



# **Global Email Marketer system User's Guide**

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# About This User's Guide

## How to Use This User's Guide

This user's guide describes the Global Email Marketer system's Graphical User Interface (GUI). It shows you how to use each screen in the GUI.

- Use the [Introduction](#) to get a basic overview of the Global Email Marketer system.
- Use the [Getting Started](#) chapter to start sending emails right away.
- Use the [Troubleshooting](#) chapter to diagnose and solve specific problems.
- Use the rest of the user's guide to see in-depth descriptions of the Global Email Marketer system's features. The chapters are roughly arranged in order of the frequency with which you are likely to use them when configuring the Global Email Marketer system.

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# I

# INTRODUCTION

This section contains the following chapters:

[Introduction](#)

[Getting Started](#)

[Logging In to the Global Email Marketer system](#)

[The Global Email Marketer system Interface](#)

# Introduction

## Welcome to the Global Email Marketer system

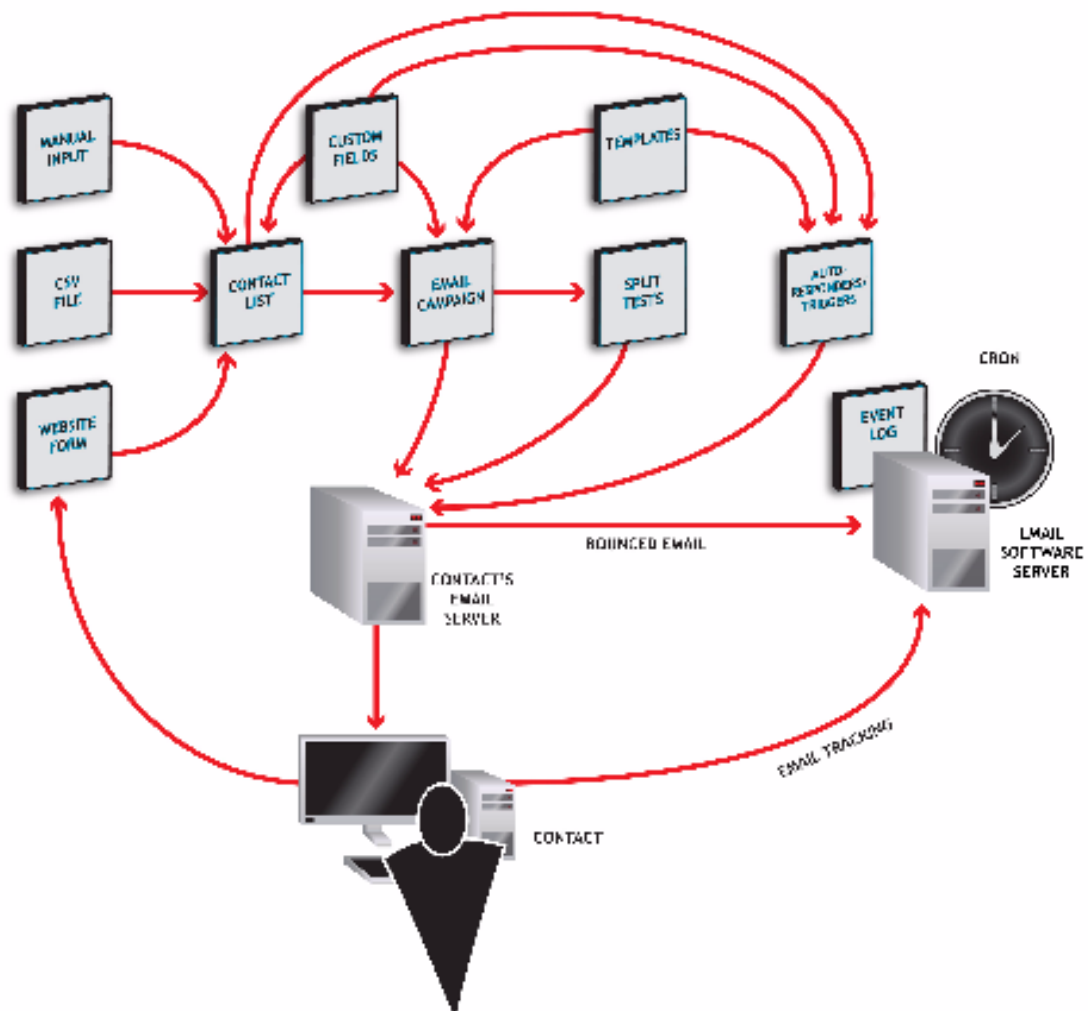
Congratulations on your purchase of the Global Email Marketer system! The Global Email Marketer system gives you an unprecedented ability to create, manage and automate large-scale email marketing campaigns, mailing lists, and automatic responses.

Note: If you want to start using the Global Email Marketer system to send out emails right away, see [Getting Started](#).

## Global Email Marketer system Overview

Here's an overview of how the Global Email Marketer system works. The figure below shows how the Global Email Marketer system's most important components interact. The rest of this chapter describes the components in this figure.

**Figure 1** Global Email Marketer system Overview



## Contacts

Contacts are the people about whom you store information in the Global Email Marketer system. These are the people to whom you send emails.

## Contact lists

The Global Email Marketer system stores all of your contacts in contact lists.

You can have multiple contacts lists, and you can configure each contact list to work in a different way. For example, you can configure one contact list to send out automatic emails to its members every month, and configure another list to take no automatic action. You can also configure information differently for each contact list (such as the “from” address of the emails you send out, and your company name).

## Manual Input, CSV Files and Website Forms

There are three ways to add contacts to a contact list: by inputting them manually one-by-one, by uploading a CSV (Comma-Separated Value) file with information on multiple contacts, or by having contacts fill out a form on your website.

**Note:** You can output a CSV file from many database and spreadsheet applications (Microsoft Excel, for example). When you upload a CSV file to the Global Email Marketer system, you can specify how the Global Email Marketer system should populate the contact list with the information in the file.

The Global Email Marketer system helps you create forms you can put on your website to let your customers sign up for your newsletter or emails.

**Note:** You can design forms in the Global Email Marketer system, and then paste the HTML directly into your web pages. You can also put some kinds of forms into the emails you send out.

There are three ways to add contacts to a contact list: by inputting them manually one-by-one, by uploading a CSV (Comma-Separated Value) file with multiple contacts’ information, or by having contacts fill out a form on your website.

**Note:** You can output a CSV file from many database and spreadsheet applications (Microsoft Excel, for example). When you upload a CSV file to the Global Email Marketer system, you can specify how it should populate the contact list with the information in the file.

## Templates

Use HTML and plain-text templates to form the basis of your email campaigns. Templates make your emails attractive and promote your brand identity.

Either use the templates included with the Global Email Marketer system, which are designed specifically to display correctly in all popular email clients, or design your own using the Global Email Marketer system's fully-featured HTML development editor and plain-text editor.

## Email Campaigns and Split Tests

Email campaigns are the emails that you send out from the Global Email Marketer system to the people on a contact list.

Email campaigns are based on an HTML or plain-text template, and are sent to members of a contact list. You control when you send email campaigns; you can send them at the click of a button, or schedule them to be sent out at a specific point in the future.

Split tests allow you to discover which version of an email is most effective. You can create different variations on an email (three versions with different subject lines, for example) and send them out to your contact list at random, in equal numbers. The statistics that are returned let you see which version has the highest open or click-through rate.

The Global Email Marketer system also supports automatic split testing, in which the "candidate" email versions are sent to only a small proportion of your contact list, and the "winner" version is then sent to the remaining contacts in the list.

## Autoresponders and Triggers

Like email campaigns, autoresponders are emails based on HTML or plain-text templates. However, autoresponders are sent out automatically at pre-defined intervals after a contact is added to a contact list.

For example, you may want to send out one autoresponder as soon as contacts are added to the list ("Thanks for joining our mailing list!") and another a month or a year after they join ("You've been reading our daily newsletter for 30 days now; tell us what you think!").

Triggers are similar to autoresponders, but allow you even greater flexibility to automate email and administrative tasks to happen automatically when certain other events occur. You can set up date-related triggers (so that everyone in your contact list receives a "Happy Birthday" email on their birthday, for example) and event-related triggers (so that a contact is automatically added to a "warm leads" contact list when he or she opens your email).

## Custom Fields

Custom fields are variables that are added to a contact list. You can add any kind of variable you want ("City", "Date of birth", "Zip code", "Hat size" - whatever you need).

When you add a custom field to a contact list, you can then add it in to an email campaign.

The Global Email Marketer system already has a lot of built-in custom fields that you can use to personalize your emails. For example, if you required that a contact fills in a "First name" field in the website form, you can then send out an email that automatically addresses the contact as "Dear Joe". This function is similar to the "mail merge" feature found in some word processing and database applications

**Note:** If you are going to use custom fields in emails, it is strongly recommended that you make them mandatory (a contact must fill them in to sign up). This way, you can be sure that you will have no embarrassing gaps in your emails.

## Email Tracking

The Global Email Marketer system allows you to track and view a variety of information about the emails you send; how many are opened (and when), how many links are clicked in each one (and which link was clicked), and so on.

## Bounce Tracking

Bounced emails are those that never reach their destination.

This can happen for numerous reasons. However, if you keep sending emails to an address that does not accept them, there is a danger that your email server could be blacklisted (making it much more difficult to send subsequent emails to anybody). To avoid this, the Global Email Marketer system can track bounced emails, discover why they were bounced, and automatically act by deactivating contact's email addresses. The contact's details remain in the list, but emails are no longer sent.

The Global Email Marketer system can tell the difference between emails that bounced for temporary reasons (a contact's inbox was full, for example) and those that bounced for permanent reasons (the account does not exist, for example). The Global Email Marketer system can then take different action depending on the type of bounce that occurred.

## Event Log

The Global Email Marketer system's event log is a CRM (Customer Relationship Management) feature that allows you to see all of your interactions with a contact at a glance. Information about Global Email Marketer system-related events (for example, each time an email is sent to a contact) is logged automatically, and you can also manually log all sorts of other information (for example, each time you call or meet a contact in person).

# Getting Started

Use this chapter if you want to start sending out emails right away. The steps in this chapter show you how to set up a list of your contacts, and send emails to them.

**Note:** The Global Email Marketer system should already be set up and configured on your server. If you are in doubt, check with your system administrator or whoever is in charge of the server.

Steps marked with a red asterisk (\*) are necessary. The other steps are not necessary, but allow you to perform additional, useful tasks.

Follow the links to other parts of this user's guide for information on how to complete each step.

## **1 Log in to the Global Email Marketer system. \***

Use your username and password to access the Global Email Marketer system. See [Logging In to the Global Email Marketer system](#).

## **2 Set up a contact list. \***

Create a list to hold information about your contacts (the people to whom you send your emails). You can also configure the following:

- Your name, email address, and other personal details.
- Your company's name, address and phone number.
- Where bounced emails should be sent.
- Which custom fields you want to use (see step 3).
- Which fields you want to see when you view the list.

See [Creating and Editing Contact Lists](#).

## **3 Create custom fields.**

If you want to collect a specific type of information about your contacts, you can create a custom field to hold the information.

- You can specify the kind of field you want to make (text box, drop-down list, check box, and so on), and a variety of other settings.
- You can also specify whether or not the field should be mandatory (if a field is mandatory, it must be filled in before you can successfully add a contact to the list).

See [Creating and Editing Custom Fields](#).

**Note:** Skip this step if you do not want to collect information that is not covered by the built-in fields.

## **4 Add contacts to your contact list. \***

Manually add information about one or more people to whom you want to send emails. You can also upload a file containing contacts' information, if you have one.

See [Adding or Editing a Contact](#).

## **5 Create a signup form.**

Use the Global Email Marketer system to create an HTML form you can add to your website that allows people to add their information to your contact list.

See [Creating and Editing Forms](#).

**Note:** Skip this step if you do not want to allow people to sign up to join your contact list.

## **6 Place the signup form on your website.**

Add the HTML form you created in step 5 to a page on your website.

See [Adding a Form to Your Website](#).

**Note:** Skip this step if you did not create a form in step 5.

## **7 Create an email campaign. \***

Email campaigns control the emails you sent to the contacts on your contact list.

- Specify whether you want to send an HTML email, a plain-text email, or both (known as "multipart").
- Design the HTML and/or text components of the campaign. Use the built-in templates, modify a template, or build your own from scratch.
- Write your email's text content.
- Use custom fields, if required.
- Activate the email: allow it to be sent to your contacts.
- Validate your email, if required: check how it looks in popular email clients.
- Preview your email, if required: send a test copy to your own email address.
- Save the campaign.

See [Creating and Editing Email Campaigns](#).

## **8 Send your campaign to your contacts. \***

Select the contact list to which you want to send the email campaign, and send it out to the contacts belonging to the list.

See [Sending Email Campaigns](#).

## **9 Check statistics about your campaign.**

Find out how many of your emails reached their targets successfully, how many were opened, and a variety of other statistics.

See [Viewing Email Campaign Statistics](#).

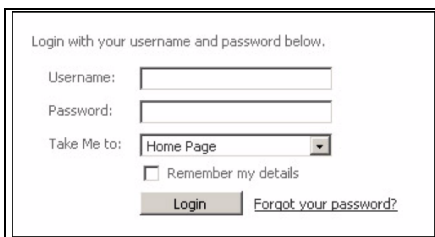
**Note:** Skip this step if you do not want to view statistics about your campaign.

# Logging In to the Global Email Marketer system

Take the following steps to log in to the Global Email Marketer system.

- 1 Open your Internet browser and enter the Global Email Marketer system's URL in the address bar. Hit **Enter** or click **Go**.

**Figure 2** Login Screen



Login with your username and password below.

Username:

Password:

Take Me to:

Remember my details

[Forgot your password?](#)

- 2 Enter your **Username** and **Password**.
- 3 Select the screen you want to see once you have logged in. See the following pages for more information on each screen:
  - **Home page:** see [Using The Home Screen](#).
  - **My contacts:** see [Viewing and Managing Contacts](#).
  - **My contact lists:** see [Viewing and Managing Contact Lists](#).
  - **My segments:** see [Creating, Editing and Viewing Segments](#).
  - **My email campaigns:** see [Viewing and Managing Email Campaigns](#).
  - **My autoresponders:** see [Viewing Autoresponders](#).
  - **My campaign statistics:** see [Viewing Email Campaign Statistics](#).
- 4 If you want the Global Email Marketer system to remember your **Username** and **Password**, click **Remember my details**. If you do not want the Global Email Marketer system to remember your details, leave this box unchecked.

**Note:** Select **Remember my details** only when you are the only person with access to the computer you are using. NEVER select this on a public computer. Failure to adequately protect the details of your contacts may contravene your local data protection laws.

- 5 Click **Login**. If your **Username** and **Password** are correct, the screen you selected in step 3 displays.

Note: If you forgot your password, click the **Forgot your password?** link. A screen displays in which you can enter your **Username**. Click **Send email**. An email is sent to the email address you registered with the Global Email Marketer system. You can click a link in the email to regain access to the Global Email Marketer system.

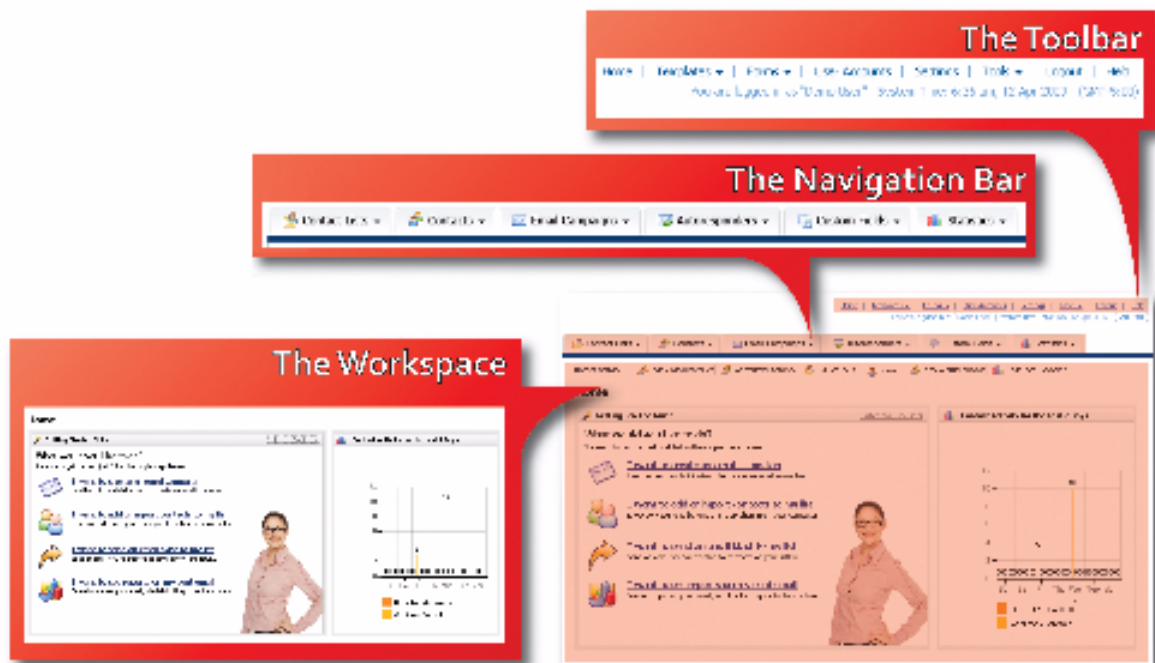
# The Global Email Marketer system Interface

This chapter discusses the Global Email Marketer system's Graphical User Interface (GUI). The GUI lets you control every aspect of the Global Email Marketer system.

## The Global Email Marketer system Interface at a Glance

The GUI is divided up into three parts.

**Figure 3** The Global Email Marketer system Interface at a Glance



- See [The Toolbar](#) for more information on the toolbar.
- See [The Navigation Bar](#) for more information on the navigation bar.
- The fields that display in the workspace depend on the screen you are currently viewing. [The Navigation Bar](#) and [The Toolbar](#) sections of this user's guide deal with the workspace.

## Recent Activity Log

When the recent activity log is enabled (see [Configuring User Settings](#)), a list of the screens you have recently visited displays at the top of your screen.


**Figure 4** Recent Activity Log

Recent Activity:  XMas Offer |  demo |  Buy Now and Save 1

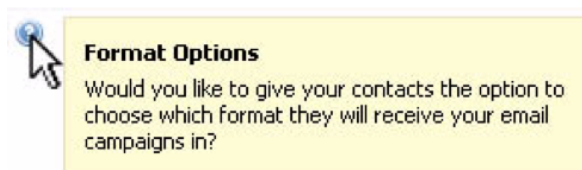
Click an item in the recent activity log to jump back to the relevant screen.

**Note:** The recent activity log is a user-specific setting; you can turn it on or off for one user without affecting how the interface displays to other users.

## Tooltips and Knowledge Base Links

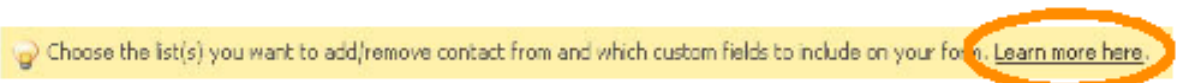
Many objects in the GUI have tooltip icons next to them (  ). Place your mouse pointer over the tooltip to see more information about the object.

**Figure 5** Tooltips





Other objects have text links next to them. Click these links to see an article from the knowledge base on the subject.



**Figure 6** Knowledge Base Links



To see more articles in the knowledge base, click **Help** in the toolbar.

## Sorting Lists

When you see  and  arrow icons in a list heading, use them to sort the list.

Click  to sort the list in ascending order, or click  to sort the list in descending order.

## Navigating Lists

In pages with numerous list entries, navigation tools display.

**Figure 7** Navigating Lists



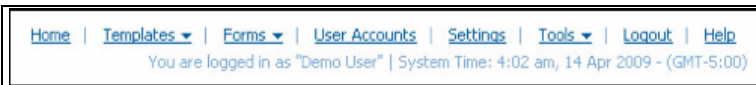
**Table 1** Navigating Lists

|                  |                                                            |
|------------------|------------------------------------------------------------|
| Results per page | Select the number of list entries to display in each page. |
| <<               | Click this to go to the first page in the list.            |
| Back             | Click this to move backward one page in the list.          |
| 1, 2, 3, ...     | Click this to go to the numbered page in the list.         |
| Next             | Click this to move forward one page in the list.           |
| >>               | Click this to go to the last page in the list.             |

## The Toolbar

The toolbar displays in every screen.

**Figure 8** The Toolbar



Use the toolbar to perform tasks related to the Global Email Marketer system's system and management.

**Table 2** The Toolbar

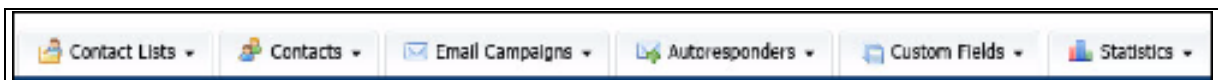
|           |                                                                                                                                                                                                                                                                                                                                                           |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Home      | Click this to return to the <b>Home</b> page, where you can see your contact activity for the last seven days and use the <b>Getting Started</b> tool.<br><br><i>Note: The <b>Getting Started</b> tool walks you through the basic configuration steps you need to take to set up the Global Email Marketer system and start sending email campaigns.</i> |
| Templates | Click this to view the Global Email Marketer system's built-in email templates, or to create or configure your own custom email templates.<br><br><i>Note: Templates control the appearance of the emails you send.</i>                                                                                                                                   |
| Forms     | Click this to see a menu that lets you create, view and edit website forms.<br><br><i>Note: You can create forms for your website that let contacts subscribe, unsubscribe, modify their details, or send information to a friend.</i>                                                                                                                    |

|               |                                                                                                                                                                                                                                                                                               |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| User Accounts | Click this to go to the <b>User Accounts</b> screen, where you can create, delete and manage the Global Email Marketer system's user accounts.<br><br><i>Note: When you create new users, you can specify the features, templates, contact lists and so on to which each user has access.</i> |
| Settings      | Click this to go to the <b>Settings</b> screen, where you can view and change global system, email and scheduling, security and addon module settings.                                                                                                                                        |
| Tools         | Click this to see a menu that allows you to check information about your server's configuration, check for updates to the Global Email Marketer system, view the PHP error log, and check the Global Email Marketer system's components' file permissions.                                    |
| Logout        | Click this to log out of the Global Email Marketer system. You will need your user name and password to log back in.                                                                                                                                                                          |
| Help          | Click this to go to the the Global Email Marketer system online knowledge base, where you can read help articles on all of the Global Email Marketer system's features.                                                                                                                       |

## The Navigation Bar

The navigation bar displays in every screen.

**Figure 9** The Navigation Bar



Use the navigation bar to go to screens where you can create, configure and manage your email campaigns.

**Table 3** The Navigation Bar

|               |                                                                                                                                                                                                                                                                                                                                                                   |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact Lists | Click this to see a menu that lets you manage contact lists, bounced emails, contact list segments and contact list groups.<br><br><i>Note: Bounced emails are emails you sent that could not be delivered.</i><br><br><i>Note: Segments are groups of contact list entries that share a particular feature; for example, entries with ".com" in the address.</i> |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contacts        | <p>Click this to see a menu that lets you manage contacts manually, upload or download a file of contacts, and manage suppression lists.</p> <p>Note: The Global Email Marketer system uses CSV (Comma-Separated Value) files to upload contacts. Many common applications such as Microsoft Outlook and Excel can export CSV files.</p> <p>Note: Suppression lists contain email addresses to which emails are not sent, even though the address remains on the contact list.</p> |
| Email Campaigns | <p>Click this to see a menu that allows you to view, create and send email campaigns, perform split tests and view scheduled emails.</p> <p>Note: Scheduled emails are emails you have configured the Global Email Marketer system to send out at a particular point in the future.</p>                                                                                                                                                                                            |
| Autoresponders  | <p>Click this to see a menu that allows you to create, view and edit autoresponders and triggers.</p> <p>Note: Autoresponders are emails that are sent out automatically after a certain event (for example, as soon as a contact joins your list). Triggers are similar to autoresponders, but allow you even greater flexibility to automate email and administrative tasks to happen automatically when certain other events occur.</p>                                         |
| Custom Fields   | <p>Click this to see a menu that lets you create, view and edit subscription form custom fields.</p> <p>Note: By default, subscription forms contain only <b>Email Address</b> and <b>Contact Format</b> (plain text or HTML) fields. Custom fields help you gather more information about your contacts when they join your list.</p>                                                                                                                                             |
| Statistics      | <p>Click this to see a menu that lets you view statistics about your email campaigns, split tests, triggers, autoresponders, contact lists and user accounts.</p>                                                                                                                                                                                                                                                                                                                  |