Logistics

Before We Begin

- Shared audio
- State your name when asking questions
Introduction

Please share:

- Your name
- Your experience with ListManager
- How many lists are you working with?
- What kinds of campaigns will you be sending from ListManager?
What You’ll Learn To Do

- Become familiar with interface and workflow
- Add and manage members
- Create simple targeted audience subgroups
- Create content and personalize messages
- Schedule and approve mailings
- View reports
- Create automated messages and web forms
Agenda

- Overview of interface
- Add and manage members
- Create segments
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form
• Overview of interface
• Add and manage members
• Create segments
• Become familiar with the content area
• Schedule/Deploy mailings
• Interpret results through reports
• Create automated messages
• Design a new subscriber form
Log In

- Use the URL given to you by your ListManager admin
- Use your email address (not your name) and password to log in
- Each admin should have a separate account
Home Page Overview

Home Page:
- Navigate to the appropriate list
- See how your mailings are performing
List Navigation

Quickly navigate to the desired list

Welcome training@lyris.com | Logout
List: analuz Language: English
Send the right message to the right audience

- Add Members
- Create Segment
- Include Content
- Deploy a Mailing
- View Reports
Utilities

- Modify list settings
- Automate messages
- Web forms
- And MORE…
Home Page Statistics

The reporting statistics area displays recent mailings at a glance.
Add and Manage Members

• Overview of interface
• Add and manage members
• Create segments
• Become familiar with the content area
• Schedule/Deploy mailings
• Interpret results through reports
• Create automated messages
• Design a new subscriber form
Members Overview

Members

- Easily add and manage members
- Typically subscribe to join the list
- Information saved in ListManager’s database
- Only “normal” members receive email
Add members in a variety of ways

- Using the LM interface, or
- Importing members from Text or CSV file
Add a Single Member

1. Enter Email Address (*required)
2. Click Save

Note that the total number of members you may have on your server is determined by your license.
Import Members Via Text File

1. Choose the status of the members
2. Select the file
3. Choose Import
• One member per line
• Name can be added
Import Members From CSV File

- Import a CSV file with demographic information
- Duplicates are either updated or skipped
- The status of the member will not be changed
Before Importing:

- See what fields are available on your server
- Required field: *EmailAddr_*
- Recommended field: *FullName_*
In Excel: Indicate the field name in the first row
Import Members From CSV File

4. Click File, then Save As…
5. Save as type, select CSV
Click on the link of the email address to edit member information
Mange Members

Use drop down box to view members by status
Find your members across the lists
Create Segments

- Overview of interface
- Add and manage members
- Create segments
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form
Segments Overview

Create targeted mailings through segments
Four Easy Steps:
1. Select “Create New Segment”
2. Include Name and Description
3. Use the Insert Clause Wizard
4. Save and Test
Segments (Step 1)

Select Create New Segment
Segments (Step 2)

- Include Segment Name *(no spaces, no capitals)*
- Write a description
Segments (Step 3)

Read the Clause Like a Sentence:

- Select all members for whom the state field equals to CA
- Fields available depend on your database, license
Use **and**, **or**, **not**, **( )** buttons to add more clauses.
Segments (Step 4)

Save and Test your segment to make sure you’re pulling the right people.
Become Familiar with the Content Area

- Overview of interface
- Add and manage members
- Create segments
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form
Create Messages With:

- The built-in HTML editor
- Templates
- Remote images in the Image Library
Create New Content

Six Easy Steps

1. Header information
2. Create multipart message
3. Manage your images
4. Add attachments (optional)
5. Select character set
6. Create the mailing
New Content (Step 1)

- Fill in Content name & Description
- Edit header information
New Content (Step 2)

Enhance Your Content
- Customize
- Personalize
The HTML editor allows easy change to the content.
Mail-merge Tags

Use mail-merge tags to personalize the content
Insert Field Give You the Option to Insert:

- Mail merge fields
- Database fields
- Unsubscribe email address
Insert URL Gives You the Option to Insert:

- Clickthrough URL: Text & Image
- URL to unsubscribe
- URL to forms
- URL to web fetch
- URL to rich media
New Content (Step 3)

Manage Your Images

- Resize, or
- Swap
Add attachments on the Advanced Tab
Internalization:
Click the Character Set box and choose a set from the list.
Preview the content or use the “Create Mailing” shortcut
Templates

- Create content from templates
- Design your own template
Create Content From Template

Four Easy Steps:
1. Choose Create From Template
2. Fill in the Essentials Information
3. Edit Editable Region
4. Preview or Create Mailing
Select Your Template:

1. Select “Create From Templates”
2. Select “Your Templates” or “Built-in Templates”
Fill in “Content name,” “Description,” and header information.
Editable regions have a green border. Click inside to edit region.
When finished, “Create Mailing”
Create a New Template

5 easy steps

1. Choose Create New Template
2. Fill in the Essentials Information
3. Insert Your Content
4. Specify the Editable Regions
5. Create mailing
Create a New Template (Step 1)

You can use your own HTML to design templates. Choose “Create New Template.”
Create a New Template (Step 2)

Just like in the content creation, fill in the name, description, and header information.
Create a New Template (Step 3)

Import your file
Create a New Template (Step 4)

Click on the region to make it editable. You can select images or text.
Create a New Template (Step 5)

When finished, “Create Mailing”
Build a Mailing

- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion
Define what content goes out, who gets it, and how it is tracked
Six Easy Steps

1. Choose the Content to be sent
2. Select the desired Segment
3. Enable Tracking
4. Schedule your mailing
5. Preview the mailing
6. Save and Test the mailing
Mailing (Step 1)

Two ways to insert content:

- Compose on the fly
- Import saved content
With ListManager you can send to:

- The entire list
- A specific segment
- Across lists
Mailing (Step 3)

Track your:

- Tracking is enabled by default
- Keep track of who has opened your message and who has clicked on a URL
Schedule sending time

- Hold for approval (default)
- Schedule for certain date and time
Mailing (Step 5)

“Preview” shows content merged for random or particular recipient.
Mailing (Step 6)

Save and Test shows real tests

- Sends “real” messages to admin
- Tags and scripting fully activated
You can also send a message to be distributed to your list by sending it to the listname@yourservename.com address. Example: newsletter@listmanager.example.com

Send to a segment by sending to listname.segmentname@yourservename.com

List and membership settings determine who is allowed to post mailings via email and whether they need approval.
Messages, by default, are set to wait for approval
To approve click on "Send" or "Schedule"
View Reports

- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion
Home Page

Key statistics available from homepage
Quick access to reports

- Report Dashboard
- Mailing Overview
- Delivery Tracking
- Email-Advisor
- And MORE
The Report Dashboard is an aggregate report that allows you to see how the list, site, or campaigns are doing and view monthly averages.
This report provides an overview for mailing’s success and failure rates with deliverability for 9 distinct categories.
Delivery Statistics Report

This report tells you the progress of your mailing and how successful they have been.
See

- How successful have individual mailings been in reaching members?
- Who has opened or clicked on the mailings?
See member activity:

- How many people have joined recently?
- What is the total membership count for each list?
- What is the status of the member?
### Subscriber Activity

See a table of subscription activity

<table>
<thead>
<tr>
<th>Date</th>
<th>New Members</th>
<th>Unsubscribes</th>
<th>Bad Addresses</th>
<th>Net Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-05-04</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2007-05-05</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2007-05-06</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2007-05-07</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2007-05-08</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2007-05-09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2007-05-10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total for period</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Grand totals *</td>
<td>180</td>
<td>14</td>
<td>7</td>
<td>159</td>
</tr>
</tbody>
</table>
Create Automated Messages

- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion
Setup Automated Messages to send hello, double opt-in, goodbye messages automatically
Automated Messages

Two Easy Steps

1. Create new Document Content
2. Create new Document Association
Automated Messages (Step 1)

Start with Document Content
Automated Messages (Step 1)

1. Click “Create from Template”
2. Select the appropriate template
Automated Messages (Step 1)

1. Select a name and description to help you identify your doc.

2. From, To, and Subject are the header of message.

3. Select the Text Message Tab to customize your message.

4. Save and Test.
Automated Messages (Step 2)

Choose Document Association
Automated Messages (Step 2)

1. Click “Create New”

2. Documents available to you will automatically appear on this page

3. Save
Create a Subscriber Form

- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion
Create a Subscriber Form

Drive members to your list by adding a subscription form to your website
Create a Subscriber Form

Two Easy Steps

1. Choose desired information to include in the form
2. Copy & paste HTML in to your website
Create a Subscriber Form
(Step 1)

Form can:

- Confirm new members
- Add to multiple lists
- Request additional demographic information
Create a Subscriber Form (Step 2)

Copy and paste the form’s source code into your web page
Q&A

- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion
Support:
888-LYRIS-CS
(888-597-4727)

www.lyris.com /customer-service/
Self-Serve Portal.
If you do not have a Self-Serve Portal Username, please go to:
http://www.lyris.com/support/support_signup.html
Questions about this presentation contact:
Ana DeLeón
ana@lyris.com

www.lyris.com