How to Get Started Guide

Table of Contents

An autoresponder and newsletter service should be an invaluable aspect of any website, and it's an effective way to follow up with anyone who has requested to receive information from you by e-mail.

This guide will walk you through, step-by-step, on how to get the basics setup for your first e-mail campaign.

Please feel free to print this guide to use as a reference while you work on your account.

Navigation

Before we get to work, let's get acquainted with the control panel and how you'll navigate around your new account.

Working in Lists

Each list in an account has its own messages, subscribers, and sign up forms, and you may set up as many in your account as you'd like. For instance, if you have multiple websites, you can have a list for each.

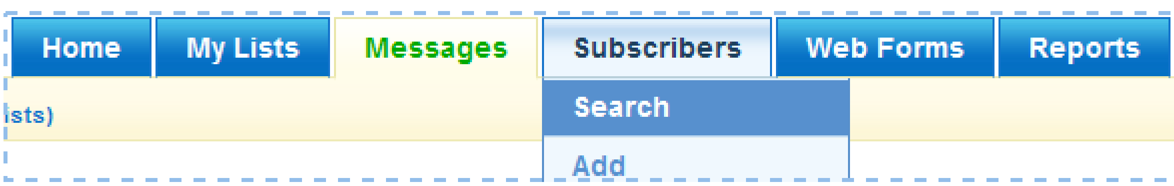
To help you to work separately within each list, near the top of any page you're working on, you'll find the name of the list you're working on in the Current List drop-down box.

To select the list you'd like to work in, choose it from that box.

Tabs and Menus

Once you have the list you'd like to work on selected, to navigate around its settings, you'll use the row of tabs and menu options at the top of the page.

If you hover your mouse pointer over top any of the tabs, you'll find menu options to choose from just beneath them.



For example, if I wanted to search through my subscribers, I'd hover my mouse over the **Subscribers** tab, then click on **Search**.

Setting Up Your List

Now that we know how to get around in the account, let's set up our first list.

Hover over the My Lists tab and click on List Settings.

On this page, we'll set up the basics for your list.

List Settings

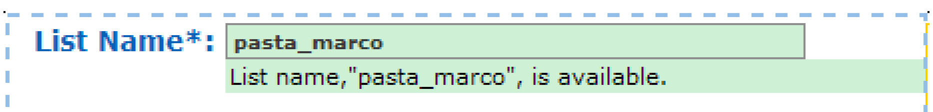
Description

Choose a few words here to describe the subject of your list. When someone clicks on the unsubscribe link at the bottom of your messages, they will be reminded of what it is they'd subscribed for with this value.

List Name

This sets the name you'll see in the **Current List** box. It will appear in very limited places in your e-mail campaigns to your subscribers (such as on the unsubscribe page), but it is mostly for your reference, like naming a file on your computer.

Enter in your desired name, and wait a few seconds. Just beneath the box, you'll see either a green or red highlighted line letting you know of whether or not that name is available.



Company Branding

There are a few places where you're subscribers will be directed to pages hosted on our system. These include the page they see when they click on the unsubscribe and confirmation links.

This is not an entirely necessary section to fill out. In fact, if you're looking to get setup quickly, I might even recommend skipping it for now. You can always come back later to set this up to brand these pages.

Here's an example of a page to help to illustrate the customization:

Company Name

Just enter the name of your company here.

Website URL

Enter the address for your website so subscribers can visit from these pages using your link.

Logo URL

If you have an logo published on your website, copy its location (URL address) and paste it in this box.

Divider HTML Color

Notice the green bar in the above graphic. It's a subtle touch you can make, perhaps to match the color scheme of your web page. Type in a color name or use the color code, if you have it.

Reply Address

Email Address

When someone opens their e-mail, they will see either your name or your e-mail address in the 'From' line. This will help them to identify your e-mail from the countless other messages they see.

Email Address	Name
help@example.com	Widget Co.

It's important that you brand your messages with an e-mail address including your name or your company's. Wherever possible, you'll want to use an e-mail address hosted at the same domain as your website.

So, for example, if my website is found at http://www.example.com, I could use marc@example.com or newsletter@example.com.

Tip Avoid using e-mail addresses found at the domains of free providers (e.g. @yahoo.com and @gmail.com) or Internet Service Providers (ISPs like @verizon.net), since spammers often use these for their reply addresses. Needless to say, you don't want to be confused with spammers.

Be sure to use an address you check regularly, so that you're in compliance with U.S. Federal law, and so that when your subscribers respond to your messages with an inquiry, you can get back to them in a timely manner.

Name

Enter your name or the name of your company, something that your subscribers will recognize as soon as they open their e-mail.

From/Reply

Check this box for the e-mail address you just entered. This sets which address in the list appears in the 'From' line.

From/Reply	Notifications
☑	☑

Notifications

If you'd like to receive a message from us notifying you of when a new subscriber is added to your list and when subscribers unsubscribe from your list and leave you comments, check this box.

Writing Your Messages

There are two different types of messages to concern yourself with: follow up messages and broadcasts.

What is the Difference Between Autoresponders and Broadcasts?

Autoresponder / Follow Up Messages

Follow ups are messages sent automatically, in a sequence. An autoresponder is sent first, immediately when someone subscribes to your list. That message is followed by a series of messages, each scheduled with a set amount of days in between.

For instance, I could set up a message welcoming my subscribers as the autoresponder. That way, they'll receive a message acknowledging their addition to the list right away.

I could then follow that with a second message sent two days later introducing myself and the product I sell on my website, three days later a message giving more information on that product, and so on...

These messages help to build a relationship and trust over time with people who may have otherwise just visited your website once, never to be seen or heard from again. They are helpful for such things as marketing materials, training sequences, and answers to frequently asked questions.

Broadcast Messages

Broadcasts are sent once, at a scheduled date and time. They can be written as far in advance as you would like, and you won't need to log into your account to send them. Instead, they'll be sent at the saved time you've scheduled them for without your intervention.

For example, if I wanted to send a monthly newsletter, I could set up three broadcasts for this month, next month, and the following, all scheduled to be sent on the first, perhaps at 9:00 AM.

Perhaps I'd like to send a message to my entire list letting them know of a special promotion I'm running. It's *time-sensitive* material, since they need to act by a certain time, so I let them know by broadcast.

Creating a Follow Up Message

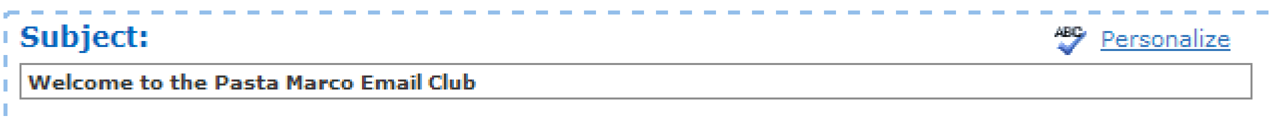
To navigate to the follow up set-up page, hover your mouse pointer over the **Messages** tab, then click on **Follow Up**.

Since you don't have any messages created yet, you'll see only an **Add Message** button. Click on this button to create the autoresponder.

Creating a message here is very much like writing one in your own e-mail program. There are some additional options, such as click tracking and templates, but let's skip those for today; they are important for getting our first message sent to our subscribers, which is what we want to concentrate on.

Subject

This subject appears as the subject line of your message, the same as how the subject of your e-mail messages appears to your friends and associates.



Enter something brief that describes the actual subject of the message. Use something enticing but not off topic.

For an autoresponder message, since you'll be welcoming subscribers to your campaign, it makes sense to use words like 'welcome' or 'thanks'.

Tip

Think of ways to make your messages stand out. Clever subjects are a great way to entice your subscribers to open your messages. However, using CAPS, the word 'free', and excessive punctuation (!!!) is good only for getting your messages put into your subscribers' SPAM folder.

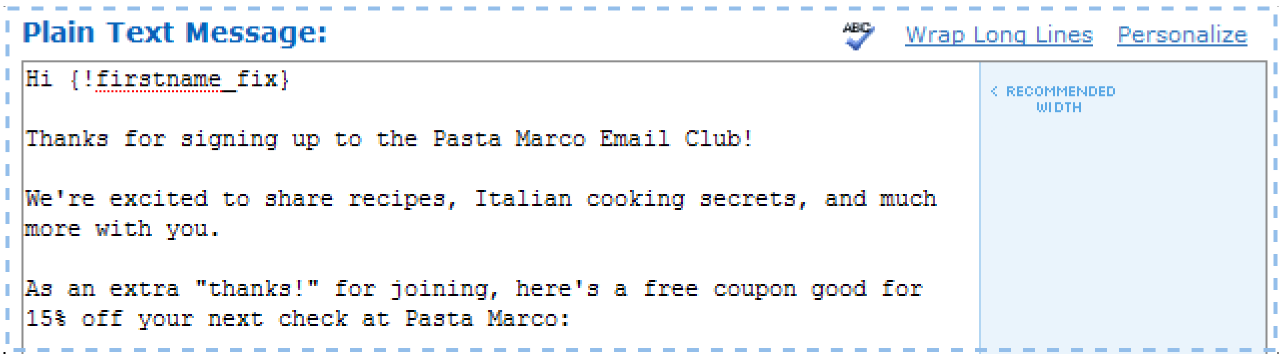
HTML Message

You'll notice that there's an HTML Message box, where you can type in a formatted message (or use our templates), but we'll leave this blank for now. It's not essential to getting started, and you'll *always want to include a plain-text version of your messages* in any case.

Plain Text Message

The body of your message goes here. You can copy and paste from somewhere else, or type directly into the box.

Use the Personalize link to customize your message, say with a customer's name.



Notice that there is a Recommended Width block, which indicates where you should cut off the lines of your messages to be sure that they appear to your subscribers the same way you write them.

Many e-mail programs will impose a line length limit, and will cut your lines off if you don't take this measure. If your lines go over this length, just click on the **Wrap Long Lines** link to shorten them.

Don't know what to write in this message?

Tip

Use this is as an opportunity to touch base with a new subscriber. Who are you? Why did they receive this message? What can they expect to receive from you?

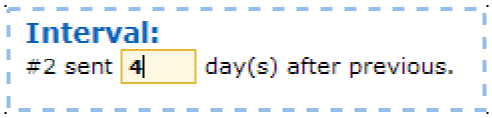
The most important thing is to just get something in there to get started. Later, once you're all set up, you can consider things like what types of questions you find yourself answering a lot. You may need to look no further than your sent box.

Save the message

Click on the **Save** button at the bottom of the page, and your autoresponder is ready to go.

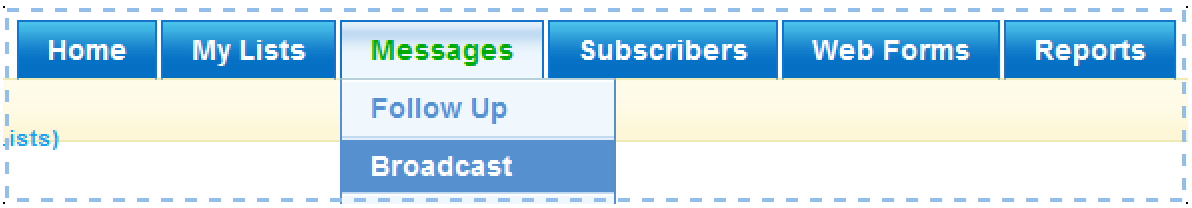
Message #2, 3, 4 …

Creating the messages that follow up on your autoresponder is just as simple as the first. The only difference is that once you click on **Add Message** and add your message content, you'll find a field to set the number of days our system should wait after the previous.



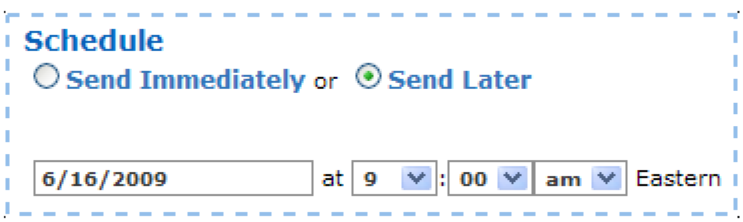
Creating a Broadcast Message

To navigate to the broadcast page, hover your mouse pointer over the **Messages** tab, then click on **Broadcast**.



Click on **Create Broadcast Message**. This button will open a new draft of a message to work on.

Creating broadcasts is very similar to creating follow ups, with a few small differences. You'll notice that, instead of a message intervals, you'll set a specific date and time.



Choose when you'd like for it to send, add your message, then hit the **Save** button at the bottom of the page.

You'll see your message in a Pending Broadcasts section of the page. Notice the date and time set for you each message you've created. Just click on the **Queue Now** button to confirm you'd like for your message to be sent at the time you see.

Publishing Web Forms

Now that you have a message set up, the final step is to publish a sign up form to your website.

Web forms provide you with a means to generate a list of responsive subscribers to send your messages to. Without a place to request more information, it is difficult to establish a relationship with your website visitors. Instead, people may visit your page, take one look, and never return again.

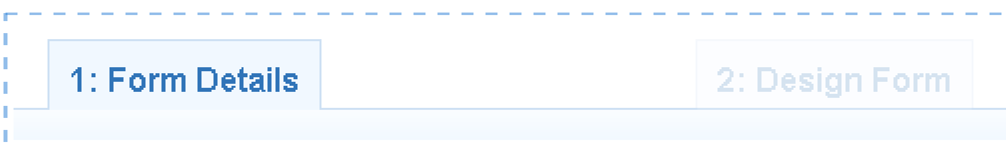
Let's get your first web form published to make sure you're taking advantage of the power of an opt-in e-mail service to enhance your site.

Designing a Web Form in Your Control Panel

Click on the **Web Forms** tab.

Click on the **Create Web Form** button.

You'll find two steps to cover: Form Details and Design Form.



We'll start with Form Details. Once you've completed that section, you'll click the **Next** button to get to the design.

Form Details

Form Name

Give your form a name. This appears only to you, so just use something you can easily reference later.

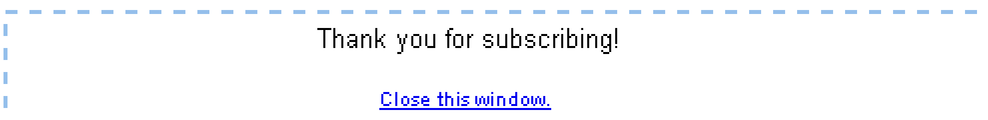
Type

This option controls the appearance of your form. Today we'll stick with an in-line form, the type that appears directly within the content of your page, not above or below.

Tip: It's important to have one of these published to your page, regardless of whether or not you come back later to also add a pop-up or pop-over type form to your page. To maximize the number of subscribers you generate, you may want to install several to your site eventually.

Thank You Page

When your subscribers submit your web form, they are sent to a page that will thank them for subscribing. By default, this is a basic page hosted on our service's web server, with no branding.



If you or your web designer would like to publish their own page on your website, you'll just need to enter the address you'd like for us to send them to here.

Forward Variables

This is meant for developers or programmers. Just leave this unchecked.

Ad Tracking

Once you have a few forms published to your website, it will be useful to review your subscribers and your campaigns statistics to see which of your forms are the most effective in generating subscribers.

Entering an Ad Tracking value will help you determine who used what form to subscribe. For example, if someone used your in-line form on your main page, you might type 'inline-main'.

Start on Message

If you'd like to start subscribers who use this form on any other message than the autoresponder, choose that message from this box. In most cases, you'll leave it set as is.

Click the **Next** button.

Design Form

There are two panels to observe on this page: Fields and Preview.

Fields

It's necessary to capture an e-mail through your sign up form in order to add subscribers to your list and capturing a name will allow you to personalize your messages with it., so you'll find those fields already under Preview.

You can add additional fields (e.g. phone number, city, etc.) by clicking on the **Add New Field** link.

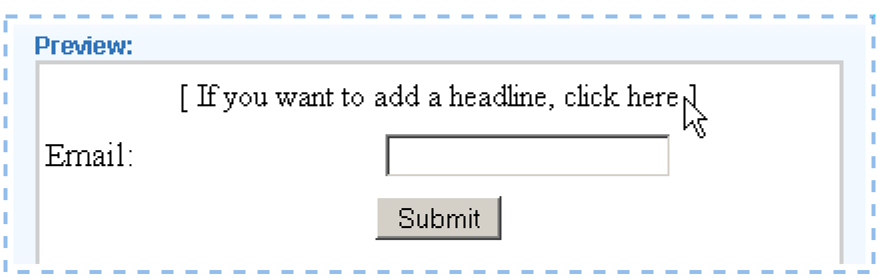
Tip You have the option to add up to 25 custom fields to your list, but before you go asking for everything from address to phone number to shoe size, stop and think about what is really necessary. The simpler your forms are, the more likely someone is to give you their contact information.

Preview

With your fields set, you can begin to work on the way your form appears.

Headline

The headline is what appears above the input boxes (e.g name, e-mail) in your form.



To set the headline for the form, click on that line. An example of a headline is:

“Sign up for a monthly newsletter”

It is meant to put the form into context to make it clear what incentive someone has to enter their information.

Form Fields

Just beneath the headline, you'll find the fields currently set to be captured by your form. By default, you'll see only 'Name' and 'Email', but you can add the others by hovering over them and clicking on the green '+' button that appears to the right side of the field.

Once you've finished adding your fields, you can click on the **Submit** button to change the caption of that button to something like 'Sign Me up!' if you wish.

Now that you've completely set up the fields and details, just click **Save** at the bottom of the page to complete your form.

Publishing a Form to Your Web Page

In the Control Panel

You've completely set up your form. Now, it's just a matter or getting it published to your page.

In your control panel, you should see a page with the name of your form, some tracking statistics, and a **Get HTML** link. Click on that link.

Name	Type	Displays	Subscribers	S/D	Unique Displays	S/UD	Preview	Get HTML
Widget Sign up Form Main Page	inline	0	0	0.0%	0	0.0%	Preview	Get HTML

A window pops up giving you an option between two versions of HTML. Usually, you'll want to choose the default, “JavaScript Snippet” version for reasons of simplicity.

The “Raw HTML” version gives more opportunity for re-design of the form, so if your web designer asks for the HTML, provide them with that one.

When you're ready to publish the HTML to your site, just copy it to your clipboard.

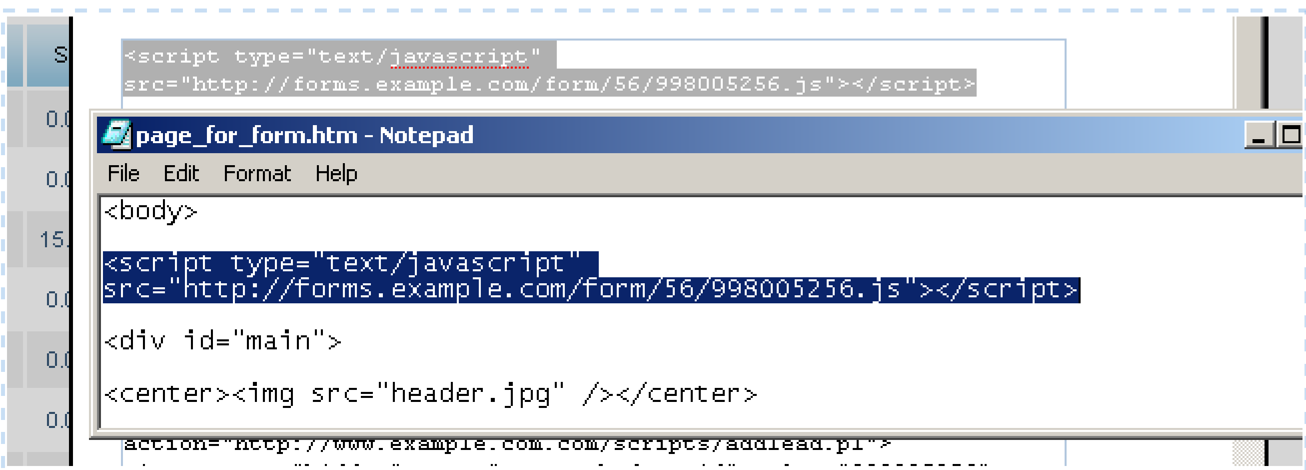
In Your Web Host's Control Panel

In order to publish the web form to your page, you'll need to have access to make changes to your website. Your web host should have information on just how you do so in their documentation, or you may need to contact their support for a quick walk-through.

Tip

You need to get to the *HTML source* of the page, so that you can copy the HTML we're providing you with and paste it in. When looking through the help or calling your host, use that keyword (e.g. “Can you tell me how to get to the *HTML* so that I can make changes to my pages?”).

Once you've found the HTML, just paste in what you've copied.



Save the changes, and reload your webpage (making sure your cache is clear in your browser so that it's loading the changes you made).

You should see your form published with a place for your subscribers to opt-in to receive your information. Having troubles publishing it to your website? Contact our customer support team about how we might help you.

Conclusion

That's all you need to do in order to get going with your e-mail campaigns. Congratulations on taking an important step in building effective communications with a list of responsive subscribers.

If you have questions on anything mentioned in this guide, you're more than welcome to contact our customer support team. There are real, live people here happy to help. Thank you for choosing our service!

Appendix: Confirmed Opt-in

What is Confirmed Opt-in?

SPAM is a serious problem today, with no sign of it getting much better in the near future. To help to battle SPAM, ISP's (the services your subscribers use to get their e-mail) have set standards for the way e-mail campaigns such as yours should be conducted.

One of these standards is referred to commonly as verified or confirmed opt-in. With this feature, when a subscriber is added to a list, they are sent a customized message with a link to click on. Only once they click on the link does their subscription become active.

What does it mean for my account?

We require this feature for all imported subscribers and any added by sending an e-mail to your autoresponder's address. There's a page in your account where you may make changes to the message.

If you make these changes, not only does your reply address show in the messages headers, but your subject will reflect something relevant to the subscriber, as well the body of the message.

Why should I use it?

Although this is entirely necessary for imports and subscribers added by e-mail, it is also **very highly** recommended for web form submissions, such as what we describe in this getting started manual.

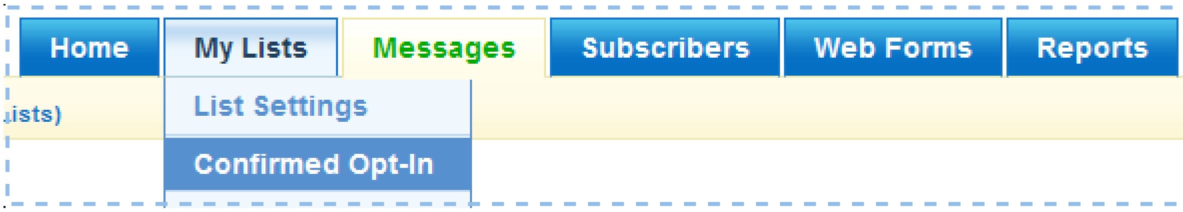
Confirmed opt-in provides an audit trail showing that not only did someone put an e-mail address into your sign up form, they've also confirmed that request as the only person with access to that address.

This makes it a secure transaction. Anyone can put anyone else's address into a form to see what's on the next page (and believe me, it happens *a lot*), but only the owner of the e-mail address can open that message and click on the link it contains.

Strictly speaking, this feature is an important aspect of any responsible e-mail sender's campaigns. I'd make this a tip, but that would be a misnomer. It's really entirely necessary.

How do I turn it on?

Click on the **Confirmed Opt-in** link found under the **My Lists** tab.



You'll see options for turning the feature on near the top of the page. Just click on the **OFF** link next to the Web Form Submissions option.

Opt-In Method	Status	Note
Web Form Submissions	OFF	**Strongly recommend this be turned ON** to prevent malicious subscriptions and false spam allegations.

Now that confirmation is turned on for all submissions, you can customize the message. You'll notice that you can customize the subject, as well as the first and last paragraphs of the message.

You may also send subscribers to a custom page after they click on the confirmation link, much like how you set a custom thank you page for your web forms.

Once you've saved your changes, you can preview the message at the bottom of the page.

Appendix: Importing a List of Subscribers

Important: Where is This List From?

Do you have a list of people who have previously requested to receive information from you? We offer an import feature to help you to migrate these subscribers to our service.

We have very high standards for what subscribers can be used with our service, and we take care to monitor them to make sure that we can continue to offer the excellent delivery rate we do.

Before we get to *how* to import, there are a few things you'll need to consider.

Did these people really request to receive e-mail message from you?

A lot of times when discussing the source of imports with customers, we'll hear “these are my customers” or “they gave me their business cards at a trade show”. Unfortunately, this just isn't the same as giving permission to receive e-mail messages.

So, you need to ask yourself: did they really give me their permission to receive e-mail? If not, I'm afraid they just aren't appropriate for importing to our service.

Was this list provided to you by a third party? Was it *purchased* or obtained from a *co-registration* service you're using? **Don't import this list.** The use of these lists is strictly prohibited by our Terms of Service and *will result in the termination of your account*.

Have you sent them e-mail recently?

When it comes to e-mail, consent has an expiration. If you haven't sent messages to some people on the list for more than a few months, they should not be used either.

Subscribers from a longer period before tend to report messages as SPAM at a higher rate and are less likely to stick around should they even verify.

Has the list been managed for undeliverable e-mail addresses, and have unsubscribe requests been respected?

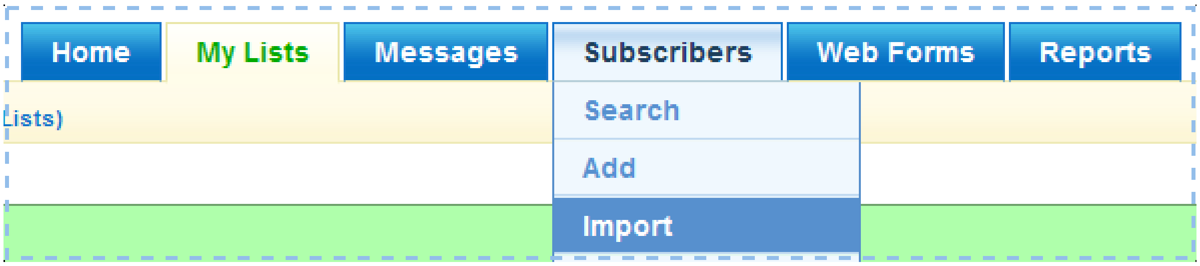
Maintaining a clean list is of vital importance, and our service covers both of these bases. Unfortunately, if your previous service has not, there is no way to no clean the list, and it cannot be used.

How to Import

Since we require confirmation for imported subscribers, you'll first need to customize the message sent to them. This helps to make the message recognizable to your subscribers.

You'll find instructions on doing so in the 'Confirmed Opt-in' appendix of this guide.

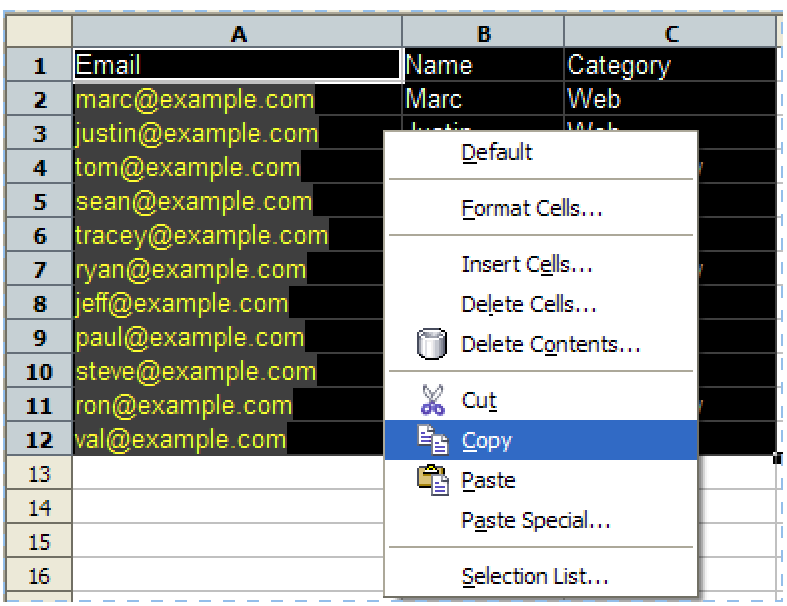
Once you've customized this message, go to the **Import** page, found under the **Subscribers** tab.



You'll find a form that provides you with an option to copy and paste in your subscribers.

Subscribers

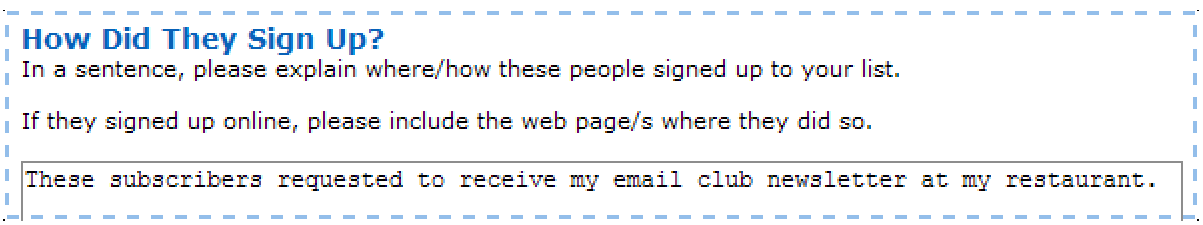
Your subscriber data goes here. If you have your information in a spreadsheet, highlight all data, then copy it and paste it into this field.



Once you paste into the box, the information will seem to lose the row and column format it had in the spreadsheet. But in fact, the columns are still separated by a 'tab' character, so it's nothing to worry about.

Provide an opt-in source

How did these subscribers request to receive your specific information? Provide as much detail as possible (including URL address where appropriate) to expedite the process, as imports are reviewed by our support team.



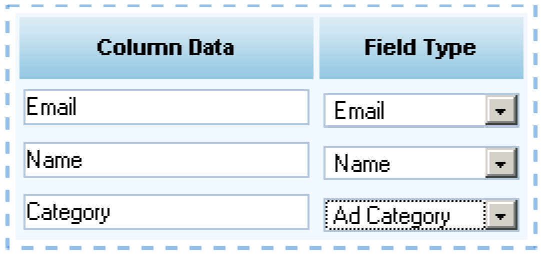
Remember, the use of purchased or co-registration subscribers is strictly prohibited by our terms of service. They cannot be imported.

Delimiter

What format do you have your list in? The most common is a spreadsheet. For this type of file, you can leave this set as is. If you're copying from a plain-text file with values separated by another character (a comma for instance) type it here.

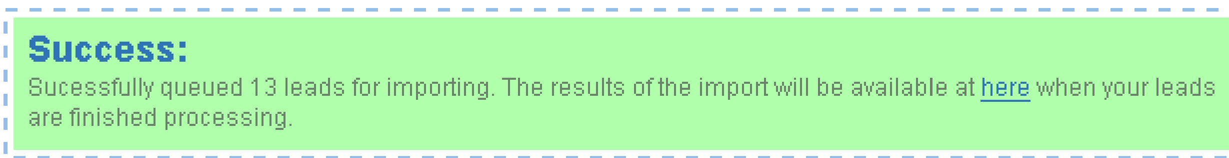
If you change the delimiter, be sure to enter the actual character here, and not the word spelled out. So, for example, if your fields are separated by a "," character, enter that character and *not* "COMMA".

Hit the **Next** button at the bottom of the page.
Match up the columns from your spreadsheet with the fields in your account.



Don't have all the fields you want in your account? Click on the **My Lists** tab, then on **Custom Fields** and add the ones you need. You can come back to this page to match up after you've added them.

Once you've completed this, click on the **Save** button. You should find a green success box indicating that your subscribers are processing.



Check back after a little while, following the link to check on the status of your import.