



New Features Overview

For Administrators

Feature Overview: E-Marketing

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We are pleased to announce the launch of a new email marketing feature that enables users to create, launch and track outbound email campaigns directly from within the online application. Available to authorized users from the **Send Email** button on **Search Results** (which formerly opened a new blank email window in the user's default email editor, such as Outlook), this new feature allows users to send emails to up to 500 contacts at a time and track the email on each contact record. Emails can be sent using email templates stored within the application (including existing email templates) or the text of the email can be entered on the fly. All of the mail merge fields available within the **Send Email** feature for individual contacts are also available here. The new mass mailing feature also includes analytics to track and report on open rates, clickthroughs and unsubscribes. To assist with anti-spam compliance, each message sent out using the tool includes an opt-out link along with the physical mailing address of the sender.

Permissions

To utilize the email marketing feature, a user must have **Multiple Email Distribution** set to Yes on the main Privileges page for their account.

Email Marketing

To send an e-marketing blast, perform the appropriate search to return the records containing the contacts to whom you wish to send the email message. On Search Results, click **Send Email**. See below for details on system prompts for initial acceptance of the terms of use and email verification. The system will then prompt you as to whether you wish to send to all records in the result set, or only selected records (in which case you need to add checkboxes next to those records on the search results page). You can also choose to check or uncheck the box to include additional contacts from those records. You can also choose whether you wish to send to all contact s or only those who have specifically opted in (i.e. the email marketing status is set to Opt-in). By design, the system will never send email to any contacts whose Email Marketing Permission is set to Opt-out.

The system then takes you to the main Send Email page. If you have a larger list of recipients, you can click on the "To" hyperlink to view a pop-up dialog box that displays the full recipient list.

Click on the orange **Manage Email Templates** at the top of the page to create/edit an email template, or click on the gray **Select Email Template** button to choose an existing template. Authorized administrators can also access email templates via Administration > Email Message Templates. Alternately, users can

enter the body of the email message directly in the WYSIWYG text box. Advanced users may wish to click on the < > icon in the textarea toolbar to toggle to HTML mode. Whether you select an email template or manually enter text, you can edit the body of the text in the textarea window, including adding/changing formatting or inserting mail merge fields to personalize the message. To include hyperlinks that will be tracked via clickthrough tracking, use the link icon in the formatting toolbar.

Always double-check all of the content as well as the from address, reply to address and subject line. Also take a moment to review the footer information as this is the sender company name and physical address that will appear at the bottom of every email.

Ensure that the **Log in contact record** box is checked if you wish to track the email on each recipient's individual contact record.

Note that if a list contains duplicate entries for a specific email address, the system will automatically de-dupe the list and send only one copy to any email address in that blast. Activity will be tracked under the contact most recently updated.

When you are ready to send the message, click the **Send** button at the bottom of the page. The email blast will be sent immediately.

Reporting

The **Email Campaign Report** provides insight on real-time analytics for your email campaigns and can be accessed under the Marketing Reports section via either the Reports button at the top of any screen or via the Report Filter. Whichever way you reach the report, it will always report on all emails to date (i.e. results are not filtered according to any search criteria). Administrators have access to statistics for all emails for the workgroup. Other users in the hierarchy (e.g. account managers, partner reps) have access to statistics on emails they sent.

The main Email Campaign Report page provides a summary of all emails sent to date as well as the sender name and email and the total number of recipients and # of unique opens to date. Click on Create Shortcut to save a shortcut to your homepage. Clicking on the hyperlink for the number of recipients for a particular email provides a full recipient list. Clicking on the number of unique opens launches a detailed tracking report including **date and time first opened** (see note below), date and time for any **additional opens**, any **clickthrough activity** and any **unsubscribes**.

Note that recipients must have images turned on in their email client for their open tracking to be reported. In addition, note that with the exception of opt-outs, statistics cannot be tracked for plain text emails.

Individual contact-level reporting is also available in the **Email History** section of the individual contact record. Recipient-specific actions, including opens, clickthroughs and opt-outs is provided.

Email Verification

To comply with anti-spam regulations and ensure the highest possible deliverability rates, the sender's email address must be verified through a quick email-based verification process. When the user visits the Send Email area for the first time, the system will prompt them to verify their email address. The system instantly sends a verification email address to the email address listed on the user's account and the user simply clicks on the verification link in the email. Back

in the application, they can then click Continue to proceed with the Send Email process. Note that if other email address(es) have been added by the Administrator (see below), the user can choose to either verify their own address or proceed and choose one of the available verified email addresses.

Administrators can verify additional email addresses for their team by going to **Administration > Email Verification**. This feature is useful for teams running marketing campaigns that should be sent from generic or campaign-specific corporate email addresses (e.g. sales@, info@, events@ etc.) The main Email Verification screen displays the email address and status (verified or pending) for all submitted email addresses. By clicking on the orange Add Emails button, the Administrator can trigger verification email to one or more addresses. Just like the user email verification, the recipient must then click on the verification link in the email that they receive. Once a group email is verified, it is available to all users for use in the “from” and “reply to” fields in addition to their own email address. Administrators can also delete email addresses (either verified or pending) via the main Email Verification page.

Opt-outs

Note that if a recipient clicks on the unsubscribe link in the email you send and then confirms that they want to be removed, the **Email Marketing Permission** field on all records in the workgroup with that email address listed will be updated to **Opt-out**.

Limits

Email blasts are limited to a maximum of 500 email addresses per blast. The daily limit per workgroup is 1000 email addresses, calculated based on Greenwich Mean Time (GMT).

Terms of Use

The e-marketing service is for use only for your internal business purposes. All users of the system must comply with the posted Terms of Use, including agreement not to send unsolicited email messages. When a user visits the Send Email area for the first time, they will be prompted to read and agree to the Terms of Use. A link to the terms also appears on each page in the e-marketing section.

Best Practices

- It is recommended that you utilize email templates for email marketing blasts. This allows you to ensure consistency of messaging across blasts and senders.
- Sending a test email to yourself (as well as any other relevant members of your team) is always highly recommended to ensure that the final email appears exactly as desired.
- For security and deliverability, attachments cannot be included in e-marketing emails. However, you can provide recipients with a link to the document which will boost deliverability rates and also allow you to track who clicked through to the document.