IMS E-Marketer Documentation

****Pop-up Blocker Warning** – The *IMS E-Marketer* administrative interface is accessed through a website browser (i.e. Internet Explorer, Firefox, Safari). Certain functions of the program produce 'popup' windows. You may need to configure or disable your browser's popup blocker in order for all functions of the program to work properly.

Contents

Important URL's

*For all of the URL's below insert the specific name of your installation where you see '***your-name-here***'

Administrator Login Page	http://www.imarketsolutions.net/***your-name-here***/admin
User Subscription/Signup Page – send this link to a user interested in signing up	http://www.imarketsolutions.net/***your-name-here***/?p=subscribe
User Unsubscribe Page – send this link to a user interested in unsubscribing	http://www.imarketsolutions.net/***your-name-here***/?p=unsubscribe
User Request For 'Preferences Link' Page – send this link to a user interested in requesting their personal preferences page link	http://www.imarketsolutions.net/***your-name-here***/?p=preferences

Admin Functions

Change The Admin Login Name

1. Log in to the admin panel.
2. Under the **System Functions** heading, click **Admin**.
3. Enter a new admin login name (maximum 25 characters).
4. Click **Save Changes**.

****Change The Admin Email Address**

1. Log in to the admin panel.
2. Under the **System Functions** heading, click **Admin**.
3. Enter a new email address.
4. Click **Save Changes**.

****Changing the admin email address is not recommended. This address is the default 'From' address for your email communications. Your recipients may miss messages if they do not recognize your new email address. If you absolutely must change this address, it is a good idea to send an email to all of your users alerting them you will be using a new address.

Change The Admin Password

1. Log in to the admin panel.
2. Under the **System Functions** heading, click **Admin**.
3. Enter a new password.
4. Click **Save Changes**.

Subscriber Page Functions

An initial subscriber page will be created for you by IMS, follow the steps below to create additional subscriber pages.

Add Attributes

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Attributes**.
3. In the **Add New Attribute** box (bottom of the page), enter the *Name*, *Type*, *Default Value*, *Order of Listing* and *Is this attribute required?* information.
4. Click **Save Changes**.

Edit Attributes

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Attributes**.
3. Modify any of the existing attributes.
4. Click **Save Changes**.

Delete Attributes

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Attributes**.
3. Check the **Tag** checkbox of the attribute(s) you would like to delete.
4. Click **Delete**.

Configure Attributes – certain types of attributes (checkbox, radio, select) require additional configuration. After these types of attributes are created, follow the steps below to configure them.

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click the attribute you would like to configure.
3. Click **add new** to add an option to the attribute, follow the instructions on the screen.

Create A Subscriber Page

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Spage**.
3. Click **add a new one** (at the bottom of the page).
4. Follow the instructions on the page to configure the new subscriber page.
5. Click **Save and Activate** to make the signup page live.

Preview A Subscriber Page

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Spage**.
3. Click **view** for the subscriber page you wish to preview.

- **Edit A Subscriber Page**

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Spage**.
3. Click **edit** for the subscriber page you wish to modify.
4. Click **Save and Activate** to make your modifications live.

- **Delete A Subscriber Page**

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Spage**.
3. Click **del** for the subscriber page you wish to remove.
4. Confirm the delete in the popup box that appears on the screen.

List Functions

- **Add A List** – an initial list will be created for you by IMS, follow the steps below to create additional subscriber lists

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **list**.
3. Click **add a list**.
4. Enter the information for the list and click **Save**.

- **Edit A List**

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **List**.
3. Click **edit** for the list you wish to modify.
4. Click **Save** to finalize your changes.

- **View Members Of A List**

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **List**.
3. Click **view members** for the list you wish to modify.

- **Delete A List**

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **List**.
3. Click **delete** for the list you wish to remove.
4. Confirm the delete in the popup box that appears on the screen.

User Functions

- **Add A User** – there are a few different ways to add a user to the system. The steps below provide the most straightforward approach for accomplishing this task.

1. Log in to the admin panel.
2. Under the **Configuration Functions** heading, click **Spage**.
3. Click **view** on the subscriber page you would like to use to add the user.
4. In the box with the colored background, select **Make this user confirmed immediately** or **send this user a request for confirmation email**.
5. Enter the rest of the user details.
6. Select the list(s) to signup the user to.
7. Click **Subscribe to the Selected Lists**.

- **Edit A User's Preferences / Data**

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **Users**.
3. You can search for a user using the search tools at the top of the screen or you may scroll down the page to find the user you would like to edit.

   Click the email address of the user you would like to edit.

4. Modify the user's preferences / data fields.
5. Click **Save Changes**.

- **Delete A User**

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **Users**.
3. You can search for a user using the search tools at the top of the screen or you may scroll down the page to find the user you would like to delete.

   Click **del** on the line of the user you would like to delete.

4. Click **OK** in the popup window to confirm deletion of the user.

- **Un-blacklist A User**

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **Users**.
3. You can search for a user using the search tools at the top of the screen or you may scroll down the page to find the user you would like to delete.

   Click the email address of the user you would like to un-blacklist.

4. Click **history** (link located right of center, approximately halfway down the page).
5. Click **Remove user from Blacklist** (link located on the left-side, approximately halfway down the page).
6. Click **OK** in the popup window to confirm removal of the user from the blacklist.

Mark All Users Confirmed

1. Log in to the admin panel.
2. Click **manage users** (gray link - located in the menu on the right-side of the page).
3. Click **reconcile users** (gray link - located on the left-side of the page).
4. Click **mark all users confirmed** (link located on the left-side, approximately halfway down the page).

Export Users

1. Log in to the admin panel.
2. Under the **List and User Functions** heading, click **Export**.
3. Select the date range for your export.
4. Select the columns of data for your export (By default all columns are selected).
5. Click **Export**.
6. Click **Save** in the popup window to save the export file to your computer.

How to Send a Message

MINIMUM STEPS for sending a message (steps 1-10)

Create And Send A Message

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Send**.

   This will take you to the 'send a message' page. This page contains 7 tabs that provide the functionality for creating and sending a message. The instructions below will take you through the 'Content' and 'Lists' tabs. This is the minimum required for sending a message.

Add Content – Content Tab

3. Enter a **Subject** for your message.
4. The **From Line** field will automatically be set to your default 'from' address. It is NOT recommended to change this field. Your recipients may miss messages if they do not recognize the modified 'from' email address. If you absolutely must change this address, it is a good idea to send an email to all of your users alerting them you will be using a new address.

5. Enter the content of your message in the editor on screen.

   It is good practice to periodically save your work as you craft your message. To do this click **Save Changes** at the bottom of the page.
6. A default footer is provided at the bottom of the page. You can change this footer on a per message basis if you would like.
7. Click **Save Changes**.

Send Message To The Queue - Lists Tab

In order for a message to be sent to your list(s) it needs to be sent to the queue **AND** the queue needs to be processed.

8. Select the list(s) you would like to send your message to.
9. Click the **Send Message to the Queue** button.

   At this point the message is in the queue waiting to be processed.
10. **To release the message from the queue immediately:**
    On the page that follows, click the orange link at the bottom of the page titled **process the message queue**, this will release the message from the queue and send it to your list(s) immediately.

    To release the message from the queue at a later date and time:
    In the menu on the right side of every page is an option titled **process queue.** Clicking this with release and send all messages sitting in the queue.

ALL OF THE OPTIONS for sending a message (steps 1-22)

Create and Send A Message

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Send**.

This will take you to the 'send a message' page. This page contains 7 tabs that provide the functionality for creating and sending a message. The instructions below will take you through each tab. You can move between tabs at anytime and in any order, just be sure to click **Save Changes** before moving between tabs.

Add Content – Content Tab

3. Enter a **Subject** for your message.
4. The **From Line** field will automatically be set to your default 'from' address. It is NOT recommended to change this field. Your recipients may miss messages if they do not recognize the modified 'from' email address.
5. Enter the content of your message in the editor on screen.

It is a good practice to periodically save your work as you craft your message. To do this click **Save Changes** at the bottom of the page.

6. A default footer is provided at the bottom of the page. You can change this footer on a per message basis if you would like.
7. Click **Save Changes**.

Format The Message - Format Tab

8. Select either **HTML** or **text** as the format for your message.

HTML is the default and recommend setting for your message.

9. If using a template, select the template you would like to use from the drop-down list.
10. Click **Save Changes**.

Add Attachments - Attach Tab

Warning - Attachments add considerable overhead to your email messages. Emails you send have a greater chance of getting dropped or tagged as SPAM if they include attachments. It is a better practice to upload the attachment (file) to your website and provide a link in your email body to this location.

11. Click **Browse** to locate the file on your computer you would like to attach to your message.
12. In the popup window that appears, select the file you would like to attach and click **open**.
13. Click '**Add(and save)'** to attach the file and save your work.

Scheduling - Scheduling Tab

No changes are necessary in this tab. By default, your message will automatically be released when you process the message queue. However, you can embargo a message so that it can not be accidentally processed before a specific date and time. After the embargo date, you will still have to manually process the message queue to release the message.

14. Set the embargo date to the date and time you would like to prevent the message from being processed before. You will still have to manually process the message queue after this date and time.
15. Click **Save Changes**.

Criteria - Criteria Tab

To send a message to your entire list(s), no changes are necessary in this tab. This tab is used to limit the distribution of a message to specific values of attributes. For example, say you have an attribute called 'Job Title' with the values 'teacher', 'janitor' and 'administrative assistant.' By selecting the attribute 'Job Title' and the value 'teacher', you could limit sending your message to just teachers.

16. Select any attributes and values you would like to limit your message distribution by.
17. Click **Save Changes**.

Send Message To The Queue - Lists Tab

In order for a message to be sent to your list(s) it needs to be sent to the queue **AND** the queue needs to be processed.

18. Select the list(s) you would like to send your message to.
19. Click the **Send Message to the Queue** button.

At this point the message is in the queue waiting to be processed.

20. **To release the message from the queue immediately:**
On the page that follows, click the orange link at the bottom of the page titled **process the message queue**, this will release the message from the queue and send it to your list(s) immediately.

To release the message from the queue at a later date and time:
In the menu on the right side of every page is an option titled **process queue.** Clicking this will release and send all messages sitting in the queue.

ALL OF THE OPTIONS for sending a message CON'T

- **Miscellaneous Options – Misc Tab**

21. Enter an email address to receive an alert when the message starts and finishes processing.
22. Click **Save Changes**.

- **Resend A Message To New Users**

You can resend any message you have previously sent to new members of your list(s). For example, you could resend the same 'Welcome' message every few weeks to the new members of your list.

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Messages.**
3. Locate the message you would like to resend in the **sent** tab.
4. Click **requeue** for the message you would like to resend (link located in the far right column for each message).

   At this point the message is in the queue waiting to be processed.
5. **To release the message from the queue:**
   In the menu on the right side of every page is an option titled **process queue.** Clicking this with release and send all messages sitting in the queue.

   The system will only send the message to users who have not received it before.

- **Suspend A Queued Message**

This function is used to place a hold on a message in the queue. The message remains in the queue, but won't be sent out if the queue is processed. Other messages can be queued and processed without effecting the suspended message.

1. Log in to the admin panel
2. Under the **Message Functions** heading, click **Messages**.
3. Click the **queued** tab.
4. Locate the message you would like to suspend and click **suspend sending** (link located in the middle column for each message row).
5. To unsuspend the message, click **requeue** for the message you would like to unsuspend (link located in the far right column for each message).

   At this point the message is in the queue waiting to be processed.

- **Process Bounces**

In order to gather statistics on bounced emails that you send, you have to tell the system to '*process bounces'*.

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Process Bounces**.

   The bounces will begin being processed immediately. The progress of this process will be displayed on screen.

View Messages

- **View Sent Messages**

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Messages**.
3. Click the **sent** tab.
4. The messages you have sent will be listed in chronological order, newest to oldest.

   You can **view**, **requeue**, **edit** and **delete** your sent messages (links are located in the far right column for each message).

View Message Drafts

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Messages**.
3. Click the **draft** tab.
4. Your message drafts will be listed in chronological order, newest to oldest.

You can **view**, **requeue**, **edit** and **delete** your message drafts (links are located in the far right column for each message).

View Queued Messages

1. Log in to the admin panel.
2. Under the **Message Functions** heading, click **Messages**.
3. Click the **queued** tab.
4. Messages in the queue will be listed in chronological order, newest to oldest.

You can **view**, **requeue**, **edit** and **delete** your queued messages (links are located in the far right column for each message).

Statistics Functions

View 'Bounces', 'Views' and 'Open Rates' For Sent Messages

1. Log in to the admin panel.
2. On the menu on the right side of the screen, click **statistics** to be taken to the statistics page.
3. Click **overview** to view a summary of your sent message statistics.
4. Each sent message includes:
   - the **date** it was sent
   - how many users the message was **sent** to
   - how many emails **bounced** back for that message
   - how many users viewed (**views**) the message
   - the open **rate**, which is the percentage of users that viewed the message

View Click-Through Rates For Sent Messages

This statistic shows which links were clicked in your message. This is useful to determine if your audience is viewing the information you want to expose them to.

1. Log in to the admin panel .
2. On the menu on the right side of the screen, click **statistics** to be taken to the statistics page.
3. Click **view clicks by message** to view a summary of message click-through statistics.
4. Under the heading **Available Messages** click a message to view the click-through details for that message.
5. Message details include:
   - the links that were clicked
   - the date and time of the **first click**
   - the date and time of the **latest click**
   - the total number of **clicks** for each link
   - the percentage of users who clicked each link (**click rate**)
   - which users clicked each link (**who**)
6. Click **view users** to see who has clicked each link (link located on the far right of each row).