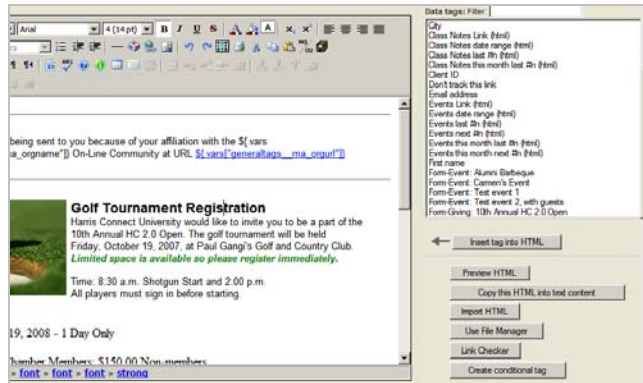


Figure 8

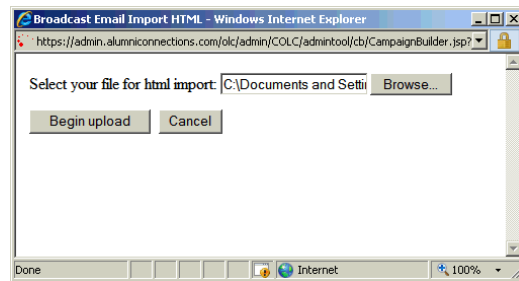


Figure 9

File Manger

File manager allows administrators to upload images and files from their hard drive to be used in their email message. Administrators have the ability to copy, rename, move, and delete files as necessary. For more information on how to use File Manager, view **Appendix B**.

Link Checker

Link Checker is a built-in feature that automatically verifies that URL's you entered are valid. Valid URLs will display OK in the Status column.

Link Checker recognizes text as a URL only if it begins with `www.` or `http://`. Link Checker does NOT currently support URL's on a SSL secure server - those beginning with `https://`.

Note: *If you need to use a link to a URL starting with `https://`, please do not run Link Checker.*

When Link Checker finds a URL of this format, it will attempt to retrieve the document pointed to by the URL link. If it is unsuccessful at this attempt, the link will be marked as invalid. There is one exception; links that fail because they are within an authenticated realm (i.e. a userID and password are required) are ignored. When a link is listed as invalid, there are several possible reasons:

- The URL was misspelled.
- The server on which the document resides is down, either temporarily or permanently.
- The server on which the document resides is not responding within a reasonable amount of time.
- The outbound connection to the Internet from this server is temporarily down.

If you want to verify the link yourself, you can cut-and-paste it into any browser.

Create Conditional Tag

Administrators have the ability to create conditional content that will only display for targeted recipients within the recipient list. For example, for the Reunion Weekend announcement email blast I wish say “Welcome to your 1st Reunion Weekend!” to the class of 2008, and I would like to say “Join us for Reunion Weekend 2009!” to all other class years.

1. Once on the **Create & Manage Content** tab, place your cursor where you want the conditional statement to go.
2. Click the **Create Conditional Tag** button below the Data Tag list. The **Create a conditional tag** popup will display. See *figure 10*.
3. Select the database field you wish to target.
4. Select equals or contains.
5. Enter the text you wish to display for this targeted group.
6. Check the **Check here to include an “else” clause**, if applicable. The window will refresh and the or else display area will display. See *figure 11*.
7. Enter the Else clause.
8. Click **Insert Conditional tags**, or **Cancel** to abort.

The conditional statement will appear in the content window. See *figure 12*.

Figure 10

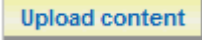
Figure 11

Figure 12

Upload new content

Upload new content allows an administrator with proper access level to upload an HTML and a Text file.

How to upload new content:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation under **bar**.
3. Select the **Create and Manage Content** tab. The **Create and Manage Content** page will display.
4. Click the **Upload content** button (). The **Upload email content** page will display. See figure 13.
5. Enter the **content name**.
6. Click the **Browse** buttons to upload the HTML and Text files.

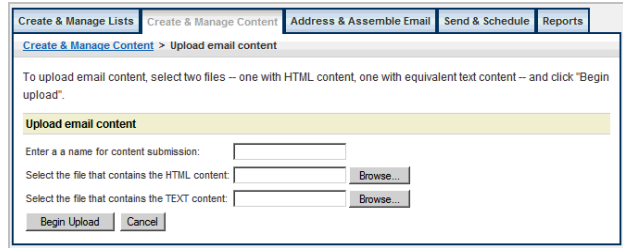


Figure 13

Note: You do not have to upload both an HTML and Text file.

7. Click **Begin upload**, or **Cancel** to abort. The **Create and Manage Content** page will display with the newly saved content at the top of the list.

IMPORTANT!

When modifying uploaded HTML files that were originally created using an outside editor such as Dreamweaver or FrontPage, it is best to use the Simple editor. The Xinha and FCK editor are known to alter the html code and remove Cascading Style Sheets (CSS). It is event suggested to use the outside editor for multiple modifications.

Edit, duplicate, and delete content

Administrators with proper access level can edit, duplicate, and delete content.

How to edit email content:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar.
3. The **Create and Manage Lists** page will display. Click the **Create & Manage Content** tab. The **Create & Manage Content** page will display.
4. Click the **Edit** link next to the appropriate content. *See figure 14.* The **Edit email content** page will display with the content name displayed.
5. Make all necessary modifications to the content.
6. Click **Save content** or **Cancel** to abort. The **Create & Manage Content** page will display.

| Content Name | Content Owner | Action |
|----------------------------------|---------------|---|
| Enhancement Notification 01Apr07 | nspivey | Edit Duplicate Delete |
| 10th Annual HC 2.0 Open | nspivey | Edit Duplicate Delete |
| General - Deb Sig (template) | nspivey | Edit Duplicate Delete |

Figure 14

How to duplicate email content:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Create & Manage Content** tab. The **Create & Manage Content** page will display.
4. Click the **Duplicate** link next to the appropriate content. *See figure 14.* The **Edit email content** page will display with the content name displayed as *Copy of <Original Content Name Here>*.
5. Modify the **content name**.
6. Make all necessary modifications to the content.
7. Click **Save content** or **Cancel** to abort. The **Create & Manage Content** page will display with the newly saved content.

How to delete email content:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Create & Manage Content** tab. The **Create & Manage Content** page will display.
4. Click the **Delete** link next to the appropriate content. *See figure 14.*

IMPORTANT!
Deleting content associated to a scheduled email will cause an error, and prevent the email from going out.

Address & Assemble Email

Address & Assemble Email allows administrators with proper access level to compile the recipient list and content along with the From Email Address, Reply Email Address, To, etc.

Create new email

Create new email allows an administrator to create and save a new email communication.

How create new email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Address and assemble a new email** button (**Address and assemble a new email**). The **Edit email details** page displays. See figure 15.
5. Enter the **email name**.
6. Select the **From**.
7. Enter a **From email address**.
8. Enter a **Reply-to email address**.
9. Enter a **To**.
10. Enter **BCC** (Blind Copy Email Addresses), if applicable.
11. Enter a **Subject**.
12. Select the **email content**.
13. Select the **recipient list**.
14. Select the **email format**.
15. Select a **Campaign**, if applicable.
16. Select a **Category**.

How to select a category/campaign:

- a. Select a category in the **Available Categories** list. Select multiple categories by holding the CTRL + the click mouse or Apple Key + click mouse for Mac Users.
- b. Click the **Select** button. The selected category or categories will display in the **Selected Categories** list.

How to remove categories/campaign:

- a. Select a category in the **Selected Categories** list. Select multiple categories by holding the CTRL + the click mouse or Apple Key + click mouse for Mac Users.
- b. Click the **Remove** button. The removed category or categories will no longer display in the **Selected Categories** list.

The screenshot shows the 'Address & Assemble Email' web interface. The top navigation bar includes 'Create & Manage Lists', 'Create & Manage Content', 'Address & Assemble Email', 'Send & Schedule', and 'Reports'. The main content area is titled 'Address & Assemble Email > Edit email details'. It is divided into three main sections: 'Email details', 'Email content and recipient list', and 'Campaign & Categories'. The 'Email details' section has a text input for 'Email name' and several dropdown menus for 'From' (currently 'Harris Client Community'), 'From email address', 'Reply-to email address', 'To', and 'BCC email addresses'. There are also 'More information' links next to the 'To' and 'BCC email addresses' fields. The 'Email content and recipient list' section has a dropdown for 'Select email content' (currently 'Enhancement Notification 01Apr07'), a dropdown for 'Select recipient list' (currently 'Registered Members'), and radio buttons for 'Select type of email to send' (currently 'HTML and text'). The 'Campaign & Categories' section has two lists: 'Available campaigns' and 'Selected campaigns', and 'Available categories' and 'Selected categories'. Each list has a 'Select' button and a 'Remove' button. At the bottom, there are several red error messages: 'You must select at least one category for this email.', 'You must enter in a name for this email.', 'You must enter in a subject for this email.', 'You must enter in a from email address for this email.', 'You must enter in a reply email address for this email.', and 'You must enter in a To value for this email.'. A 'Save this email' button is located at the bottom left.

Figure 15

17. Click **Save this email**. The **Address & Assemble Email** page will display with the newly created email at the top of the list.

Note: Additional From Options, Campaigns, and Categories can be added via the Campaign Manager.

Suggestion: Administrators can further personalize their email communication by adding data tags such as First Name and Last Name to the To or Subject fields. Click the More Information link next to each field to learn more.

Edit, duplicate, and delete emails

Administrators with proper access level can edit, duplicate, and delete email details.

How to edit an address & assembled email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Edit** link next to the appropriate email. See *figure 16*. The **Edit email details** page will display with the email name displayed.
5. Make all necessary modifications to the email details.
6. Click **Save this email**. The **Address & Assemble Email** page will display.

| Email Name | Email Owner | Category | Campaign | Recipient count | Testing Options | Action |
|----------------------|-------------|--------------------------------|----------|-----------------|-------------------|---|
| Launch Email 02Oct07 | mspivey | General Announcement - General | | Unknown | Calculate Display | Send test email Check spam rating Edit Duplicate Delete |

Figure 16

How to duplicate an address & assembled email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Duplicate** link next to the appropriate email. See *figure 16*. The **Edit email details** page will display with the content name displayed as *Copy of <Original Email Name Here>*.
5. Modify the **email name**.
6. Make all necessary modifications to the email details.
7. Click **Save this email**. The **Address & Assemble Email** page will display with the newly saved email.

How to delete an address & assembled email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Delete** link next to the appropriate email. See *figure 16*.

IMPORTANT!
Deleting a scheduled email will cause an error, and prevent the email from going out.

Send Test Email

Send Test Email allows an administrator to send a quick test email.

How to send a test email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Send test email** link next to the appropriate email. See figure 17. The **Send a test email** window will display. See figure 18.
5. Select the appropriate recipient list from the **Available test lists**.
6. Click **Send test email to selected list** button, or **Cancel** to abort.

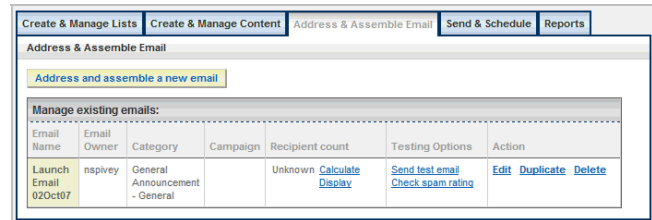


Figure 17

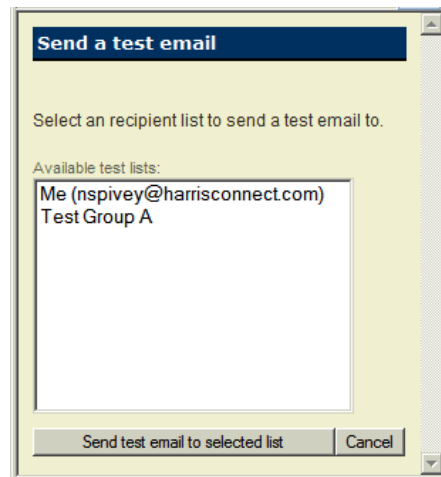


Figure 18

IMPORTANT!
These test emails do not display on the Reports tab. To send a "true" test email:

1. Create a test recipient list, but do not check the list as a test. Indicate it is a test by adding "Test" to the List Name.
2. Create the content.
3. Address and assemble the test email
4. Actually send the email via the Send & Schedule tab. Go to the Send & Schedule for more information.

Check Spam Rating

Email Marketing filters your selected emails through "Spam Assassin" to grade the email's likelihood of being flagged as spam. There are a number of factors that determine the grade of the email, and Spam Assassin will assign an overall score to your message based on the factors.

How to check an emails spam rating:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Check spam rating** next to the appropriate email. The **Spam Rating Results** window will display. See figure 19.
5. Click the **Close** button.

Note: An email must have content in order to successfully check the spam rating.

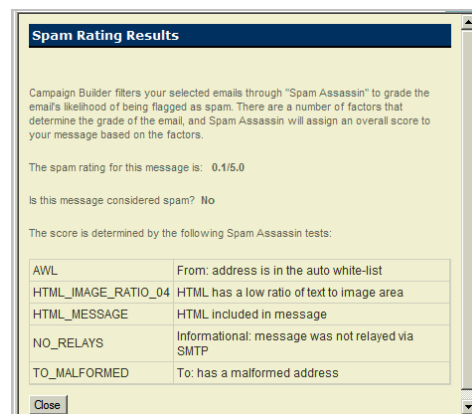


Figure 19

Calculate Recipient Count

Calculate Recipient Count allows administrators to calculate the number of potential recipients minus opt-outs.

How to calculate an email's recipient count:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Calculate** link under the Recipient count header next to the appropriate email. See *figure 20*. The **Address & Assemble Email** page will refresh and the count will replace the "unknown" text. See *figure 21*.

Note: An email must have a recipient lists in order to successfully calculate the recipient count.

| Email Name | Email Owner | Category | Campaign | Recipient count | Testing Options | Action |
|----------------------|-------------|--------------------------------|----------|-----------------|----------------------|---|
| Launch Email 02Oct07 | inspivey | General Announcement - General | | Unknown | Calculate Display | Send test email Check spam rating Edit Duplicate Delete |

Figure 20

| Email Name | Email Owner | Category | Campaign | Recipient count | Testing Options | Action |
|----------------------|-------------|--------------------------------|----------|-----------------|----------------------|---|
| Launch Email 02Oct07 | inspivey | General Announcement - General | | 5 | Calculate Display | Send test email Check spam rating Edit Duplicate Delete |

Figure 21

Display Recipient List

Display allows an administrator to view the targeted recipient list.

How to display the recipient list:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Display** link under the Recipient count header next to the appropriate email. See *figure 21*. The **List Display** window will display. See *figure 22*.

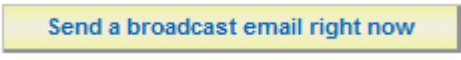
| ISD | Name | Email |
|----------|--------------------|---------------------|
| ISD03312 | Marie L. Margiotta | nana430@yahoo.com |
| ISD00945 | Elaine Connery | econnery914@cox.net |
| SD02300 | Natasha Spivey | byeVA@hotmail.com |
| ISD02241 | Debbie Cartossa | madwoman@msn.com |
| ISD02176 | Deb Taylor | deb_taylor@aol.com |

Figure 22

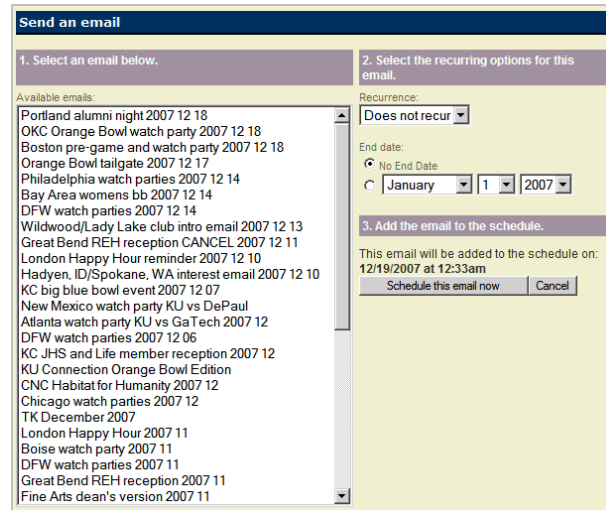
Send & Schedule

Send & Schedule allows administrators with the proper access level to send emails immediately or to schedule for some time in the future.

How to send an email right now:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Click the **Send a broadcast email right now** button
.
 The **Send an email** window will display. See figure 23.
5. Select the appropriate email from the **Available Emails**.
6. Click the **Schedule this email now**, or **Cancel** to abort. The **Send & Schedule** page will refresh with today's calendar view loaded with the email in the appropriate time slot. See figure 24.
7. Click the **Approve** link under the scheduled email.

Note: Only administrators with the proper access level can approve email messages.



The screenshot shows the 'Send an email' interface. On the left, under '1. Select an email below.', there is a list of 'Available emails' including 'Portland alumni night 2007 12 18', 'OKC Orange Bowl watch party 2007 12 18', and others. On the right, under '2. Select the recurring options for this email.', there are 'Recurrence' and 'End date' options. The 'End date' is set to 'January 1, 2007'. At the bottom right, there is a section '3. Add the email to the schedule.' with a 'Schedule this email now' button and a 'Cancel' button.

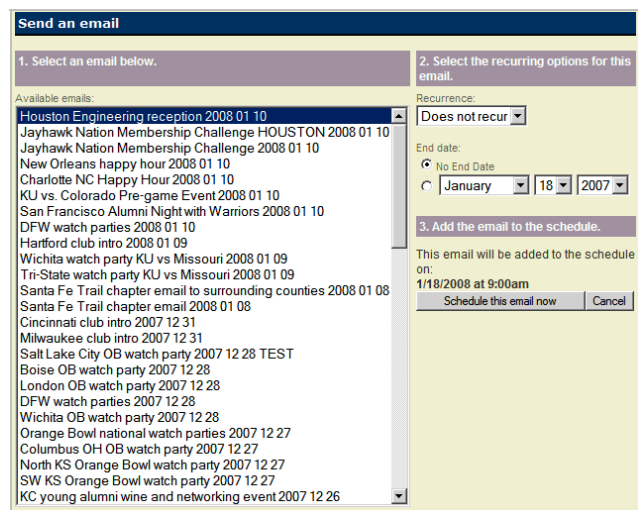
Figure 23

| | |
|---------|---|
| 10:00PM | |
| 10:30PM | Launch Email 02Oct07 Broadcast scheduled - NOT APPROVED 10:42 PM Approve |

Figure 24

How to schedule an email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display with current month.
4. Select the appropriate month > day > time. The **Send an email** window will display with the select date and time stamp. See figure 25.
5. Select the appropriate email from the **Available Emails**.
6. Click the **Schedule this email**, or **Cancel** to abort. The **Send & Schedule** page will refresh with selected day calendar view loaded with the email in the appropriate time slot.
7. Click the **Approve** link under the scheduled email.



The screenshot shows the 'Send an email' interface. On the left, under '1. Select an email below.', there is a list of 'Available emails' including 'Houston Engineering reception 2008 01 10', 'Jayhawk Nation Membership Challenge HOUSTON 2008 01 10', and others. On the right, under '2. Select the recurring options for this email.', there are 'Recurrence' and 'End date' options. The 'End date' is set to 'January 18, 2007'. At the bottom right, there is a section '3. Add the email to the schedule.' with a 'Schedule this email now' button and a 'Cancel' button.

Figure 25

Recurring Emails

Administrators have the ability to schedule repetitive emails at daily, weekly, monthly, quarterly, or yearly intervals, send the message until a certain date or without an end date, and reschedule the entire list of pending emails. The Recurring Email option is great for personal e-mail reminders and e-Cards, monthly Chapter, Class, or Club Leader meeting reminders, and direct marketing communications to constituents.

How to schedule a recurring email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Click the **Send a broadcast email right now** button

[Send a broadcast email right now](#)

The **Send an email** window will display. See figure 26.

5. Select the appropriate email from the **Available Emails**.
6. Select the recurrence (Daily, Weekly, Monthly, Quarterly, or Yearly).
7. Select the End Date or No End Date.
8. Click the **Schedule this email now**, or **Cancel** to abort. The **Send & Schedule** page will refresh with today's calendar view loaded with the email in the appropriate time slot. See figure 27.
9. Click the **Approve** link under the scheduled email.

Note: Only administrators with the proper access level can approve email messages.

Figure 26

Figure 27

How to reschedule a recurring email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Search for the running email.
5. Click the email name (Calendar View) or the View Details link (List View). The email detail page will display.
6. Click the **Reschedule** link. The rescheduling dropdown menus will display. See figure 28.
7. Select the appropriate **New date**, time, and **Recurring options** (recurrence and end date or No End Date).
8. Click the **Reschedule now** link, or **Cancel** to abort.

Figure 28

Calendar View

Calendar View allows administrators to view scheduled emails by Year, Month, Week, or Day.

How to access the calendar view of scheduled emails:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display with current month and the current day highlighted. See figure 29.
4. Click the appropriate view (Month, Week, Day, Today, or Year) link.

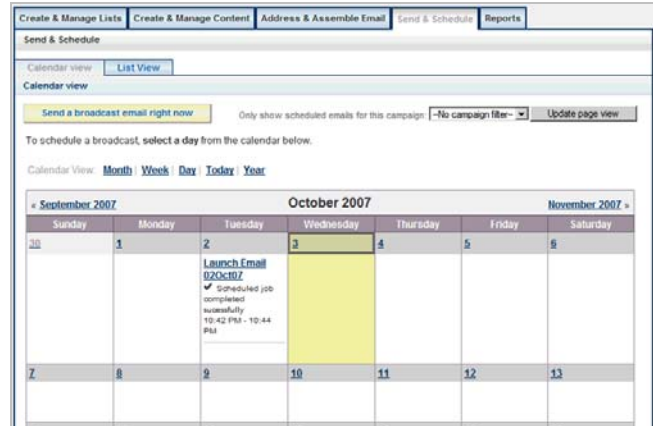


Figure 29

Approve/Reject

Administrators with the proper access level can approve or reject running emails. Administrators can view details on the scheduled email prior to approving or rejecting.

How to approve a scheduled email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Find the appropriate scheduled email.
5. Click on the name of the scheduled email. The details window will display. See figure 30.
6. Click the **Approve** link.

Note: You can preview the HTML and Text message by clicking the Preview HTML/text links. See Figure 30. For more information click the More Info link in the Status section. See Figure 30. The details will display. See Figure 31.

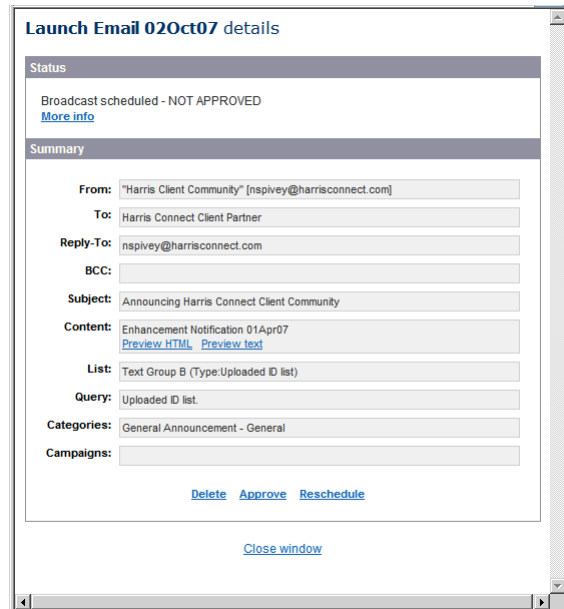


Figure 30

| Broadcast scheduled - NOT APPROVED | |
|------------------------------------|--|
| Recipient count: | 5 |
| Scheduled date: | 11/26/2007 9:00am |
| End time: | Job hasn't run to completion yet. |
| Log: | 10/2/2007 10:59pm Schedule item added by nspivey |
| Schedule item id: | 12 |
| Mailing_id: | COLC-20071002225903 |
| Owner: | nspivey |
| Admin Restrictions: | none |

Figure 31

IMPORTANT!
Administrators with proper access levels can delete, approve, reject, and reschedule an email from the detail window.

How to reject a scheduled email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Search for the running email.
5. Click the email name (Calendar View) or the View Details link (List View). The email detail page will display.
6. Click the **Reject** link. See figure 32.



Figure 32

Abort

Abort allows administrators with the proper access permission to abort a running email message.

How to abort a running email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Search for the running email.
5. Click the Abort link.

Note: Emails sent to a small number of recipients may run too quick to display the Abort link.

Restart

Restart allows administrators with the proper access permission to restart a stalled email message. It prevents administrators from having to contact Harris to restart their broadcast. An administrator knows an email is dead when Total Counts in the Summary Report do not change for an hour or more. The system will look at the entire recipient list, remove the ones it already delivered to, and continue to send to the rest.

IMPORTANT!
Restart should only be used if the system has failed.

If the job is still running and you hit restart, it will send a duplicate email to whoever hasn't already received the message from the first job running.

How to restart a stalled email:

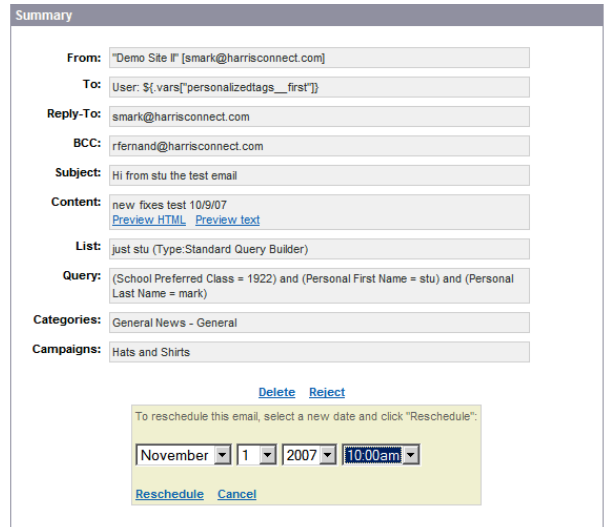
1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Search for the running email.
5. Click the email name (Calendar View) or the View Details link (List View). The email detail page will display.
6. Click the **Restart** link.

Reschedule

Reschedule allows administrators with the proper access permission the ability to reschedule scheduled emails.

How to reschedule an email:

9. Login to the Harris Tool.
10. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
11. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
12. Search for the running email.
13. Click the email name (Calendar View) or the View Details link (List View). The email detail page will display.
14. Click the **Reschedule** link. The rescheduling dropdown menus will display. See *figure 33*.
15. Select the appropriate date and time.
16. Click the Reschedule link.



The screenshot shows an email summary page with the following details:

- From:** "Demo Site II" [smark@harrisconnect.com]
- To:** User: \${ vars["personalizedtags__first"] }
- Reply-To:** smark@harrisconnect.com
- BCC:** rfernand@harrisconnect.com
- Subject:** Hi from stu the test email
- Content:** new fixes test 10/9/07
[Preview HTML](#) [Preview text](#)
- List:** just stu (Type:Standard Query Builder)
- Query:** (School Preferred Class = 1922) and (Personal First Name = stu) and (Personal Last Name = mark)
- Categories:** General News - General
- Campaigns:** Hats and Shirts

Below the summary, there are links for [Delete](#) and [Reject](#). A yellow box contains the text: "To reschedule this email, select a new date and click 'Reschedule':". Below this text are three dropdown menus: "November", "1", and "2007", followed by a time dropdown menu set to "10:00am". At the bottom of the yellow box are links for [Reschedule](#) and [Cancel](#).

Figure 33

Delete

List View allows administrators with the proper access permission to delete scheduled emails.

How to reject a reschedule an email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Search for the running email.
5. Click the email name (Calendar View) or the View Details link (List View). The email detail page will display.
6. Click the **Delete** link. The "Are you sure you want to delete this broadcast" window will display. See *figure 34*.
7. Click OK to successfully delete, or Cancel to abort.

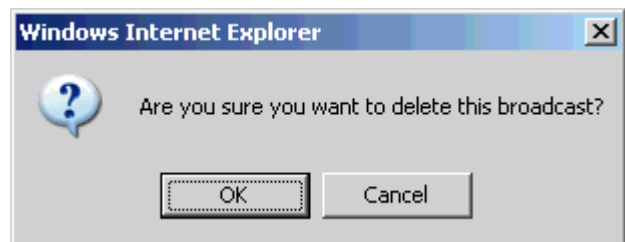


Figure 34

IMPORTANT!

To Delete an email that was scheduled to go immediately, you must Reschedule the email first.

List View

List View allows administrators to view scheduled emails as a chronological list.

How to access the list view of scheduled emails:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display.
4. Click the **List View** tab next to the **Calendar View** tab. The **List view** page will display. See *figure 35*.

| Schedule date | owner | Email name | Status | Action |
|-------------------|---------|----------------------|--|---|
| 11/26/2007 9:08am | mspivey | Launch Email 020c107 | Broadcast scheduled - NOT APPROVED | View details Delete Approve |
| 11/2/2007 10:42pm | mspivey | Launch Email 020c107 | ✓ Scheduled job completed successfully | View details |

Figure 35

Campaign Filter

Campaign Filter allows administrators to view only scheduled emails associated to a specific campaign. The Campaign Filter is available in Calendar and List View.

How to access the Campaign Filter:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Send & Schedule** tab. The **Send & Schedule** page will display in calendar view.
4. Select the appropriate campaign from the dropdown menu. See *figure 36*
5. Click the **Update page view** button. The calendar will refresh with only the scheduled emails for that campaign.

Note: The Campaign Filter is also available in List View.

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------|---|-----------|----------|--------|----------|
| | 1 | 2 Launch Email 020c107 ✓ Scheduled job completed successfully 10:42 PM - 10:44 PM | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |

Figure 36

Reports

Reports allow administrators with the proper access permissions to analyze the success of the email communication.

How to access reports:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create and Manage Lists** page will display.
3. Click the **Reports** tab. The **Reports** page will display. *See figure 37.*
4. Click **View Summary** link next to the appropriate email. The View Summary Report page will display. *See figure 37.*

| Email Name | Scheduled start | Job end | Status | Action |
|----------------------|-------------------|-------------------|--|------------------------------|
| Launch Email 02Oct07 | 10/2/2007 10:42pm | 10/2/2007 10:44pm | ✓ Scheduled job completed successfully | View Summary |

Figure 37

| | |
|------------------------|--|
| Display - | View the report data on screen. |
| Download List - | Download text or comma- or tab-delimited file. |
| Make new list - | Save data as a new recipient list. |

Recipient Details

- **Total sent (OK+ bounced)** – This count reflects the number of messages that were actually delivered successfully plus bounce backs.
- **Sent OK** – This count reflects the number of messages that were actually delivered successfully (total emails less bounce backs). The recipients Unique ID, First Name, and Last Name display in the Emails Delivered Report.
- **Total recipient list count** – This count reflects the number of emails retrieved as a result of the initial query/search used to create the recipient list.
- **Open Count** – This count reflects the first time an individual opened the HTML version. If the **Open Counter Data Tag** is NOT used, Open Count is set to 0.

Recipient Errors

- **Missing merge data** – This count reflects the number of recipients missing a row from one of the online directory tables.
- **Bounce back** – This count reflects the number of messages we attempted to deliver but could not due to one reason or another and they were returned to the system.
- **Missing email address** – This count reflects the number of emails with missing email addresses.
- **Bad email address** – This count reflects the number of email addresses that are invalid due to formatting problems.
- **Merge problem** – This count reflects the number of emails that encountered problems merging the data tag value from the database into the content such as Class Year, First Name, or Security Info.
- **Mail sending problem** – This count reflects the number of emails with a bad domain.
- **Unknown problems** – This count reflects the number of emails with errors not listed above.

Link Tracking

- **Unsubscribe tag clicks** – The number of recipients who clicked on the unsubscribe link.
- **Unsubscribe from clicks** – The number of recipients who actually unsubscribed.
- **Registration tag clicks** – The number of recipients who clicked on the registration link.
- **Registration from clicks** – The number of recipients who clicked on the registration link and actually registered once they reached the Registration page.
- **Update tag clicks** – The number of recipients who clicked on the User Update link.
- **Updates from clicks** – The number of recipients who clicked on the User Update link and actually updated their profile information.
- **Class Notes link clicks** – This statistic represents the number of recipients who selected the Class Notes link.

Links to Forms

- **Transactions from form links** –The number of transactions from Donation/Membership Form links.
- **Total from form links** – The total amount generated from Donation/Membership Form links.
- **Link #** – The link number, URL, and number of recipients who clicked on the Donation/Membership Form link.

Other links

- **Link #** – The link number, URL, number of recipients who clicked on the link, and the percentage of recipients who clicked verses the number of emails sent OK.

Appendix A: Xinha Editor

Below is a description of each toolbar function. See Figure 1.

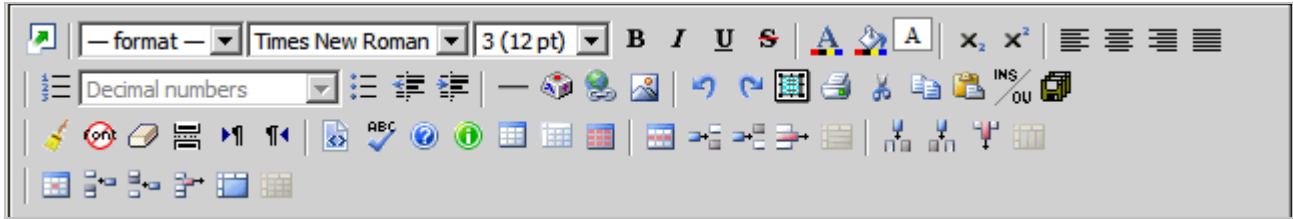


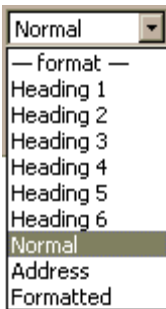


Figure 1.A

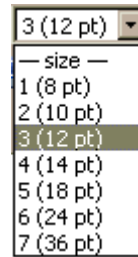
-  Maximize Editor
-  Minimize Editor































Change heading style for a line or paragraph
































Change the font style



Change font size


- | | | | |
|---|---|---|----------------------------------|
|  | B Bold selected text |  | Save As |
|  | <i>I</i> Italicize selected text |  | Clear up HTML |
|  | <u>U</u> Underline selected text |  | Clear Inline Font Specifications |
|  | S Strike-through selected text |  | Remove formatting |
|  | Change font color of selected text |  | Split Block |
|  | Change the background color |  | Direction left to right |
|  | View current style of selected text |  | Direction right to left |
|  | Insert subscript |  | Toggle HTML Source |
|  | Insert superscript |  | Spell Check |
|  | Left-align a paragraph |  | Help using editor |
|  | Center a paragraph |  | About this editor |
|  | Right-align a paragraph |  | Insert a table |
|  | Justify a paragraph |  | Toggle Borders |
|  | Number selected text |  | Table Properties |

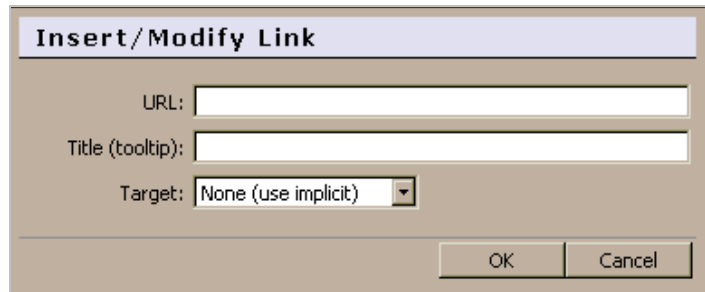
| | |
|--|--------------------------|
|  | Bullet selected text |
|  | Decrease indent |
|  | Increase indent |
|  | Insert Horizontal Line |
|  | Insert Special Character |
|  | Insert a Web link |
|  | Insert/Modify an Image |
|  | Undo last action |
|  | Redo last action |
|  | Select all |
|  | Print document |
|  | Cut selected text |
|  | Copy selected text |
|  | Paste text |
|  | Insert/Overwrite |

| | |
|---|----------------------|
|  | Row Properties |
|  | Insert a row before |
|  | Insert a row after |
|  | Delete row |
|  | Split row |
|  | Insert column before |
|  | Insert column after |
|  | Delete column |
|  | Split column |
|  | Cell Properties |
|  | Insert cell before |
|  | Insert cell after |
|  | Merge cells |
|  | Split cells |

Note: *Grayed out icons are not supported.*

How to insert a hyperlink:


1. Highlight the text you wish to make a hyperlink.
2. Click the **Insert Web Link** button . An **Insert/Modify Link** popup will display. See *Figure 2*
3. Enter the full URL beginning with **http://**.
4. Set the **Target** to **New Window**. The new page will open in a new browser window. This feature prevents the user from having to hit the browser **BACK** button to return to the broadcast email.
5. Click the **OK** button.




The screenshot shows a dialog box titled "Insert/Modify Link". It has three input fields: "URL:" which is empty, "Title (tooltip):" which is empty, and "Target:" which is a dropdown menu currently showing "None (use implicit)". At the bottom right, there are two buttons: "OK" and "Cancel".

Figure 2.A

How to insert and email hyperlink:

1. Click the **Insert Web Link** button . An **Insert/Modify Link** popup will display.
2. Enter "**mailto:**" + **email address**. For example: The email link to nspivey@harrisconnect.com should be "mailto:nspivey@harrisconnect.com". Since this is an email link, there is no need to enter anything for the Target.
3. Click the **OK** button.

How to modify a hyperlink:

1. Place the cursor on the link.
2. Click the **Insert Web Link** button . See *Figure 3*.
3. Make the necessary modifications.
4. Click the **OK** button.



The screenshot shows the "Insert/Modify Link" dialog box. The "URL:" field now contains the text "http://www.harrisconnect.com". The "Title (tooltip):" field remains empty. The "Target:" dropdown menu is now set to "New window (_blank)". The "OK" and "Cancel" buttons are still present at the bottom right.




Figure 3.A

How to delete a hyperlink:

1. Highlight the hyperlink.
2. Click the Delete key on the keyboard.
3. Re-type the text.

Note: Simply typing a full URL or email address and clicking somewhere else in the email message will automatically display URL and email address as a link. The Target will default to none. Modify the link to update the Target.

How to insert image:

1. Select the image.
2. Click the **Insert/Modify Image** button  ().
3. An **Insert Image** popup will display. See *Figure 4*.
4. Enter the **Image URL** (full path and file name) for the image.
5. Enter the **Alternate text**. The Alternate Text is the text that appears when the user rolls over the image with the mouse. It is also the text read by Browser Readers for the visually impaired users.
6. Click  button.

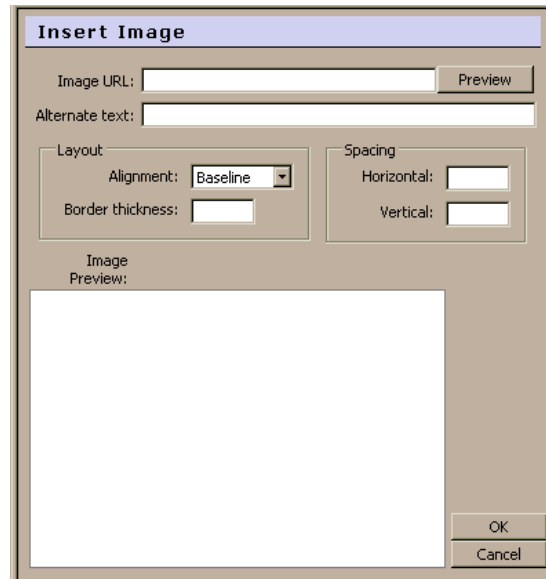
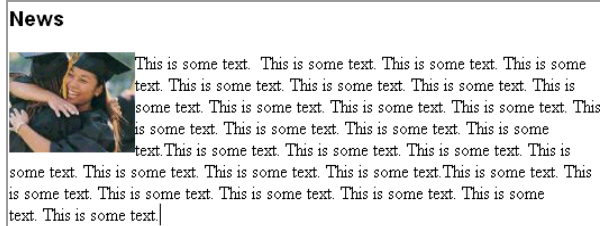


Figure 4.A

IMPORTANT!

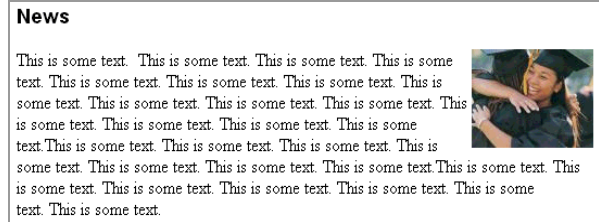
*Any images included must exist on a web accessible server.
Use File Manager to upload images from your hard drive to the Harris Server.*

Alignment is used when you want to wrap text around the image.



Align Left

Figure 5.A



Align Right

Figure 6.A


Spacing refers to the **Horizontal** and **Vertical** spacing between the text and the image.

Border Thickness is used to display a border around the image. When making an image a hyperlink, a blue border displays by default. See *Figure 5*.



Figure 7.A

How to modify an image:

1. Select the image.
2. Click the **Insert/Modify Image** button (). The **Insert Image** popup will display. See *Figure 8*.
3. Make necessary modifications.
4. Click **OK**.



Insert Image

Image URL:

Alternate text:

Layout

Alignment:

Border thickness:

Spacing

Horizontal:

Vertical:

Image Preview:



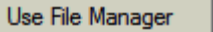
Figure 8.A

Delete Image

1. Select the image.
2. Click the **Delete** button on the keyboard.

Appendix B: File Manager

How to create a new directory/folder:

1. Click the **Use File Manager** button (). The Library window will display. See Figure 1.
2. Enter a new directory/folder name.

IMPORTANT!
This directory name should be relatively short (less than 30 characters) and consist of only letters, numbers, and the dash (-) or underscore (_) characters.

3. Click the **Create this folder** button. The new folder will display in the list of folders.
4. Click on the directory/folder name to open.

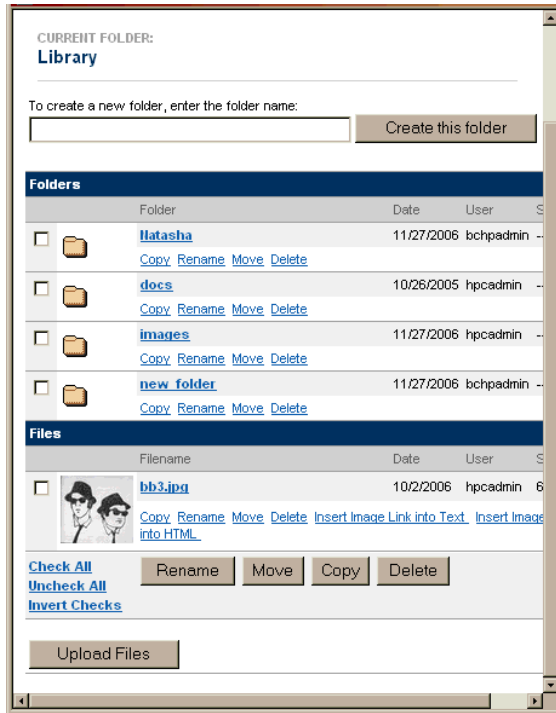


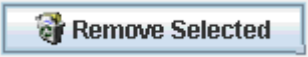
Figure 1.B

How to upload images/files:

1. Click the **Upload Files** button. The Upload Files popup will display. See Figure 2.
2. Click the **Browse** button to select files from your computer.
3. Click the **Upload** button to upload your files. Click the **STOP** button to abort.
4. Once the files have been uploaded (the file names will disappear from the list once they have been uploaded), click the **Continue** button.

Note: Hold the **CTRL** key as you select each file using your mouse to select multiple photos from the same directory.

Remove Unwanted Files

1. Hold the **CTRL** key and select the files you wish to remove from list.
2. Click the .

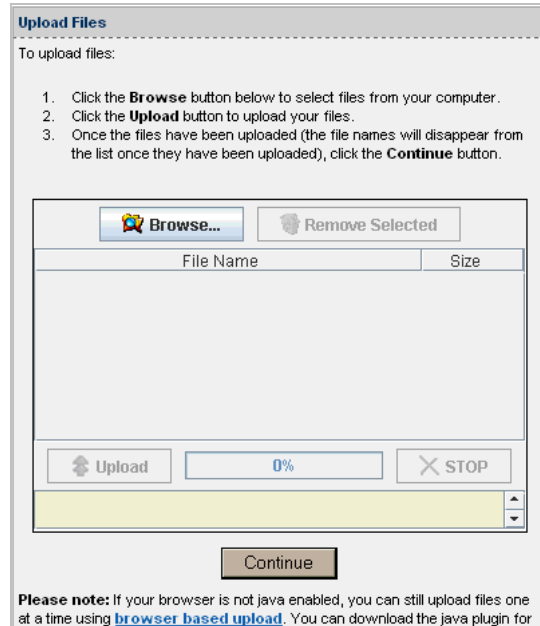
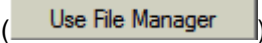


Figure 2.B

How to insert an image from File Manager:

1. Place cursor in the HTML message where you want the image to go.
2. Click the **Use File Manager** button (). The Library window will display. See *Figure 3*.
3. Click the directory/folder Name to open, *if necessary*.
4. Click the **Insert Image into HTML** hyperlink next to the image you wish to insert.

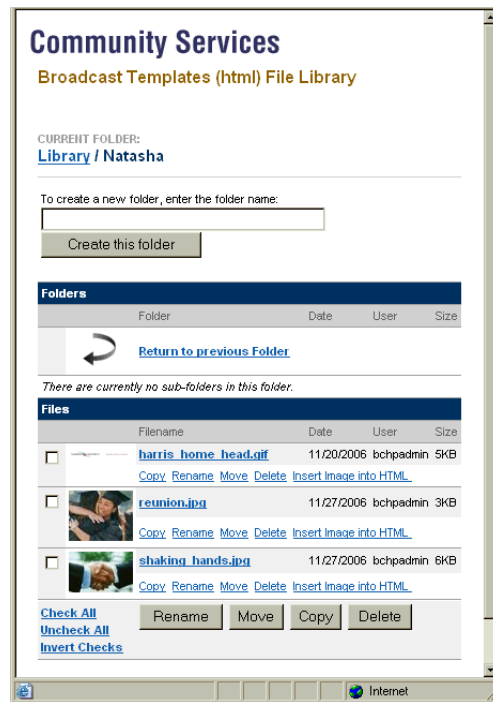
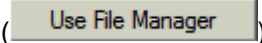


Figure 3.B

How to insert a link to a file in File Manager:

1. Place cursor in the HTML message where you want the link to go.
2. Click the **Use File Manager** button (). The Library window will display. See *Figure 3*.
3. Click the directory/folder name to open, *if necessary*.
4. Click the **Insert Link into HTML** hyperlink next to the file you wish to insert.
5. Enter the text you wish the user to click on as the link for **Link Text**. See *Figure 4*.
6. If you wish the file to open in a new browser window, check the **Open in New Window** checkbox.
7. Click the **Make Link** button.

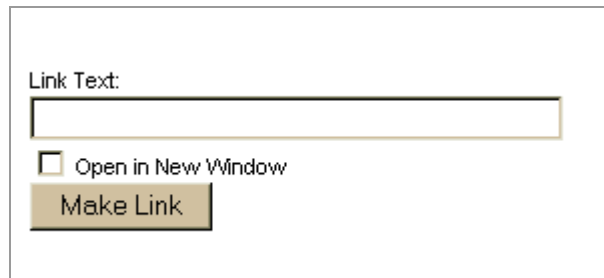


Figure 4.B