



INSUmail 

Insumail Manual Business Solution

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About this manual

This manual will learn you fast and easily how to:

- [Create your mails](#) (Section 1: Create)
- [Define your target public](#) and [launch your campaign](#) (Section 2: Launch)
- [Evaluate your campaigns](#) (Section 3: Evaluate)
- [Manage your files](#) (Section 4: Library)
- [Manage your Insumail account](#) (Section 5: My Account)



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1 Introduction to Insumail

This is the manual of the Insumail e-mail marketing software. With Insumail, one can create, launch and evaluate campaigns.

The application contains 5 main sections:

1. [Create](#), where you create e-mails and landing pages
2. [Launch](#), where you store and organize your contacts in contact groups, and launch campaigns
3. [Evaluate](#), where you evaluate your campaigns
4. [Library](#), where you store files, images and templates
5. [My Account](#), where you do settings and manage the users of your account

All subscribers of Insumail work in an account. Each account has a specific account URL, where all users of the account can log on to with their own login. Each account contains all the creations, contacts, contact groups and campaigns that have been created or inserted by all the users of this account. The library is also specific per account.



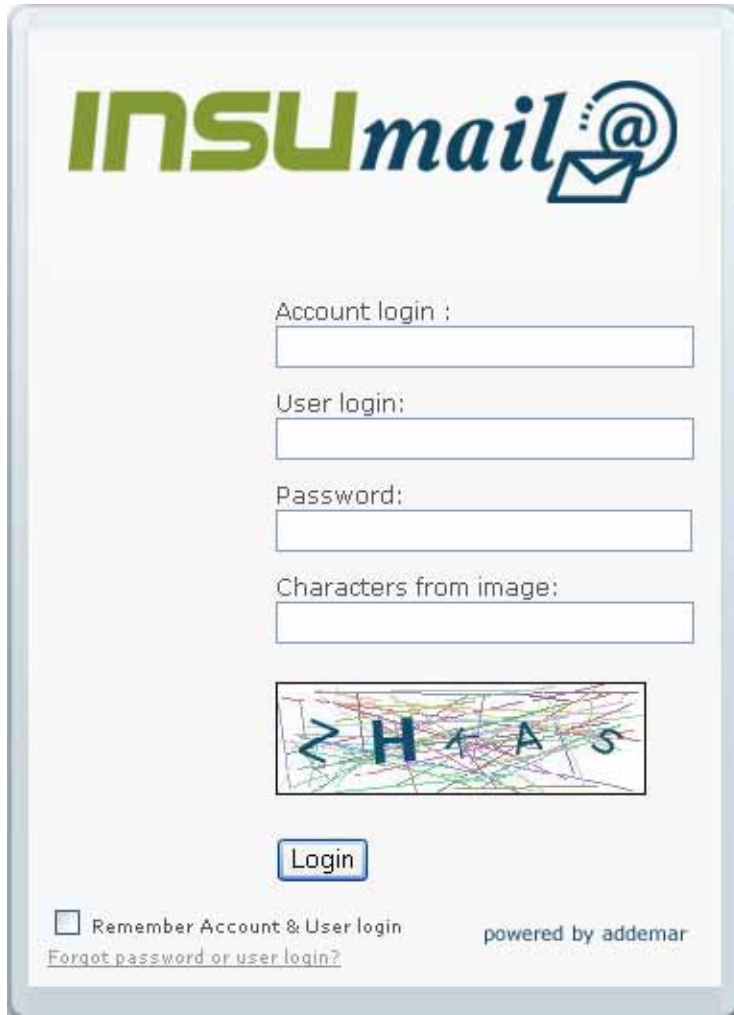
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2 Logging on to Insumail

To log on to Insumail:

1. Open a browser window.
2. Type the Insumail URL **http://www.insumail.be/login** and navigate to this page. The login page of Insumail opens up.



The screenshot shows the Insumail login interface. At the top is the logo 'INSUmail@' with an envelope icon. Below it are four input fields: 'Account login', 'User login', 'Password', and 'Characters from image'. A 'Login' button is positioned below the fields. At the bottom left, there is a checkbox labeled 'Remember Account & User login' and a link 'Forgot password or user login?'. At the bottom right, it says 'powered by addemmar'.

Figure: Login page.

3. Type your account login. Click the next field.
 - When your account login is recognized as an account in the new Insumail, you will have to fill in your user login and your password.
 - When your account login is recognized as an account in the old Insumail (before December 2006), you will have to fill in your password only. If you log on, you will be able to access the old Insumail software. This manual does not apply to this old software. Consult the online help you find in the screens.
4. Copy the characters you see in the captcha-image.
5. If you are working on your own computer and you want the system to store your account login and your user login, check the checkbox **Remember Account & User login**. The next time you log on, you will only need to fill in your password and the captcha.
6. Click **Login**.

You are working in your account now.

1. Probably a pop-up comes up after you logged on. This pop-up tells you there are unread notes in your inbox. You can click the link in the pop-up to read the note, or click Exit to read the notes later. (Read more about notes [here](#).)



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2. In the top right corner, you see the following information:
 - **Account Login:** full account name (here 'Agency XYZ').
 - **User Login:** full user name of the user that has logged on (here 'Frank Smeets').
3. In the top left corner, you will see links to your environments:
 - **Home:** this is the link to your home environment where you can create, launch and evaluate campaigns
 - **Agency Master:** this is the link to the agency master environment where you can manage your customer accounts
 - **Retail Master:** this is the link to the retail master environment where you can manage your subaccounts

Note: Depending on your subscription to Insumail and the type of account you have, the environment links can appear differently. Users of the Business Solution have only access to their own Home environment. Users of agency accounts will also have access to the Agency Master environment. Users of the Retail Solution will also have access to the Retail Master environment.



Figure: Insumail Home start page

Note: Forgot your password or your user login? Browse to www.insumail.be/login and click the link on the bottom of the dialog. Fill in your e-mail address or your account and user login. You will receive an e-mail containing a link where you can create a new password.



3 Section 1: Create

In the **Create** section you can create and manage the e-mails you send to your customers. You can also create landing pages: small web pages to which your e-mails can link.

Open the Create section by clicking the **Create** button on the left side of the screen.

Here you can:

- [Manage your e-mails](#) and [create new e-mails](#)
- [Manage your landing pages](#) and create new landing pages

To perform one of these activities, open the relative folder on the left side of the screen.

3.1 E-mail

3.1.1 Managing e-mails







When you open the section **Create** and click the folder **E-mails**, you see the overview of all e-mails created in your account.

To start [creating a new e-mail](#), click the **New e-mail** button.

For each e-mail, you see the following information:


Name	Name of the e-mail. The name of the e-mail is never shown to the receivers of the e-mail, it is for your own reference.
Type	Format of the e-mail, html or text.
Language	Language of the e-mail. This defines the language of the standard sentences in the e-mail.
Description	Description of the e-mail, for your own reference.
Created on	Date on which the e-mail was created.
Last update	Date on which the e-mail was last updated.

On each e-mail you can perform the following actions:

	Edit e-mail	Click this icon to edit the e-mail. The interactive preview opens up.
	Delete e-mail	Click this icon to delete the e-mail. A confirmation will be asked. You can retrieve deleted e-mails in the recycle bin .
	Move e-mail	When you create more folders within the E-mails folder, you can click this icon to move the e-mail to another folder.
	Copy	Click this icon to copy the e-mail. A copy of the e-mail will be created in the same folder. You can edit the copy by clicking the  icon and change the name in the properties of the e-mail.
	Preview	Click this icon to preview the e-mail. A pop-up window shows the e-mail like it will appear in the receiver's inbox.

3.1.2 Creating a new e-mail

To create a new e-mail:

1. Go to the Create section and open the **E-mails** folder.
2. Click the  button. The **New e-mail** dialog opens up.
3. Select the template you want to use for your e-mail.

Tip: To create an e-mail in text format, choose the text template.

Note: Templates can be managed in [the library](#).



- Select the language of your e-mail. This selection determines the language of all fixed elements in the template, such as the default headings and the standard sentence for unsubscribing.



Figure: E-mail with standard sentences highlighted. When creating the e-mail, you define the language of these standard sentences.


- Give your e-mail a name. For later reference, you can also add a description to your e-mail.

Tip: The name and the description of your e-mail will not be shown to the receivers of the e-mail. Make sure, however, to give all your e-mails a unique name, so that you can recognize them later.
- Click the **Create** button. Your e-mail will be created based on the template you have chosen, and shown in the [interactive preview](#).
- You can now:
 - Fill in the content of your e-mail using the [interactive preview](#).
 - Fill in the content of your e-mail using the [step by step wizard](#).
 - Change the [colours and the fonts](#) of the e-mail.
 - [Personalize the content](#) of the e-mail.

3.1.3 Editing an e-mail

3.1.3.1 Editing via the interactive preview

You will find the interactive preview in the **Create** section, each time you:

- create a new e-mail or a new landing page
- click the  button next to an existing creation

To edit via the interactive preview:

- Hover with your mouse cursor over text and images to find out which areas are editable.

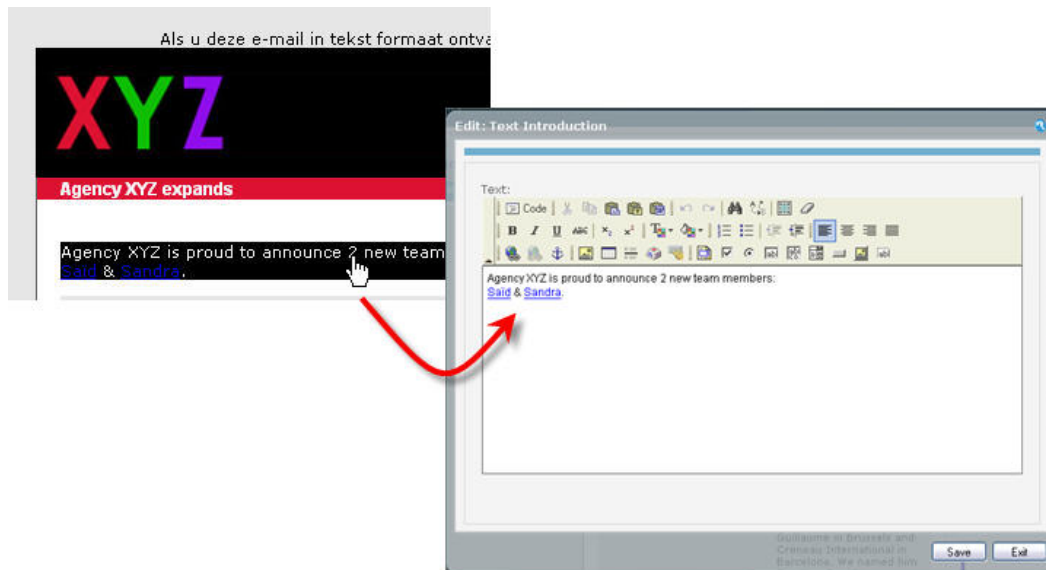




Figure: Area highlighted in black when you hover with the mouse cursor: this area can be edited. Click and a text editor dialog pops up.

2. Click every single area to edit it. Depending on the type of template you have chosen when you created this e-mail or landing page, the following areas can be available:
 - **Image area:** If you click an image area, an [Edit Image](#) dialog pops up. Here you can select an image.
 - **Link area:** If you click a link area, a link dialog pops up. Here you can create a link.
 - **Text field:** If you click a simple text field: a Text Field dialog pops up. Here you can type one line of text.
 - **Text area:** If you click a simple text area: a Text Area dialog pops up. Here you can type more line of text.
 - **Editor area:** If you click an editable text area: a [Text Editor](#) dialog pops up. Here you can type and layout text. In some areas you can even insert images, links, forms and tables.
 - **News article area:** If you use the newsletter template: a [News Article Editor](#) can pop up. This is a special pop-up that helps you to create newsletter articles with links to the extended version of the article in one shot.
3. Each time you click **Save** in one of the pop-ups, your modifications are saved and appear immediately in the interactive preview.

Tip:

To edit the content of your e-mail, you can also use the  [Step by step wizard](#). You will be able to fill in text fields and upload images one by one.

To change the default [colours and fonts](#) used in your template, click the  **Colours and fonts** button. You will be able to specify the colours of the borders and headers, and the fonts.

4. When you are ready editing, you can click the **Close** button. Your modifications will be saved.

3.1.3.2 Adding or removing articles

In most templates, you will be able to add or remove articles. Hover with your mouse over the interactive preview, and you will discover an area such as:



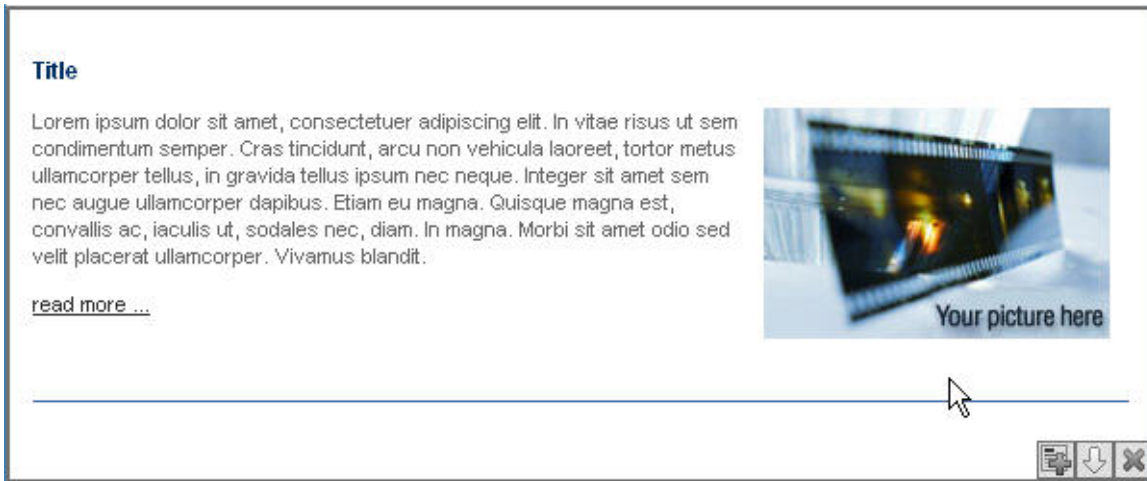


Figure: area highlighted with a grey border and small buttons on the right when you hover with the mouse cursor: this area can be duplicated, moved or deleted.

This indicates that the entire article (title, text, picture and link) can be duplicated. Once you have duplicated articles, more icons appear, by which you can move down or up, and delete. An explanation of the icons:

	add article	Click this icon to duplicate the area indicated by the grey border. The duplicated area appears below the original area.
	move up	Click this icon to move the selected area up.
	move down	Click this icon to move the selected area down.
	delete article	Click this icon to delete the area indicated by the grey border.

Note for template designers: this function is realized with the INSUMAIL list tag (<INSUMAIL type="list"> </INSUMAIL>)

3.1.3.3 Using the image dialog

The image dialog opens up when you click an image in [the interactive preview](#). This dialog is used to insert an image from your [library](#) into your e-mail or landing page.



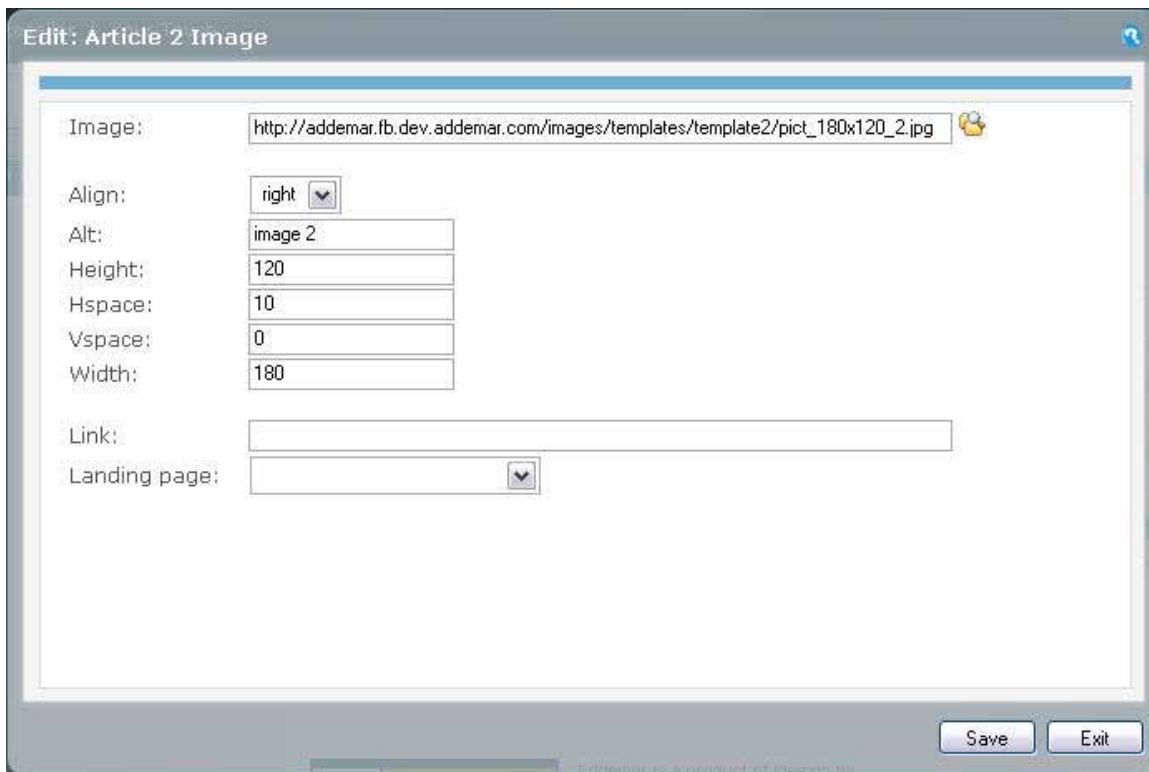





Figure: edit image dialog

Tip: To make sure the uploaded image fits the template, prepare an image with the same dimensions as are displayed in the width and height field of the image dialog.

Note: If you are working in the [text editor](#), you can also insert images. Via the  icon, you access [another image dialog](#).

To insert an image:

1. Click the  icon. The image folder of your library opens up.
2. Select the image:
 - If the image has already been uploaded to your [library](#), browse to the image and click it. The image filename appears in the **Image file** field. Click **OK** to insert the image.
 - If the image has not been uploaded yet to your [library](#):
 1. Open the directory to which you want to upload the image or create a new folder by clicking the  icon.
 2. At the bottom of the screen, click the **Bladeren** or **Browse** button.
 3. Search the image you want to upload on your local pc or network and double-click it.
 4. Click the **Upload** button. The image is uploaded to the active folder.
 5. Browse to the uploaded image and click it. The image filename appears in the **Image file** field. Click **OK** to insert the image.
3. In the **Alt** field, fill in a short text describing the image. This text appears if for one reason or another (e.g. computer offline) the image would not appear when your e-mail is viewed.
4. In the **Width** and the **Height** field, the dimensions that fit in the template are displayed. To avoid stretching of the image, upload an image of the same dimensions. If that is not possible, you can take an image with other dimensions. To avoid this image is stretched or too big for the template, keep the prescribed width or the prescribed height, and erase the other value.
5. In the **Align** field, you can choose how your image should be aligned in its box.
6. In the **Hspace** and the **Vspace** field, you can specify how much space (in pixels) should be around the image. Hspace defines the space left or right from your image, Vspace the space above and below the image.
7. Click **Save** to insert the image in the interactive preview.

Tip: You can create a link on the image. Just insert an URL (<http://www.something.be>) in the **Link** field or select a landing page from the drop down.

Note for template designers: this function is realized with the INSUMAIL Image tag (<INSUMAIL type="image" />)

3.1.3.4 Using the editor

The editor opens up when you click a text area in [the interactive preview](#). This dialog is used to create the content of your e-mail or landing page. You can insert text, layout the text, and insert links, tables and images.

You can choose to work in the WYSIWYG editor (What You See Is What You Get), this is like working in Microsoft Word or Microsoft Frontpage; or you can work in HTML.

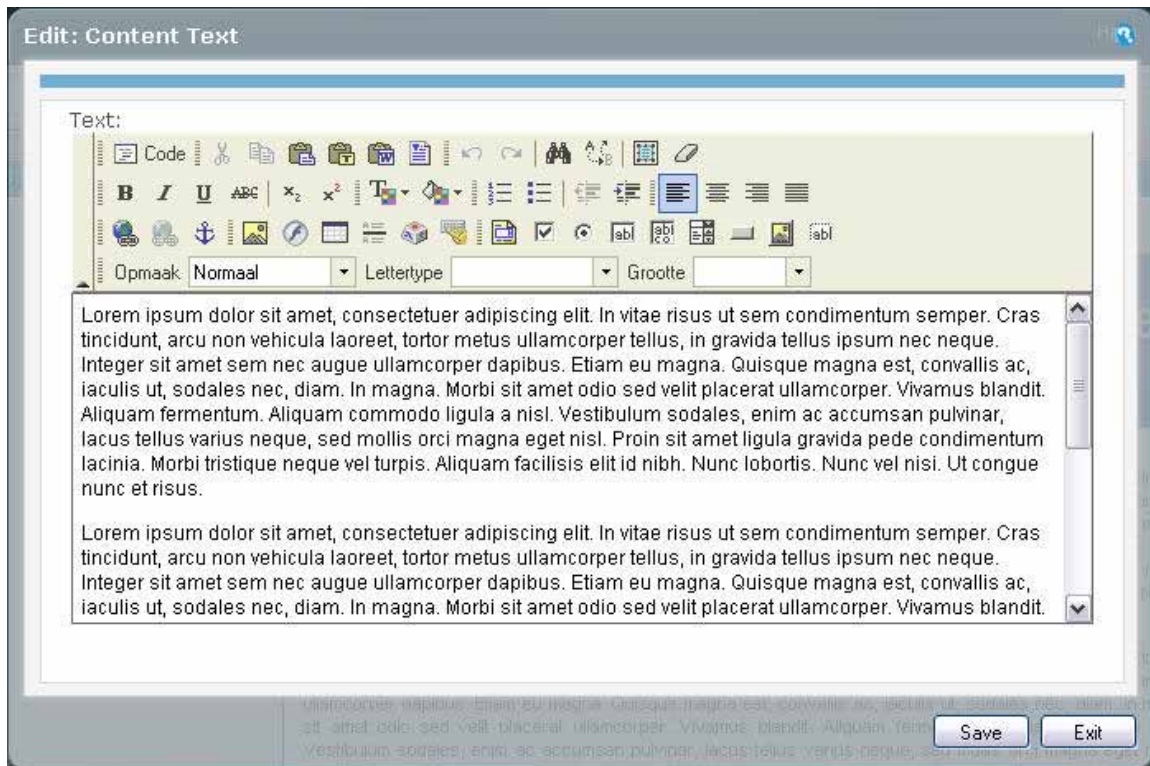




Figure: WYSIWYG editor

Note: Independently from how you created your e-mail, it will be sent in HTML format. While you are working in the WYSIWYG editor, you are creating html code in the background.


Note for template designers: this function is realized with the INSUMAIL texteditor tag (<INSUMAIL type="texteditor_full" />)

To use the HTML editor:












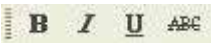


1. Click the  Code button.
2. In this text area, you can work as in any HTML editor. You can also copy-paste HTML code created in another program.
3. You can always switch to the WYSIWYG editor by clicking the  Code button again.
4. Click **Save** to save changes. Your e-mail or landing page is immediately shown in the interactive preview.


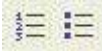







To use the WYSIWYG editor:








In the WYSIWYG editor, you can work almost as in Microsoft Word. Below you find a description of the used icons:

	Cut or remove the highlighted text.
---	-------------------------------------








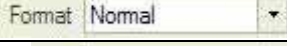

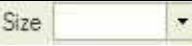


	Copy the highlighted text.
	Paste the text you copied. You can also copy from another application and paste here.
	Paste the text you copied without formatting (as plain text).
	To copy text from Microsoft Word: Click this icon. A special dialog appears. Copy text from Microsoft Word, and paste it into the area on the dialog. Erase font definitions, check the first checkbox. To erase style definitions such as text colour, check the second checkbox. Click OK to paste the text into the WYSIWYG editor. All unnecessary code from Microsoft Word is erased. Note: we advise to check both checkboxes before clicking OK.
	To insert some ready-made elements in the content of your creation. This function includes a standard form, a send to friend link and two different send to friend forms . To insert an element into your creation: <ol style="list-style-type: none"> 1. Place your cursor where you want the form to appear. 2. Click the  icon. 3. Make sure the check box Replace actual content is not checked (unless you want to replace all the content of this area). 4. Click the element you want to insert. 5. If you inserted a basic form, you can read here how to adapt the form to your needs.
	Undo or redo the most recent action taken.
	Find a word or phrase within the text of the page. You can indicate whether you want to respect upper/lowercase or not.
	Find and replace a word or phrase within the text.
	Select all of the text in the page (usually used before copy or cut or to apply a style or format to the whole page).
	Remove the formatting from the highlighted text.
	Make the highlighted text Bold , <i>italic</i> , underlined or strikethrough.
	Make the highlighted text superscript or subscript.
	Change the color of the highlighted text.

	<p>Change the background color behind the highlighted text.</p>
	<p>Add numbering or bullets to highlighted text lines.</p>
	<p>Increase or decrease the highlighted text's indentation.</p>
	<p>Adapt the alignment of the highlighted text (left, centered, right, justified).</p>
	<p>Add or remove a hyperlink from highlighted text.</p> <p>Hyperlink</p> <p>To insert a hyperlink to a website:</p> <ol style="list-style-type: none"> 1. Select the text where you want to put the link. 2. Click the  icon. 3. Choose URL and type the url in the URL field. 4. Click the Doel or Target tab. In the first drop down, choose new window (_blank). For the receiver of your e-mail, this link will open in a new browser window. 5. Click OK to create the link. <p>Anchor</p> <p>To insert a hyperlink to another part of the e-mail or landing page:</p> <ol style="list-style-type: none"> 1. First define the anchor. Select the text where you want the link to arrive. 2. Click the  icon. 3. Give a simple name to the anchor and click OK. You have defined an internal anchor now. 4. Select the text where you want to put the link to this anchor. 5. Click the  icon. 6. Choose internal link in the page and select the anchor from the list of anchors. 7. Click OK to create the anchor link. <p>Mailto</p> <p>To insert a link that creates an automatic e-mail:</p> <ol style="list-style-type: none"> 1. Select the text where you want to put the link (most of the time this will be an e-mail address or a name). 2. Click the  icon. 3. Choose E-mail and type at least the e-mail address. You can also predefine an e-mail subject and a standard message, but this is not mandatory. 4. Click OK to create the mailto link. <p>Landing page link</p> <p>To insert a link to a landing page:</p> <ol style="list-style-type: none"> 1. First create the landing page via Create > Landing page > New landing page

	<ol style="list-style-type: none"> 2. Select the text where you want to put the link to the landing page. 3. Click the  icon. 4. Choose Landing page and select the landing page you want to link to in the drop down list that appears. 5. Click OK to create the landing page link. <p>Note: A landing page link cannot be tested in the Preview. Send a testmail to test out your landing page link.</p> <p>File link</p> <p>A file link is a good alternative to an attachment in an e-mail. Attachments are easily caught in SPAM filters. File links are links to files that physically reside on a server and can be opened or downloaded from that server by the receiver of the e-mail.</p> <p>To insert a link to a file that resides in your library:</p> <ol style="list-style-type: none"> 1. Select the text where you want to put the link. 2. Click the  icon. 3. Click the button Bladeren op server/Browse on server. 4. Browse to the file you want to link and click it. 5. Click OK to create the file link. <p>Edit link</p> <p>To edit an existing link, right-click the link. A pop-up with a menu appears. Choose the option Edit link. You can change the link properties now.</p> <p>Remove link</p> <p>To remove a link:</p> <ol style="list-style-type: none"> 1. Select the link you want to remove. 2. Click the  icon.
	<p>To insert an image in the page:</p> <ol style="list-style-type: none"> 1. Put your mouse cursor where you want to insert the image. 2. Click the  icon. 3. Click the button Bladeren op server/Browse on server. You will be able to browse your library. 4. Browse to the image you want to insert and click it. 5. In the Alternative field, fill in a short text describing the image. This text appears if for one reason or another the image would not appear when your e-mail or landing page is viewed. 6. In the Width and the Height field, the dimensions of the original image are shown. To avoid stretching of the image, make sure the lock icon is closed (). You can increase or decrease the height or the width of the image, the other value will follow. 7. Click OK to insert the image in your creation.
	<p>To insert an Flash animation in the page:</p> <ol style="list-style-type: none"> 1. Put your mouse cursor where you want to insert the Flash animation.



	<p>2. Click the  icon.</p> <p>3. Click the button Bladeren op server/Browse on server. You will be able to browse your library.</p> <p>4. Browse to the animation you want to insert and click it.</p> <p>5. In the Width and the Height field, the dimensions of the original animation are shown.</p> <p>6. Click OK to insert the animation in your creation.</p> <p>Note: For reasons of deliverability and rendering, it is better not to include animations in e-mails. Use this feature only when you are creating landing pages.</p>
	<p>To insert a table in the page:</p> <ol style="list-style-type: none"> Put your mouse cursor where you want to insert the table. Click the  icon. Define the number of columns and rows in the table. Define the width of the table. You can define an absolute width (pixels) or a relative width (percentage). Define the width of the border around the table (border width) and the width of the lines in the table (distance between cells). If you do not want to show borders, set both border values to 0. Define the alignment of the table (center, right, left) on the page. To give your text some space, define the distance of the text to the border. Click OK to insert the table in your creation. <p>Note: You can still change table properties by right-clicking the table.</p> <ul style="list-style-type: none"> To insert extra columns, rows or cells, or to split and merge cells, right-click the table To define the colour of the table border or the background colour of the table, select the table and right-click it. You find colour settings in the cells submenu.
	<p>Insert divider line (horizontal rule).</p>
	<p>Insert symbols & special characters (trademarks, currency, etc.) .</p>
	<p>Online keyboard for certain non-roman character languages.</p>
	<p>Create forms.</p>
	<p>Give text a specific format, such as Heading 1, Heading 2</p>
	<p>Choose a specific font for the selected text</p>
	<p>Choose a specific font size for the selected text</p>

3.1.3.5 Using the link dialog

The link dialog opens up when you click a predefined link area such as the [More...](#) links in [the interactive preview](#). In this dialog you can define a link to a website or to one of your Insumail landing pages.



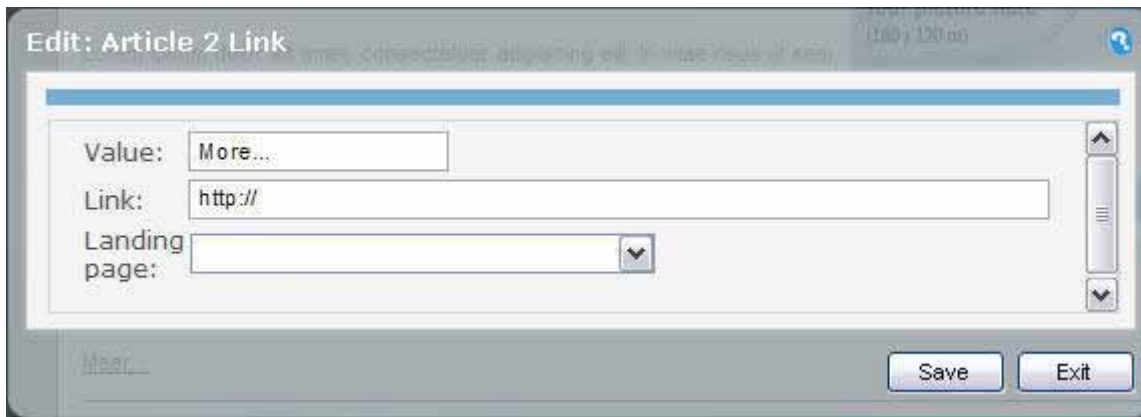



Figure: Link dialog in interactive preview

Note: If you are working in the [text editor](#), you can also add links. Via the  icon, you access [another link dialog](#).

To insert a link:

1. Insert or adapt the text you want to be displayed as link in the **Value** field.
2. To create a link to a website: type the address of the website in the field **Link**.

Some examples:

- <http://www.insumail.com>
- <http://www.insumail.com/en/web/index.php?n=38>

Tip: If you do not know the exact address of the web page you want to link, browse to it and copy the address from your browser.

3. To create a link to one of your landing pages, select the landing page from the list in the field **Landing page**.

The list in this drop down contains the following categories:

- **Creations:** landing pages in this part of the list are mere creations. They can be found in the Create section.
- **Draft:** landing pages in this part of the list are already in a campaign, but not launched yet. You can link to them, but don't forget to launch them too.
- **Launched:** landing pages in this part of the list are already online.

Note for template designers: this function is realized with the INSUMAIL list tag (<INSUMAIL type="link" />)

3.1.3.6 Using the news article dialog

The news article dialog can open up when you click an article area in [the interactive preview](#) (e.g. when you use the Newsletter template). This dialog is used to create at once the content of your e-mail and of your landing page.

You will be able to specify for each article a title, a short and a long text, and a link to jump from the short text to the long text. On the e-mail, the title is shown followed by the short text and the link. When the recipient of your e-mail clicks the link, he will see a landing page (or online version of the e-mail) with the title and the long text.



From:
Reply:
To:
Subj:



Figure: schematic representation of the newsletter template: e-mail with short articles (left) and online version with long articles (right)

The pop-up that comes up is the following:



CRM GROUP
Brugsesteenweg 48
8520 Kuurne

Tel.: 056 37 28 75
Fax: 056 36 14 96
E-mail: info@crm.be

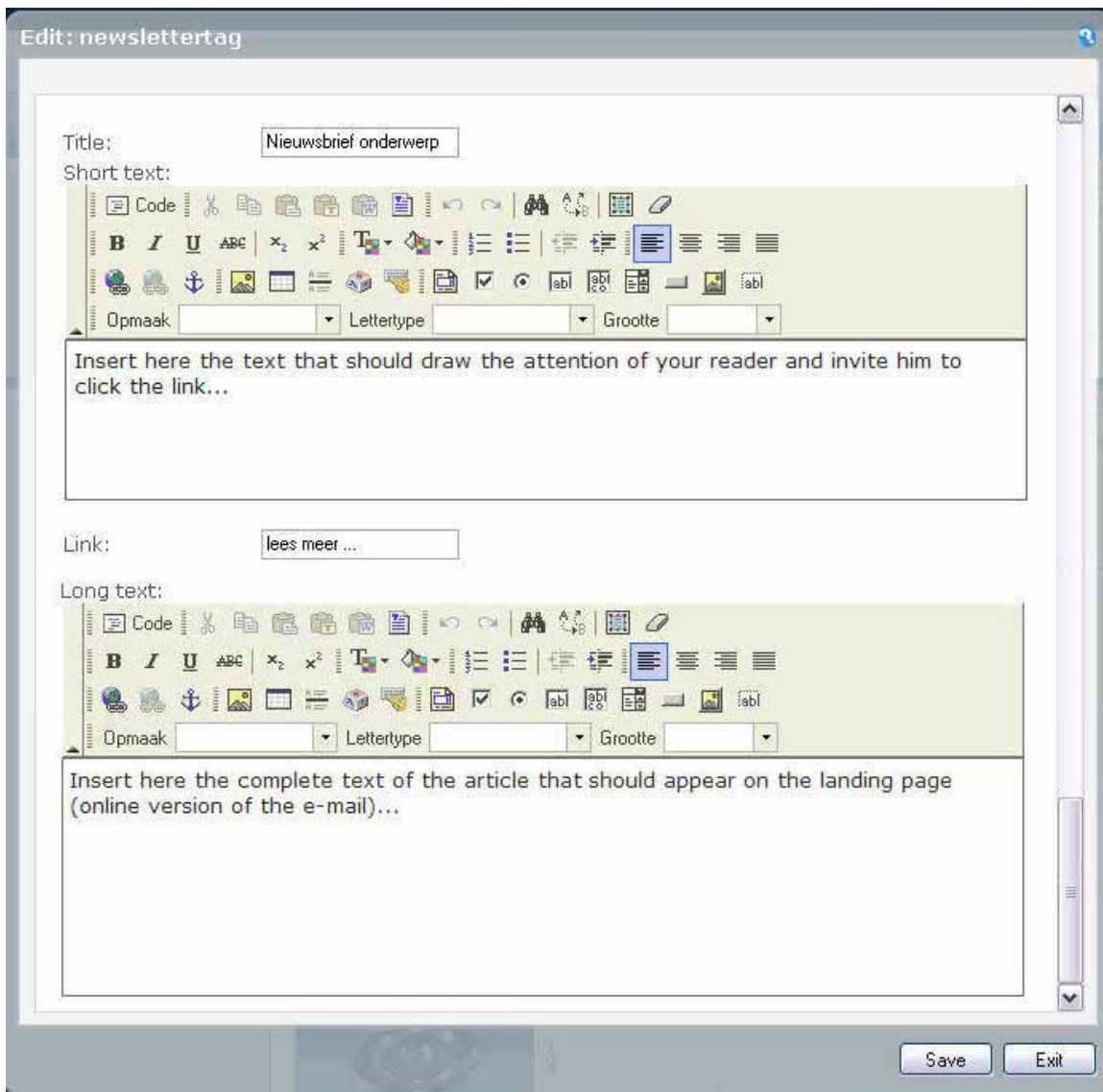



Figure: News article dialog

To fill the news article dialog :

1. Insert the title of the article. This title appears on both the e-mail and the landing page.
2. Insert the short text of the article. This text appears only on the e-mail.
3. Insert the link text. This link only appears on the e-mail.
4. Insert the long text of the article. This text appears with the title on the landing page.

Note: you can edit your text as you do in the other pop-ups. For an explanation of the icons, [see above](#).

Tip: If you want to preview the long version of your e-mail, send a test mail. At the moment, it is impossible to preview the long version via the  **Preview** button. Links will not work in this preview.

Note for template designers: this function is realized with the INSUMAIL article tag (<INSUMAIL type="article" />)


3.1.4 Step by step wizard

When you are working in [the interactive preview](#), you can also use the **Step by step** wizard to create the content of your creation. In the **Step by step** wizard, you will be able to fill in text fields and upload images one by one.

1. Click the  **Step by step** button. The **Step by step** pop-up appears.




2. Fill in all fields on all tabs. The items that appear in this pop-up depend on the template you have chosen when you [created the e-mail](#).
3. Click the **Save** button to confirm your changes. The changes will be visible in the interactive preview.

Tip: To change the default [colours and fonts](#) used in your template, click the  button. You will be able to specify the colours of the borders and headers, and the fonts.

3.1.5 Changing colours and fonts

When you are working in [the interactive preview](#), you can still change the colours and the fonts of the creation. Doing this, you will overrule the colours and fonts defined in the chosen [template](#).

1. When the interactive preview appears, click the  button.
2. The **Colours and fonts** pop-up appears.

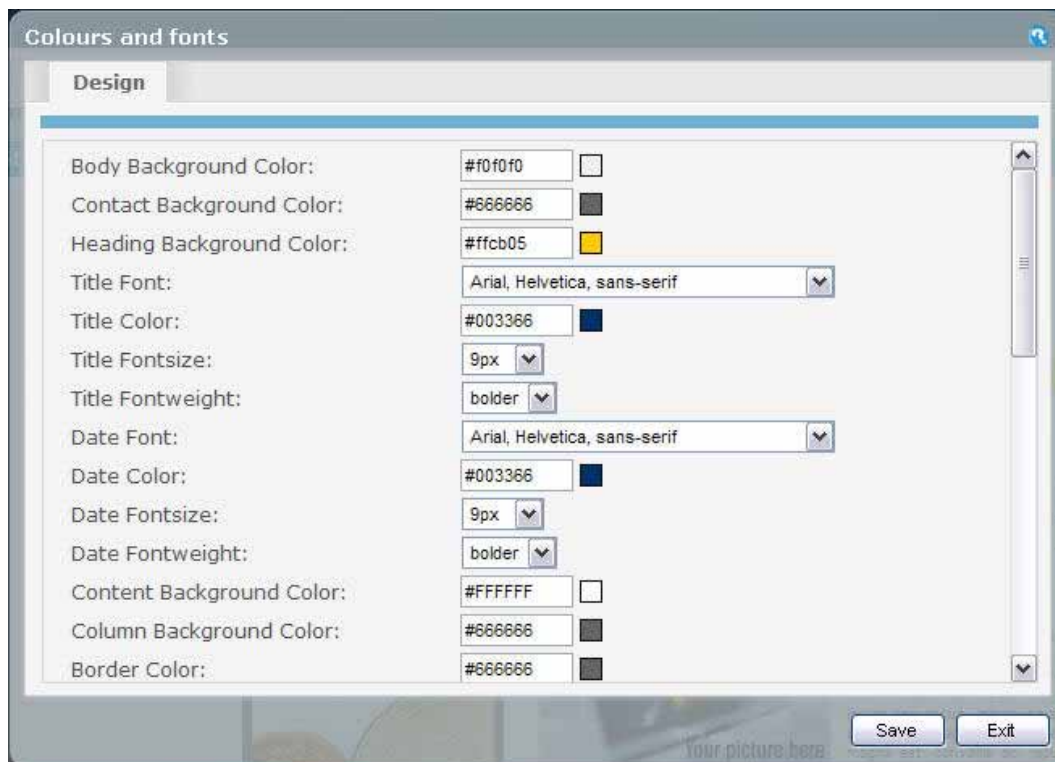



Figure: Colours and fonts dialog

3. You can now:
 - Change a colour:

Tip: Double click a colour field. A colour selection bar opens up. Select a colour with your mouse cursor and click. The Hex-code of the chosen colour appears. To have more possibilities for colour selection, click the  icon at the end of the colour selection bar.
 - Change a font
 - Change a font size
 - Change a font weight (normal, bold, bolder, lighter)

Note: The items that appear in this pop-up depend on the templates in your account.

4. Click the **Save** button to confirm your changes. The changes will be visible in the interactive preview.

Note: You can also [change colours and fonts for all templates](#) in the My Account layout settings.

3.1.6 Personalizing the content of your creation

Subject: What about a new car, **John**?



Greetings: Dear **John**, Dear **Mr. Hennigan**, Dear **Mrs. Hennigan**,

To personalize your e-mails and your landing pages, you can use all contact data that is stored in Insumail. The fields in your Insumail contacts database have a special code, e.g. <?first_name?>, or <?title?>, or <?name?>. These codes can be introduced in all text field in the body of your e-mail, and also in the To and Subject fields in the message header.

To find a personalization code:

1. Go to the **Launch** section and open the **fields** folder.
2. In the column **Code**, you find the codes to use.

You can type this code in every text box in the content of your e-mails and landing pages (HTML, WYSIWYG or Step-by-Step).

In the [launch wizard](#), you can also introduce the same codes in the **Subject** and **To** field in the Message header of each item. The result is only visible when you send your e-mail and when you access a landing page via an e-mail coming from Insumail.

Note: As a matter of course, the fields used to personalize your e-mails should be available in Insumail and filled in for each contact. For the moment, Insumail cannot fill in any default value. This is a future development.

Tip: Do you want to send personalized content? Content adapted to the personal profile of the client? Try dynamic content!

3.1.7 Creating a send to friend action

One way to grow your opt-in mailing list is to do a send-to-friend action. You include in your e-mail a button or a small form that invites the receiver of the e-mail to send this e-mail to one of his friends or colleagues. The friend who receives the forwarded e-mail will be invited to subscribe to the mailing list, so that he will receive the e-mails himself the next time.

When you do a send-to-friend action in Insumail, you will find in the results of the campaign how many e-mails have been forwarded, and contacts who subscribe (and only those) will be added to your contacts database in a separate mail group.

The send-to-friend action is totally prepared in Insumail, and can be realized in two ways:

- you include a link in an e-mail. This link leads to a form on a standard landing page, where the receiver of the e-mail can fill in the name and address of his friend and a message, and click a button to forward the e-mail.
- you include a form in an e-mail. In this form, the receiver of the e-mail fills in the address of his friend and forwards the e-mail.

Note: you can only insert send to friend links and forms in e-mails, not in landing pages.

3.1.7.1 Inserting a forward link in an e-mail

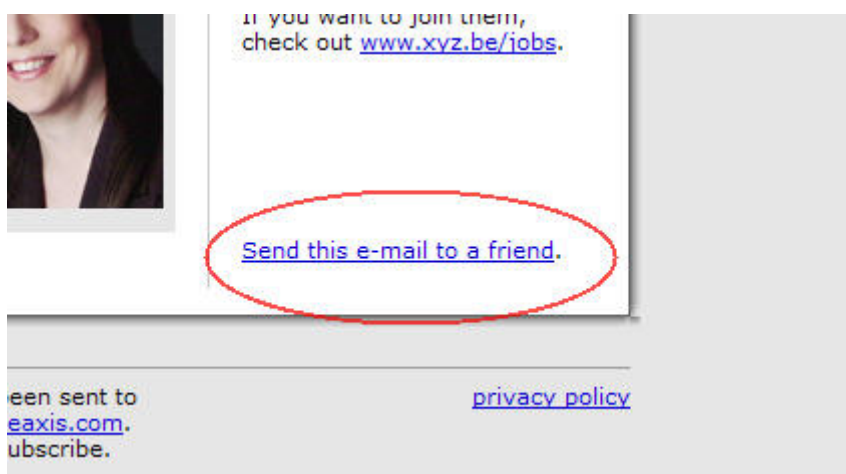



Figure: example of a send-to-friend link in an e-mail



To include a forward link in an e-mail:

1. Create the content of the message.
2. Put the cursor where you want to insert the forward link.
3. Click the  icon.
4. In the pop-up that comes up, first make sure the checkbox **Replace actual content** is not checked.
5. Choose **Send to friend link**. The link to the Send to friend form standard landing page is created on your email.
6. You can change the text of the link if you want.

The contact who receives the e-mail with the link, clicks the link. A send-to-friend form appears on a landing page in the house style of the account. He fills in and hits the Send button.

v


Figure: send-to-friend form on standard landing page, accessible through send to friend link in e-mail.

3.1.7.2 Inserting a forward form in an e-mail



Figure: example of a send-to-friend form in an email

To include a forward form in an e-mail:

1. Create the content of the message.
2. In the interactive preview, click the area where you want the form to appear.
3. In the WYSIWYG editor, click the  icon.
4. In the pop-up that comes up, first make sure the checkbox **Replace actual content** is not checked.
5. Choose **Send to friend form 1**. The form is inserted in your creation. The red dotted line indicates the borders of the form, which is not visible in the final e-mail. You can still edit the alignment, insert spaces, apply lay-out as you would do with any other text.

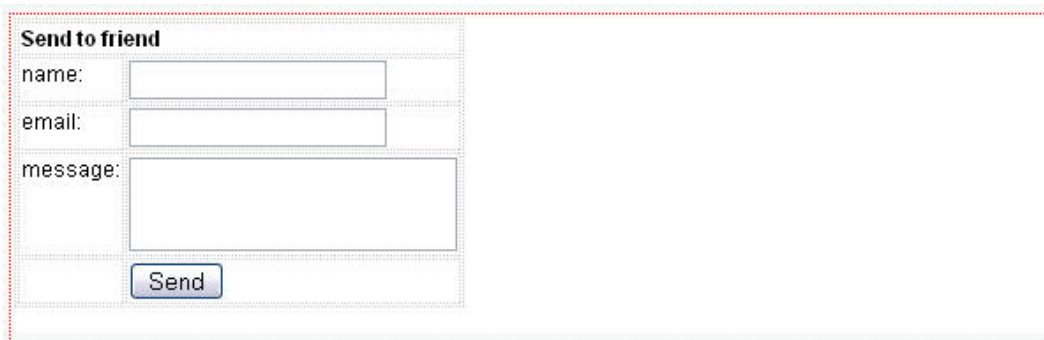


Figure: the form in the WYSIWYG editor. The red dotted line indicates the borders of the form, and is not visible in the final mail.

6. To see the final result, click the **Save** button.



Tip: You can give a border and a background color to this form. [Create a table](#) in the e-mail, and copy the form in this table. Right-click the table to adapt background colour (click Cell - Cell properties). An example:

Forward this e-mail to a friend		
e-mail address:	<input type="text"/>	<input type="button" value="send"/>

The contact who receives the e-mail with the form fills in an e-mail address and hits send.

3.1.7.3 What happens next?

The receiver of the forwarded e-mail sees a special header above the original mail:

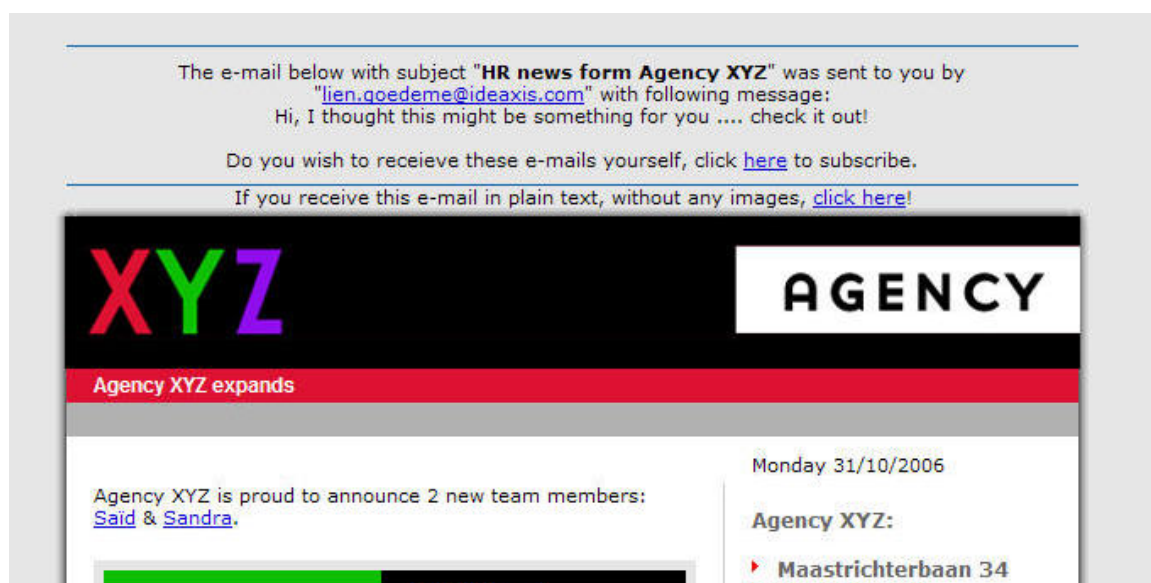



Figure: forwarded email with special header

In this header, he reads the message that the forwarder has written. There is also a subscribe link "click here to subscribe"; if he clicks here, he will find a form to complete, and he will be subscribed to the contact group "Forwards".

3.1.7.4 Results of this campaign?

The results of a send-to-friend campaign:

- In case you integrated the forward link: the number of clicks on the **Forward** link give an indication of the number of e-mails that are forwarded
- The detailed results of the Send-to-Friend action can be found in the **Forwards - Send-to-Friend** block.
- The newly subscribed contacts can be found in the contact group **Forwards**. If you want to distinguish the forwards of this action from the following actions, rename the contact group clicking the  icon, before you start a next Send-to-Friend action.



3.2 Landing pages

3.2.1 Managing landing pages

When you open the section **Create** and click the folder **landing pages**, you see the overview of all landing pages created in your account. Landing pages are mini-websites that are accessed by a link in a mail. The advantage of using Insumail landing pages is that all clicks and opens can be registered as a result of your campaign.







Most of the time, a landing page will be launched together with an e-mail, in one campaign. A notorious example is that of the newsletter, which contains, for each article, just an introduction followed by a "more..." link. This link leads to a landing page, where the remainder of the article can be read. The results in Insumail show which links in the e-mail have been clicked, and also which links in the landing page have been clicked.

To start creating a new landing page. Click the **New landing page** button.

For each landing page, you see the following information:


Name	Name of the landing page. The name of the landing page is never shown to a visitor, it is for your own reference.
Language	Language of the landing page. This defines the language of the standard sentences in the e-mail.
Description	Description of the landing page, for your own reference.
Created on	Date on which the landing page was created.
Last update	Date on which the landing page was last updated.

On each landing page you can perform the following actions:

	View and edit landing page	Click this icon to view the landing page and/or edit it. The interactive preview pops up.
	Delete landing page	Click this icon to delete the landing page. A confirmation will be asked. You can retrieve deleted contact groups in the recycle bin .
	Move landing page	When you create more folders within the E-mails folder, you can click this icon to move the e-mail to another folder.
	Copy	Click this icon to copy the landing page. A copy of the landing page will be created in the same folder. You can edit the copy by clicking the  icon and change the name in the properties of the landing page.
	Preview	Click this icon to preview the e-mail. A pop-up window shows the e-mail like it will appear in the receiver's inbox.

3.2.2 Creating a landing page

To create a new landing page:

1. Go to the Create section and open the **Landing pages** folder.
2. Click the  button. The **New landing page** dialog opens up.
3. Select the template you want to use for your landing page.
Note: Templates can be managed in [the library](#).
4. Select the language of your landing page. This selection determines the language of all fixed elements in the template, such as the default headings.
5. Give your landing page a name. For later reference, you can also add a description.
Tip: The name and the description of your landing page will not be shown to the visitors of the page. Make sure, however, to give all your landing pages a unique name, so that you can recognize them later.
6. Click the **Create** button. Your landing page will be created based on the template you have chosen, and shown in the [interactive preview](#).
7. You can now:



- Create the content of your landing page using the [interactive preview](#).
- Create the content of your landing page using the [step by step wizard](#).
- Change the [colours and the fonts](#) of the landing page.
- [Personalize the content](#) of the landing page: refer to the visitor's name, company, etc.

3.2.3 Editing a landing page

Editing a landing page is exactly the same as editing an email.

See chapter **3.1.3 Editing an e-mail**.

3.2.4 Changing colours and fonts

You can change the colours and fonts of a landing page the same way as you do for an email.

See chapter **3.1.5 Changing colours and fonts**.

3.2.5 Personalizing the content of your creation

You can insert personalization code the same way as in emails.

See chapter **3.1.6 Personalizing the content of your creation**.



4 Section 2: Launch

4.1 Contacts


4.1.1 Managing contacts

In the Launch section, you can manage your contacts. For each contact a profile is stored. You can import contact details from your own system using a .csv file or fill in the contact profiles manually. Contact profiles can be updated and enriched throughout your campaigns using forms in e-mails and landing pages. You can assign contacts to contact groups. For each contact, a history of imports and updates is kept, and response behaviour is also tracked.




Open the **contacts** folder. Here you see all the contacts of your account in Insumail.

From this screen, you can:

- [create a new contact](#) by clicking the **New contact** button.
- [import contacts](#) by clicking the **Import** button.
- [export contacts](#) by clicking the **Export** button.
- [search contacts](#) by clicking the **Search** button.

You can 'quick edit' the contact details shown on the screen. Click the value shown on the screen, edit it and click the  button.

On each existing contact you can perform the following actions:



	Edit	Click this icon to edit the contact profile . Via this button, you can also access the contact profile update history and the tracking of his open and click behaviour.
	Delete	Click this icon to delete the contact. A confirmation will be asked. You can retrieve deleted contacts in the recycle bin . You can delete more contacts at once by selecting them via their checkbox and using the  button. Use the selectbox on top of the list to select the entire page.

Note: To [modify the fields](#) which define your contacts profiles or to add new fields, open the **fields** folder in the Launch section. To modify which fields appear on the contacts screen, use the edit view functionality.

4.1.2 Creating a new contact

Most of the time you will be [importing contacts](#) from a CRM system or another database, but you can also manually create contacts.

To create a new contact:

1. Go to the Launch section and open the **contacts** folder.
or
Go to the Launch section and open the **contact groups** folder. Scroll to the mailgroup to which you want to add contacts, and click the  icon.
2. Click the  **New contact** button. The **New contact** dialog opens up.
3. First, fill in the contact profile.
Tip: To [modify the fields](#) which define your contacts profiles or to add new fields, open the **fields** folder in the Launch section.
4. Click the **Save** button to add the new contact to your contacts folder.

Tip: To add this contact to a mailgroup, click the  icon next to the contact. On the tab **Subscribed to**, you can indicate the mailgroups to which you want to assign this contact.



4.1.3 Importing contacts

You can import contact details from your local applications via a file in XLS, CSV or XML format. There are two possible ways of importing: directly via the importing tool, or via the FTP server. **Direct import** is only possible for files with a size up to 8,00 Mb. Larger files should be uploaded via the [FTP functionality](#).

Note: It is possible to format the imported values during the import. Read more about this here.

Note: No time to read this manual? Take a quick tour to know how you can import contacts.

4.1.3.1 Direct import

Files with a file size below 8,00 MB in formats .XLS, .CSV or .XML can be imported directly via the import function. For larger files, use the [FTP functionality](#).

We recommend to use the CSV format for importing. CSV files can be created manually in Microsoft Excel. Define columns for each contact detail, and give clear labels to each column. Choose Save as... and select CSV (*.csv) when saving.

You will be able to match the columns (CSV) or tags (XML) in the imported files to the existing fields in Insumail. If the field corresponding to the column/tag does not exist yet in Insumail, it will be created via this import.


	A	B	C	D
1	voornaam	e-mail	lastname	
2	Jo	jo.gielen@crm.be	Gielen	
3	David	david.baeyens@crm.be	Baeyens	
4	Filip	filip.onkelinx@crm.be	Onkelinx	
5	Ivo	ivo.rulkens@crm.be	Rulkens	
6	Jan	jan.schapmans@crm.be	Schapmans	
7	Jurgen	jurgen.vanhex@crm.be	Vanhex	
8	Ken	ken.hendriks@crm.be	Hendriks	
9	Lien	lien.goedeme@crm.be	Goedemé	
10	Marion	marion.sterckx@crm.be	Sterckx	
11	Pieter Jan	pieterjan.dequeker@crm.be	De Queker	
12	Pieter	pieter.reynders@crm.be	Reynders	
13	Pieter	pieter.vanknippenberg@crm.be	Van Knippenberg	
14	Raf	raf.timmermans@crm.be	Timmermans	
15	Sophie	sophie.haenen@crm.be	Haenen	
16	Stefan	stefan.maris@crm.be	Maris	

Figure: Example of a .csv file in Microsoft Excel

Tip: The values should appear in different columns. If your Excel shows all values in one column, whatever the separator sign (comma, tab, semicolon, ...) used, you can always convert it to a table with one value per cell:

1. Select the column containing the values you want to convert to more columns.
2. Click **Data** and then **Text to columns**
3. In the wizard, choose the option **Separated**. Click **Next**.
4. Indicate the sign that is used as separator between the values. This sign (comma, semicolon, ...) will be converted to a column break. Click **Next**.
5. Click **Finish**. Your .csv should be in the right format to import now.

To import contacts:

1. Go to the Launch section and open the **contacts** folder.
2. Click the  **Import** button. The **Import** dialog opens up.
3. Click the **Browse** or **Bladeren** button and select the file to import from your local pc or network.
4. Fill in the source. This is a free text field. The source text is stored in the contact history to be used for later reference.
5. You can choose whether you want to update existing contacts. If you select Yes, the details of contacts in your Insumail account that corresponds to contacts in the imported file will be overwritten.



6. Indicate to which mailgroup(s) you want to assign the imported contacts.

Tip: You can immediately assign the imported contacts to a new contact group. Fill in the name of the new contact group and check the checkbox. A new contact group will be created containing all imported contacts.

7. Map the columns of the imported file to the fields in the Insumail contacts database. Select the corresponding field from the drop down list. Fields that do not yet exist in Insumail will be created using the column label.

Important: Make sure to map at least the email field. Email is a mandatory field in Insumail.

Note: For import via XML, the tags available in the XML will appear as "columns". You can match them to the fields in Insumail.

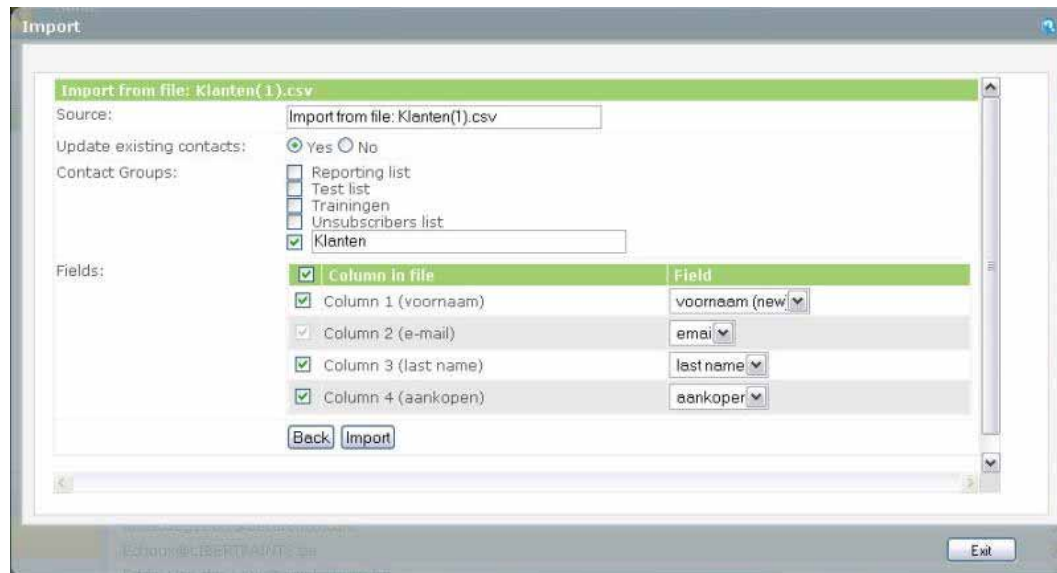



Figure: import dialog: fill in the source, select the contact group to update or create and map the columns of your .csv to the fields of the database in Insumail.

8. Click the **Import** button to start importing.
9. The result of your import action are shown on a new screen. You can export an overview of invalid and/or double contacts. Click the  icon. Invalid contacts are not imported, double contacts are imported only once.


Note: Unsubscribed contacts will also be updated, but they remain unsubscribed.

10. The imported contacts are shown in the **contacts** folder. They are also added to the contact groups you specified.

4.1.3.2 Importing via FTP

When you want to import contact files with a size larger than 8,00 MB, it is best to use the FTP functionality. You can only import via FTP using the CSV format.

To import contacts via FTP:

1. Prepare the contacts file you want to upload and save it in .CSV.
2. Create an FTP user in Insumail.
3. Use an FTP application of your choice to upload the contacts file to the Import folder you find on the Insumail FTP server.
4. Go to the Launch section and open the **contacts** folder.
5. Click the  **Import** button. The **Import** dialog opens up. The files you put in the Import folder on the FTP server appear on the screen.



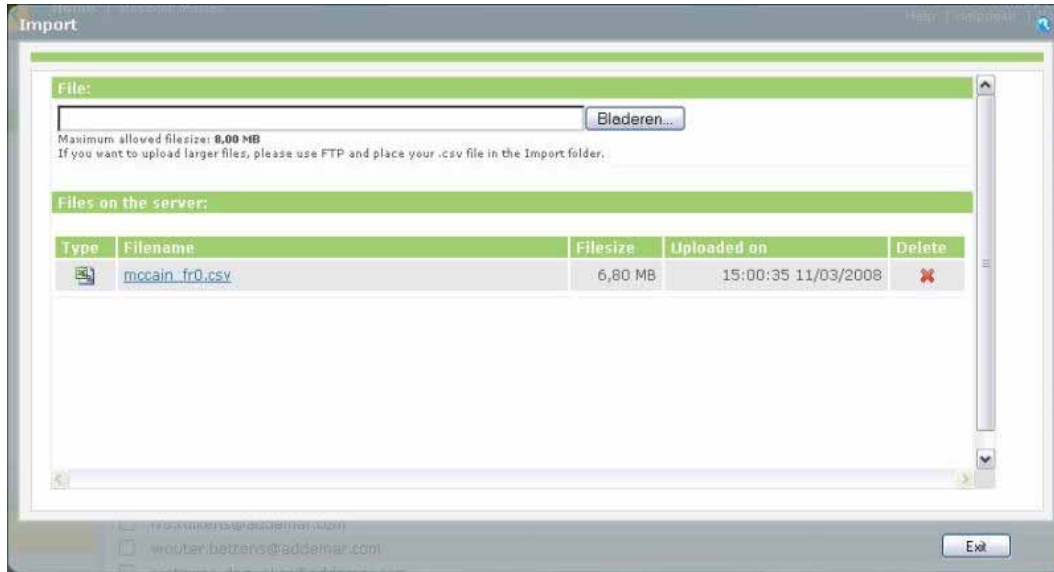


Figure: import dialog with file uploaded via FTP.

6. Click the filename to start importing this file into your Insumail contacts database.
7. Fill in the source, select a contact group and map the fields (see [above](#)).
8. Depending on the server load and the size of your file, you will find an **Import** button or a **Schedule import** button on the bottom of the screen (scroll down).
 - If there is an **Import** button, importing will start immediately. The imported contacts are shown in the **contacts** folder. They are also added to the contact groups you specified.
 - If there is a **Schedule import** button, importing will be scheduled and executed as soon as possible. When importing is ready, a [new note](#) will be sent to you. You find an overview of all scheduled tasks for your account in My Account > Scheduler.

4.1.4 Exporting contacts

You can export contact details from Insumail in CSV, XLS or XML format.

Note: If you plan to [import](#) the same file again in Insumail later, work in CSV or XML.


To export contacts:

1. Go to the Launch section and open the **contacts** folder.
2. Click the  **Export** button. The **Export** dialog opens up.
3. Depending on the number of contacts you want to export, a direct export or a scheduled export will be proposed:
 - If there is an **Export** button, exporting will start immediately. Select the export format and click Export. Download the exported file on your system.
 - If there is a **Schedule export** button, exporting will be scheduled and executed as soon as possible. You cannot choose the export format, only .CSV is possible. When exporting is ready, a [new note](#) will be sent to you. You can download the exported file from the note. You find an overview of all scheduled tasks for your account in My Account > Scheduler.

Tip: If you want to export contacts based on their behaviour (opened, clicked, ...) in a certain campaign, go in Evaluate and [create a follow-up group](#).

4.1.5 Searching contacts

To search contacts:

1. Go to the Launch section and open the **contacts** folder.
2. Click the  **Search** button. The **Search** dialog opens up.



3. Create the search rules.
4. You can combine different conditions using a separator.
5. Click the **Search** button. All contacts that reply to the search criteria are shown.

Tip: You can now export or delete the contacts in the search results.

To formulate search rules, keep in mind that:

- Each row contains a condition which the results should meet.
- Some examples of conditions:


	Type	Operator	Value
"Living in Hasselt"	Postal	=	3500
"all telenet accounts"	email	contains	telenet.be
"in contact group Ideaxis"	In 'Ideaxis'		
"not in contact group Ideaxis"	NOT in 'Ideaxis'		

- Rows can be combined using a separator:
 - **AND:** results will meet both conditions
e.g. if you want to send to the contacts living in hasselt and having a telenet e-mail address, combine the two conditions above with AND.
 - **OR:** results will meet at least one of the conditions
e.g. if you want to send to two contact groups, select one contact group, the OR separator, and the second contact group.
- You can use the following wildcards:
 - **%** for more than one character
 - **_** or **?** for one character
- You can delete a condition by clicking the **Delete** button.

To save a search:

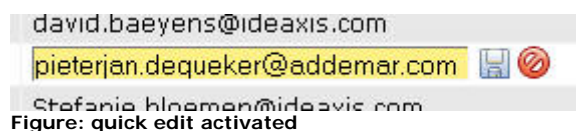
1. Formulate the search condition you want to save.
2. In the field below, fill in a name for this search.
3. Click **Save**. The pop-up closes down.
4. When you reactivate the search pop-up, the search you just saved will appear in the menu on the left of the screen.



4.1.6 Editing a contact

All contacts in your database can be edited. You can edit a contact, and change its properties via the  icon. You can also edit directly on the screen, this is the quick edit.

To use the 'quick edit':

1. Go to the **Launch** section and open the **contacts** folder.
2. Click the email address or any of the other fields you want to edit directly on the screen. The field appears in a yellow box.
3. You can change what you want.




4. Confirm using the  icon. Your changes are saved.
5. Discard the changes using the  icon. The original value of the field appears again.

Tip: if you want to be able to quick edit other fields than the ones shown on the screen, use the Edit view functionality.

To edit a contact and its properties:



1. Go to the Launch section and open the **contacts** folder.
2. Click the  icon next to the contact you want to edit. The **Edit contact** dialog opens up.
3. This dialog contains four tabs:
 - **Profile:** this tab contains all [fields](#) that define the contact profile. You can fill in and update all these fields.
Note: You can [modify the fields](#) which define your contacts profiles or add new fields: open the fields folder in the Launch section.
Tip: To update the profile of a lot of contacts in one time: [Search](#) the contacts you want to update. [Export](#) the search results in CSV format, add columns and fill in all profile details, and [import](#) the file again choosing **Update contacts**.
 - **Subscribed to:** this tab contains all [contact groups](#) to which the contact has been assigned. To assign a contact to a contact group, just check the checkbox. To remove a contact from a contact group, just uncheck the checkbox.
Tip: To subscribe a lot of contacts in one time to a contact group: [Search](#) the contacts you want to assign to the contact group. [Export](#) the search results in CSV format, and [import](#) the file again selecting the contact group to which you want to assign them.
 - **History:** this tab contains the contact history. Here you can find when the contact has been added to your contacts and from which source, when the contact has unsubscribed, when it has been removed from a contact group, ...
 - **Tracking:** this tab contains an overview of all e-mails sent to this contact; and reports opening and clicking behaviour of this person. You can access the same overview in the [Evaluate section](#).
4. When you are ready editing, click the **Save** button to confirm your modifications. Click **Exit** to discard your modifications.



4.2 Contact groups

4.2.1 Managing contact groups

In the Launch section, you can manage your contact groups. You can assign contacts to contact groups. You will launch your campaign to one or more contact groups.

Open the **Contact groups** folder. Here you see all the contact groups that have been defined in your account in Insumail.

To [create a new contact group](#), click the **New group** button.

Two types of groups exist: **static** contact groups and **dynamic** contact groups.

- **Static contact groups** consist of individual contacts assigned to these groups.
- **Dynamic contact groups** are composed by rules which select, each time again, the contacts that reply to these rules.
When you create a dynamic contact group, you create rules to select contacts. Each time you use a dynamic contact group, contacts are selected based on those rules.








Three special contact groups are by default in the contact groups overview:

- The **unsubscribers list** contains all contacts that have unsubscribed and that will never receive any e-mail from your account again.
- The **reporting list** contains all addresses to which the reporting e-mails are sent. You can [create more reporting lists](#).
- The **test list** contains all your test contacts. This contact group is used when you click the **Test** button in the [Launch wizard](#). You can [create more test lists](#). You will be able to choose to which test list you want to sent your test e-mail at the moment of testing.

For each contact group, you see the following information:

Name	Name of the contact group. Use a unique name for each contact group, so that you can recognize the contact groups later.
Number Contacts	Number of contacts in this contact group.
Type	Static or dynamic contact group.
Description	Description of the contact group. For your own reference.
Created on	Date of creation.
Last update	Last time the name or the properties of the contact group, or the rules of a dynamic contact group, were updated.

On each contact group you can perform the following actions:

	Contacts	Click this icon to see the list contacts belonging to this contact group.
	Edit	Click this icon to edit the contact group name, type and description.
	Delete	Click this icon to delete the contact group. A confirmation will be asked. You can retrieve deleted contact groups in the recycle bin . Note: The contact group is deleted, not the contacts that where in this contact group. If you want to delete contacts that belong to one contact group. Open the contact group via the  icon and click  Delete contacts.
	Move	Click this icon to move the contact group to another folder.
	Dynamic	(only for dynamic contact groups) Click this icon to view or edit the rules that define this dynamic contact group.


4.2.2 Creating a new contact group

A contact group is a mailing list, a group of contacts, static or dynamically based on rules, to which you want to send campaigns. When you create a campaign, you can still combine contact groups, select certain contacts in a contact group and exclude others, or select contacts over all contact groups.






Two special types of contact groups can be created: test lists and reporting lists. A test list is the group of contacts who receive test mails, a reporting list is the group of contacts who receive reporting e-mails. You can define which test list and which reporting list should be used in the [launch wizard](#).

To create a new contact group:

1. Go to the Launch section and open the **contact groups** folder.
2. Click the  **New group** button. The **New group** dialog opens up.
3. Fill in the name of the contact group.
4. Select the type of contact group you want to create:
 - **Static contact groups** consist of individual contacts assigned to these groups. When you create a static contact group, you will add contacts to this contact group manually.
 - **Dynamic contact groups** are composed by rules which select, each time, the contacts that reply to these rules. When you create a dynamic contact group, you create rules to select contacts. Each time you use a dynamic contact group, contacts are selected based on those rules.
5. If you want to create a test list, choose **test list** in the **Special** field. If you want to create a reporting list, choose **reporting list** in the **Special** field.
6. For later reference, you can add a description to the contact group.
7. Click the **Add** button to create the contact group.

If you created a static contact group

If you created a static contact group, you can add contacts to the contact group manually.

1. In the **contact groups** folder, scroll to the contact group you just created.
2. Click the  button. The contacts folder for this contact group opens up.
3. You can now:
 - [Add contacts manually](#). Use the  **New contact** button. Newly added contacts are added to the contact group you just created.
 - [Import contacts](#). Use the  **Import** button. Imported contacts are added to the contact group you just created.

If you created a dynamic contact group


If you created a dynamic contact group, the **Edit rules** dialog pops up after you created the contact group. You can [formulate rules for your dynamic contact group](#) here. Based on those rules, contacts will be selected each time you use the dynamic contact group.

4.2.3 Editing rules for a dynamic contact groups

Dynamic contact groups are composed by rules which select, each time, the contacts that reply to these rules. When you [create a dynamic contact group](#), you create rules to select contacts. Each time you use a dynamic contact group, contacts are selected based on those rules.

Note: the same rules selector is used to define the target public of your campaign.

To formulate rules for a dynamic contact group:

1. Go to the Launch section and open the **Contact groups** folder.
2. Click the  icon next to the contact group you want to edit. The **Edit rules** dialog opens up.
3. Create one or more conditions. The number of contacts that matches these rules is shown.
4. You can combine different conditions using a separator.
5. Click the **Save** button to save the rules. Click **No** to discard the changes.


To formulate rules for a dynamic contact group, keep in mind that:

- Each row contains a condition which the results should meet.
- Some examples of conditions:

	Type	Operator	Value
"Living in Hasselt"	Postal	=	3500
"all telenet accounts"	email	contains	telenet.be



"in contact group Ideaxis"	In 'Ideaxis'		
"not in contact group Ideaxis"	NOT in 'Ideaxis'		
"age between 16 and 20"	Age	>	16
	AND		
	Age	<	20

- Rows can be combined using a separator:
 - **AND:** results will meet both conditions
e.g. if you want to send to the contacts living in Hasselt and having a Telenet e-mail address, combine the two conditions above with AND.
 - **OR:** results will meet at least one of the conditions
e.g. if you want to send to two contact groups, select one contact group, the OR separator, and the second contact group.
- You can delete a condition by clicking the  icon.

Note: The drop down list **Type** contains all contact groups and fields that have been created in the Launch section.



4.3 Fields

4.3.1 Managing fields

In the Launch section, you can manage your contacts. The profiles of your contacts consist of different fields: e-mail, first name, last name, phone nr, ... You can manage these fields by yourself: you can create, edit and delete fields.

The fields of your contacts database can also appear on the [edit profile page](#), that is the landing page accessible through each e-mail sent from your account. On this page, the receiver of the e-mail can change his own profile data.

You can use the field codes to [personalize the content](#) of your creations.





Open the **fields** folder. Here you see all the fields that have been defined in your account in Insumail. These fields appear in the [new contact](#) and the [edit contact](#) dialog. The order in which those fields appear is defined in the fields folder.

To [create a new field](#), click the **New field** button.

For each field, you see the following information:

Name	Label of the field
Code	Code of the field, which you can use to personalize your creations .
Show	If yes, this field is shown on the edit profile page .
Description	Description of the field. For your own reference.
Created on	Date of creation.
Last update	Last time the field label, the description or the characteristics were updated.

On each field you can perform the following actions:

	Edit	Click this icon to edit the field label, the description and the field characteristics. Here you can also define the labels in other languages and the settings for the edit profile page .
	Delete	Click this icon to delete the field. A confirmation will be asked. You can retrieve deleted fields in the recycle bin .
	Up	Click this icon to move the field one place up. Repeat action to move the field to the top.
	Down	Click this icon to move down the field. Repeat action to move the field to the bottom.

4.3.2 Adding a new field

To add a field:

1. Go to the Launch section and open the **fields** folder
Click the **New field** button. The **Create a new field** dialog opens up.
2. Fill in the name of the field. This is the label that will be used in Insumail.
3. Select a **Type** of field.

The selected type defines the format of input.


Text field	If you select the Text field type, values inserted in this field can be in any format, there is no check on the format.
Email	If you select the Email type, values inserted in this field should always be an email address, of the format xxxxx@yyyyy.zz).



Number	If you select the Number type, values inserted in this field should always be number (12 or 54870654). Spaces are not allowed.
Phone number	If you select the Phone number type, values inserted in this field should always be composed of numbers. Dots (.), plus (+) and spaces are allowed (015 678 678, or +32 15 678 678, or even 015.67.86.78). Slashes (/) or dashes (-) are not allowed.
Date	If you select the Date type, values inserted in this field should always be of the DD/MM/YYYY format (23/02/2010).
AutoNumber	If you select the Autonumber type, the value in this field increments automatically for each contact you insert. E.g. when you import 100 contacts, the first contact will have number 1, the second number 2, the last number 100. When you import a next time, numbering will start from 101. This can be used for unique IDs, for instance.
File	If you select the File type, the value in this field should be an URL (http://www.insumail.com/home.php or \\driver\disk\file).
Selectbox	If you select the Selectbox type. You can create a drop down box. Insert the values you want to appear in the selectbox menu. One value per line. Press ENTER to go to the next line. (Read more here.) Tip: if you want to show this field on the Edit Profile page or on another form, make sure the translations are filled in. Open the properties of the field by clicking the icon. Go to the tab Labels Selectbox and fill in all translations.

4. Check the **Unique** checkbox if you want that the value filled in this field is a unique value over the complete Insumail database. E-mail is a unique field by default.
5. Check the **Required** checkbox if you want that it is required to fill in this field when creating a contact.
6. For later reference, you can add a description to the field.
7. Click the **Add** button to create the field.


From now on, this field will be available in all your contact profiles.

Tip: You can define a label for this field in different languages. Click the  icon after you have created the field. On the **Labels** tab, fill in all languages. If you want this field to appear on the [edit profile page](#), go to the **Edit profile** tab and check the **Show** box.

4.3.3 Editing a field

Fields define the profile that is kept for each [contact](#) in Insumail.

To edit a field:

1. Go to the Launch section and open the **fields** folder.
2. Click the  icon next to the field you want to edit. The **Edit field** dialog opens up.
3. This dialog contains three tabs:
 - **Characteristics:** this tab contains all characteristics of the field. You can fill in and update all these fields.

Name	General name of the field. A label can be defined per language, see the Labels tab.
------	--



Type	Type of the field. This defines the required format of the inserted value. (e.g. date, number, file, selectbox)
Unique	Make a field unique if you want to make sure that each inserted value is unique. (e.g. e-mail address is a unique field)
Required	Make a field required if you want to make sure that this field is always filled in.
Import formatting	Apply a certain formatting to the values in this field while importing. (Read more here.) Note: This option is only available upon request. Contact the Insumail team to activate this.
Code	The code is generated automatically based on the name of the field. This code is used to personalize the content of your e-mails .
Description	Description of the field. For your own reference.

- **Labels:** this tab contains all labels of the field in different languages. When the field is used in a form (e.g. [edit profile page](#)), the right language will be used.
 - **Edit profile:** this tab defines the settings for this field regarding the [edit profile page](#).
4. When you are ready editing, click the **Save** button to confirm your modifications. Click **Exit** to discard your modifications.

4.3.4 Defining the edit profile page

The edit profile page is the page that all receivers of your e-mails can access through the link they find below their e-mail.



Figure: bottom of an e-mail in Insumail, click on edit profile link

When they click it, the edit profile page, a landing page or mini webpage opens up in their browser:




Figure: example of an edit profile page

The fields that appear on this page refer to fields in your contacts database. If the receiver of your e-mails fills in these fields or changes one of the values, your contacts database is also updated.

To see which fields will appear on the edit profile page:

1. Go to the Launch section and open the **fields** folder.
2. The fields for which **'Yes'** appears in the Show column will be shown on the edit profile page.

To define which fields appear in the edit profile page:

1. Go to the Launch section and open the **fields** folder.
2. Click the  icon next to the field for which you want to define edit profile page characteristics. The **Edit field** dialog opens up.
3. On the tab **Edit profile**, you find the following characteristics:

Show	Use this checkbox if you want that this field is shown on the edit profile page.
Required	Make a field required if you want that the value is never left empty. (e.g. e-mail address is a required field)
Readonly	Make a field read-only if you want that the visitor of the edit profile page can see this value, but not change it.

4. On the **Labels** tab, you can define all labels of this field in different languages. When the field is used in the edit profile page (or in another form), the right language will be used.




- Also on the **Labels** tab, you can write an info sentence that will be displayed below the field in the edit profile page. You can give a hint for the required format (e.g. dd/mm/yyyy for a date field), or a tip regarding the meaning of the label.

An example:

Taal:
(In welke taal wenst u uw correspondentie te ontvangen?)

- When you are ready editing, click the **Save** button to confirm your modifications. The modifications apply immediately to the edit profile page, even for already sent e-mails.

Note: If you want to create a link to the Edit Profile page elsewhere in an e-mail or landing page, do the following:

- Select the text or the image on which you want to put the link.
- Click the  icon.
- In the dialog that pops up, select **URL** and **<other>**. As URL, type the following code: **<?add_edit?>**



Link

Linkomschrijving Doel

Linktype
URL

Protocol URL
<anders> <?add_edit?>

Bladeren op server

OK Annuleren

Figure: link properties pop-up

- Click **OK**.

4.4 Campaigns

4.4.1 Viewing campaigns in draft

In the Launch section, you can find all campaigns in draft. A campaign is in draft when one or more of its containing e-mails or landing pages has the status **draft** or **draft (testing)**, so when it has not been launched definitively yet.




To continue launching an item in **draft** or **draft (testing)**, click the Launch campaign button. The [launch wizard](#) opens up.

Overview of statuses for a campaign item:

- **draft**: the launch wizard has been started, the campaign item (e-mail, landing page) has been selected, but somewhere after that the launch wizard has been stopped, clicked exit or timed out. When you open the [launch wizard](#) again, it will resume where you left it.
- **draft (testing)**: a test mailing has been sent. Open the [launch wizard](#) again to launch definitively.
- **scheduled for sending**: a time of sending has been programmed. The item will be sent starting from the scheduled time.
- **sent**: the item has been sent. You will find results in the [Evaluate section](#).

Note: You will not see items scheduled of sending or sent in the Launch section, those can only be found in the Evaluate section.

On each campaign item in status **draft** or **draft testing** you can perform the following actions here:

	Preview	Click this icon to preview the e-mail or the landing page. To edit it, you should open the e-mail in the Create section.
	Delete	Click this icon to delete the e-mail or the landing page. A confirmation will be asked. You can retrieve deleted e-mails in the recycle bin . Note: The item will be deleted from this campaign. The creation will continue to exist in the Create section and possibly in other campaigns.
	Move	Click this icon to move the campaign item to another campaign.

4.4.2 Launching a campaign

A campaign is any combination of one or more launched e-mails and/or landing pages. In a campaign, you can define for each e-mail when and to whom it is launched. A campaign can be defined over time (weekly newsletter), or regard just a one shot action (an e-mail for an inquiry followed by a thank you e-mail).

Campaigns are launched through the launch wizard which is accessible on most pages in the top right corner of the application screen ([Launch campaign](#)). Once launched, you can follow the results of your campaigns in the Evaluate section.

Note: No time to read this manual? Take a quick tour to know how you can launch a campaign.

To launch a campaign:

1. Open the Create, Launch or Evaluate section and click the [Launch campaign](#) button at the right side of the screen.
2. Choose what you want to do. The following options are proposed:
 - **Launch a new campaign.**
Fill in a name for a campaign and click **Start**. A new campaign is created.
 - **Continue launching a campaign.**
This option is used to continue where you left the launch wizard. Choose a campaign and click **Start**. Only draft campaigns can be continued.
 - **Launch new items in campaign.**
This option is used to add e-mails or landing pages to an existing campaign. Choose a campaign and click **Start**.




- **Launch an e-mail or a landing page without a campaign.**

This option is used to send e-mails you want to follow-up individually and put online landing pages as a mini-site, independently from a campaign. Click **Start**.

Note: if you do not want this dialog to appear, and work without campaigns (without folders in Evaluate), ask the Insumail team to do this setting.

3. First you will define **WHAT** you want to launch. Select the items you want to send in the e-mail and/or landing page lists. The name of the item is copied in the field on the right. You can change that name for your own reference. When you have selected all items to include in this campaign, click **Next**.

Tip: When you select an item, a copy of the item is added to the campaign. In the list appears **Copy of 'name e-mail' (date, hour)**. This date refers to the last update of the item before it was copied to the campaign. If you update the item in the section Create later, the copy of the item in the campaign will

not be updated. You can update the copy of the item in the campaign by clicking the  icon.

4. Each **ITEM** you selected appears on a tab. For each e-mail, you will now define how, to whom and when it should be send. Use the pane on the left to navigate through all definition pages:

- **Message header**

This page contains the e-mail fields which will appear in the receiver's e-mail client.

Subject	Subject of the e-mail
To name	By default, the e-mail address of the receiver will be shown. You can type here a fixed expression, such as "to all habitants of Hasselt", or use an expression with a field code to personalize , such as "to the entire <?company?> team".
From name	Name displayed in the from field of the e-mail. This can be your company, your own name, your division, ...
From e-mail address	From address displayed next to the from name (or instead of the from name). This is a required field.
Reply e-mail address	Reply address to which receivers of your e-mail can reply. Only manual replies and out of office replies are sent to this address, system errors are sent to the Insumail domain and appear in Ete .



- **Text version**

When the receiver's e-mail client does not support HTML, a text version of the e-mail will be shown. You can only select [a text version if you have created one](#) before.

- **To**

In this page you define to whom the item should be send. Select one contact group from the list, combine two contact groups using the OR separator, or make a complex selection [using the rules editor](#).

- **When**

In this page you define when the e-mail should be send. Click the  icon to select date and time on a calendar pop-up. Close the calendar pop-up by clicking the  button.

Tip: If you do not fill in a start time, sending will start as soon as possible. If you do not select an end time, sending will be finished as soon as possible. If you fill in both start and end time, sending will be spread between the defined start and end time.

Note: It is possible to schedule recurrent mailings, such as birthday e-mails. Ask the Insumail team to activate this feature.

- **Reporting**

In this page you define if and to whom reports about this e-mail or landing page should be sent. The drop down list contains all reporting lists that you defined in the [contact groups section](#). If you do not want reports to be sent, choose **no contact group**.

For each landing page, you just have to define when the landing page should be published online. If you do not select an end time, the landing page will stay online as long as your account exists.

5. As last step, an **OVERVIEW** is shown. You see all items, the number of contacts selected for sending, and the scheduled time of sending. If something has been wrong defined in the previous steps, you will find an error (red) or warning (orange) here. Click **Previous** to correct the errors.
6. You are obliged to launch a test first. Choose to which test list you want to send your test mail and click **Test**. The campaign will be sent to the [test list](#) you selected. The Evaluate section opens up, where you can follow the results of your test. The status of the tested items in your campaign is **draft (testing)**.
7. Control the e-mails that have been sent for test. It is important to test in different e-mail clients. You can test the landing pages via the link [online for test](#).



8. If the test has been successful, you can launch the campaign definitively. Click the **Launch campaign** button in the top right corner.

Tip: If the test revealed errors in your creations, first go to the Create section and [edit your creations](#). Then go back to the Evaluate section, open the campaign you are working on and click the LAUNCH button in the top right corner. In the WHAT step, update your creations by selecting again the original from the list of creations.

9. Control each step of the wizard. Progress through the steps by clicking the **Next** buttons.
10. At the last step, click the **Launch** button to launch the items definitively to the defined target public. The e-mails will be sent on the scheduled time and the landing pages will be published online. The Evaluate section opens up, where you can follow the [results of your campaign](#).

Note: You can [relaunch](#) a launched item by clicking the  icon.



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5 Section 3: Evaluate

In the **Evaluate** section you can evaluate all aspects of your launched campaigns.

Open the Evaluate section by clicking the **Evaluate** button on the left side of the screen.

Here you can:

- [Evaluate your campaigns](#)
- [Evaluate your contacts](#)
- [Evaluate fields in your contacts database](#)

To perform one of these activities, open the relative folder on the left side of the screen.

5.1 Evaluating campaigns

5.1.1 Detailed results

A campaign is any combination of one or more launched e-mails and/or landing pages. In a campaign, you can define for each e-mail when and to whom it is launched. A campaign can be defined over time (weekly newsletter), or regard just a one shot action (an e-mail for an inquiry followed by a thank you e-mail).

Note: No time to read this manual? Take a quick tour through the Evaluate section.

Campaigns are organized in folders. Each folder is a campaign. A campaign consists of one or more e-mails and landing pages, which you find when you open the folder. These e-mails and landing pages are called "items" of the campaign.

Note: The folder **Campaigns** at the top level regroups all items that have been launched without specifying a campaign.








Tip: You can [export your campaign results](#). Click the  button on top of the screen.


To evaluate a campaign:

1. Open the **Evaluate** section.
2. Open the **Campaigns** folder and browse to the campaign you want to evaluate. The overview of items in this campaign opens up.
3. For each campaign item, you see the following information:

Name	Name of the campaign item.
Type	Type of the campaign item: html e-mail, text e-mail or landing page.
Status	Status of the campaign item: draft, draft (testing), scheduled for sending, sending, sent Note: accounts that are in a validation cycle can also find the following statuses: waiting for validation, accepted, rejected
SPAM score	SPAM score of the e-mail: green = OK, orange = warning, red = e-mail will not be sent.
Queued	Total number of e-mails that are in the queue for sending. E-mails in the queue will be sent instantaneously. Percentage: number of queued e-mails divided by the number of e-mails planned for sending.
Sent	For an e-mail: total number of sent e-mails, including errors. Percentage: number of sent e-mails divided by the number of e-mails planned for sending. For a landing page: number of contacts that accessed this landing page.
Delivered	For an e-mail: number of e-mails delivered to the receiver. Percentage delivered: number of delivered e-mails divided by the number of sent e-mails. For a landing page: number of contacts that accessed this landing page
Undelivered	Number of e-mails where delivering has not succeeded.



	Percentage error: number of e-mails in error divided by the number of sent e-mails.
Date / Time	Start date and time of sending or scheduled start of sending.
	Click this icon to open detailed results.
	Click this icon to see more details about the SPAM score .
	Click this icon to preview the e-mail or landing page. Tip: Want to show this preview on your company website? You can use the URL you find on top of the detailed results page.
	Click this icon to delete the e-mail or landing page.
	Click this icon to move the e-mail or landing page to another folder.
	This icon only appears when your e-mail is in status scheduled or sending. Click this icon to cancel sending.
	This icon only appears when your e-mail is in status sent, or your landing page is in status online. Click this icon to launch the e-mail again to a different public, or extent the publication period of the landing page.

4. Click the  icon next to the campaign item for which you want to see more detailed results. The detailed results page opens up. The page is composed of different parts:
- [Top](#)
 - [General](#)
 - [Clicks](#)
 - [Bounces](#)
 - [Contacts](#)
 - [Forms](#)
 - [Forwards - send to a friend](#)

Note: Results of your test mails are excluded from the results once your campaign has been launched definitively.

Top

On the Detailed results page, you first find some details about your campaign.

You find also the preview URL. Use this URL if you want to create somewhere a link to this campaign item.

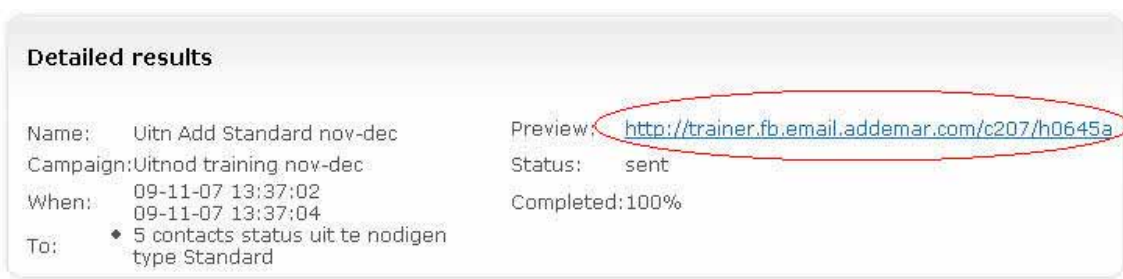


Figure: snapshot of the detailed results page, link to preview can be used in any website to show preview of this email or landing page.

Tip: You can also create a link to the **most recent** campaign item. This is a relative link, it always points to the last email or landing page you've sent out. You can read how this works here.

General

In the **General** part, you find the same information as in the overview page, with the following detailed results.

Click on numbers in the table to see an overview of the contacts who sent, clicked, opened, are still pending or in error.

Not opened	Number of contacts who did not open the e-mail (yet). Percentage not opened: Number of e-mails not opened (yet) divided by the total number of delivered e-mails.
------------	--



Opened	Number of contacts who opened the e-mail but did not do click any link in the e-mail. Percentage opened: Number of e-mails opened without action divided by the total number of delivered e-mails.
Clicked	Number of contacts who opened and clicked on a link in the e-mail. Only links in the content of the e-mail or landing page are counted. System link clicks (online link, privacy policy, unsubscribe) do not count for the total of clicks here. You find more details in the clicks section below. Percentage clicked: Number of clicked e-mails divided by the total number of delivered e-mails.
E-mail invalid	Number of undelivered e-mails because of invalid address. Percentage invalid: Number of invalid address errors divided by the total number of undelivered e-mails.
Domain invalid	Number of undelivered e-mails because of invalid domain. Percentage invalid domain: Number of invalid domain errors divided by the total number of undelivered e-mails.
Blacklisted	Number of undelivered e-mails because the address was listed on a global blacklist. Percentage blacklisted: Number of blacklisted e-mails divided by the total number of undelivered e-mails.
Bounced	Number of undelivered e-mails because of a mailbox error, a security error, a network or system error. Insumail distinguishes different types of bounces . Percentage bounced: Number of bounced divided by the total number of undelivered e-mails.

Clicks

In the **Clicks** part, you find the list of links available in the e-mail. A distinction is made between system links and links in the content. Clicks on system links (online link, unsubscribe, edit profile link) do not count in the total number of clicks (above). Only links in the content of your e-mail or landing page are counted for the clicks rate.

Click on the numbers in the table to see an overview of the contacts who clicked the link.

For each link you find the following information:

Total clicks	The total number of people who clicked on this link. Percentage total clicks: the number of clicks on this link divided by the total number of clicks generated by this e-mail.
Unique clicks	The number of unique clicks on this link. If someone clicked twice on a link, this counts for two unique clicks. Percentage unique clicks: the number of unique clicks on this link divided by the total number of unique clicks generated by this e-mail.
Total	Total number of clicks and unique clicks generated by this e-mail.

Bounces

In the **Bounces** part, you find the detailed bounce results.

- The numbers in the table refer to the number of bounces of that Type or Category.
- The percentages in the table refer to the number of bounces of a specific type or category divided by the total number of bounces.
- Click on the numbers to see an overview of the contacts who bounced and find the bounce type, category and subtype.

Bounces can be distinguished using three hierarchical levels, each one referring to a digit in the status code contained in the delivery status notification (for more info, see <http://rfc.sunsite.dk/rfc/rfc3463.html>):

- **Type:** hard or soft bounces
- **Category:** seven categories of bounces can be distinguished, see below.
- **Subtype:** the detailed error message

Types



Soft	A soft bounce is a persistent transient failure. The message as sent is valid, but some temporary event prevents the successful sending of the message: the inbox of the user can be full, a network error occurs, ...
Hard	A hard bounce is a permanent failure. This bounce is not likely to be resolved by resending the message in the current form. Some change to the message or the destination must be made for successful delivery.

Category

Addressing	There is a problem with the originator or destination address, such as address syntax or validity.
Mailbox	There is a problem with the receiver's mailbox.
Mail system	There is a problem with the destination system.
Network and routing	There is a problem with the delivery system, such as the network, the routing, or the directory.
Mail delivery protocol	There is a problem with the message delivery protocol. These failures include the full range of problems resulting from implementation errors or an unreliable connection.
Message content or media	There is a problem with the content of the message. These codes report failures due to translation, transcoding, or otherwise unsupported message media.
Security or policy	There is a problem with a policy, such as per-recipient or per-host filtering and cryptographic operations.

Contacts

In the **Contacts** part, you find the number of contacts who unsubscribed, who [edited their profile](#) and who filled in a form.

Click on the numbers to see the contacts who did that action.

Forms

In the **Forms** part, you find the number of contacts who filled in the form. (if their was a form in your e-mail or landing page)

Click on the number to see an overview of the contacts who filled in the form.

Forwards - send to a friend

If you integrated the [send to friend scenario](#) in your campaign, you will find in the **Forwards** part the number of contacts who forwarded the e-mail, the number of times the e-mail was forwarded (each contact can forward multiple times), and the number of new subscriptions resulting from your send to friend action.

Click on the number to see an overview of the contacts who forwarded.

5.1.2 What does this SPAM score mean?


When you send a test mail, you will be able to see a SPAM score for your e-mail in Evaluate.

The colour coding is the following:

SPAM 5.00	SPAM score above 2.0. Your e-mail will be blocked by SPAM filters or end up in the Junk E-mail folder.
WARNING 1.60	SPAM score between 0.1 and 2.0. The probability your e-mail gets blocked by SPAM filters is existing.
OK 0.00	SPAM score 0.00. No SPAM suspicion.

In case of a warning and certainly in case of a SPAM score above 2.0, it is better to change the content or layout of your e-mail.

To know what you should change:

1. Click the  icon. The following pop-up appears:



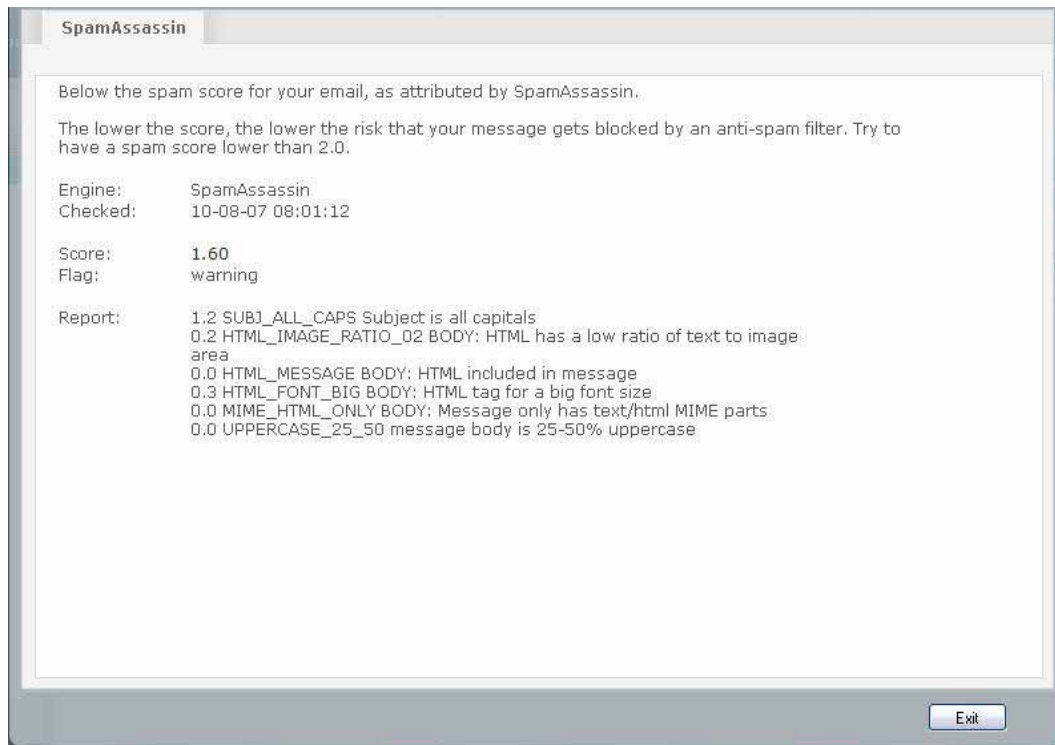


Figure: SPAM score details

2. In this screen, you find the elements composing the SPAM score of your e-mail. Here is an explanation of most frequent errors:

0.0 HTML_MESSAGE BODY: HTML included in message	Your e-mail is in HTML. This is not a problem anymore.
0.0 MANY_EXCLAMATIONS Subject has many exclamations	Your subject contains many exclamation marks, but not too much to give raise to SPAM score.
0.0 MIME_HTML_ONLY BODY: Message only has text/html MIME parts	Your e-mail contains both a HTML and a text part. This is not a problem anymore.
0.0 UPPERCASE_25_50 message body is 25-50% uppercase	Your e-mail body contains too much text in uppercase. Change some text to lowercase, place it in bold for instance. This is not a real problem.
0.2 HTML_IMAGE_RATIO_02 BODY: HTML has a low ratio of text to image	You have too much images compared to the text in your e-mail. Insert more text or remove some images.
0.2 HTML_SHOUTING5 BODY: HTML has very strong "shouting" markup	Your e-mail has a lay-out that suggests shouting, such as uppercase words, bold and words between **. To avoid this, make your lay-out a bit more strict.
0.3 HTML_FONT_BIG BODY: HTML tag for a big font size	Your e-mail contains some words in a bigger font. This suggests shouting or drawing attention, a technique often used by SPAMmers.
0.5 HTML_FONT_FACE_BAD BODY: HTML font face is not a word	Your e-mail contains an inexistent font face definition. Use a known font face type.
0.6 HTML_COMMENT_SAVED_URL BODY: HTML message is a saved web page	In the first lines of code, the text <!-- saved from URL ...>suggests you copied a web page as your e-mail.
0.8 HTML_FONT_LOW_CONTRAST BODY: HTML font color similar to background	The colour font of your text is too similar to the background of your e-mail. This suggests that you do not want to show the text in your message. Change one of the colours to have more contrast.



0.8 INFO_TLD URI: Contains an URL in the INFO top-level domain	Your e-mail contains an URL containing .info. Lots of SPAMmers do.
1.2 BIZ_TLD URI: Contains an URL in the BIZ top-level domain	Your e-mail contains an URL containing .biz. Lots of SPAMmers do.
1.2 HTML_OBFUSCATE_05_10 BODY: Message is 5% to 10% HTML obfuscation	Your e-mail contains too much HTML coding in proportion to the text included in your e-mail. This could be due to a paste from Word, or Javascript contained in the code of your e-mail.
1.2 SUBJ_ALL_CAPS Subject is all capitals	Your subject is in uppercase. It is better to use lowercase.
1.4 MARKETING_PARTNERS BODY: Claims you registered with a partner	Your e-mail probably contains the word 'partner'. Rephrase the sentence.
1.5 SUBJECT_ENCODED_TWICE Subject: MIME encoded twice	Your subject is too long or contains too many special characters (@, , °, é, à, ù). One special character equals at least 5 normal characters. Make the subject shorter.



- 3.
4. If you have changed the content or lay-out of your e-mail, you can send a new test mail. Normally your SPAM score should be lower.


5.1.3 Exporting campaign results

You can export the results of your campaigns in the following formats:

- pdf
- xls
- csv
- xml

To export your campaign results:


1. Open the **Evaluate** section.
2. Open the **Campaigns** folder and browse to the campaign for which you want to export results. The overview of items in this campaign opens up.
3. Click the  **PDF** button to export the results page in .pdf format. You can choose to open or save the file on your local system.
4. Click the  **Export** button to export the results in another format.
5. Choose the format and click the **Export** button. You can choose to open or save the file on your local system.

Tip: You can also export the behaviour of your individual contacts in .xls, .csv or .xml. Open the Contacts section in Evaluate and click the  **Export** button on top of the screen.

5.1.4 Creating follow-up groups

In order to do follow-up marketing campaigns, you can create new contact groups based on the results of a campaign. You can save all bouncers, openers, clickers, not-openers, etc. into new contact groups that you can use for a follow-up campaign.


Note: the follow-up group is a static mailgroup, a snapshot. If your campaign is still generating results, it is best to wait before you take this snapshot!

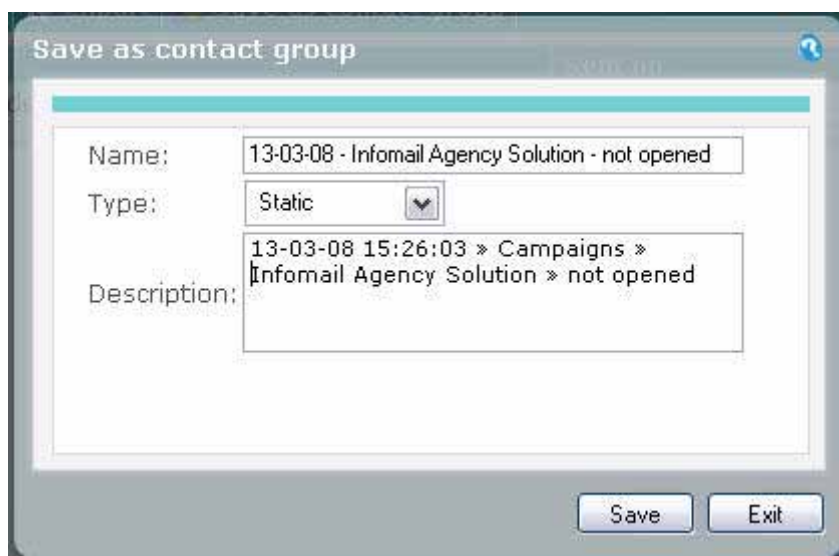
1. Open the detailed results page of the campaign for which you want to create follow-up groups. Click the  icon.
2. On the detailed results page, click the number for which you want to create the follow-up group.



General			
queued	sent	delivered	undelivered
		not opened 105 48.17%	e-mail invalid 0 0%
		opened 113 51.83%	domain invalid 0 0%
		clicked 2 1.77%	blacklisted 0 0%
			bounced 24 100%
0 0%	242 100%	218 90.08%	24 9.92%

Figure: screen capture from the detailed results page in Evaluate.

- The contacts are shown on the page. Click the . The following pop-up appears:



The dialog box titled "Save as contact group" contains the following fields:

- Name: 13-03-08 - Infomail Agency Solution - not opened
- Type: Static
- Description: 13-03-08 15:26:03 » Campaigns » Infomail Agency Solution » not opened

Buttons: Save, Exit




Figure: Dialog to save a new contact group based on contact behaviour

- A suggestion is made for the Name and the Description of the contact group. You can give this contact group any name and description you want, of course.
- Click **Save**. The newly created contact group appears between your contact groups in **Launch > contact groups**. You can use it for your following campaigns.

5.1.5 Relaunch a campaign item

When an e-mail has been sent, you can relaunch it later without much effort. You can also extend the publication period of the landing page via the relaunch button.

To relaunch a campaign item:

- Open the section Evaluate.
- Find the item you want to relaunch.
- Click the  icon.
- The relaunch wizard opens up, this is the same as the launch wizard. Every value is prefilled as you did while launching the first time. You can change what you want.
- On the **To** page, select your target public. You can select the same contact group as for the first launch, but exclude contacts who already received the e-mail. You can also select another contact group, or formulate a query to select a specific group of contacts.
- If you don't want a contact to receive the e-mail twice, indicate the checkbox **Exclude contacts already sent to**.
- On the **When** page, define when the e-mail should be send. Click the  icon to select date and time on a calendar pop-up. Close the calendar pop-up by clicking the  button.

8. You can do a test mail, but you can immediately launch to your target public too.



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5.2 Evaluating contacts

A contact is an e-mail address you saved in Insumail. In the evaluate section, you can evaluate the behaviour of your contacts.

To evaluate a contact:

1. Go to the evaluate section and open the contacts folder. The overview of contacts appears.
2. For each contact, you can evaluate the behaviour looking at the following characteristics:

Queued	Total number of e-mails that are in the queue for sending to this contact. E-mails in the queue will be sent instantaneously. Percentage: number of queued e-mails divided by the number of e-mails planned for sending.
Sent	Total number of sent e-mails to this contact. Percentage: number of sent e-mails divided by the number of e-mails planned for sending.
Delivered	Number of e-mails delivered to this contact. Percentage delivered: number of delivered e-mails divided by the number of e-mails sent to this contact.
Undelivered	Number of e-mails that has not been delivered to this contact. Percentage undelivered: number of undelivered e-mails divided by the number of e-mails sent to this contact.

3. **Tip:** You can modify the characteristics shown in this overview via the  button.
4. Click the  icon next to the contact for which you want to see more detailed results. The contact profile dialog opens up, with the **Tracking** tab displayed. You see for each e-mail sent to this person when he opened and clicked it.

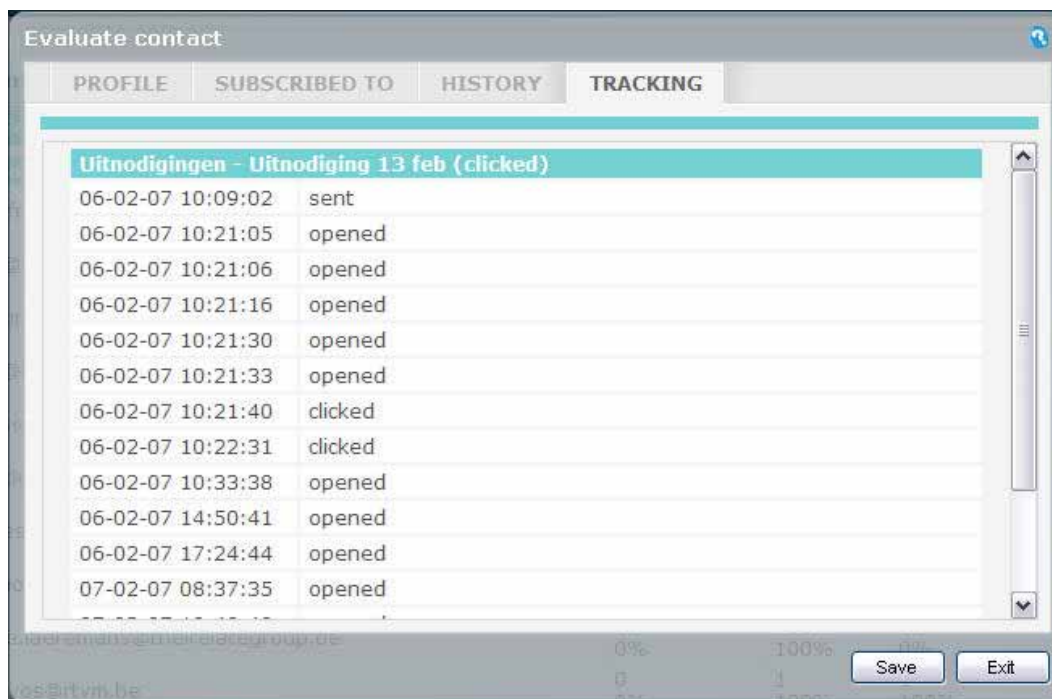




Figure: overview of the behaviour of a contact on an invitation e-mail. Numerous openers one after the other indicate probably the email was in the inbox and, by scrolling up and down in the list of emails, the invitation was shown several times in the preview pane of the email program.

Note: You can find the same overview for each contact in the **Launch** section. Open the **contacts** folder en click the  icon next to the contact of which you want to see the tracking.

Tip: You can export the behaviour of your contacts in .xls, .csv of .xml. Click the  button on top of the screen.



5.3 Evaluating fields

You can evaluate the profiles in your contacts database, e.g. the distribution of your contacts over different geographic regions, or the distribution of the languages of your contacts over a certain geographic region, etc. This is based on the fields in your contacts database.

- You can choose to show one field. The distribution of the values of this field over your entire contact database will be shown.
- You can also combine two fields. The relation between the values of those two files will be shown then.
- You can choose to filter the data by one specific mailgroup. Only the data of the contacts in this mailgroup will be used then.

To evaluate fields:

1. Go to the Evaluate section and open the **Fields** folder. In this folder, every query you create will be saved.
Click the **New query** button. The **Create** dialog opens up.




Figure: Create a new query to evaluate fields

2. Choose at least a field in the first drop down. The distribution of the values in this field over your entire contacts database will be shown.
3. If you choose a field in the second drop down, the relationship between the first and the second field will be shown.
4. You can filter the results by choosing a mailgroup in the third drop down. Only the contacts in that mailgroup will be displayed in the result.
5. Choose a name for your query. If you do not enter a name, the fields you chose will be used as name.
6. Click **Add** to display the results of the query.

postal	total
2200	1
2430	1
3500	10
3545	1
3590	2
3600	1
3840	1
NL6221 GD	1
	18

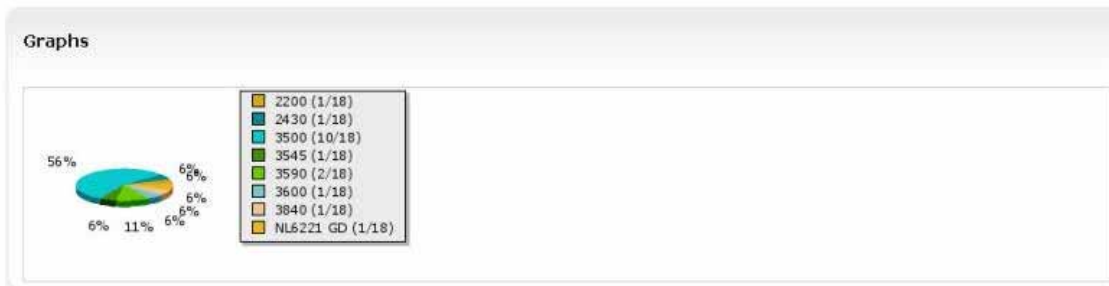

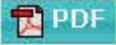




Figure: Example of a query: the distribution of the postal codes over a contacts database of 18 contacts.

Tip:

You can export the results of your query in .pdf, .xls, .csv or .xml. Click the  **Export** button or the  **PDF** button on top of the screen.

You can also search for specific results within these results. Click the  **Search** button.

You can edit the query by clicking the  **Edit** button.



6 Section 4: Library

In the library you can store and manage all the images and other files you want to use in your creations. Images can be integrated in your creations; for other files such as PDF and Microsoft Office files, a file link can be inserted.

You can also upload and manage your custom templates in the Library. Custom templates appear between the standard Insumail templates in the first step of [creating a new e-mail](#) or a new landing page.

Here you can:

- [Upload a file](#)
- [Upload an image](#)
- [Manage templates](#)
 - Create a template
 - Upload a template
 - Preview a template
 - Download a template
 - Delete a template

Note: the files and templates you store in the library are stored on the Insumail server, but no one except the users of your account have access to your files.

Tip: if you want to upload lots of images or files, you can use connect to the FTP server to upload.



6.1 Uploading files to the library

If you upload files to the library, you can refer to them via a file link in your creations. E.g. You can insert a file link to a .pdf file in your e-mail, instead of sending the file via attachment. The receivers of your e-mail can click the link and view or download the .pdf from the server.

Note: Images should be [uploaded to the images folder](#), so that they can be inserted immediately in your e-mails and landing pages.

To upload a file to the library:

1. Go to the Library section and open the **Files** folder. A pop-up with a file system opens up.

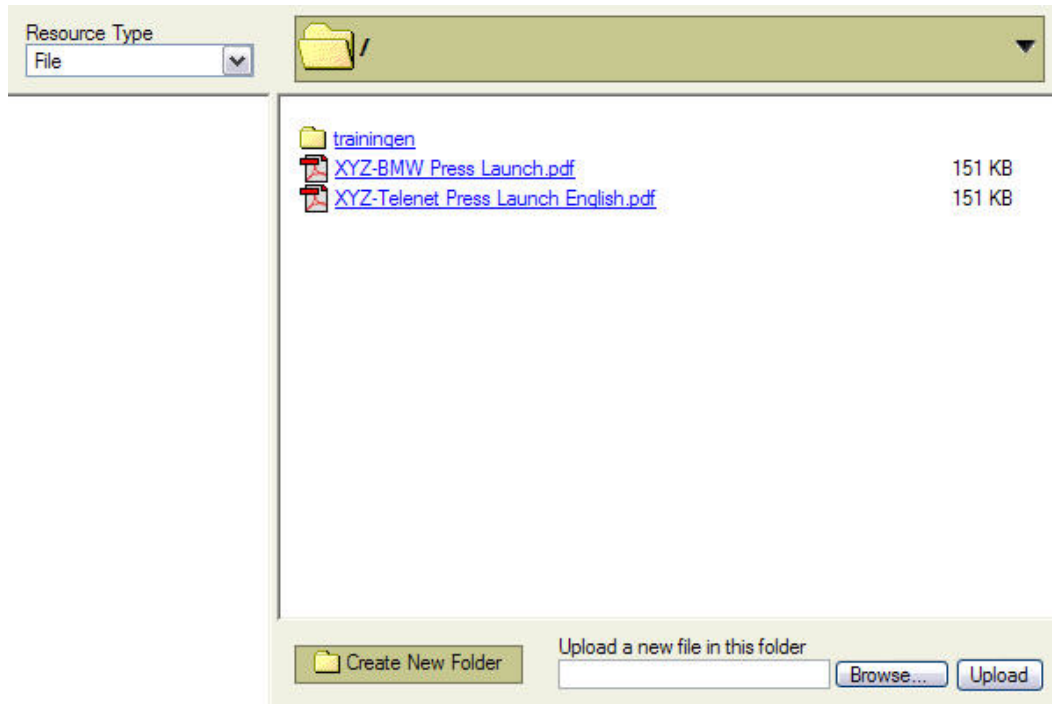



Figure: Files folder in the Insumail library

2. Open the folder to which you want to upload the file or create a new folder.
Tip: to create a new folder, click the **Create New Folder** button at the bottom of the screen.
3. At the bottom of the screen, click the **Bladeren** or **Browse** button.
4. Search the file you want to upload on your local pc or network and double-click it.
5. Click the **Upload** button. The file is uploaded to the active folder.
6. Click the  button on the window to close the file system pop-up.

Note: To avoid errors, make sure the filename of the file you want to upload does not use hyphens (-) or spaces.

6.2 Uploading images to the library

Images are a special type of files, they should be stored in the **Images** folder. All images that are stored in the images folder can be inserted immediately in your e-mails and landing pages.

To upload an image to the library:

1. Go to the Library section and open the **Images** folder. A pop-up with a file system opens up.

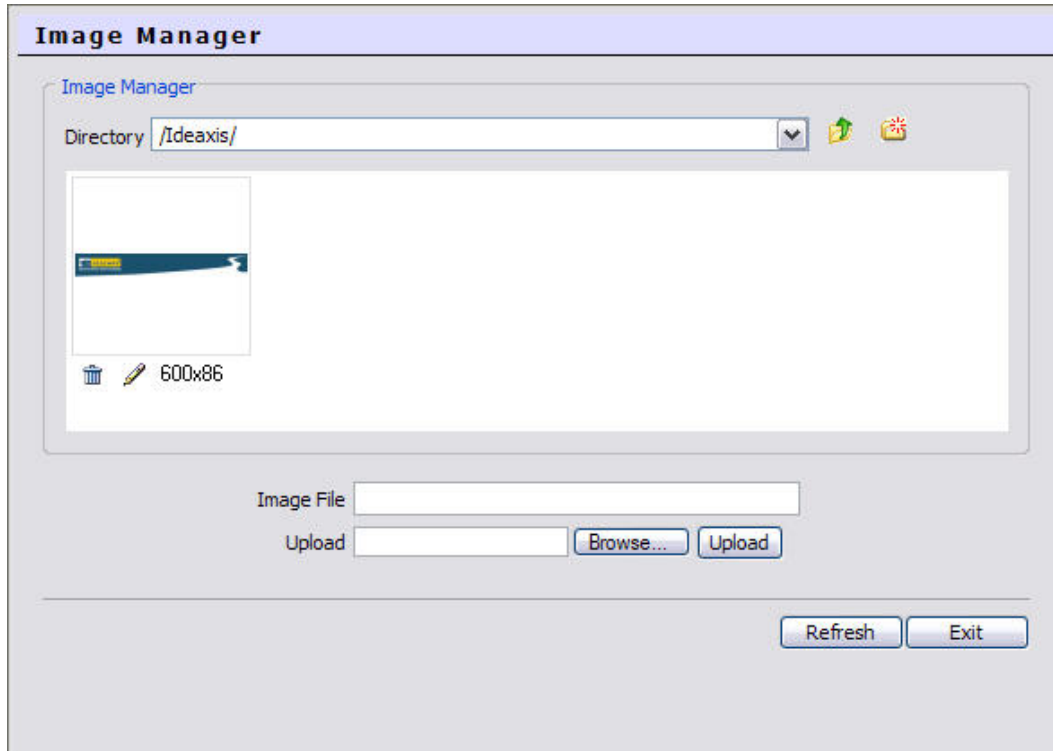


Figure: Images folder in the Insumail library

2. Open the folder to which you want to upload the image or create a new folder.
3. At the bottom of the screen, click the **Bladeren** or **Browse** button.
4. Search the image you want to upload on your local pc or network and double-click it.
5. Click the **Upload** button. The image is uploaded to the active folder.
6. Click the **Exit** button to close the file system pop-up.

6.3 Templates


When you start [creating a new e-mail](#) or landing page, you first have to select a template. Templates define the basic organization and the layout of your creations.

In the library, you can find an overview of all the templates used in your account.

Standard templates


When you start using Insumail, a series of basic templates are included in your account. The first two templates represent a layout that is frequently used for newsletters. The third template is a rather free template with predefined heading and footer, the fourth template contains only the mandatory Insumail elements.


Those standard templates can be customized to a certain degree via [the settings menu](#): you can change colours and fonts, and add your company banner and logo. The contact information that you fill out in My account is prefilled in all new creations. When you make a creation, you can still change the same things, but at the level of the individual e-mail or landing page. The empty template (template 4) permits you to create something of your own, at the level of a creation.

The thumbnail gives a small preview of the template, to see a preview in a browser window, click the  icon.

Custom templates

To create a specific layout that can be reused in all your creations, you can create your own custom templates in an HTML tool such as Dreamweaver and upload them to the Library.

If you want to base your creation on an existing template, you can download a template from Insumail. Click the  icon.

If you do not want to use a certain template anymore, you can delete the template. Click the  icon.

Attention! This template can not be restored via the recycle bin. It is deleted permanently.



7 Section 5: My Account

In the My Account section, you can alter the basics of your account.

Here you can:

- [define default e-mail settings](#)
- [access your recycle bin](#)
- [manage the users of your account](#)
- [read and send notes](#)

7.1 Settings

In the My Account section of each account, that you can reach via the Home, you can access the general settings for the account. Here you can preset some general layout elements and e-mail settings that apply to the complete account. You can also define preferences for link tracking, bouncing and opt-in/opt-out.

Open the **Settings** folder. The settings section is composed of three parts:

- **[Layout settings](#)**: set colours and fonts that overwrite all templates, insert a banner in all templates, insert your company logo
- **[Default text settings](#)**: set default from name and from address for e-mails, adapt the privacy policy text, insert all your company information
- **[Preferences](#)**: set your preferences for link tracking of mailto links and anchors, define your bounce policy and set your preferences for opt-in and opt-out.

What you insert via the layout and text settings is filled in as default in the create and launch process, but can be changed during that process, for each e-mail separately.

7.1.1 Default text settings

Via the default text settings, you can set default from name, from address and reply address for e-mails, adapt the privacy policy text that appears when receivers click the privacy policy link on the bottom of your e-mails, and insert all your company information that should appear in the contact section of each e-mail.

- The default message header will appear in the [launch wizard](#) when you start launching an e-mail. You can still change it at that point.
- The contact information that you fill in here will appear in each creation that you base on a [standard Insumail template](#), and is still editable in each e-mail separately.
- The privacy policy text appears when the receivers of your e-mail click the "privacy policy" link on the bottom of the e-mail.



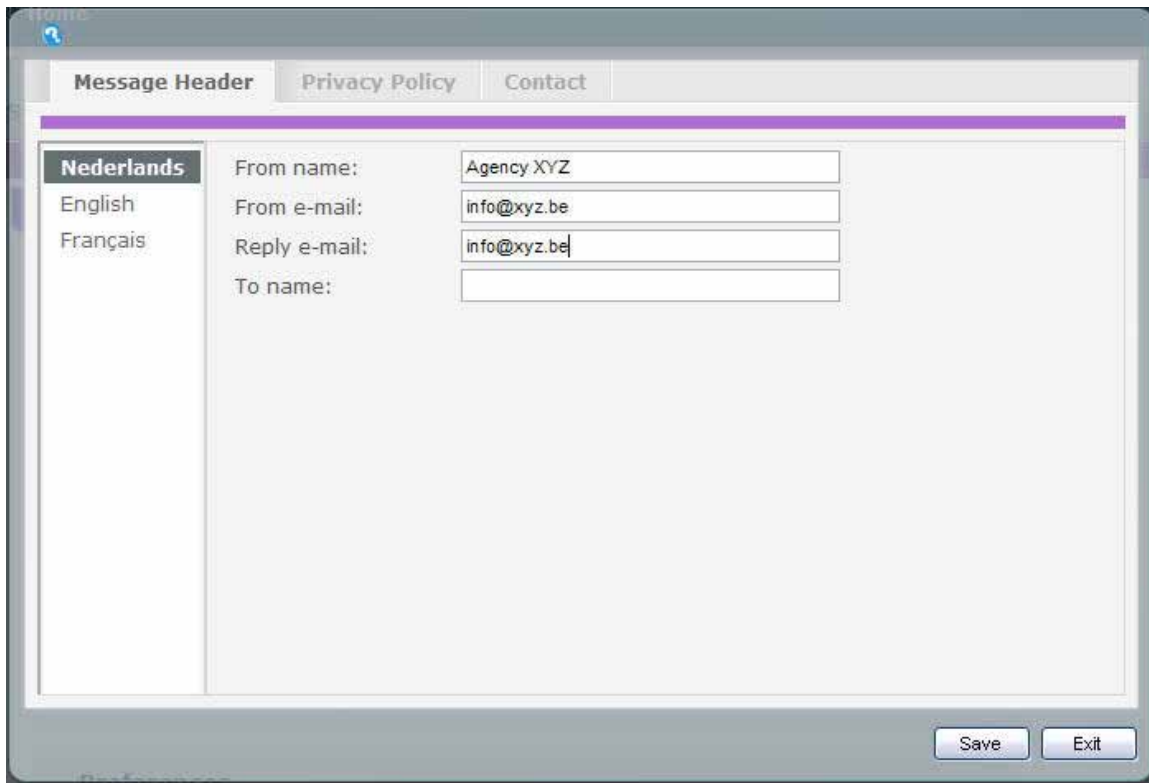


Figure: Default text settings pop-up

To fill in the default text:

1. Go to the My Account section and open the **Settings** folder.
2. Select **Default text**. The default text dialog opens up.
3. To set a default from name, from address and reply address: click the **Message header** tab. Here you can fill in all default e-mail fields that appear in the receiver's inbox.
 - **From e-mail:** sender's e-mail address
 - **From name:** sender's name
 - **Reply e-mail:** default e-mail address where replies to sent e-mails should be sent to.
 - **To name:** default name of the receiver of your e-mail, which appears in the To field of the receiver's inbox. The default value is the e-mail address of the receiver. You don't have to fill in anything unless you want to insert a specific value, such as a fixed wording e.g. "to all subscribers of newsgroup XYZ", or a reference to the real name of your receiver e.g. "<?first_name?> <?last_name?>". ([Want to know more about personalizing?](#)).

When you launch a campaign, the e-mail addresses that you have typed here will be prefilled. You can change it for each item in a campaign.

4. To adapt the privacy policy: click the **Privacy policy** tab. The privacy policy is the text that appears when one of your receivers clicks the privacy policy link in the bottom right corner of the e-mail. A standard text is available, you can edit it as you want.
5. To insert your company information: click the **Contact** tab. All contact information that is inserted here will be the default contact information on your creations. You can, of course, change the contact details at the level of an individual creation.
6. Click the **Save** button to confirm your changes.

Note: As this are text settings, a default for each language has to be preset. On each tab, fill in the default text for each language: click the language and fill in the fields that appear. Click the next language, fill in, etc. When you [start a new creation](#), you will be able to select the language of the default text.

7.1.2 Preset lay-out settings

Via the layout settings, you can set colours and fonts that overwrite all templates, insert a banner and your company logo in all templates. You can also change the layout of your contacts data.



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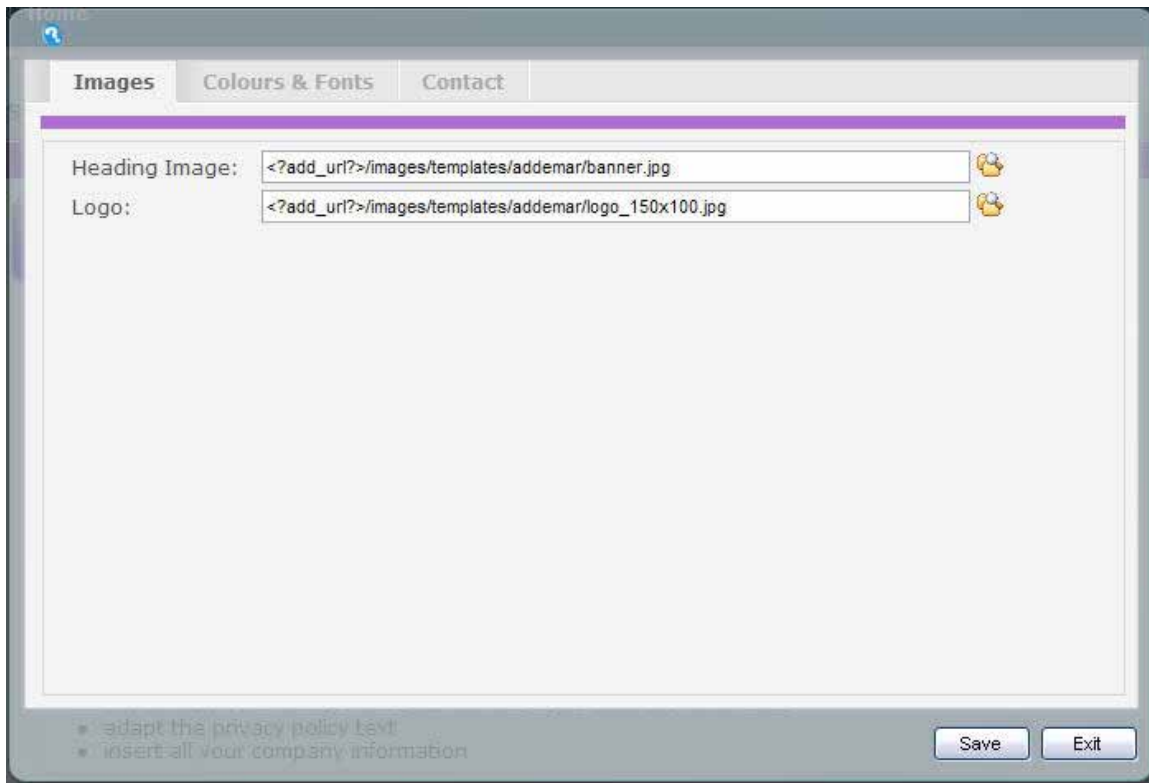




Figure: Lay-out settings dialog box

To preset layout:

1. Go to the My Account section and open the **Settings** folder.
2. Select **Layout**. The layout dialog opens up.
3. To insert a banner and a company logo: click the **Images** tab. You can now:
 - upload the banner you want as default heading for all your creations. Click the  button next to the **Heading image** field. The Images map in your Library opens up. Browse to the banner image and click it.

Note:

 - If the banner image is not uploaded to your Library yet, you should first [upload the image to the Library](#).
 - The size of the banner .jpg should be 600x80 px to fit the standard templates.
 - upload a company logo. Click the  button next to the **Logo** field. The Images map in your Library opens up. Browse to your company logo image and click it.

Note:

 - If the logo is not uploaded to your Library yet, you should first [upload the image to the Library](#).
 - The size of logo .jpg should be 150x100 px to fit the standard templates.
4. To change the colours and fonts that are defined in the templates: Click the **Colours and fonts** tab. You can now:
 - Change a colour

Tip: Click the colour field. Select a colour with your mouse cursor and click. The Hex-code of the chosen colour appears.
 - Change a font
 - Change a font size
 - Change a font weight (normal, bold, bolder, lighter)
5. To change the layout of the contact data in a standard Insumail template: click the **Contact** tab. You find two editable fields:
 - **Contact text block:** in this field, you can define the layout of the contacts section that is used in Standard template 1 and 2.



- **Contact text line:** in this field, you can define the layout of the contacts section that is used in Standard template 3.

Tip: Do not change the values between < >. Those values refer to the text fields you can fill in on the [Default text dialog](#). You can change the order of the values, adapt the punctuation and add text between them. An example:

<pre><?set_contact_company? <?set_contact_street?> <?set_contact_number?> <?set_contact_postal?> <?set_contact_city?> <?set_contact_country?> <?set_contact_tel?> / <?set_contact_fax?> <?set_contact_email?> / <?set_contact_url?></pre>	<pre><?set_contact_company? <?set_contact_street?> <?set_contact_number?> <?set_contact_postal?> <?set_contact_city?> tel: <?set_contact_tel?> fax: <?set_contact_fax?> e-mail: <?set_contact_email?> www: <?set_contact_url?></pre>
--	--

2. Click the **Save** button to confirm your changes.

Note: These changes apply to all future creations. Existing creations are not updated when you change settings.

When you [create a new e-mail](#) or landing page now, these settings will be applied to the template you choose. While you are working in [the interactive preview](#), you can still change the colours and the fonts of the creation and the contact data, but only at the level of the individual creation.

7.1.3 Preferences

You can set your preferences for link tracking, for opt-in and opt-out. You can also define what should happen to bouncers.

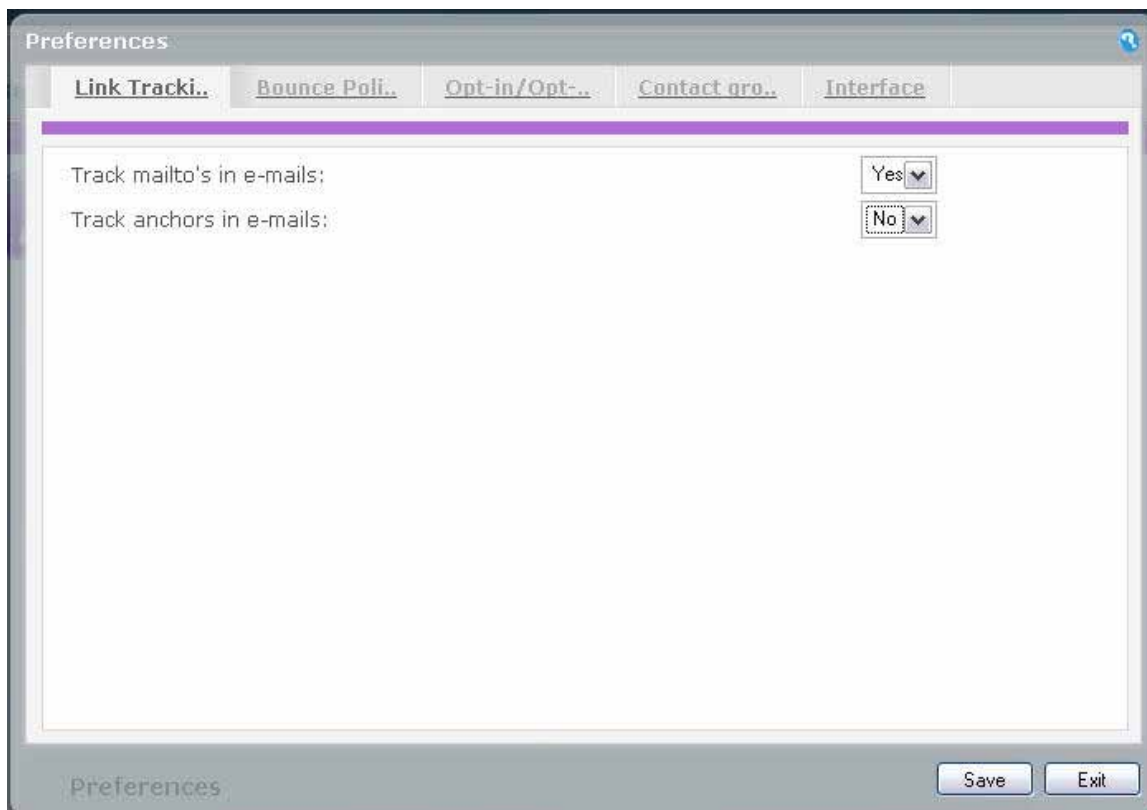


Figure: Preferences dialog

To set preferences:

1. Go to the My Account section and open the **Settings** folder.



2. Select **Preferences**. The preferences dialog opens up.

7.1.3.1 Link tracking

To set preferences for tracking of specific links: click the **Link tracking** tab. You can now:

1. Tell whether you want that **mailto links** in your e-mails should be tracked as a link or not. If you choose "No", clicks on this link will not be registered as a result in Insumail.
Note: A mailto link is a link that, when clicked, opens a ready-to-send e-mail message; mostly with a fixed subject and a defined body text on the receivers computer. The receiver can type the e-mail and send it immediately. When tracked, the mailto e-mail will pop-up in the house style of the account. When not tracked, the mailto e-mail will appear in the default mail composer. ([Want to know more about creating mailto links?](#))
2. Tell whether you want that **anchors** in your e-mail should be tracked as a link or not. If you choose "No", clicks on these links will not be registered as a result in Insumail.

Note: An anchor is an internal link in an e-mail, mostly from the introduction (a bullet list) to one of the articles in the e-mail. ([Want to know more about creating anchors?](#))

7.1.3.2 Bounce policy

To set preferences for bounces: click the **Bounce policy** tab. You will be able to set preferences for hard bounces and soft bounces. ([Want to know more about types of bounces?](#))

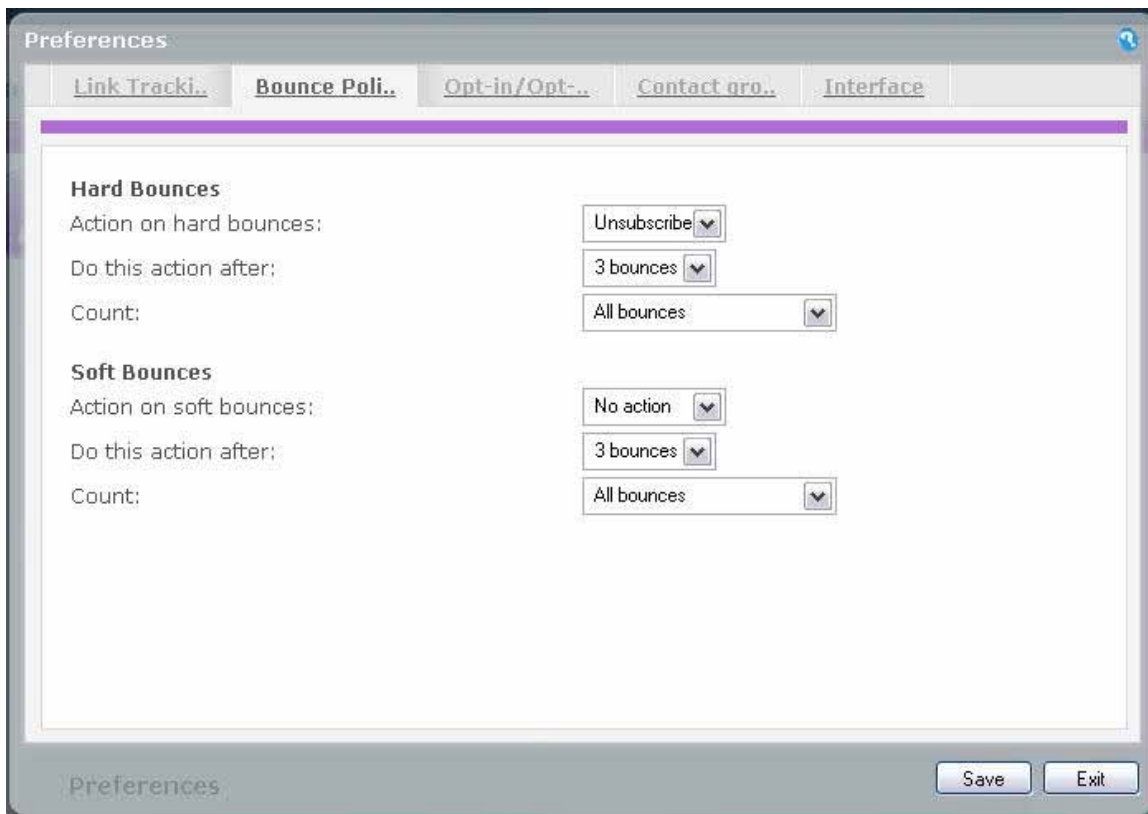


Figure: Default bounce policy settings. If an address bounces a message 3 times, this contact will be added to the unsubscribers list. In case of 3 soft bounces, no action happens.

1. You define first the **action** that should happen to the addresses that bounce. You have the choice between:
 - no action: no action will happen on the contacts that bounced.
 - unsubscribing: the contacts that bounced are added to the unsubscribers list. They will never receive any e-mail from your account anymore.
 - removing: the contacts that bounced are deleted from your contacts database.

2. Then you define the **number of bounces** after which the contact should be removed or unsubscribed. If you choose 3 bounces, e.g. the contact will only be unsubscribed/removed after the third message that bounces at his address.
3. Finally, you can still specify whether **all bounces or only consecutive bounces** should be counted. If you choose only consecutive bounces, the bounce counter will be reset to 0 when a message arrives successfully at a contact that previously bounced.
4. Do this for both hard bounces and soft bounces. Remember that soft bounces most of the time are temporary errors, that could be solved at any moment.

7.1.3.3 Opt-in / Opt-out

To set preferences for subscribing and unsubscribing: click the **Opt-in / Opt-out** tab. You will be able to set preferences for the unsubscribing process (opt-out) and for the subscribing process (opt-in).

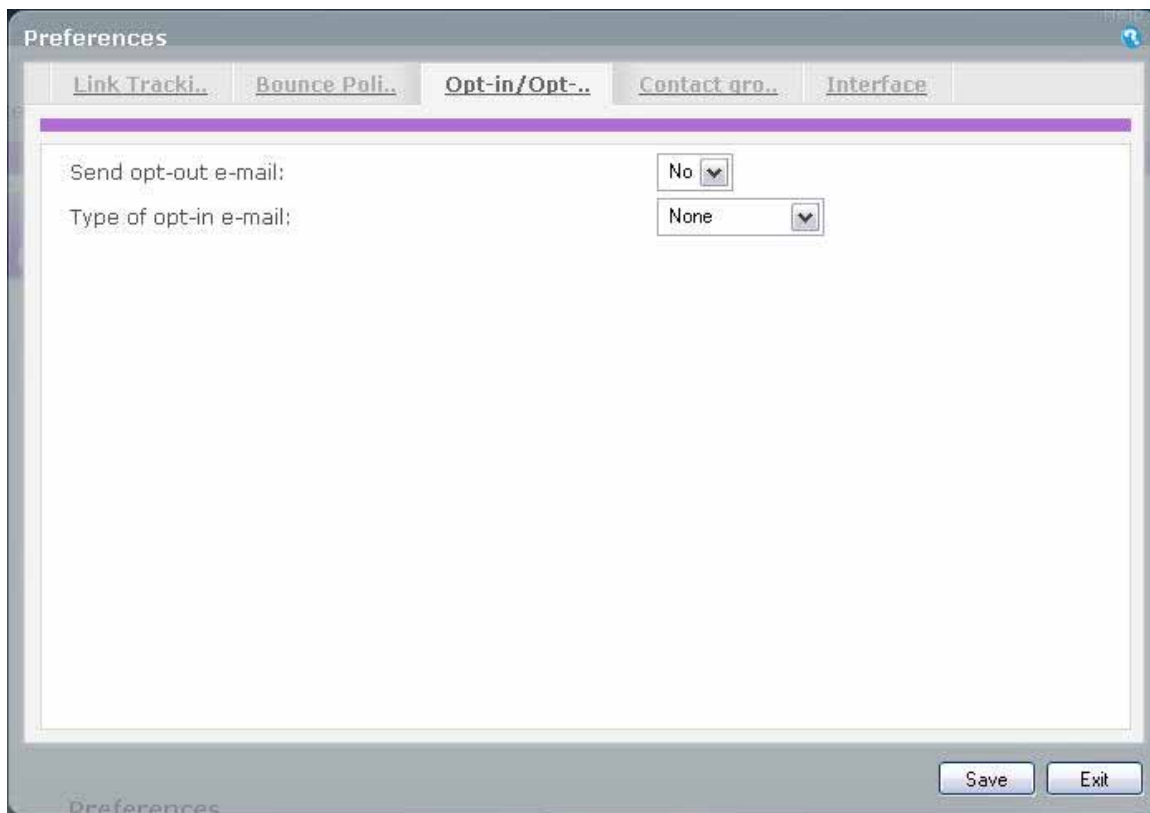


Figure: Default opt-in/opt-out settings. No e-mail will be sent when a contact unsubscribes, and there is no action via e-mail when a new contact subscribes.

1. In the **opt-out setting**, you define whether a contact that unsubscribes via the unsubscribe link in your e-mail should still receive an e-mail confirming his unsubscription. You have the following choices:
 - no: no e-mail will be send to unsubscribers.
 - yes: a confirmation e-mail will be send to unsubscribers.
2. In the **opt-in setting**, you define whether a contact that subscribes to your list via a send-to-friend form or a form on your website should:
 - not receive any e-mail. Choose "None". The contacts subscribes through the form and that's it.
 - receive a confirmation e-mail. Choose "Confirmed opt-in". The contact subscribes through the form and receives an e-mail to confirm his subscription.
 - receive an e-mail by which he can confirm his subscription. Choose "Double opt-in". The contact says he want to subscribe through the form, he receives an e-mail to ask for confirmation. Only when he confirms by clicking the link in the e-mail, the contact is subscribed to your list.

7.1.3.4 Contact groups

If you want to set preferences for the use of the special contact groups: click the **Contact groups** tab. You will be able to define which contact group should be used by default as test list and as reporting list.

Note: this feature is only interesting if you have defined more than one test list or more than one reporting list in the **Launch/Contact groups** section. (Read more about contact groups [here](#)).

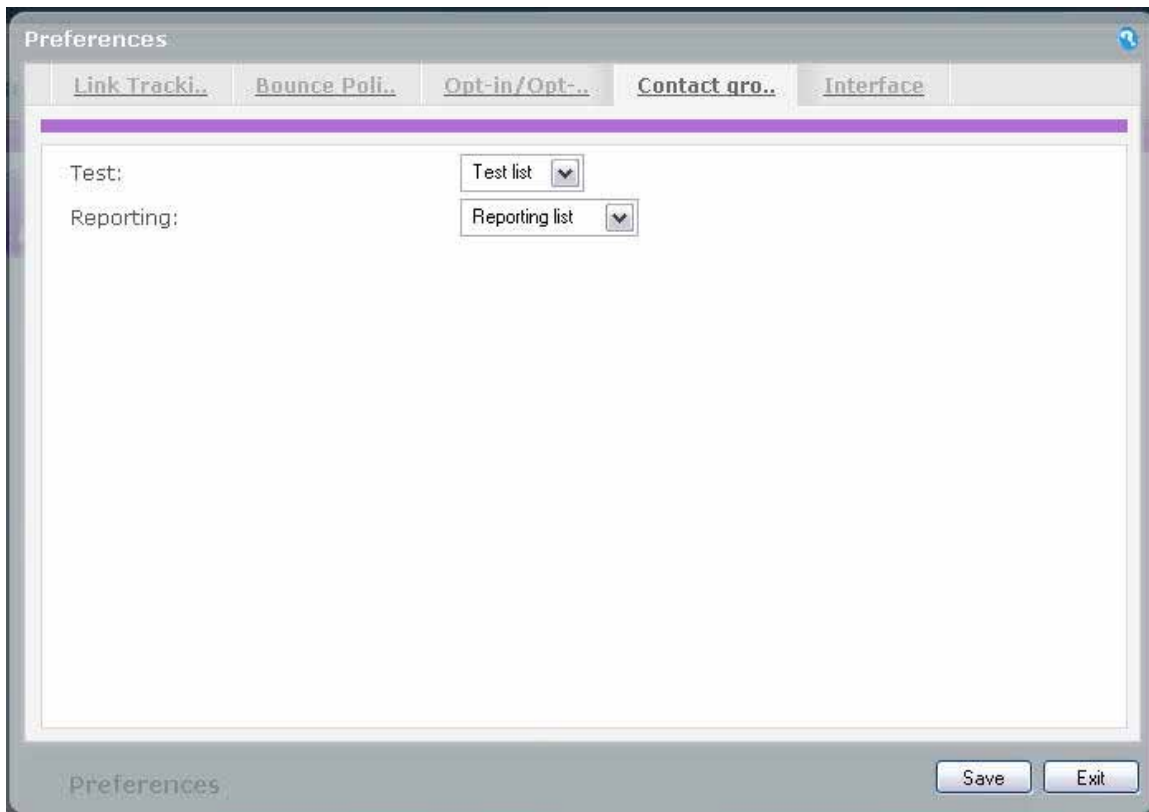


Figure: Default contact group settings. The default list used for testing is the Test List, the default list used for reporting is the Reporting List.

1. In the **Test** setting, you define which list will be used by default for sending test mails. You can select all test lists defined on your account. ([How to create extra test lists?](#))
2. In the **Report** setting, you define which list will be used by default for sending reporting mails. You can select all reporting lists defined on your account. ([How to create extra reporting lists?](#))

7.1.3.5 Interface

If you want to set preferences for the quick edit functionality in the contacts section: click the **Interface** tab. You will be able to define the behaviour of the [quick edit functionality](#).

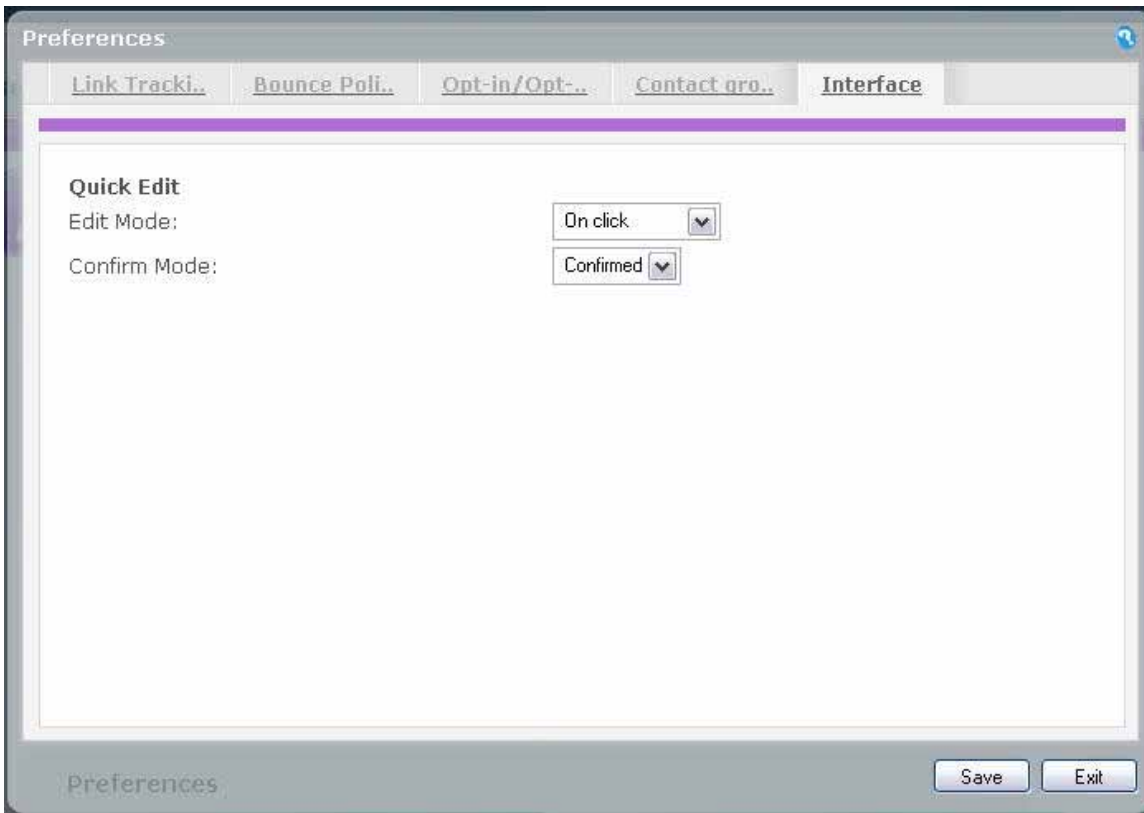
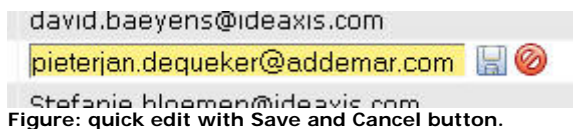


Figure: Default quick edit settings. The quick edit functionality appears when you single click, and you have to confirm the modifications.

1. In the **Edit Mode** setting, you define on which command the quick edit functionality should appear: single click or double click.
2. In the **Confirm Mode** setting, you define on which command the quick edit modifications should be confirmed: by clicking the Save button, or by leaving the field. If you choose **Confirmed**, a Save and Cancel button will appear next to the quick edit functionality. If you choose On Leave, these buttons will not be there, and modifications are saved when you leave the edit field.





7.2 Recycle bin

In the My Account section, you can access the Recycle Bin. You can retrieve all deleted items in the Recycle bin. If you deleted an item unintentionally, or you need a deleted item again later, you can restore it from the recycle bin.

Open the **Recycle bin** folder. Here you see all the deleted items of your account in Insumail.

On each item you can perform the following actions:

	Restore	Click this icon to restore the deleted item. Restored items are set back in the folder where they were deleted before. If you want to restore all deleted items, click the Restore all button.
	Delete	Click this icon to delete the contact permanently. A confirmation will be asked. Attention! If you delete an item in the recycle bin, you can NOT retrieve it anymore. If you want to empty the recycle bin, click the Delete all button.

If you want to restore all deleted items, click the **Restore all** button.



7.3 Users

7.3.1 Managing users

In the My Account section, you can manage the users of your account. By default, only one user is defined per account. This is the owner of the account. New users can be created.



Each user has his own user name and password to log in. For each user, access rights can be defined, and a history is kept.

Open the **users** folder. Here you see all the users of your account in Insumail.

Here you can:

- [create a new user](#)
- [change a user's password](#)
- [change a user's access rights](#)
- [view a user's history](#)
- create an FTP user to upload files to your library connecting to the FTP server


On each existing user you can perform the following actions:

	Edit	Click this icon to edit the user profile .
	Delete	Click this icon to delete the user. A confirmation will be asked.


7.3.2 Creating a new user

When an account is created, the main user - the owner -, is created in the same time. On each account, however, other users can be created. You can give other users the same access rights as you have, or you can reduce their [access rights](#), and create, e.g. a reporting user.

To create a new user:

1. Go to the My Account section and open the **Users** folder.
2. Click the **+ New user** button. The **New user** dialog opens up.
3. Fill in:
 - the first name and last name of the person that will be this user
 - the e-mail address of this person
 - Language: interface language for this user.
 - Country: country from where the user is operating. This is used to control the regional settings.
 - Timezone: timezone in which the user is operating. This is used to control sending time.
 - the user login: This is the name used to log in. Choose a short name without spaces. A user login should be at least three characters.
 - the password of this user. Fill in a password and repeat this password in the second text area. A password should be at least three characters, combining numbers and letters.
 - the validity of the user login. Click the  button and select a date and hour on the calendar pop-up. When a user's validity term is over, he will not be able to log on anymore.
 - if this user is a validator, check the checkbox. Read more about validation on account level.
4. Click **Add** to create the new user.
5. The access rights tab opens up. [Define the user's access rights](#).
6. Click **Save**. The new user will be added to the **Users** overview.

7.3.3 Editing a user profile


1. Go to the My account section and open the **Users** folder.
2. Click the  icon next to the user whose profile you want to change.
3. On the different tabs, you can:
 - [edit the user profile](#)
 - [change the password](#)



- [change the access rights](#)
- [view the history](#)

To edit a user's profile:

On the **Profile** tab, you can change:

- the first name and last name of the person
- user login: This is the name used to log in. Choose a short name without spaces.
- the e-mail address of this person.
- language: interface language for this user.
- country: country from where the user is operating. This is used to control the regional settings.
- timezone: timezone in which the user is operating. This is used to control sending time.
- disabled: check this checkbox to disable the user temporarily. The user login will be blocked. To enable again, just uncheck the checkbox.
- the validity of the user login. Click the  button and select a date and hour on the calendar pop-up. When a user's validity term is over, he will not be able to log on anymore.

To change a user's password:

Click the **Password** tab. Fill in a new password and repeat this new password in the second text area. Click **Save**. The old password is removed from the system, and the new password can be used from this moment.

Note: To change your own password, you have to fill in first your current password.

To modify a user's access rights:

Click the **Access rights** tab. You see all environments and sections of the application. You can define for each environment whether the user has access to it, and do the same for each section and its folders. Choose **Normal** to give access, **None** to deny access.

E.g. When you want to create a **reporting user**, select the **Home** environment. Leave the global setting on Normal, but select None for all sections except for the Evaluate section. Within the Evaluate section, you can still decide whether you give access to campaigns and contacts, or only to campaigns. Select the Agency environment and set global setting to None. The reporting user will not have access to the Agency environment.

To view a user's history:

Click the **History** tab. You can see when this user logged on and off, via which page, and on which internet connection he operates.




7.4 Notes

Notes is a fast and simple way to communicate with the Insumail team. You will receive notes from the Insumail team, and you can send support questions to the Insumail team.

You will find all new notes when clicking the  link in the upper right corner of the screen.

You can also open the Notes folder in the MyAccount section.

- in your inbox you will find all notes sent to you.
- in your outbox you will find all notes you have sent.

To read a note, click the  icon.

Do you want to know how to [send a support note to Insumail?](#)

7.4.1 Ask for support

If you need support from the Insumail Team, you can send a note to the Insumail Support team.

Note: if you are a customer of an Insumail Agency, your support questions will go to your agency, not directly to the Insumail team. If you are working in a Retail Solution, your note will go to the administrator of your company.

To send a support note:

1. On the Insumail home page, you find a link to send support notes quick and easily. Click the button or the icon to send a support note.

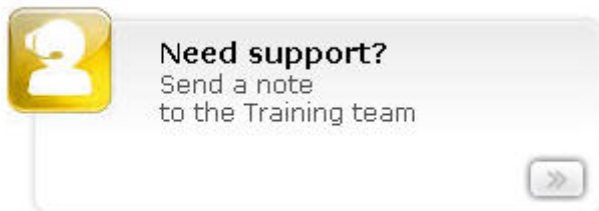



Figure: Support link on home page.

- Tip :** you can also go to the **Notes** section in **My Account** and click the  button.
2. In the pop-up that appears:
 - Insert a subject.
 - Type your note text. Remember to be very clear about your problem; i.e. cite the exact name of the e-mail and campaign, hour and date, ...
 3. Click the **Send** button to send the note to support.

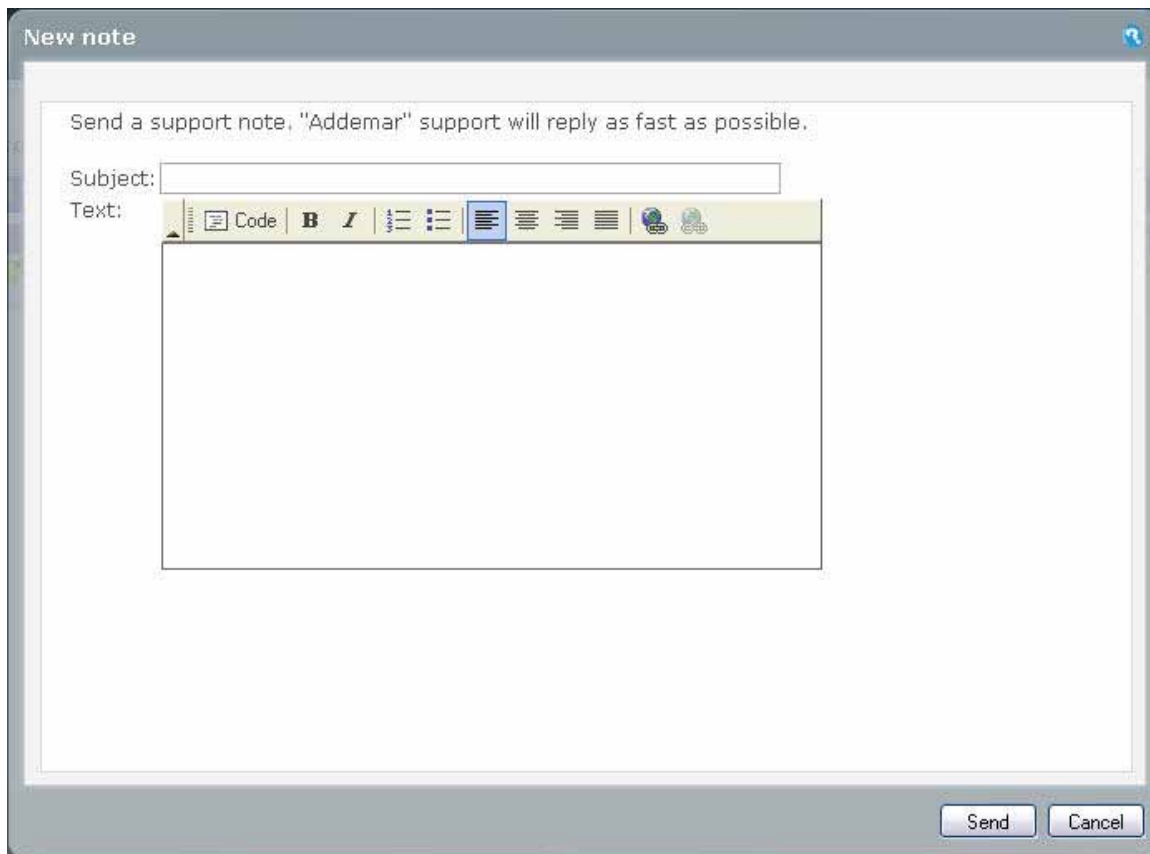


Figure: New note dialog box, to send a support note to the Insumail training team.

You will find this note in your Outbox in the **Notes** section.

A reply from support will come as a new note. When you log on to Insumail, a pop-up will tell you new notes arrived. Just click the link in the pop-up to read the notes, or click Exit to read the note later.

You can find new notes in your inbox also by clicking the  link in the top right corner of your screen.



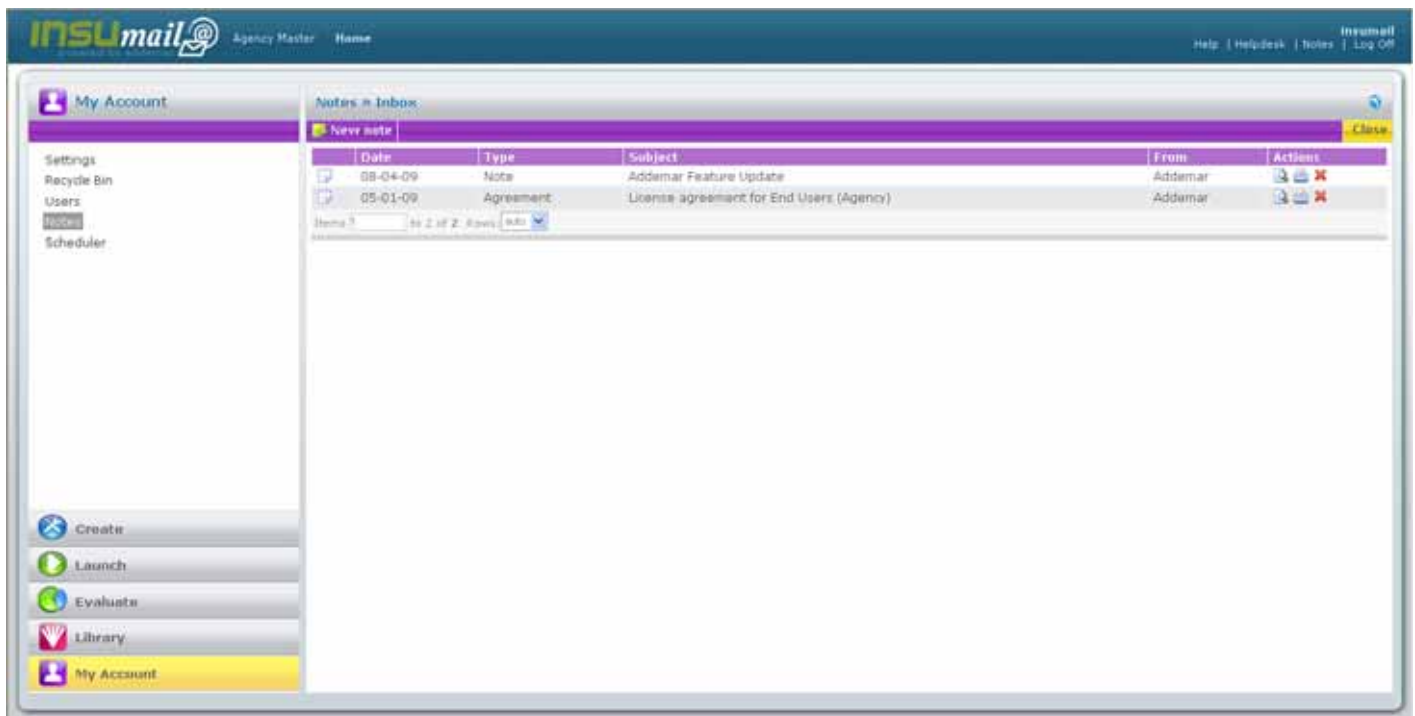





Figure: Notes inbox with read and unread notes.

You can now:

- Click the  icon to read the note.
- Click the  icon to print the note.
- Click the  icon to delete the note.