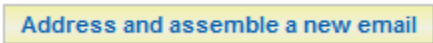


Address & Assemble Email

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

How to Address & Assemble a new email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Address & assemble a new email** button (). The **Edit email details** page displays. See figure 1.
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 **email content**.
13. Select **recipient list**.
14. Select **type of email to send (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 CTRL + 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 category/campaign:

- a. Select a category in the **Selected categories** list. Select multiple categories by holding CTRL + 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.

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

Figure 1

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

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.

Edit, duplicate, and delete emails

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

How to edit an email that has been Addressed & Assembled:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & 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 2.* 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	nspivey	General Announcement - General		Unknown	Calculate Display Send test email Check spam rating	Edit Duplicate Delete

Figure 2

How to duplicate an email that has been Addressed & Assembled:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & 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 2.* 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 email that has been Addressed & Assembled:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & 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 2.*

IMPORTANT!

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

Send a Test Email

Send a 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 & Manage Lists** page will display.
3. Click the **Address & Assemble Email** tab. The **Address & Assemble Email** page will display.
4. Click the **Send a test email** link next to the appropriate email. *See figure 3.* The **Send a test email** window will display. *See figure 4.*
5. Select the appropriate recipient list from the **Available test lists**.
6. Click **Send test email to selected list** button, or **Cancel** to abort.

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

Figure 3

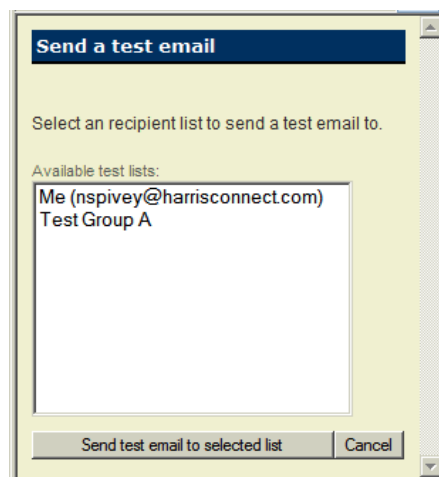


Figure 4

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 & 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 email's spam rating:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & 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 5*.
5. Click the **Close** button.

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

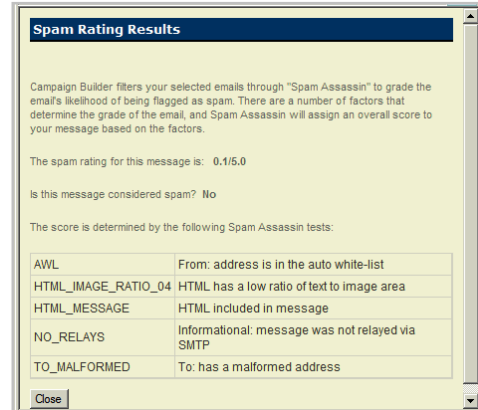


Figure 5

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 & 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 6*. The **Address & Assemble Email** page will refresh and the count will replace the "unknown" text. See *figure 7*.

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

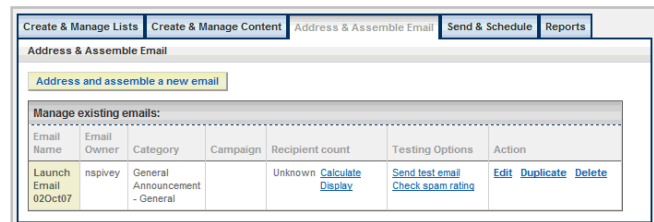


Figure 6

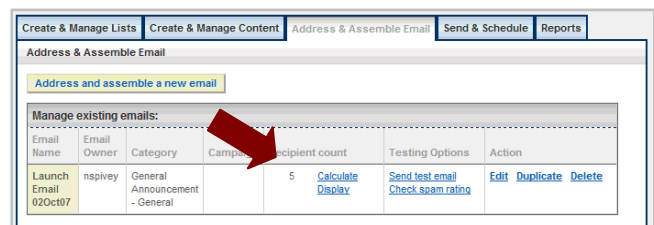


Figure 7

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 & 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 7. The **List Display** window will display. See figure 8.

List Display		
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 8

Send & Schedule

Send & Schedule allows administrators 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 & 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 9.

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 10.
7. Click the **Approve** link under the scheduled email.

Send an email

1. Select an email below.

Available emails:

- Portland alumni night 2007 12 18
- OKC Orange Bowl watch party 2007 12 18
- Boston pre-game and watch party 2007 12 18
- Orange Bowl tailgate 2007 12 17
- Philadelphia watch parties 2007 12 14
- Bay Area womens bb 2007 12 14
- DFW watch parties 2007 12 14
- Wildwood/Lady Lake club intro email 2007 12 13
- Great Bend REH reception CANCEL 2007 12 11
- London Happy Hour reminder 2007 12 10
- Hadyen, ID/Spokane, WA interest email 2007 12 10
- KC big blue bowl event 2007 12 07
- New Mexico watch party KU vs DePaul
- Atlanta watch party KU vs GaTech 2007 12
- DFW watch parties 2007 12 06
- KC JHS and Life member reception 2007 12
- KU Connection Orange Bowl Edition
- CNC Habitat for Humanity 2007 12
- Chicago watch parties 2007 12
- TK December 2007
- London Happy Hour 2007 11
- Boise watch party 2007 11
- DFW watch parties 2007 11
- Great Bend REH reception 2007 11
- Fine Arts dean's version 2007 11

2. Select the recurring options for this email.

Recurrence:

End date:

No End Date

January 1 2007

3. Add the email to the schedule.

This email will be added to the schedule on: 12/19/2007 at 12:33am

Figure 9

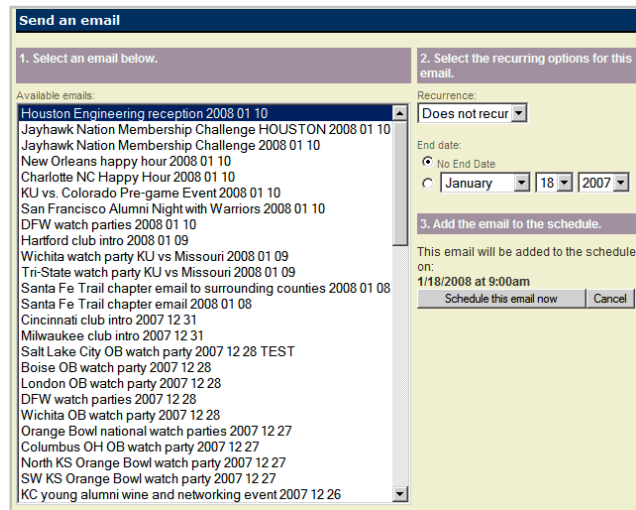
10:00PM	
10:30PM	<p>Launch Email 02Oct07</p> <p>Broadcast scheduled - NOT APPROVED</p> <p>10:42 PM</p> <p>Approve</p>

Figure 10

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

How to schedule an email:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & 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 11.*
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.



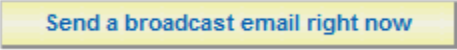
The screenshot shows the 'Send an email' window. It is divided into two main sections. The left section, titled '1. Select an email below.', contains a list of 'Available emails' with 'Houston Engineering reception 2008 01 10' selected. The right section, titled '2. Select the recurring options for this email.', shows 'Recurrence' set to 'Does not recur' and 'End date' set to 'No End Date'. Below this, there are dropdown menus for 'January', '18', and '2007'. A button '3. Add the email to the schedule.' is visible. At the bottom, it says 'This email will be added to the schedule on: 1/18/2008 at 9:00am' and includes 'Schedule this email now' and 'Cancel' buttons.

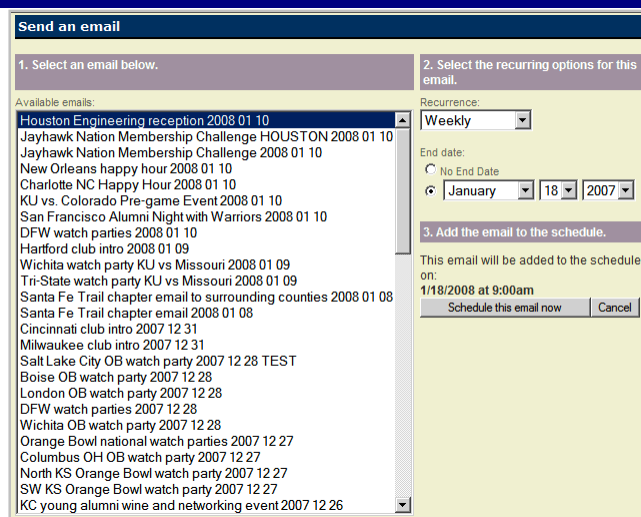
Figure 11

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 email reminders and eCards, 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 & 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

5. Select the appropriate email from the **Available Emails**.
6. Select the recurrence (Daily, Weekly, Monthly, Quarterly, or Yearly).



This screenshot is similar to Figure 11 but shows the 'Recurrence' dropdown menu set to 'Weekly'. The 'End date' section remains 'No End Date'. The 'Schedule this email now' button is highlighted.

Figure 12

7. Select **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 13.*
9. Click the **Approve** link under the scheduled email.

10:00PM	
10:30PM	<p>Launch Email 02Oct07 Broadcast scheduled - NOT APPROVED 10:42 PM Approve</p>

Figure 13

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

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 & 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 14.*
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.

[Delete](#) [Reject](#)

New date

December 19 2007 12:30pm

Recurring options

Recurrence:
 Daily

No End Date
 Until December 23 2007

[Reschedule now](#) [Cancel](#)

Figure 14

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 & 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 15.*
4. Click the appropriate view (**Month, Week, Day, Today, or Year**) link.

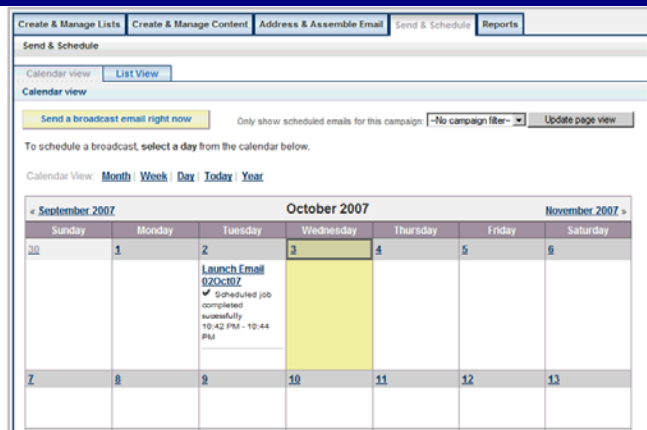


Figure 15

Approve/Reject

Administrators with the proper access permission 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 & 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 16.*
6. Click the **Approve** link.

Note: You can preview the HTML and text message by clicking the [Preview HTML](#)/[text](#) links. *See figure 16. The details will display. See figure 17.*

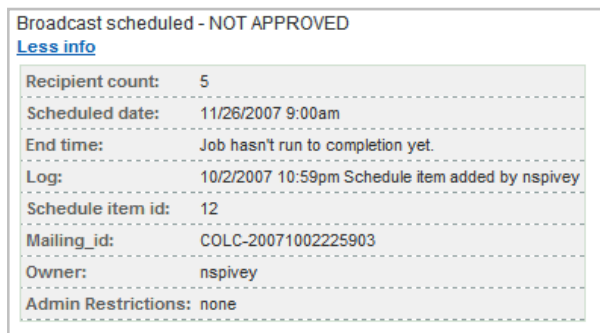


Figure 16

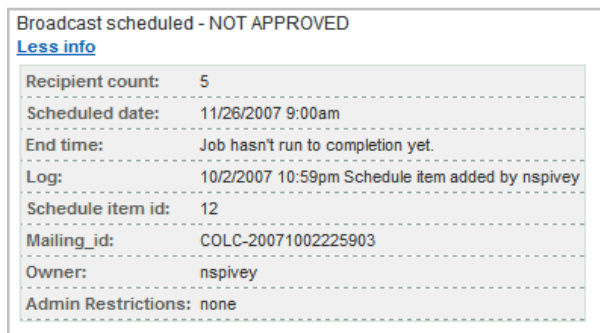


Figure 17

IMPORTANT!
Administrators with proper access permission 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 & 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 18.

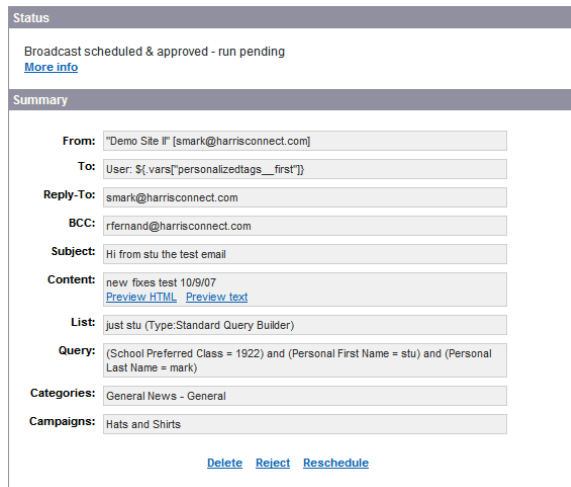


Figure 18

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 & 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 & 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:

1. Login to the Harris Tool.
2. Click the **Email Marketing** link in the left navigation bar. The **Create & 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 19.*
7. Select the appropriate date and time.
8. Click the **Reschedule** link.

The screenshot shows the 'Summary' page for an email. The email details are as follows:

- 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 details, there are two links: [Delete](#) and [Reject](#). A yellow box contains the following text: "To reschedule this email, select a new date and click 'Reschedule'". Below this text are four dropdown menus for selecting a date and time: "November", "1", "2007", and "10:00am". At the bottom of the yellow box are two links: [Reschedule](#) and [Cancel](#).

Figure 19

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 & 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 20.*
7. Click **OK** to successfully delete, or **Cancel** to abort.

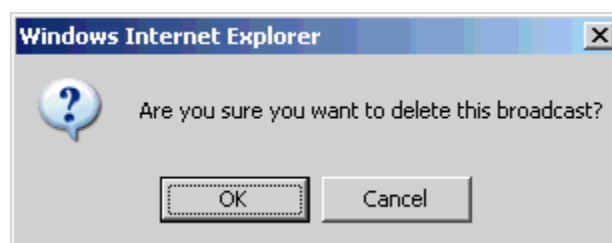


Figure 20

IMPORTANT!

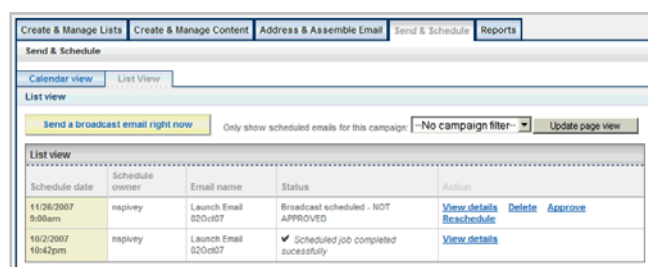
To Delete an email that was scheduled to go immediately, you must Reschedule the email first.

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 & 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 21.*



Schedule date	Schedule owner	Email name	Status	Action
11/26/2007 5:00am	rsprvey	Launch Email 020e07	Broadcast scheduled - NOT APPROVED	View details Reschedule Delete Approve
10/2/2007 10:42pm	rsprvey	Launch Email 020e07	✓ Scheduled job completed successfully	View details

Figure 21