SIEBEL EMAIL MARKETING STAND-ALONE

USER GUIDE

VERSION 7.5.3, REVISION A
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Introduction

This guide provides information about maintaining Siebel Email Marketing Stand-Alone. For information about system requirements, see *System Requirements and Supported Platforms* on SupportWeb.

NOTE: This document may contain references to BoldFish. Products formerly labeled as BoldFish are now known as Siebel Email Marketing Stand-Alone.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

Siebel Application Administrators	Administrators who plan, set up, and maintain Siebel applications.
Siebel Application Developers	Developers who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Administrators responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

With the exception of the Quick Start chapter, the layout of this manual is similar to the workflow of Siebel Email Marketing Stand-Alone as it likely would be used for the first time.

In other words, before first-time users can send a mailing, they will have to:

- Set up a database.
- Create a list or query and configure it for bounce handling.
- Create the email message content template, inserting template variables and commands where desired.

After the preceding items have been completed, users can concentrate on “Sending a Mailing” on page 121 and subsequent chapters, and see previous chapters as necessary.

Additionally, there are a few appendixes that provide supplementary material that users may find helpful.

The layout of this manual is as follows:

- “Siebel Email Marketing Stand-Alone Quick Start” on page 25. This section provides an easily-located reference for those users who just need help with the posting process.

  NOTE: The Quick Start chapter is for those users who have previously set up lists, queries, and templates, are not sending internationalized content, and simply need a quick reference regarding the posting process.

- “Setting Up a Database” on page 37. This section provides information about connecting an external database to the system.
- “Setting up a List” on page 43. This section provides information about creating a new list.
- “Setting up a Query” on page 69. This section provides information about defining a query and using the query wizard.

- "Content Generation" on page 85. This section provides information about creating and personalizing the message content template.
- "Populating Template Variables" on page 105. This section provides information about incorporating template variables in a mailing.
- "URL Tracking" on page 113. This section provides information about inserting tracked URLs into a message.
- "Sending a Mailing" on page 121. This section provides information about sending mailings using the five-step posting process.
- "Mailing Control" on page 143. This section provides information about controlling the delivery of a mailing.
- "Reporting" on page 145. This section provides information about monitoring the delivery status of a mailing, as well as the statistical analysis of a mailing, campaign, or subscriber.
- "An Overview of Message Types" on page 161. This section provides a general primer on the different types of messages.
- "The Basics of Email Campaign Development" on page 167. This section lists the many factors you should keep in mind when planning an email campaign.
- "How to Build Effective Email Messages" on page 177. This section provides some basic guidelines to help build effective email messages and make email campaigns a success.
- "How to be Opt-In Compliant" on page 183. This section provides several guidelines to follow in order to keep your opt-in list happy and make sure that recipients never think of your email as spam.
- "Background Information" on page 189. This section details Siebel Email Marketing Stand-Alone-related Internet technologies.

Siebel Email Marketing Stand-Alone fully supports double-byte character sets in GUI-initiated mailings. It is possible, for example, to send a mailing containing Japanese or French content through the user interface.

Previous versions of Siebel Email Marketing Stand-Alone could correctly deliver mailings with double-byte content only if the mailing was created programmatically through the Siebel API. For more information, see "Sending Mailings with Internationalized Content" on page 132.

Additional Documentation

This guide does not contain information about upgrading Siebel Email Marketing Stand-Alone. That information is in *Siebel Email Marketing Stand-Alone Installation Guide* on SupportWeb.

Revision History

Siebel Email Marketing Stand-Alone User Guide

Version 7.5.3, Rev. A

Table 1. Changes Made in Version 7.5.3, Rev. A

Topic	Revision
"Introduction" on page 11	Added new Introduction chapter (this chapter) and moved "About this Guide" information to this chapter.
"About Email Delivery" on page 17	Changed title of Preface to Process of Email Delivery.
"Siebel Email Marketing Stand-Alone Architecture Overview" on page 18	Replaced figures and added new Architecture section.
"Multitenancy" on page 21	Added this section.
"Connecting to the Siebel Email Marketing Network" on page 22	Updated procedure.
"The People Screen" on page 53	Added privileged author and moderator definitions paragraph.
"Forward to a Friend" on page 99	Added FTF Hyperlink section for HTML.
"Sending the Mailing" on page 131	Changed steps of the procedure.
"Mailing Delivery Status" on page 146	Deleted bulleted list content.

Additional Changes

- Changed the template and format for the entire book.
- Deleted references to POP3 and Pipemail as they are no longer supported.

About Email Delivery 1

Understanding Email Delivery

To understand Siebel Email Marketing Stand-Alone (EMSA), you must first understand the process of email delivery.

Email Delivery—One to One

When an email message is sent by person *A* to person *B*, a process takes place to attempt the delivery of the email. The first step in this process occurs when the user clicks the Send button on their email client. The email client tries to initiate a connection to an email server. This email server is often called a *Mail Transfer Agent* (MTA) because of its function, or a *SMTP Server*, because of the protocol that it uses. When the client has a connection to an MTA, the MTA and the client communicate through the SMTP (*Simple Mail Transfer Protocol*). The message is then transferred to the MTA. If the recipient of the email (person *B*) has their mail box on this server, then the server drops the email in the box and the job is done. If person *B* is on another domain, the MTA executes a *DNS* (Domain Name Service) lookup to find the address of another MTA to communicate with. Another SMTP conversation occurs, and the second MTA receives the message and delivers it to person *B*'s mail box. When it is in person *B*'s mailbox, they will be able to retrieve it using another protocol, such as *POP* (Post Office Protocol), and read the message in their email client.

Of course, a number of things can go wrong with this process. For example, the domain of the recipient can be unreachable, or not exist at all. In this case, an error message, or *bounce*, is created by the MTA that discovered the problem, and the bounce is returned to the sender of the message. Another problem might be that the domain has been found, but the user does not exist on that domain. Again, a bounce is created and sent back to the sender of the original message. Both of these examples are called *hard* bounces. This means that not only was the email unable to be delivered, but that it will *never* be able to be delivered, due to an invalid email address.

Another type of error can occur if the domain and user both exist, but the user's mailbox is full. Or, the recipient may be out of the office for a period of time (that is, on vacation) and has temporarily configured their email program not to accept incoming email. In both of these cases, a bounce is returned as well. However, these bounces are classified as *soft* bounces, because although the email could not be delivered at present, it may be possible to deliver the message in the future.

Email Delivery—One to Many

Now that we have an understanding of the process of email delivery for a single message, let us see what happens if we scale this process up to thousands or even millions of messages, such as commonly occurs in email marketing campaigns. The problem with the SMTP protocol is that it is just what it was designed to be: *simple*. It can only handle one message at a time, and the time it takes to deliver each message is dependent on the network latency between the various MTAs involved, and the efficiency of the MTAs themselves. To send out a million messages over a single MTA will likely take hours—or more likely days—depending on message size and the speed of the MTA hardware.

About Siebel Email Marketing Stand-Alone

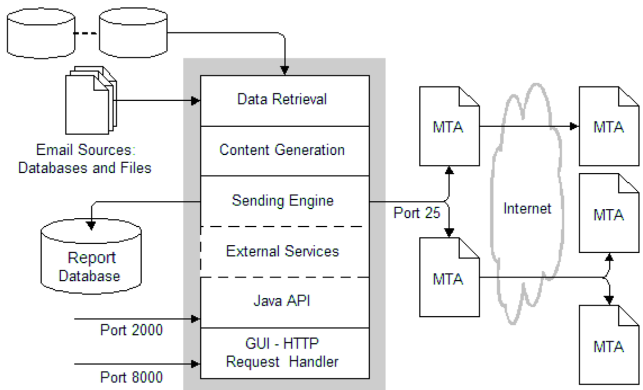
Siebel Email Marketing Stand-Alone (EMSA) allows you to quickly send high volumes of personalized email messages while automatically handling bounced messages, and allows you to track a variety of campaign results.

Siebel Email Marketing Stand-Alone Architecture Overview

The component architectures describe how the parts of Siebel EMSA interact from both an inbound and outbound perspective.

Siebel Email Marketing Stand-Alone architecture is separated into outbound and inbound. (See Figure 1 and Figure 2).

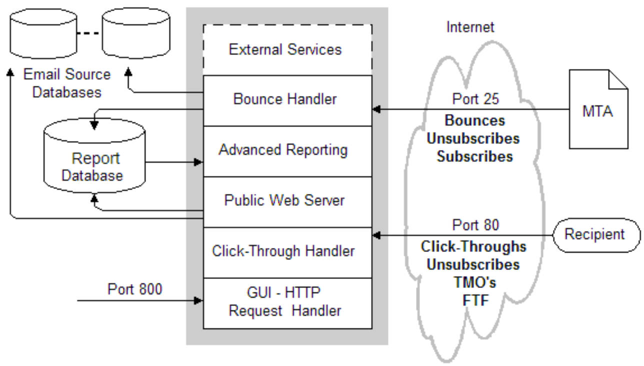
Figure 1. Siebel Email Marketing Stand-Alone Outbound Overview



The component outbound architecture is described as follows:

- Email Source databases must have a JDBC driver.
- File uploads of email addresses and personalization data are also supported.
- External Services are Java programs that can be written and are triggered by the Siebel EMSA for events such as
- Server start up and server shut down
- Unsubscriptions
- Bounces (Hard and Soft)
- Java API (aka NetAPI) permits programmatic access to the Siebel EMSA through port 2000, by default.
- Siebel EMSA listens on port 8000 by default for browser requests.
- Siebel EMSA round-robins among all defined MTAs for load balancing.

Figure 2. Siebel Email Marketing Stand-Along Inbound Overview



The component inbound architecture is described as follows:

- Email Source databases must have JDBC driver. If the email source database does not support stored procedures, a PS engagement is required to implement the functionality. The infrastructure is in place, however.
- Advanced Reporting Module (ARM).
- External Services are generic Java programs that can be written and they may exist for events such as the following:
  - Server start up
  - Server shut down
  - Unsubscriptions
  - Bounces
  - Track Message Opens (TMO)
- Click-throughs, unsubscribes, and TMOs are recorded in the Report Database. Unsubscribes are also processed back into the email source database through a stored procedure.
- Bounces are processed into both the email source database via stored procedures and are recorded back into the Report Database.
- Email based unsubscribes are also supporte.d

- Ports 25, 80, and 8000 must be open on the Siebel EMSA

Multitenancy

The *multitenancy* functionality allows multiple enterprises access to the same server. This means that users from different enterprises can create lists, send mailings, and conduct statistical analysis from the same server without conflict.

There is no additional set up or configuration required to enable the multitenancy feature. It is automatically enabled, and always on.

However, it is important to understand that by allowing multiple enterprises access to the same server, individual users of Siebel Email Marketing Stand-Alone could possibly experience a loss of privacy in relation to the Default List and uploaded files of recipients.

For example, the Default List contains the default settings inherited by all new lists. The Default List is user-configurable so that you can set limits, content policies, and other options for new lists. However, the Default List is accessible to any authorized user, and as such could possibly be reconfigured without your knowledge. Therefore, it is in your best interest not to rely on the values contained in the Default List, as those values could possibly change over time without your knowledge.

If you upload an external file of recipients to send a mailing and assign *Default Flights List* as the configuration value, the list of recipients could be viewed by those without permission or authorization. Therefore, it is in your best interest not to leave a list of recipients in the *Default Flights List* over time.

These areas of caution are covered in more detail in the respective sections of this manual.

Siebel Email Marketing Network

When sending an email campaign, the user has the choice of sending email through their local network or through the Siebel Email Marketing Network.

Siebel Email Marketing Network is a dedicated, spam-free, high-speed email channel through which you can send large quantities of personalized messages much faster than conventional email systems. Siebel Email Marketing Stand-Alone (EMSA) eliminates the need for extensive internal IT support, equipment, and infrastructure while alleviating the bandwidth burden typically caused by high-volume email. Or, if you have used outside vendors to send large email campaigns for you, you will no longer have to give control of your database or customer lists to others. Siebel EMSA provides you with an extremely fast, inexpensive, secure platform for delivering your email.

Connecting to the Siebel Email Marketing Network

In order to connect to the Siebel Email Marketing Network, you must first contact Siebel Customer Support to obtain the following items:

- A Client ID. This is a Siebel-generated string.
- A Client Certificate**.** This is a Siebel-generated file.

After you have obtained the preceding items, do the following:

To connect to the Siebel Email Marketing Network

1. Stop Siebel Email Marketing Stand-Alone.
2. Paste the Client Certificate file into the appropriate location:
   - (Windows) `C:\Program Files\bes\does`
   - (Solaris): `{Siebel Email Marketing Installation Directory}/does`
3. Start Siebel Email Marketing Stand-Alone.
4. Click Advanced Menu > Site Manager > Server.
5. Scroll down to the Outbound SMTP Configuration section and enter the Client ID for Siebel Email Marketing Stand-Alone in the field.
6. Click Submit.

Log Files

If you encounter any problems while using Siebel Email Marketing Stand-Alone (EMSA), you can review the contents of the following files:

- The `BoldFish.log` file includes information about current general activity with Siebel EMSA.
- The `exception.log` file includes information about Java exceptions thrown by Siebel EMSA. These can be caused by a variety of problems, such as database errors, user interface problems, and an inability to connect to SMTP Servers.
- The `console.log` file includes information that is useful for troubleshooting problems that Siebel EMSA is having with the Siebel Email Marketing Network. The log also includes information about starting up Siebel EMSA.
- The `unparsablebounce.log` and `SMTP.log` files may prove useful in determining problems with bounce handling and connections to SMTP Servers. The `SMTP.log` file is only activated if logging is set to `DEBUG#3Level` in the `log4j-congfig.properties` file located in the `<Siebel EMSA Home>\j2ee\.....`
- The `in.mbox` file includes all email received by Siebel EMSA. `web.mbox` contains messages posted through Siebel EMSA's Web interface.

Siebel Email Marketing Stand-Alone API

Although this manual is written with the assumption that the user will access Siebel Email Marketing Stand-Alone (EMSA) functionality through the user interface, it is possible to control Siebel EMSA functionality *programmatically*. For example, you might want to incorporate Siebel EMSA functionality into your existing user interface, or you might want to have Siebel EMSA complete certain functions automatically at a predetermined time. These items could be accomplished by means of Siebel EMSA network API protocol.

Siebel EMSA network API protocol is covered in detail in *Siebel Email Marketing Stand-Alone API Guide*.

Technical Support

- For problems or questions regarding Siebel Email Marketing Stand-Alone, contact Technical Support on SupportWeb.

Siebel Email Marketing Stand-Alone Quick Start 2

The majority of the time spent using Siebel Email Marketing Stand-Alone (EMSA) will be spent sending mailings. This chapter is an easily-located reference for those users who just need help with the posting process.

For more in-depth coverage of the posting process, see "Sending a Mailing" on page 121.

This chapter covers the following topics on the Siebel EMSA posting process:

Step 1—Select Recipients

The first step in the post process is to select recipients.

To select recipients

1 Click Post.

The Recipient Source screen appears.

2 Specify who will receive your mailing:

- If you select a list from the Internal lists field, your mailing will be sent to a predetermined list of people.
- For more information about internal lists, see "Setting up a List" on page 43.

- If you select a list from the Predefined queries field, your mailing will be sent to each recipient in your database who meets the criteria specified within the query.
- For more information about predefined queries, see "Setting up a Query" on page 69.
- If you want to send your mailing to an external file of recipients, see "Sending to an External File of Recipients" on page 122.

  The view of the Recipient Source screen depends on whether or not the user has previously defined at least one query. If the user has previously defined a query, then the Recipient Source screen appears as shown in the preceding image. However, if the user is exclusively relying on internal lists, then only that section of the Recipient Source screen will be visible.

  In the Recipient Source screen is a highlighted message indicating whether or not the list you are sending to adheres to the agreed-upon size specified to in the license agreement.

3. Click Next.

   The Provide Content screen appears.

Step 2—Provide Content

After you have specified who will receive your mailing, you can specify the content of the mailing. The Provide Content screen will allow you to specify the following types of email as the body of your mailing:

- A *Text* message. *Text* messages refer to messages that contain ASCII characters. Plain text messages do not contain formatting codes (such as **bold** or *italics*), and the font is usually plain with a fixed width. (The width of the font might vary from email client to email client.)
- An *HTML* message. *HTML* (Hypertext Markup Language) is the authoring language used on the Internet. You can also use HTML to write email that contains the same formatting as Web pages. This will enable you to create graphically media rich email to send to your subscribers.

- An *AOL* message. *AOL* messages are similar to HTML messages except that the enhancements are designed to be read through an AOL browser.
- A *Wireless* message. *Wireless* messages are ultra-short text messages intended for cell phones, *personal digital assistants* (PDAs), and other small wireless devices.

  Keep in mind that there is no provision for specifying a *Text & HTML* message, which is built automatically as long as you have specified the component *Text* and *HTML* messages.

  If you have uploaded a file of recipients who have specified *Text & HTML* as their preferred mail mode, make sure you provide *Text* and *HTML* versions of your content. Otherwise, those recipients will not receive the mailing.

To provide content for your mailing

1. Complete the Provide Content screen as desired:

   For each mail method that you are sending, specify the location of your mailing's body in the appropriate text field, or click the Browse button and navigate to the file as usual.

   The preferred mail mode for a given list is specified in the List Owner, Subscriptions screen. (For internal lists only: You can add subscribers and specify a preferred mail mode to an existing list from the Subscription Manager screen.)

2. If you are sending a Web page as the body of your mailing, click the URL button and enter the URL you want to send.

   NOTE: The URL buttons can be used when providing content as long as the specified URL points to content of the proper format. For example, if you click on the (Text) URL button, the URL must point to a text message.

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3. If you want to include attachments with your mailing, see "Including Attachments" on page 127.

Content Type Character Set

If your template is in a language other than your operating system's native language character set (which is usually English), you must specify the proper character set.

To specify the character set

1. Specify the character set of the template in the Content-Type-CharSet field.
2. Click Next.

Unspecified Format

The Unspecified Format dialog box may appear on the Provide Content screen.

The Unspecified Format dialog box allows you to specify a mail mode format for those recipients who have specified a mail mode not provided for by the settings on the Provide Content screen.

To select an unspecified format

- Select an alternative mail mode for each type displayed, then click OK.

  The Define Appearance screen appears.

Step 3—Define Appearance

After you have selected who will receive the mailing, you will have to specify the introductory content of your email campaign.

1. To define the appearance of your mailing
2. Complete or modify the Define Appearance screen as desired:

- **To.** This field is automatically filled in; however, you can have each recipient's email address used in place of the default text by checking Recipient's Address.

  If you check Recipient's Address, Siebel Email Marketing Stand-Alone will send out email one at a time, whereas if you do not check Recipient's Address, Siebel Email Marketing Stand-Alone will send out email in blocks of 100.

  If you check Recipient's Address, the value in the To field will be replaced with *Recipient's email address will be used*.

- **From.** This field is automatically filled in with the email address of the person who logged in to the system. However, you can modify this field.

- **Subject.** Enter a title for the email campaign.

  NOTE: This is a required field.

- **Bounces Sent To.** This field is automatically filled in.

  The email address specified in the Bounces Sent To field is where bounces go.

- **Reply-To.** Enter the email address of the person you want replies to go to.

- **Campaign ID.** Enter a unique identifier for the mailing.

  You can select a campaign ID from the list of previous campaign IDs. However, the ability to do so is dependent on the level of reporting functionality built into Siebel Email Marketing Stand-Alone at the time of installation.

  NOTE: This is a required field.

  Make sure to use only alphanumerics in the Campaign ID field. All nonalphanumeric characters will be replaced with an underscore (_).

3 Click Next.

The Preview Mailing screen appears.

Step 4—Preview Mailing

Now that you have specified who will receive your mailing, how it will be titled, and have uploaded the body of your mailing (including any attachments), you can preview your mailing to see exactly how it appears to your recipients.

To preview a mailing

1 Select how you want to receive the preview mailing by checking the appropriate email method (Text, HTML, AOL, and so on) in the Select Content to View field.

   You can choose to receive a preview for each email method that you are sending. For example, if you are sending *text*, *HTML*, and *AOL* versions of the same mailing and wish to preview all three, simply check the appropriate email methods under the Select Content to View field. However, in doing so, you will receive three separate preview mailings.

2 Enter the email address of the preview recipient(s) in the Email Address(es) field.

   By default, the Preview Mailing screen will list the email address you specified when you logged in.

3 Select whether you want the preview mailing to be sent locally or over the Siebel Email Marketing Network.

   The Local Network selection will not be available if you have a license that specifies that mailings be sent through the Siebel Email Marketing Stand-Alone Network.

4 Click Preview.

The preview will be emailed to you shortly, and the Send Mailing screen appears.

You can also choose to not receive a preview either by unchecking all boxes under the Select Content to View field or deleting all email addresses in the Email Address(es) field.

Step 5—Send the Mailing

By now you have received your preview mailing. If you are satisfied, you can now send the mailing to your recipients.

Your mailing will be sent in the same manner that you specified for your preview mailing. For example, if you specified that your preview mailing be sent to the Siebel Email Marketing Network, the actual mailing will be sent to the Siebel Email Marketing Network as well.

To send a mailing

1 Specify when you want to send your mailing. You have two options: immediately (Now) or in the future (Later).

It is important to remember that if you specify that your mailing be sent at a later date (anything other than *now*), the mailing will be sent at the specified date as determined by the server on which Siebel Email Marketing Stand-Alone is installed. Make sure you take into account such variances as different time zones, inaccurate clock settings in the server, and so on.

For more information on scheduled mailings, see Scheduled Recurring Mailings (page 118).

2 Click Send Mailing.

The Your mailing has been sent dialog box appears.

From here you can view delivery status, explore control options for your mailing, or view a detailed mailing report.

See Also

For more information about delivery statistics, see "Mailing Delivery Status" on page 146.

For more information about mailing control, see "Mailing Control" on page 143.

For more information about mailing reports, see "The Mailing Report" on page 148.

Logging In 3

The chapter covers the following topics:

The Login Screen

To log in to Siebel Email Marketing Stand-Alone (EMSA), you must navigate to the URL where Siebel EMSA is running.

The administrative server port (the port from which you can access the user interface) is usually `8000`.

- Modify your URL so that you are logging in to the machine where Siebel EMSA is installed, and appended by the administrative server port number.
- The URL should look like this:

  `http://myserver.`*`yourcompany`*`.com:8000/`

  In this case, the machine name where Siebel EMSA is installed is `myserver.`*`yourcompany.com`* and the administrative server port is `8000`.

About Default Email Addresses and Passwords

On either Windows or UNIX systems, the *default* email address/password is *root/ admin*.

After you have entered your email address and password, you can choose to:

- Save your email address
- Save your email address and password
- Not to save either

By default, your email address and password will be saved in a *cookie* for future reference.

It is recommended that the Site Manager create a new Site Manager account and then remove the default Site Manager account. The default password for the Site Manager is trivial.

A *cookie* is a small piece of information sent by a Web server to store on a Web browser so it can later be read back from that browser.

To log in to Siebel Email Marketing Stand-Alone

1. From the Login screen, enter your email address and password.
2. Click Login.

   If this is the first time logging in, the Update User Option screen appears.

The Password Finder

If you have forgotten your password, complete the following steps to request it.

To request your password

1. From the Login screen, click the Password Finder hyperlink.

   The Password Finder screen appears.

2. Enter your email address and click Email Me My Password.

   Your password will be emailed to you shortly.

Update User

If this is the first time you have logged in or if you have not changed your password, you will be sent to the Update User Options screen.

To update a user

1. Complete the form as desired and click Update Information.
2. To update user information, you must provide a first and last name.

Setting Up a Database 4

The Database Setup screen allows you to add and remove databases. In addition, you can edit the database properties, as well as configure the database.

Due to the technical nature of database connections, the database administrator (DBA) should control the functionality described in this chapter.

If you are unable to access this functionality, it is probably because your external source database has not been configured. Contact Technical Support for more information.

This chapter covers the following topics:

The Database Setup Screen

The following sections describe the database functionality.

From the Database Setup screen, you can:

- Add or remove a database.
- Edit the properties of a database.
- Configure a database to identify a subscriber's email format.
- Configure a database for the personalization of email postings.

To access the Database Setup screen

- Click DB Connections to navigate to the Database Setup screen.

Add a Database

You can add a database at the Database Setup screen.

To add a database

1. Click Create New DB.

   The Database Setup screen displays a new section that allows you to identify the attributes of the new database.

2. Identify a JDBC driver from the JDBC Template field.

   The URL and Driver fields will be populated with values provided by the JDBC driver.

   - The *URL* is required to execute the queries that define how to obtain a list of email addresses for use in a mailing.
   - The *Driver* is the address of the JDBC driver to be used for accessing a target database where Siebel Email Marketing Stand-Alone-defined tables exist.

3. Name the database in the DB Connection Name field.

4 Modify the `<hostname>` and `<port>` connection settings in the URL field so that they are appropriate for the new database and any <> delimited strings.

CAUTION: Do not modify the JDBC driver-supplied values in the Driver field unless you are absolutely sure that it is necessary to do so.

5 Provide a *user name* and *password* for the new database in the respective User Name and Password fields.

- The *user name* is the user in a target database that has privileges to read and write to the tables. Often, this is the user that was used to create the tables.
- The *password* is the password for the user that connects to the target database to maintain Siebel Email Marketing Stand-Alone-defined tables.

6 Specify a mail mode.

For more information about mail modes, see "Mail Modes" on page 39.

7 Click Test DB Connection.

Siebel Email Marketing Stand-Alone will test the new connection, and will display the result (either a message that the connection is valid by displaying the version of the database, or an *error* message) at the top of the Database Setup screen.

8 Click Update.

The attributes section of the Database Setup screen will disappear, and an icon representing the newly-created database connection is displayed at the top of the Database Setup screen.

Mail Modes

Specify the method in which your recipients will receive email.

To set up your database if it is set up so that mail mode values are associated with users

1 Click Enable Mail Mode.

NOTE: If you do not know whether or not your database is set up so that mail mode values are associated with users, ask your DBA.

The Mail Modes dialog box appears.

2 From here you can choose the mail modes that are associated with your users, and provide the appropriate identifying value in the respective field.

Make sure that the value you assign to a given mail mode is the same value as defined in the target database.

3 Click OK when finished.

If you specify the method in which your recipients will receive email by means of this method, you will have to use the mail mode variable &mode when defining a query. For more information regarding defining a query, see "Setting up a Query" on page 69.

To set up your database if it is not set up with user-associated mail mode values

1 Click Specify Default.

The Mail Modes dialog box appears.

2 From here you can choose a default mail mode for everyone.

3 Click OK when finished.

Edit Database Properties

You can edit database properties at the Database Setup screen.

To edit database properties

1 From the Database Setup screen, click the icon of the database you want to edit.

2 The attributes section for the database you want to edit appears.

3 From here you can modify the attributes, settings, and values of the selected database.

4 When finished, click Update.

The attributes section of the Database Setup screen disappears.

Remove a Database

You can remove a database at the Database Setup screen.

To remove a database

1 From the Database Setup screen, click the icon of the database you want to remove.

2 Click Delete.

The selected database is deleted.

Setting up a List 5

Most of the mailings you send will be to a list of recipients that you have specifically designated, or to a list of recipients that resulted from a predefined query.

This chapter describes the steps necessary to create and configure a list. For more in-depth information about most of the topics in this chapter, see *Siebel Email Marketing Stand-Alone Administration Guide*.

If you are unable to access this functionality, it is probably because your external database has not been configured.

This chapter covers the following topics:

- "Internal Versus External Lists" on page 44
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Internal Versus External Lists

For the purposes of this discussion, there are two types of lists: *internal* and *external*.

For more information about internal and external lists, see *Siebel Email Marketing Stand-Alone Administration Guide*.

Creating a List

You can create an internal or external list. The differences in creating an internal versus an external list are noted where appropriate.

All newly-created lists inherit default values from a special list, called the Default List. Although you are free to configure a list as you see fit during creation, it is important to realize that, due to the possibility of *multitenancy* (more than one enterprise using the same Siebel Email Marketing Stand-Alone), the Default List might be reconfigured without your knowledge. Therefore, it is in your best interest not to rely on the values contained in the Default List, as those values could possibly change without your knowledge.

For more information about the Default List, see *Siebel Email Marketing Stand-Alone Administration Guide*.

To create a list

1. From the Site Manager screen, click the List Creation hyperlink.

   The Minimum List Creation Information screen appears.

2. Complete the Minimum List Creation Information form as desired:

   - **List Name.** Specify a distinctive/readily-identifiable name for the list.

     Keep in mind that the owner-specified name for a given list may be viewable to recipients, depending on the mail client or browser.

- **List Email.** Specify an email address for the list.

  Make sure you include the name of the machine that Siebel Email Marketing Stand-Alone is installed on so that bounces and responses are handled properly.

- **List Owner.** Specify the email address of the Owner of the list. The Owner will be able to administer the list and delegate responsibilities for various features of the list.

- **List Template.** Siebel Email Marketing Stand-Alone will use the specified list as a template in creating new lists in the system. The template feature can be used as a shortcut in creating large amounts of lists with the same characteristics. However, several list options are not copied over from the template list to the new list. These include the From: and Reply-To: headers and the default subscriber options.

- **Use Subscribers From.** Siebel Email Marketing Stand-Alone will copy the specified list's subscribers so that they become subscribers of the new list when it is created.

- **Database.** You must associate a list with a database.

  CAUTION: For an *internal* list, select Internal Database. For an *external* list, select a database from the list of available external databases.

  For more information about configuring external databases, see "Setting Up a Database" on page 37.

- If you are connecting to an external database, you can now add queries to retrieve subscribers to the list/database combination. For more information about adding queries to external databases, see "Setting up a Query" on page 69.

3 Click Submit.

The Create List results screen appears. If the list was configured successfully you will get a message at the top of the screen.

4 Click the *configure the list* hyperlink to configure the new list.

Additionally, the new list owner will receive an email message confirming the account update.

Configuring a List

Whether you have created an internal or external list, you can configure it from here. The differences in configuring an internal versus an external list are noted where appropriate.

To configure a list

- After you have created a new list, click the configure the list hyperlink to configure it.

  The Configuring List screen appears. From here you can configure the new list.

The General Configuration Screen

The General Configuration screen allows you to specify many of the most common options that dictate how the list will behave.

Perhaps the most important option is which Web server the list will be associated with.

General Configuration

You can specify a value for the following settings:

- **List Email Address.** This is the email address that the list will be known as. The other aliases for the list will be based on this email address.

  This field cannot be edited, but is displayed for your reference.

  Confirm that the machine name where Siebel Email Marketing Stand-Alone (EMSA) is installed is part of the List Email Address.

- **Requests for This List are.** List Owners or Site Managers can lock a list so that subscribers cannot access the list through email requests. If locked by the Site Managers, the list owners and all other list administrators cannot access their list either. This is usually done during maintenance periods.
- **Mail Processing.** Mail distribution for a list can be suspended by List Owners or Site Managers. In that case, for each message that is not distributed, the author is notified and the list administrators are copied.
- **List Visibility.** A list should be made public only if the intention is to make it publicly available. In that case, its name and address will show up on all listings of the server's public lists, and anyone will know of its existence. If a list is made private, only its members and Site Managers will see it.
- **Confirmation Levels.** The list can be configured so that subscriptions and unsubscriptions over email require a confirmation to be sent to the user, who must reply to the return email for the operation to be completed. Subscription confirmation also implies that user attempts to reset their subscription modes are also subject to confirmation.

  In addition, you can choose to have all postings be authenticated. In that case, each posting has to have a special header line in the body: `Confirm: password`, where `password` is the author's password. The actual email message should follow this line; this special header line will be removed before the email is distributed. The benefits of confirmed posting are numerous: no fake posts, the same message body can be posted again, and so on.
- **Confirmation Cookie Timeout.** List-specific cookie timeout for list-specific user email requests.

  Siebel EMSA occasionally uses cookies to authenticate certain transactions. The authentication cookie is sent through email to the user and stored in the database. When the user responds, the cookie is removed. However, if the user never replies, the cookie will never be removed. To prevent this situation, setting a cookie timeout lets Siebel EMSA clean up the cookies after some time.

- **Processing Priority.** Siebel EMSA contains a scheduler which alters the priority of various tasks running through the system. For most lists, the priority should be left to *0*. However, if you find that a list is taking up too much processing time, you can alter its priority to be relatively lower then other lists. For other time-critical lists, you can set the priority to be higher. Valid values range from *-25* to *25*.

- **Daily Limit for Regular Mail.** How many emails would you like your list to process before mail processing is suspended? Once mail distribution for this list has been suspended, EMSA will not process any more emails for that list until the end of the day, or until manually reset by the list owners. An empty entry disables this feature.

- **Message Recipient Limit.** Enter how many recipients you would like to be included in each email message this list is forwarding.

  The recommended value for Siebel Email Marketing Stand-Alone is *100*.

  CAUTION: You must specify a value larger than *0*.

  The number of recipients actually used will be the minimum between the list-specific value and a global value that can be adjusted only by a Site Manager. If you specify a value of *1*, the system will not only serialize the posting (one email per subscriber), but will also add special headers to make it easier to identify users who want to later unsubscribe from the list by choosing to reply to a post.

  On template variable operations (as in personalized email) the system ignores this setting and sends one email per subscriber.

- **Web Server.** You can associate a list with a Web server. Select a Web server from the list of available Web servers.

- **Database.** This field was specified when you created the list. For example, if you created an internal list, the value of the Database field would be Internal Database. However, if you created an external database, the value of the Database field would be one of the available external databases.

The Archives Screen

The Archives screen lets you configure all aspects of saved archives.

NOTE: The archives are archives of messages sent to the list and are stored on disk and indexed in the database.

If you intend for your archives to be viewed from the Web server, then you must either store Text or HTML archives. We recommend that you store HTML archives, as these will always have the best quality.

If you do not have archives turned *on*, the list will not appear on the main view page, since no archives are viewable. If you have archives and then turn them *off*, then old archives will not be viewable until you turn them back *on*.

You can specify a value for the following settings:

- **Archive Messages.** Use this option to specify if messages are to be archived. You can specify if either Text, HTML or both formats are to be archived. If no formats are archived, then the archives will not be viewable through the Web site.
- **Send Messages to External Service?** Whether or not Text or HTML posts are archived within Siebel Email Marketing Stand-Alone, you can also send each post to the subscriber audience to a Java class for external archiving. The `String` arguments passed to the class's `main()` are the list name, whether this is the Text or HTML version of the post, the headers, and finally, the body. Notice that this class may be called twice (once for text, and again for HTML depending on the configuration). The message(s) sent to the class may have been modified by Siebel Email Marketing Stand-Alone and they have exactly the same content as they appear on Siebel Email Marketing Stand-Alone's archives.
- **Archive Digests.** You can archive digests within; these will not affect the archives viewed through the Web interface, but the digests will be stored in an archive file. Each digest that is sent out will be appended into the digest archive `in.mbox` file.
- **Archive Filename Format.** The archive filename specifies the filename used to write the archives. This indirectly defines how often new files are created. You can use the following `%` characters; these will be replaced in the file being written out.

  - `%c` = current message count
  - `%m` = month number (01 - 12)
  - `%M` = month name (Jan - Dec)
  - `%d` = day of month (01 - 31)
  - `%D` = day of year (Julian date) (001 - 366)
  - `%E` = day of week (Sun - Sat)
  - `%w` = week number in year (1 - 52)
  - `%W` = week number in month (1 - 5)
  - `%y` = 2-digit year (00 - 99)
  - `%Y` = 4-digit year (1900 - on)
- **Archive Timeout Interval.** Archives can expire. After an archive has existed for the specified period of time, it will be removed from the system.
- **Archive File Access.** You can specify who can view archives with this option.

The Posting Screen

The Posting screen allows you to configure many of the rules about posting to a list.

Many of the options on this screen are regular expressions, which will either filter out or modify email. These regular expressions can either be in addition to the globally-defined regular expressions, or can be used as the only regular expressions for their purpose.

You can specify a value for the following settings:

- **Who Gets Posted Messages.** Siebel Email Marketing Stand-Alone can direct incoming email to the *subscribers*, the *Owners* or an *External Service*, depending on this value.

  To set up an external service, specify the name of the Java class to load and send the post for external processing. For more information, see *Siebel Email Marketing Stand-Alone Administration Guide*.

- **Where to Get Recipient Lists.** Siebel Email Marketing Stand-Alone allows you to provide it with the list of recipients for each post, if you do not want to use the internal storage and retrieval mechanisms.

  You can specify the name of a Java class to load and get the list of recipients from. For more information, see *Siebel Email Marketing Stand-Alone Administration Guide.*

  - **Maximum Message Size.** Siebel Email Marketing Stand-Alone can reject any incoming email if its size is larger than the specified value.

    An empty entry disables this feature. (This is the default.)

    A sensible number (in bytes) would be 1,000,000, but it really depends on the speed of your network connection.

    For the following fields, if you choose it may override the Global Definition of a Regular Expression.

- **Mailer Daemon.** This is a list-specific version of the Global Mailer Daemon Regular Expression.
- **Sensed Requests.** This is a list-specific version of the Global Sensed Requests Regular Expression.
- **Suspicious Subjects.** This is a list-specific version of the Global Suspicious Subjects Regular Expression.
- **Suspicious Headers.** This is a list-specific version of the Global Suspicious Headers Regular Expression.
- **Suspicious Bodies.** This is a list-specific version of the Global Suspicious Bodies Regular Expression.
- **Preserved Headers.** This is a list-specific version of the Global Preserved Headers Regular Expression.
- **Discarded Headers.** This is a list-specific version of the Global Discarded Headers Regular Expression.
- **Visibility.** This is a list-specific version of the Global Visibility Regular Expression.
- **Aliases.** This is a list-specific version of the Global Aliases Regular Expression.

- **Email Author Firewall.** This is a list-specific version of the Global Firewall Regular Expression.

The Errors Screen

The Errors screen lets you configure what happens to errors related to this list. Errors may be email that has been returned to the system for various reasons, or errors caused by users trying to use the system in an erroneous way.

Bounces are classified in two ways:

- **Hard Bounces.** These are bounces that have been returned because there has been a permanent error. For example, *user does not exist*.
- **Soft Bounces.** These are usually caused by temporary errors. For example, *cannot connect to host*.

For more information regarding errors, see "Bounce Handling" on page 63.

The Subscriptions Screen

This screen allows you to specify the options for subscribers. The Subscriptions screen only subscribes and unsubscribes users to the internal database.

You can specify a value for the following settings:

- **List Subscriptions Are.** This option specifies how list subscriptions are handled. The available settings are:
  - `Closed`. The list does not accept subscription requests unless issued by a Subscription Manager.
  - `Open`. The list accepts all subscription requests without moderation.
  - `Moderated`. Subscription requests have to be approved by a Subscription Manager.
- **List Unsubscriptions Are.** This option specifies how list unsubscriptions are handled. The available settings are:
  - `Closed`. The list does not accept unsubscription requests unless issued by a Subscription Manager.

- `Open`. The list accepts all unsubscription requests without moderation.
- `Moderated`. Unsubscription requests have to be approved by a Subscription Manager.

- **What to Do with Subscriptions Requests.** Siebel Email Marketing Stand-Alone allows you to specify the name of a Java class to load and call whenever subscription changes are being made. That way, you can sync up between two databases.

The `String` arguments passed to that class's `main()` differs between operations.

The possible operations are:

- `ADD` (a new subscriber)
- `DEL` (delete a subscriber)
- `Other`

- **New Subscriber Default Options.** You can select the default options assigned to every new subscriber (if they have not already selected their own default options).
  - **Preferred language.** Specify the default language for new subscribers.

NOTE: Currently, the only available option is *English*.

  - **Preferred mail mode.** Specify the mail mode that new subscriber will get by default. The options shown depend on the configuration of the supporting Web server. The option AUTO DETECT tries to identify whether a user's mail reader supports HTML and will subscribe them in that mode if possible. Otherwise, the subscriber will receive MAIL/TEXT.

- **Send the Following Number of Previous Mailings to New Subscribers.** You can specify the number of most recent mailings to be sent to a newly-subscribed user.

The People Screen

With this screen you can assign different people to different tasks.

List Owners can do everything that the other people on this screen can do.

You can assign certain people to certain permissions; these people will only be able to see the screens that allow them to do their task. For example, Subscription Managers will not be able to see the list configuration pages; they will only be able to view the Subscription Manager screens to add or remove subscribers.

Enter email addresses one per line in the boxes provided.

You can specify a value for the following settings:

- **Owners.** Each list has at least one owner.

  List Owners are responsible for the configuration of the options open to them by the Site Manager(s).

  Some options, like whether the list is archived or not, may be controlled by the Site Manager.

- **Subscription Managers.** A list may have no Subscription Manager, one Subscription Manager, or more than one Subscription Manager.

  For internal lists only, in lieu of Subscription Managers, the List Owner assumes this responsibility, if subscription management is enabled.

  Subscription Managers are responsible for approving who can join or leave a list, and who can subscribe to files.

  Subscription Managers are also responsible for helping subscribers with their attributes (for both the discussion part and files).

  To specify Subscription Managers, enter their email address(es) (one address per line).

- **Error Handlers.** A list may have no Error Handler, one Error Handler, or more than one Error Handler.

  NOTE: In lieu of an Error Handler, the List Owner assumes this responsibility.

  Error Handlers are responsible for analyzing error mail (either mail bounces or error messages generated by Siebel Email Marketing Stand-Alone), and have the power to remove users whose email addresses bounce too often.

  To specify Error Handlers, enter their email address(es) (one address per line).

- **Authors.** Privileged authors are people who can post to the list. A list may have no privileged author, one privileged author, or more than one privileged authors.

  NOTE: In lieu of Privileged Authors, the List Owner assumes this responsibility (if posting is restricted to owners and privileged authors).

  To specify privileged authors, enter their email addresses (one address per line).

  Privileged authors are moderated, except for site managers and scheduled mailings.

- **Moderators.** A list may have no moderators, one moderator, or more than one moderator.

  Moderators are responsible for approving postings to a list, or reviewing documents and clipboards (perhaps HTML) before they get posted.

  Moderators have the power to review postings from regular subscribers, but not privileged authors. Privileged authors means that you can post to a list.

  Scheduled mailings and site manager mailings should not be moderated. Privileged authors are moderated, except for site manager and scheduled emails.

  To specify a moderator, enter their email address(es), one address per line.

- **Report Viewers.** A list may optionally have one or more report viewers. Report viewers have access to the Mailing Delivery Status and Reporting Statistics for mailings sent to the list, but can not create, alter, or stop a mailing. In other words, they are *read-only* users who can see mailing statistics, but cannot send mailings on their own.

  To specify a report viewer, enter their email address(es) (one address per line).

The Digests Screen

Digests are collections of things that have been emailed to a list within a certain time frame.

Each message that is posted to a list before the *Digest Collect Until Time* is collected together in one big message, and after that time a new digest is started.

When it is digest delivery time, the digest that was last collected is sent.

It is very common to have the digest collection time and digest delivery time be very close together.

You can adjust the time delay between digests being created by adjusting the digest interval time. This way it is possible to send digests once a day, twice a day, every hour, or only every week.

People who have subscribed to a mail list with mail mode of `DIGEST` or `MIME_DIGEST` will receive the digests. `DIGEST`s are easy to read with plaintext mail readers, such as *Elm*, *Pine*, *Emacs*, and *Mail*. `MIME_DIGEST`s consist of a MIME email message with each post to the list being a mime attachment.

You can specify a value for the following settings:

- **Create Digests.** A digest is a collection of messages posted and is sent out as a whole (one large message) at regular intervals. If you want digests to be collected by your list, then you should select Yes and configure the parameters that follow.
- **Collect Digests Until.** Digests can be collected until a date and time you specify. Specify the date and time to stop collection for a given digest. If you choose to have daily digests sent out, ignore the Day field; simply specify a time of day to stop collection for a given digest.

- **Digest Delivery Time.** Specify the date and time each digest is to go out. If you choose to have daily digests sent out, ignore the Day field; simply specify a time of day each digest is sent out. This time should be after the stop-collection time (previously specified).
- **Digest Creation Interval.** Specify whether you want the digest to be sent out on a monthly, daily, hourly, or on a per-minute basis. This interval is relative to the stop-collection time (previously specified).
- **Max Size of Digest.** Specify a maximum size for a given digest. Siebel Email Marketing Stand-Alone can send partial digests during a regularly-scheduled interval. If the size of a given digest exceeds the specified maximum size, Siebel Email Marketing Stand-Alone will send a partial digest.

NOTE: An empty entry disables this feature.

The Appearance Screen

The Appearance screen configures how a list will look to people who receive posts to the list through email. It does little to configure how the Web archives will appear.

You can configure how headers of incoming mail are modified before they are sent out, and if extra headers will be added as well.

You can specify a value for the following settings:

- **Description**

  Specify a name for this list.

  Keep in mind that the owner-specified name for a given list may be viewable to recipients, depending on the mail client or browser.

- **To: Header Line**

  The outgoing To: header line can be configured so that:

  - Whatever the author typed in is preserved.

- It is internally rewritten to `One Line Description<listname@domain>`.

  If the Message Recipient Limit option is set to *1* and you have selected Internally Rewritten for this option, then the To: line will contain the email address of the recipient.

  You can change the Message Recipient Limit option from the List Owner, General screen.

- **From: Header Line**

  The outgoing From: header line can be configured to preserve the identity of the author, or it can be internally rewritten to a value that you specify.

  The original author will be shown in the X-Sender: header line if you rewrite it.

- **Subject: Header Line**

  The outgoing Subject: line will be preserved as is from the original author's message.

  You also have the option to tack on the list name (to the beginning), or the list name and the current message count, so that your users can identify the list's messages more easily.

- **Reply-to: Header Line**

  The outgoing Reply-To: line can be configured to behave as follows:

  - `Omit`: No Reply-To: is inserted.
  - `Preserve`: If a Reply-To: exists in the original message, it is preserved; otherwise no Reply-To: will be shown.
  - `Sender`: If a Reply-To: exists in the original message, it is preserved; otherwise the Reply-To: is rewritten to point to the author of the message.
  - `Sender Always`: The Reply-To: will always point to the author of the message, regardless of what the original was.
  - `List`: Similar to `Sender`, but Reply-To: may point to the list's email address.
  - `List Always`: Similar to `Sender Always`, but Reply-To: will always point to the list's email address.

- `List Request Address`: Similar to `List Always`, but Reply-To: will always point to the list's administrative email address (*`listname`*`-request`).
- `User-specified Value`: You can provide your own email address to use in the Reply-To: field.
- `Personalized Unsub Address`: If the list is serializing posts and the inbound SMTP Server is on, then the Reply-To: line will contain a special email address for easy unsubscription. This email address is tailored to each user.

- **Precedence: Header Line for Outgoing Email**

  It is normal for mailing lists to have a Precedence: header line present in every outgoing message.

  This line instructs various subsystems on the Internet how to propagate a list's messages.

  If you select to use this header, you can choose one of the values provided.

  The behavior your end users experience may be unpredictable if you select a value, because this is not a standard header line.

  However, it is common practice to use a value of `bulk` or `list`.

- **Add URN Headers**

  You can select to have Siebel Email Marketing Stand-Alone generate list-specific URN headers.

  These headers usually start with `List-` and aid *mail user agents*, like Pegasus Mail, in providing an easy interface for list administrative (such as *subscription*, *unsubscription*, *help*, and so on).

  These headers are not standard; some other mail user agents may complain.

The Files Screen

This screen lets you upload files for a list.

These files will be used in various places throughout the user interface.

NOTE: Files of the same name, but different formats, can be supplied. For example, there are two *welcome* files, one in HTML and the other in plain text. Be careful to upload the right file.

You can specify the following files:

- **welcome**

  This is a list-specific file that is sent when a subscriber subscribes to a list.

  NOTE: The *server welcome file*, which is the global welcome file, is also sent to all users when they subscribe to a list.

- **auto_responder**

  This is a list-specific file that is sent to non-privileged users posting to the list.

  NOTE: The *server auto responder*, which is the global response file, is also sent to non-privileged users when they email the list server.

- **signoff**

  This is a list-specific file that is sent when a user unsubscribes from a list.

  NOTE: The *server signoff file*, which is the global goodbye file, is also sent along with this file.

- **info**

  This is a list-specific file that is sent when a subscriber requests information about a list.

- **header**

  The contents of this file are prepended to each outgoing message.

- **footer**

  The contents of this file are appended to each outgoing message.

- **digest_preamble**

  This file is included at the start of every digest sent out to users who have subscribed to the digest of a list.

- **webArchiveTemplate**

  This is a list-specific version of the *default archive template*.

  See *Siebel Email Marketing Stand-Alone Administration Guide* to determine what should be included in this file.

- **webArchiveFileIndexTemplate**

  This is a list-specific version of the *default archive file index template*.

  See *Siebel Email Marketing Stand-Alone Administration Guide* to determine what should be included in this file.

- **webArchiveIndexTemplate**

  This is a list-specific version of the *default archive file index template*.

  See *Siebel Email Marketing Stand-Alone Administration Guide* to determine what should be included in this file.

- **list_icon**

  You can provide an image file that will be displayed on the main index page next to the list.

  NOTE: You must create the file in a format that Web browsers can read (typically GIF or JPEG).

Add Subscribers to a List

If you have created a new list, you can add subscribers.

The Subscription screen only subscribes and unsubscribes users to the internal database.

1 Click Subs Manager.

The Subscription Manager screen appears.

2 Scroll down until the Add/Update/Remove Subscribers section is at the top of your browser.

3 Complete the Add/Update/Remove Subscribers form as desired:

- **Email Addresses.** Enter the email addresses of your subscribers. Alternatively, you can upload a file that contains the email address of your subscribers by means of the Browse button.

  If you like, you can simply cut and paste the contents of an existing email message's From line into this field. Accordingly, Siebel Email Marketing Stand-Alone supports entries in the form of:

- `lisa.jones@yourcompany.com` Lisa Jones
- Lisa Jones `<lisa.jones@yourcompany.com>`

Siebel Email Marketing Stand-Alone will parse entries in these formats and grab the email address and name.

Enter one email address per line and limit the number of subscribers to 200 at a time.

- **List.** Select the name of the list you are adding new subscribers to.
- **Preferred mail mode.** Specify the default mail mode for new subscribers.

4 Click Add/Update Subscribers.

You can additionally choose to modify other settings, such as Reporting Levels or Subscription Options, from their default settings. If you choose to do so, see the information regarding those settings located at the top of the Subscription Manager screen.

Remove Subscribers from a List

You can also remove subscribers from a pre-existing list.

To remove subscribers from a pre-existing list

1. Click Subs Manager.

   The Subscription Manager screen appears.

2. Scroll down until the View Subscribers section is at the top of your browser.

   Under Lists you will see a list of existing lists.

3. Select the list from which you want to remove subscribers and click View Users.

   The subscribers for the selected list appear under Email Addresses in the Add/Update/Remove Subscribers section.

4. Select the email address(es) to be removed and click Remove Subscribers. In other words, clear the email addresses from the email addresses field that you do not want to delete.

Bounce Handling

To complete the configuration of a list, you should set up procedures for handling bounces.

Introduction

The following are the three types of incoming messages that the Bounce Handler can detect:

- **Hard bounces.** These result from a permanent delivery failure, such as an *Invalid Email Account* message, that indicates no possibility of delivering the email to the recipient. Hard bounces usually result in the removal of that particular email address from the mailing list.

- **Soft bounces.** Soft bounces indicate a temporary delivery failure, such as a full mailbox or a mail server temporarily not working. In this case, the usual action is to resend the message or to institute a temporary suspension of sending to that address.
- **Replies to the original message.** When a person replies to the original email message, the Bounce Handler detects that the message is not a bounce and the message can be routed to a user-defined mailbox for a personal response.

There is an additional category of bounces, called *unparseable* bounces. Basically, unparseable bounces are bounces that are formatted in such a way that it is difficult for the receiving application to understand. More to the point, if Siebel Email Marketing Stand-Alone receives a bounce that it cannot understand, it will send the bounce to the Error Handler as an unparseable bounce. Realistically, there is not much that can be done with an unparseable bounce, but unparseable bounces are a relative rarity with Siebel Email Marketing Stand-Alone.

Configure a List for Bounce Handling

To configure a list for bounce handling you must first navigate to the Configuring List screen.

To navigate to the Configuring List screen

1. Click List Owner.

   The List Owner Options screen appears.

2. At the table consisting of all available lists, click the configure hyperlink for the list you wish to set up bounce handling.

   The Configuring List screen for the selected list appears.

3. Click the Errors hyperlink.

   The Errors section of the Configuring List screen appears. From here you can configure your list for bounce handling.

To configure your list for bounce handling

1. Complete the form as desired.

- **What to do with Bounced Email.** Siebel Email Marketing Stand-Alone can take the following actions regarding bounced email:
  - Ignore it.
  - Send it to the Error Handler.
  - Send it to a specified external service.
  - Remove the subscriber immediately when a hard bounce occurs.
  - Suspend the subscriber when the maximum number of soft bounces has been reached.

NOTE: If you choose to have the subscriber suspended when too many soft bounces occur within the grace period, you *must* also provide values for Grace Period for Soft Bounces and Max Number of Soft Bounces Within Grace Period Before User Suspended.

Siebel Email Marketing Stand-Alone can distinguish between hard and soft bounces:

- Hard bounces are permanent failures.

- Soft bounces are temporary delivery failures.

If a hard bounce is sent to a list, the user is removed immediately from the list (if so configured). Otherwise, hard bounces will be treated as soft bounces.

If the hard bounce is sent to the server, the user is suspended from all lists and will receive no email.

On soft bounces (whether to the list or to the server), the user is removed from a list (if bounces go to a list) or all lists (if bounces go to the server) if the maximum number of soft bounces is reached within the specified grace period. If the server has stricter rules (for example, a smaller grace period, or fewer bounces within that grace period) it takes precedence over lists; for example, the user is removed from all lists.

When a previously-removed user communicates with the system in any way (or server or list administrators take actions on the user's behalf), the user is automatically reinstated throughout the system, and is emailed to that effect. Therefore, a previously-removed user's attempt to log in, resubscribe, or contact a list results in automatic reinstatement.

Bounce handling may not always be successful in resolving (parsing) the bounce, and may not be able to identify addresses to suspend or remove. Therefore, you can wish to turn on notification for such cases in order to have the error handlers work manually. On the other hand, turning on notification of resolved bounces will simply send the results of the bounce analysis to the error handlers, who may take further action of their own.

Finally, you can specify the name of a Java class to load and send the bounce to for external processing. For more information, see *Siebel Email Marketing Stand-Alone Administration Guide*.

- Grace Period for Soft Bounces
- This is the grace period for temporary email failures on a per-list basis.
- Max Number of Soft Bounces Within Grace Period Before User Removed

- Siebel Email Marketing Stand-Alone can remove a user if the number of bounces from their email address exceeds the threshold.

An empty entry disables this feature.

- Max Number of Bounces Processed per Day

Specify a maximum number of email bounces the list should process each day.

An empty entry disables this feature.

NOTE: If you specify a small number, then the system will not waste too much time processing error email, but it may never catch up, either.

- Who Gets Siebel Email Marketing Stand-Alone-generated Errors

You can select who gets Siebel Email Marketing Stand-Alone-generated error messages.

They can either be sent to the Author or to the list's Error Handlers, so that users are not overburdened with error messages.

- What Database Interface Should be Used

This field is only used in conjunction with *external* lists. If the list you are configuring is an *internal* list, the What Database Interface Should be Used field will not be displayed.

The database interface is used to define how various responses resulting from a posting are handled in the associated external database. These response types are limited to subscribe and unsubscribe requests, and the processing of hard and soft bounces. Before making any selection changes, make sure that the appropriate database stored procedures or Java interface implementations exist. For more information, see *Siebel Email Marketing Stand-Alone Administration Guide*.

2. When finished, click Submit or Submit & Go.

Setting up a Query 6

Most of the mailings you send will be to a list of recipients that you have specifically designated, or to a list of recipients that resulted from a predefined query.

The following sections describe how to define a query, edit a query, or remove a query.

If you are unable to access this functionality, it is probably because your external source database has not been configured. For more information about database connections, see “Setting Up a Database” on page 37.

This chapter covers the following topics:

What is a Query?

A query is a question that, when applied against a database, returns a list of customers who meet the specified criteria.

A query is created by means of an SQL `select` statement.*SQL* is an acronym for Structured Query Language, the standardized relational database language for defining database objects and manipulating data.

If a working knowledge of SQL is not your *forte*, Siebel Email Marketing Stand-Alone can build the `select` statement for you. See “The Query Wizard” on page 72 for more information.

Query Versus List

A list is a static file that is recipient-driven. That is to say, a list will not change dramatically over time. For example, a list might consist of members of an automobile club to which you want to send a periodic newsletter. Such a list will only change to reflect the change of club members.

The result of a query is a dynamic list that is situation-driven. That is to say, the list that results from a query could possibly change significantly each time the query is applied to the database. For example, one possible query might be *Who bought mystery novels by Sue Grafton over the past year?* The resultant list from that query will probably change every time it is applied against the database.

In most situations, it would be advantageous to apply a fine-tuned query and use the resultant list rather than manually creating and updating numerous lists to cover every scenario.

The Query Setup Screen

All of the query functionality can be accessed from the DB Query Setup screen.

To access the Query Setup screen

- Click DB Query Setup to navigate to that screen.

Define a Query

Suppose you wanted to build a query that determined: *Who were the female buyers, between the ages of 21 and 27, who live in California and have incomes greater than $40,000?*

To define a query

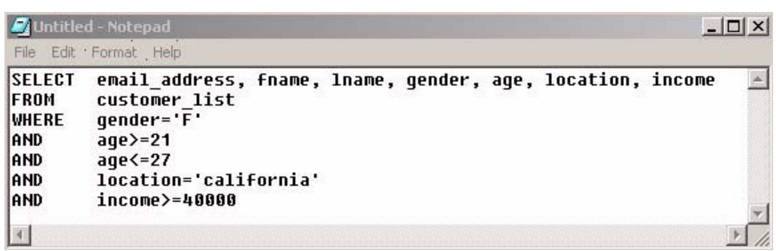
1. Click the Create New Query hyperlink.
2. Name the query in the Query Name field.

   Make sure to assign a unique name to the new query.
3. Provide a description of the query in the Description field.
4. Assign List and Database values for the query.

   The List | Database field will list available databases, assuming that your database administrator has properly connected them to Siebel Email Marketing Stand-Alone.

   For more information regarding database connections, see "Setting Up a Database" on page 37.
5. Enter the appropriate *`select`* statement for the query in the SQL TEXT field.

   In the previous example, the `select` statement would be (see the following figure):




```
SELECT   email_address, fname, lname, gender, age, location, income
FROM     customer_list
WHERE    gender='F'
AND      age>=21
AND      age<=27
AND      location='california'
AND      income>=40000
```

NOTE: It is crucial that you specify `email_address` as the first variable; otherwise the list that is created by your query will not deliver any messages.

- If you are using short tracked URLs in your content, you must specify the variable `Userid` in the `select` statement. (Also, make sure you use the proper case when using variables.) For more information about short tracked URLs, see "URL Tracking" on page 113.

  If you are not sure of the proper SQL syntax *vis-a-vis* the building of a `select` statement, see "The Query Wizard" on page 72.

- No ending syntax is needed for the `select` statement. For example, in Oracle you end a `select` statement with a semi-colon (`;`) and with Sybase and MSSQL Server, you end with `go`.

- In the preceding `select` statement, each field selected (with the exception of the initial `email_address` field) can be used as a template variable. For more information about template variables, see "Template Variables" on page 86 and "Populating Template Variables" on page 105.

6 Click Test SQL Syntax.

Siebel Email Marketing Stand-Alone will test the `select` statement to make sure that it is syntactically correct, and will display the result (either a message that the `select` statement is valid, or an *error* message) at the top of the Query Setup screen.

7 Click Update.

The attributes section of the Query Setup screen will disappear, and a new icon representing the newly-defined query is displayed at the top of the Query Setup screen.

The Query Wizard

The Query Wizard allows you to set up a query even if you do not have a working knowledge of SQL.

The Query Wizard replaces the step of adding a SQL `select` statement by means of walking you through, step by step, each phase of the process of creating a `select` statement.

When you have finished with the Query Wizard, you are returned to the section of the Query Setup screen that identifies the attributes of your new query. Notice that a new SQL `select` statement is in the SQL Text window. This is, of course, the result of your efforts with the Query Wizard.

Who Should Use the Query Wizard

Use the Query Wizard if you are looking for a quick way to create a basic query but do not have the slightest idea what an SQL `select` statement is, and—more importantly—do not want to learn, either. However, if you need a query with more complex structures, you can bypass the Query Wizard and seek assistance from your database administrator.

Step 1—Select a Table

You need to complete steps 1 through 4 in “Define a Query” on page 71 before completing this step.

To select a table

1 Click Query Wizard.

The Query Wizard screen appears.

The TABLE field will list all tables in the database that you selected in *step 4* of “Define a Query” on page 71.

2 Select a table you would like to query, and click Next.

The Select a Column screen appears.

You can only select one table per query.

Step 2—Select a Column

This step is continued from “Step 1—Select a Table” on page 73.

To select a column

1 The COLUMN field lists all columns for the specified table.

2 From here you can specify which columns will appear in the list that is created by the query.

Notice that there are two selection boxes. The first selection box is to specify the email address column; the other selection box is to specify all other columns that you want to have appear in the query's resulting list. These will be the fields used for template variables. For more information about template variables, see "Populating Template Variables" on page 105.

It is crucial that you specify the *email address* column in the first selection box. The list that is created by your query will be meaningless unless an email address is specified in the first column.

Siebel Email Marketing Stand-Alone is unable to automatically insert *email address* in the first column of the query. This is because the term used to identify email addresses can vary from database to database, and Siebel Email Marketing Stand-Alone has no way to determine what variable name means what. For example, you (or your Database Administrator) could have defined `email_address` to specify the email addresses of the customers in your database. However, another database might have `address`, `email`, `eaddress`, `emailaddress`, and so on, defined in it to mean the same thing.

NOTE: Although not required, you will probably want to see the first and last name of each customer in the list created by your new query. To do so, you will have to specify columns for a *first name*, and a *last name*. Also, you will probably want the customer's name to appear directly after the email address, so *first name* and *last name* will be the second and third columns specified. Keep in mind that just as Siebel Email Marketing Stand-Alone is unable to automatically insert *email address* in the first column of the query, it is similarly unable to automatically insert *first name* and *last name* in the second and third columns.

To select a column

- Select the columns to display in your query, and click Next.

  The Clause Values screen appears.

Step 3—Choose Clause Values

From the Clause Values screen you can build the `select` statement for your query.

This step is continued from "Step 2—Select a Column" on page 73.

The Clause Values screen allows you to write a query that, when applied against your customer database, results in a list of customers who meet the specified criteria.

Notice that the Clause Values screen consists of a group of blocks running left to right and top to bottom. Each block represents a clause, and consists of drop-down lists for column names and relational symbols, and a text field to enter an appropriate value.

Using the example:

Who are the female buyers who live in Santa Clara?

The following clauses have to be specified:

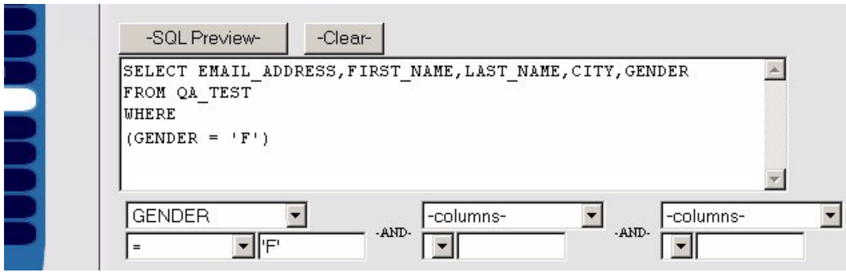
- `gender = 'F'`
- `city = 'santa clara'`

The first clause is specified by:

1. Select `GENDER` from the Column drop-down list in the first clause block.
2. In the same clause block, select = from the Symbol drop-down list.
3. In the same clause block, enter `'F'` in the Value field.

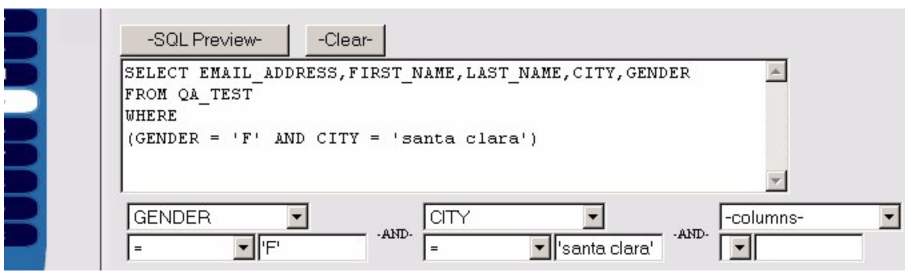
Notice that the new clause appears in the preview window (See Figure 3).

Figure 3. New Clause in the Preview Window



The remaining clause is specified in a similar manner, causing the preview window to update as follows (See Figure 4).

Figure 4. Remaining Clause in the Preview Window

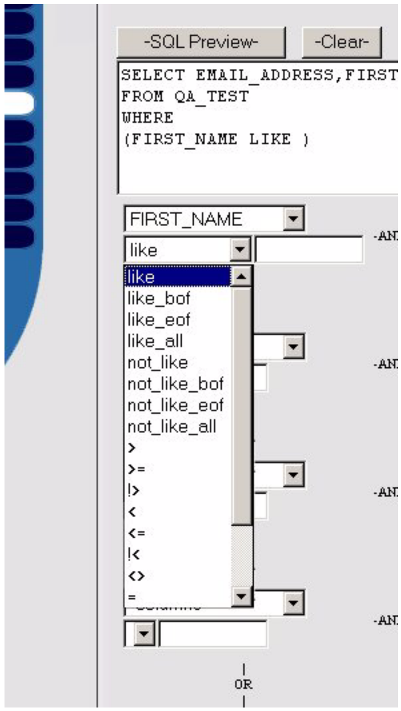


NOTE: Even though you previously specified that columns for *email address*, *first name*, and *last name* appear in your query, you do not have to specify values for those columns.

LIKE Definitions

Most of the values used in the Symbol drop-down list are self-explanatory; however, the `LIKE` values might need some explaining (See Figure 5).

Figure 5. LIKE Values



- `LIKE` — Implies that a particular column will contain an exact match.

  For example, `LIKE 'Lisa'` will only return entries where the first name is represented as *Lisa*.

NOTE: `LIKE` (and all `LIKE`-related) values are case-sensitive. Therefore, in the previous example, *Lisa* would return a match, whereas *LISA* or *lisa* would not.

- `LIKE_BOF`—Implies that a column value will contain a match for the first character.

  For example, `LIKE_BOF 'L'` will return entries where the first letter of the first name is an *L*. Therefore, names like Lisa, Lenore, and Lucy would all match.

- `LIKE_EOF`—Implies that a column value will contain a match for the last character.

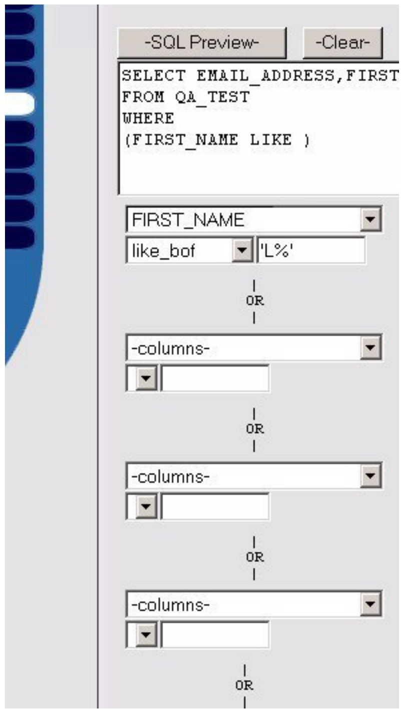
  For example, `LIKE_EOF 'a'` will return entries where the first letter of the first name is an *a*. Therefore, names like Lisa, Maria, and Angela would all match.

- `LIKE_ALL`—Implies that a column value will contain a match for the specified character, without regard to relative position.

  For example, `LIKE_ALL 'is'` will return entries where the first name contains the letters *is*. Therefore, names like Lisa, Melissa, and Elisa would all match.

NOTE: When using `LIKE_BOF`, `LIKE_EOF`, or `LIKE_ALL`, keep in mind that Siebel Email Marketing Stand-Alone is using your selection to build a SQL `select` statement. Accordingly, do not be surprised to see a `%` character inserted in addition to your `like` value. For example, if you are using `LIKE_BOF` and insert `'L'`, Siebel Email Marketing Stand-Alone will automatically display this as `'L%'`, as shown in Figure 6.

Figure 6. L% **Display**



The NOT_LIKE values are exactly the same as the LIKE values, except that they are specifying, in effect, *not matching this pattern*.

Operator Precedence

Notice that the word **AND** appears between clause blocks in each row. This acknowledges that you are writing a query in the form of *tell me the names (email address) of everyone who meets the following criteria (gender and city)*. In other words, the list that results from your query will only contain customers who meet *all* of the specified criteria. If customers do not meet all specified criteria, they are not added to the list.

However, it is possible to write a query in the form of *tell me the names (email address) of everyone who meets the following criteria (gender or city)*. In the previous example, it is safe to assume that the list that results from this query would be much larger than the list where customers are added only if they meet all criteria; after all, when specifying *gender or city*, the customer has only to meet one criteria to be added to the list.

The word OR that appears between clause blocks in each column addresses this functionality.

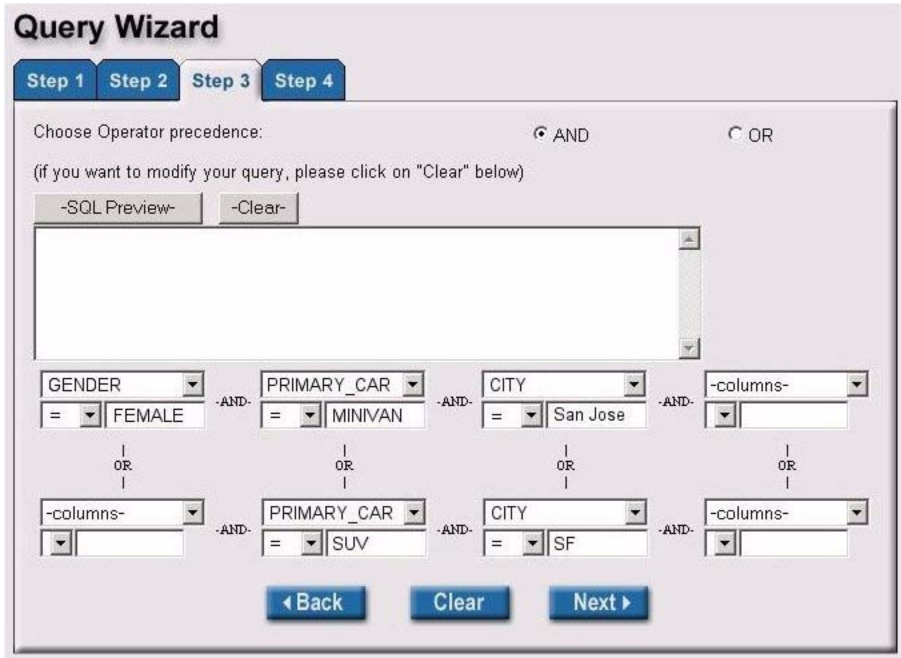
Finally, just as AND criteria is specified from left to right, OR criteria is specified from top to bottom.

By default, operator precedence is set to AND. If your query contains both AND and OR criteria, you can use this feature to change the precedence of the operators.

For example, suppose you wanted to target females who own a minivan or SUV and live in San Jose or San Francisco.

Step 3 would look like the following (See Figure 7):

Figure 7. Step 3 of the Query Wizard



When the operator precedence is set to AND, the query reads:

> Females who own a minivan and live in San Jose, or anyone who owns a SUV and lives in San Francisco.

However, by changing the operator precedence to OR, the query reads:

> Females who own a minivan or SUV and live in San Jose or San Francisco.

Clearly, the second choice is correct.

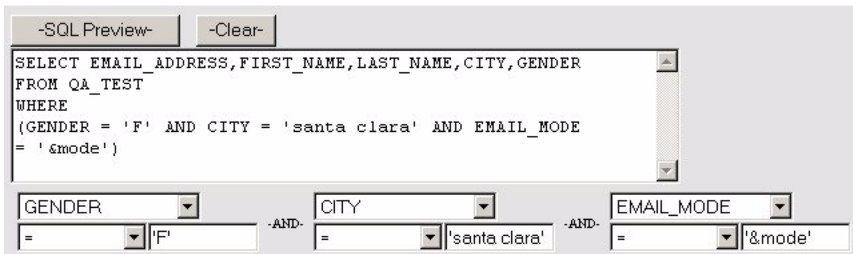
Specify a Mail Mode

As long as the database you are connected to is mail mode enabled, you can specify a mail mode in your query.

For more information regarding mail mode enabling a database, see “Mail Modes” on page 39.

To specify a Mail Mode

1 Specify a mail mode clause in your query by selecting the `EMAIL_MODE` clause and specifying a value of `'&mode'`. The preview statement updates, see the following figure.



2 If you have selected the `EMAIL_MODE` clause, when you click Next Step 4 of the Query Wizard, the Email_Mode screen appears.

3 Choose the appropriate mail mode method, and click Next.

Step 4—View the Preview List

This step is continued from “Step 3—Choose Clause Values” on page 75.

To view the Preview List

1 After you have completed specifying your clause values, click Next. The View Preview List screen appears.

   Notice that the email address, first name, and last name of each customer who met the criteria specified in the query are displayed in the first three rows of the list.

2 Verify that the first column of the list is indeed comprised of email addresses. Remember, if anything other than an email address is in the first column, Siebel Email Marketing Stand-Alone will not be able to use the list to send an email campaign.

3 When satisfied that the example list is an accurate representation of your query, click Finish.

You will be returned to the section of the Query Setup screen that identifies the attributes of your new query. Notice that a new SQL `select` statement is in the SQL Text window. This is, of course, the result of your efforts with the Query Wizard.

4 When satisfied with your new query, click Update.

The attributes section of the Query Setup screen will disappear, and a new icon representing the newly-defined query appears at the top of the Query Setup screen.

Edit a Query

You can edit a query from the Query Setup screen.

To edit a query

1 From the Query Setup screen, click the icon of the query you wish to edit.

The attributes section for the query you wish to edit is displayed. From here you can modify the attributes/settings/values of the selected query.

2 Click Test SQL Syntax.

Siebel Email Marketing Stand-Alone will test the `select` statement to make sure that it is syntactically correct, and will display the result (either a message that the `select` statement is valid, or an *error* message) at the top of the Query Setup section.

3 Click Update.

The attributes section of the Query Setup screen disappears.

Remove a Query

You can remove a query from the Query Setup screen.

To remove a query

1. From the Query Setup screen, click the icon of the query you wish to remove.

   The attributes section for the query you want to remove appears.

2. Click Delete to delete the selected query.

Content Generation 7

Before you can use Siebel Email Marketing Stand-Alone you will need to create your message *template*. The template is the message you send to your recipients. Your template can be a basic text message or it can be a highly-complex HTML message.

A message template is created using a simple language consisting of *variables* and *commands*:

- Template variables are used to insert simple personalization values.
- Template commands are used to take advantage of more advanced Siebel Email Marketing Stand-Alone functionality.

A message template can be created using any ASCII text editor, such as Notepad. Simply open your text editor, create the template, title it, and save it for later use. When you are ready to send a mailing out to your recipients, Siebel Email Marketing Stand-Alone will prompt you to upload your template into the server. For more information about the posting process, see "Sending a Mailing" on page 121.

The following sections will provide you with examples of how to create a template using variables and commands:

- "Template Variables" on page 86
- "Template Commands" on page 88

Template Variables

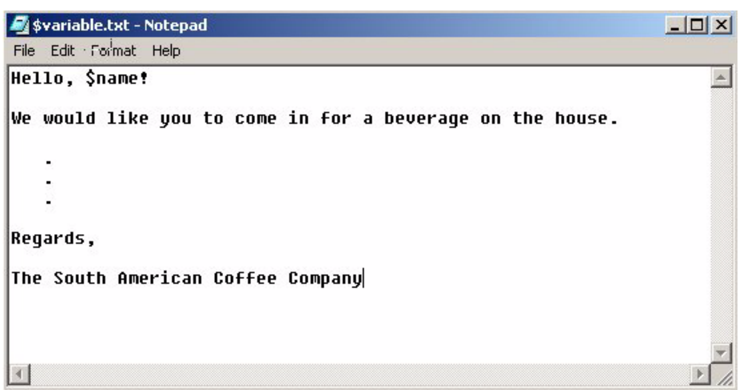
Template variables allow you to personalize an email message by inserting globally-defined variables into your content template which are later substituted by locally-defined values.

Template variables are defined in the form of `$variable` or `${variable}`. A template variable can consist of any previously-defined value from the database that contains your recipient list.

For help in defining template variables, see "Define a Query" on page 71 and "Populating Template Variables" on page 105.

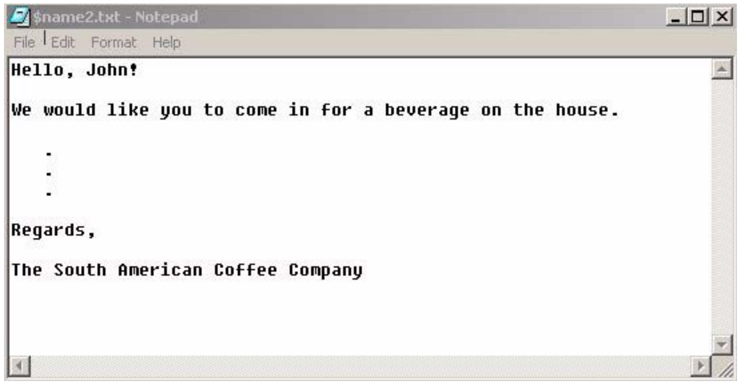
For example, you have a recipient list that you use to advertise the latest developments in coffee beverages. Your list consists of three people, *John*, *Bill*, and *Mary*. (Of course, in actuality your list will most likely be much, much larger.) In the database that the recipient list resides in, you have already specified that the template variable `$name` be equal to the first name of each recipient. Accordingly, you can personalize the greeting of your message so that each recipient receives a message that is addressed to them by name. Therefore, you would use the `$name` variable in the following manner, as shown in Figure 8:

Figure 8. `$name` Variable



The resulting message would vary according to the name of the recipient. For example, *John* would receive the following message, as shown in Figure 9:

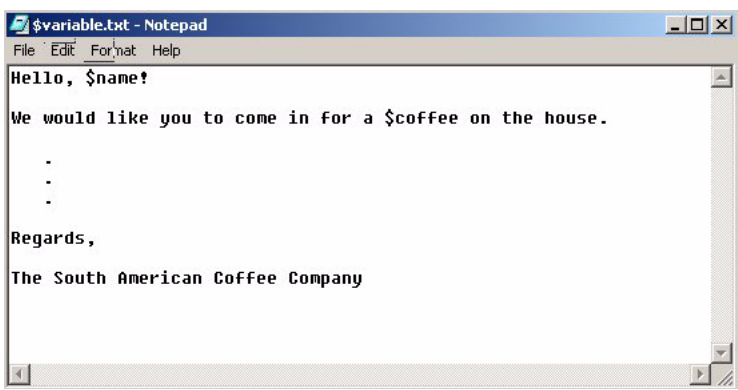
Figure 9. Resulting Message of the Name Variable



Similarly, *Bill* and *Mary* would likewise receive personally addressed messages.

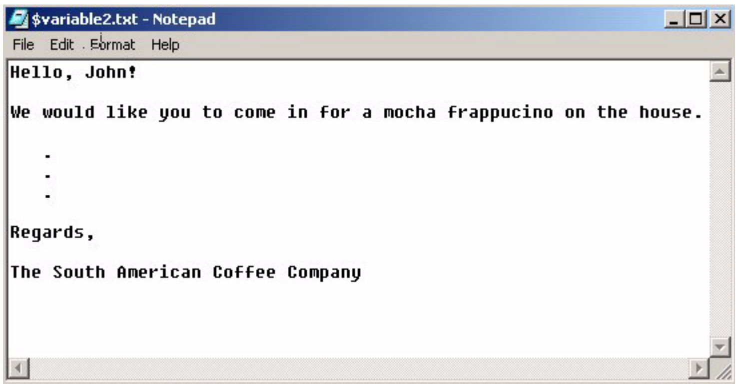
Further, template variables can be used to personalize a message according to the preferences specified by each recipient. For example, assume that in the preceding example, each recipient has previously identified a coffee beverage preference. In the database that the recipient list resides in, you have already specified that the template variable `$coffee` be equal to the coffee preference of each recipient. Accordingly, you would use the `$coffee` variable, as shown in Figure 10:

Figure 10. `$coffee` **Variable**



The resulting message would vary according to the coffee preference of the recipient. For example, *John* would receive the following message (See Figure 11):

Figure 11. Resulting Message



Similarly, *Bill* and *Mary* would likewise receive messages that were personalized according to their coffee preferences.

Siebel Email Marketing Stand-Alone template variables are case-sensitive.

Valid characters for defining template variables are alphanumeric and the underscore (_).

Template Commands

Template commands are used to take advantage of Siebel Email Marketing Stand-Alone functionality, such as:

- Adding conditional statements (“$(if)” on page 89)
- Personalizing the message header (“$(header)” on page 92).
- Indirectly referring to large chunks of varying content which would otherwise require the use of large `if/then/else` clauses (“Named Blocks” on page 92).
- Determining how many readers are clicking through to additional Web sites from your message (“Tracked URLs” on page 96).

- Making it easier for recipients to subscribe or unsubscribe to your list ("Quick Click Subscribe/Unsubscribe" on page 97).
- Making it easier for recipients to forward your message to others who also might find it of interest (while at the same time allowing the new recipient to be included in any subsequent statistical reporting) ("Forward to a Friend" on page 99).

  The following sections describe Siebel Email Marketing Stand-Alone template commands in detail.

$(if)

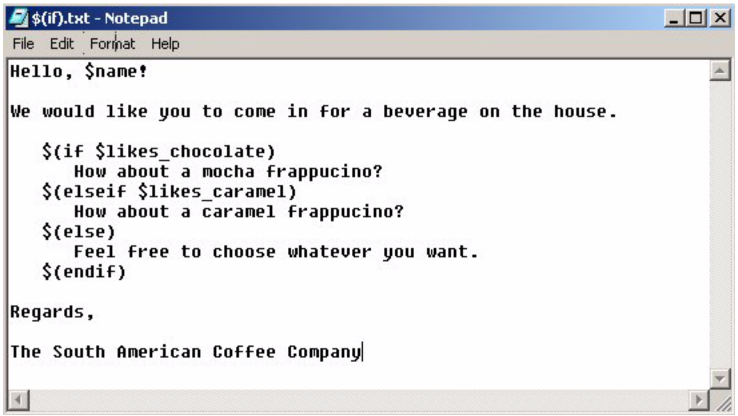
The `$(if)` template command allows you to add conditional statements to your message.

You can add conditional statements that, if *true*, would return the response you have specified.

> The `$(if)` variable is *true* if it has any value other than `null`, an empty string, or `0`.

For example, assume that you have a recipient list that you use to advertise the latest developments in coffee beverages. Each recipient has specified a coffee preference. You could then build a template using the `$(if)` variable in the following manner (see Figure 12):

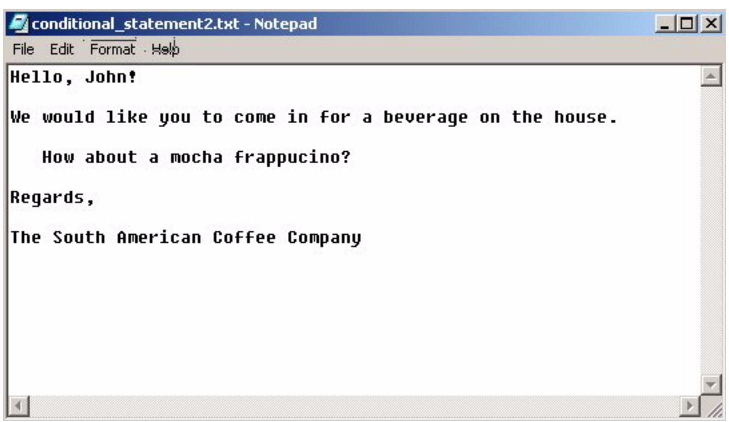
Figure 12. `$(if)` **Variable**




```
Hello, $name!

We would like you to come in for a beverage on the house.

   $(if $likes_chocolate)
      How about a mocha frappucino?
   $(elseif $likes_caramel)
      How about a caramel frappucino?
   $(else)
      Feel free to choose whatever you want.
   $(endif)

Regards,

The South American Coffee Company
```

The resulting message would vary depending on the preference identified by each recipient. For example, *John* likes chocolate coffee drinks. Therefore, he would receive the following message, as shown in Figure 13:

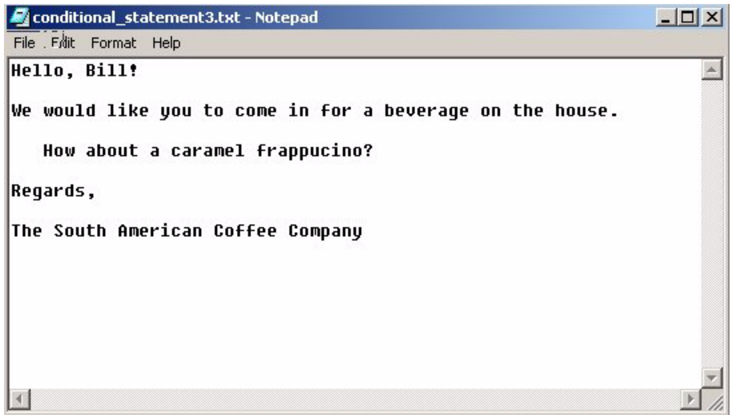
Figure 13. Resulting Message of `$(if)` **Variable**




```
Hello, John!

We would like you to come in for a beverage on the house.

   How about a mocha frappucino?

Regards,

The South American Coffee Company
```

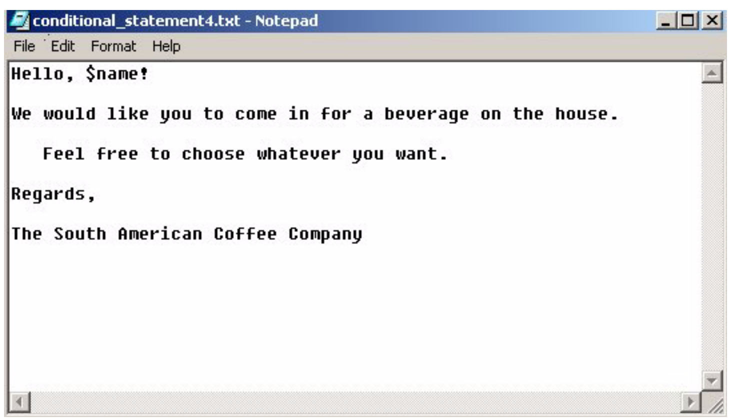
However, *Bill* likes caramel coffee drinks. He would receive the following message, as shown in Figure 14:

Figure 14. Resulting Message for Bill



Finally, *Mary* has not specified a preference. She would receive the following message, as shown in Figure 15:

Figure 15. Resulting Message for Mary



Siebel Email Marketing Stand-Alone template commands are case-sensitive.

When naming user variables, use alphanumerics and the underscore (_) only.

Nesting of `if` statements is allowed.

$(header)

The `$(header)` command allows you to add customized headers to your message.

For example, suppose that you had a customer with the following database entries:

```
FirstName=”Jane”, LastName=”Doe”, SignupDate=”Mar 7, 2002”
```

Then, if you added the following commands to your template:

```
$(header “Customer-Name” “$FirstName $LastName”)

$(header “A-Customer-Since” “SignupDate”)
```

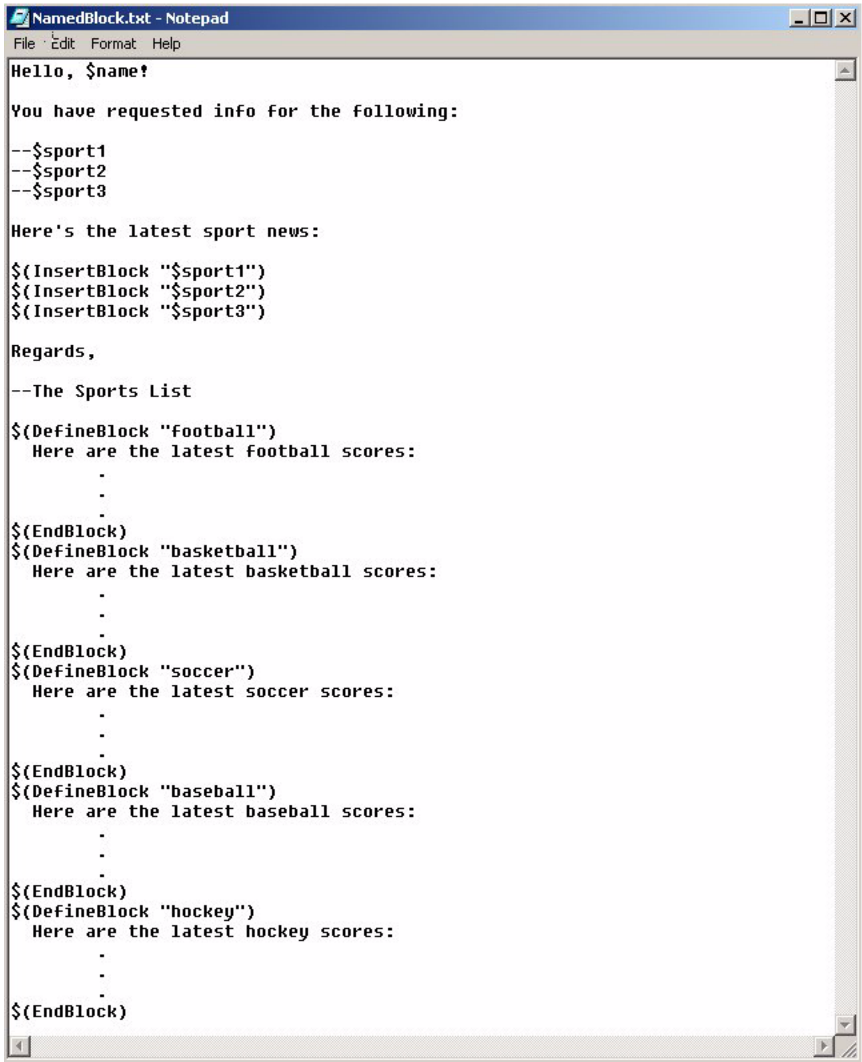
The message received by that customer would have the following headers added:

```
Customer-Name: Jane Doe

A-Customer-Since: Mar 7, 2002
```

Named Blocks

The *named block* template command allows you to indirectly refer to large chunks of varying content which would otherwise require the use of multiple `if/then/else` clauses. For example, you have a recipient list to which you send the latest sporting news. Each recipient has specified the three sports for which they want to receive news. And, you have previously defined the template variables `$sport1`, `$sport2`, and `$sport3` for each recipient. (In other words, your list database has columns called `sport1`, `sport2`, and `sport3`, and each recipient has an associated value listed in those columns.) You could then build a content template using named blocks in the following manner, as shown in Figure 16:

Figure 16. Named Block Structures



NamedBlock.txt - Notepad

File Edit Format Help

```
Hello, $name!

You have requested info for the following:

--$sport1
--$sport2
--$sport3

Here's the latest sport news:

$(InsertBlock "$sport1")
$(InsertBlock "$sport2")
$(InsertBlock "$sport3")

Regards,

--The Sports List

$(DefineBlock "football")
  Here are the latest football scores:
        .
        .
        .
$(EndBlock)
$(DefineBlock "basketball")
  Here are the latest basketball scores:
        .
        .
        .
$(EndBlock)
$(DefineBlock "soccer")
  Here are the latest soccer scores:
        .
        .
        .
$(EndBlock)
$(DefineBlock "baseball")
  Here are the latest baseball scores:
        .
        .
        .
$(EndBlock)
$(DefineBlock "hockey")
  Here are the latest hockey scores:
        .
        .
        .
$(EndBlock)
```

The resulting message would vary depending on the top three sports preferences as identified by each recipient. For example, *John's* top three choices are: football, hockey, and baseball; whereas *Bill's* top three choices are: soccer, football, and hockey; and *Mary's* top three choices are: baseball, soccer, and basketball. Each of them will receive a message that was built from the same template, but each message will be personalized according to their choices. As you can see, this method is significantly less complicated than using multiple `if/then/else` clauses.

NOTE: If a given recipient has no associated value for a named block variable listed in the content template, nothing for that variable is inserted into the message. For instance, suppose that in the preceding example Mary had only identified *two* choices for her sports preferences. In that case, she would only receive the sports news for her top two choices.

Notice that the syntax for `$(DefineBlock)` is `$(DefineBlock "foo")`. Anything can be inside the quotes, including blank spaces. However, if you want to include a " or \ as part of the name, you have to escape it with another \.

For example:

```
$(DefineBlock "Silly Name with blanks and a \" and a \\ in it")
```

creates a block named:

'Silly Name with blanks and a " and a \ in it'.

NOTE: Unlike arguments to other template commands (like `InsertBlock`), template variables are NOT expanded inside the quotes. So a template command like:

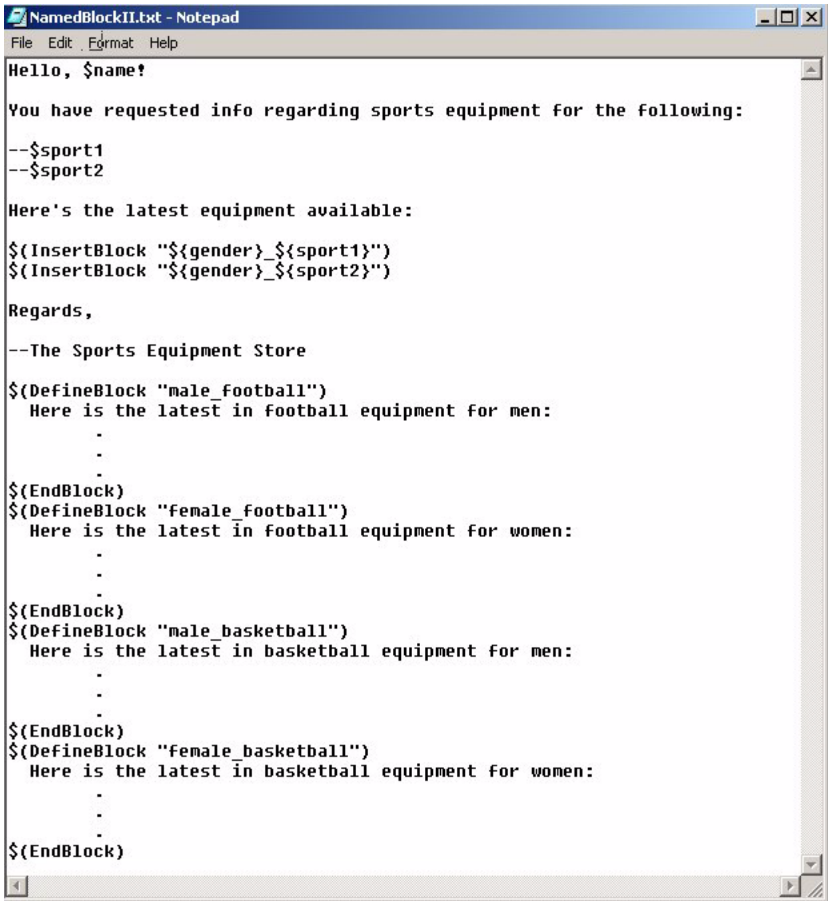
```
$(DefineBlock "foo $bar")
```

creates a block named 'foo $bar'.

Advanced Named Block Structures

Suppose that you wanted to use named blocks to provide information to customers based on the combination of two variables. For example, assume that you have a recipient list to which you send information regarding the latest sports equipment, and you want to personalize your message so that the men in the list receive the information regarding sports equipment for men, and that the women in the list receive the information regarding sports equipment for women. And, you have previously defined the variables `$gender`, `$sport1`, and `$sport2` for each recipient. (In other words, your list database has columns called `gender`, `sport1`, and `sport2`, and each recipient has an associated value listed in those columns.) You could then build a content template using named blocks in the following manner, as shown in Figure 17:

Figure 17. Named Block Structures




```
Hello, $name!

You have requested info regarding sports equipment for the following:

--$sport1
--$sport2

Here's the latest equipment available:

$(InsertBlock "${gender}_${sport1}")
$(InsertBlock "${gender}_${sport2}")

Regards,

--The Sports Equipment Store

$(DefineBlock "male_football")
  Here is the latest in football equipment for men:
        .
        .
        .
$(EndBlock)
$(DefineBlock "female_football")
  Here is the latest in football equipment for women:
        .
        .
        .
$(EndBlock)
$(DefineBlock "male_basketball")
  Here is the latest in basketball equipment for men:
        .
        .
        .
$(EndBlock)
$(DefineBlock "female_basketball")
  Here is the latest in basketball equipment for women:
        .
        .
        .
$(EndBlock)
```

Additionally, you could personalize the template in the preceding example even further by specifying an age as well.

Tracked URLs

You can use the tracked URL template command to determine how many readers are clicking through to additional Web sites from your message.

For complete information about tracked URLs, see “URL Tracking” on page 113.

$(trackMsgOpen)

The `$(trackMsgOpen)` template command allows Siebel Email Marketing Stand-Alone to track whether or not the user has opened a given message.

For complete information about the `$(trackMsgOpen)` template command, see "The $(trackMsgOpen) Template Command" on page 120.

Quick Click Subscribe/Unsubscribe

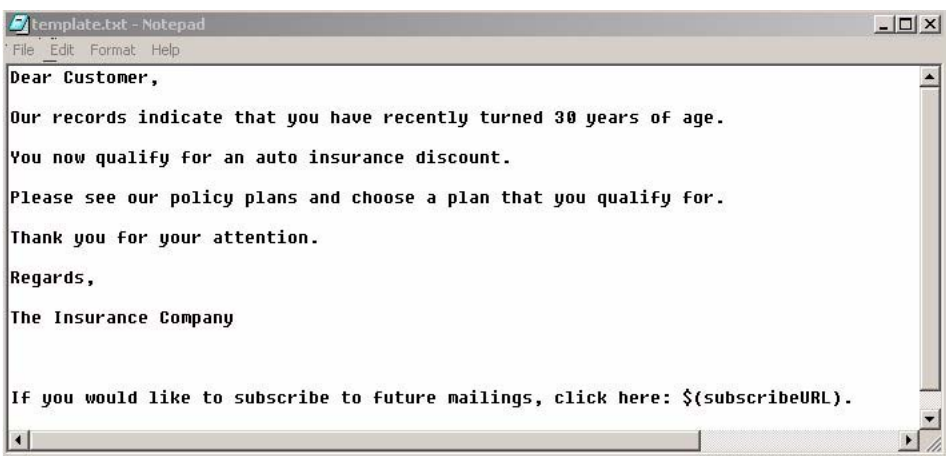
You can give your reader the option of subscribing to a list with one click by adding the `$(subscribeURL)` template command in the content template.

Siebel Email Marketing Stand-Alone template commands are case-sensitive.

When naming template commands, use alphanumerics and the underscore (_) only.

Figure 18 shows an example of a content template with the quick click subscribe variable:

Figure 18. Quick Click Subscribe Variable Template



Dear Customer,

Our records indicate that you have recently turned 30 years of age.

You now qualify for an auto insurance discount.

Please see our policy plans and choose a plan that you qualify for.

Thank you for your attention.

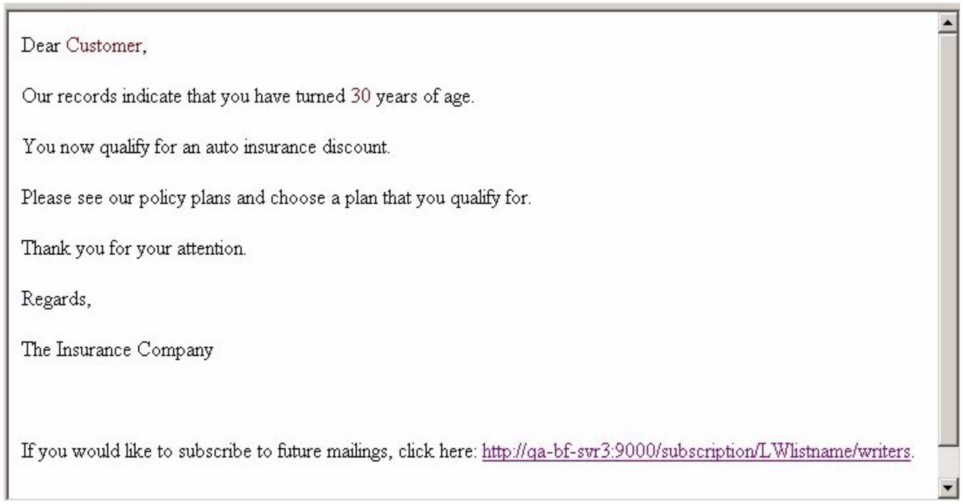
Regards,

The Insurance Company

If you would like to subscribe to future mailings, click here: $(subscribeURL).

The resulting mailing would look something like Figure 19:

Figure 19. Quick Click Subscribe Variable Email


Dear Customer,

Our records indicate that you have turned 30 years of age.

You now qualify for an auto insurance discount.

Please see our policy plans and choose a plan that you qualify for.

Thank you for your attention.

Regards,

The Insurance Company

If you would like to subscribe to future mailings, click here: http://qa-bf-svr3:9000/subscription/LWlistname/writers.

If the reader in the preceding example wanted to subscribe, they would click on the highlighted URL, enter their email address in the resulting dialog box, and click Subscribe.

Similarly, you can give the reader the option of unsubscribing from a list with one click by adding the `$(unsubscribeURL)` in the content template.

The execution of `$(unsubscribeURL)` is the same as `$(subscribeURL)`.

Also, you can set up a list so that a confirmation message is sent to the user when they subscribe or unsubscribe to a list. This setting is controlled from the List Owner, General, Confirmation screen.

Forward to a Friend

Forward to a Friend (FTF), or *viral marketing*, is a way of making it easy for recipients to forward a message on to friends or family that might also find the message of interest. And, by adding the FTF template command to your template, you are enabling Siebel Email Marketing Stand-Alone to anonymously track how often the message is forwarded, whether the new recipient subsequently clicked a hyperlink, or chose to join the mailing list themselves.

NOTE: FTF will only work if the optional Advanced Reporting Module was enabled during the initial Siebel Email Marketing Stand-Alone installation.

There are two ways that FTF can be included in your content: you can have a clickable hyperlink that will take the recipient to a browser page for entering the forwarding information; or, for HTML content only, you can have a form for entering the information directly in the content.

FTF Hyperlink

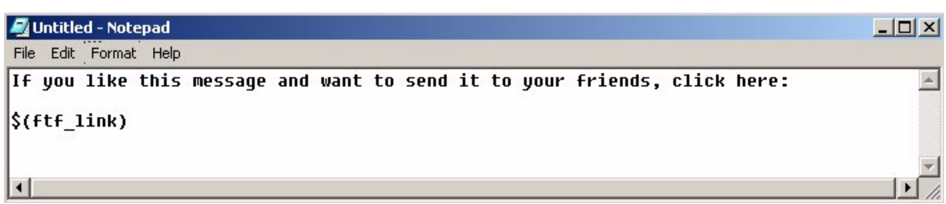
For any content type, you can include the `$(ftf_link)` template command in the content template.

If you use HTML, note that the link is better placed inside the `<A>` tag. Also note the placement of the quotation marks around `"$(ftf_link)"`. For example:

```
<A HREF="$(ftf_link)"> Description of link </A>
```

Another example of the `$(ftf_link)` is shown in Figure 20:

Figure 20. `$(ftf_link)` **Hyperlink**



The resulting mailing for this example would look something Figure 21:

Figure 21. `$(ftf_link)` **Hyperlink Email**

When the recipient clicks the hyperlink, they will be taken to a browser page that contains a form with a text area for entering an optional greeting, and a series of text boxes for entering their friends' email addresses. When the recipient (hereinafter referred to as the *forwarder*) clicks the form's Submit button, a copy of the message will be sent to each of the email addresses previously specified (these people are referred to as *forwardees*), preceded by the greeting text, if any. The browser will then display a *Thank You* page.

Inline FTF

Use this method for HTML content type only.

A form for entering the forwarding information can be included directly in the content.

There are four commands that are used:

- $(ftf_form_start—This template command must come first. It has no parameters; it just signals the start of the FTF form (it expands to an HTML <form> tag).
- $(ftf_form_greeting "attributes")—This template command expands into the text area for entering the greeting. The optional attributes parameter specifies HTML attributes that will be included on the <textarea> tag. No syntax checking of these attributes is done; it is up to the user to make sure that they are correct and valid for the HTML <textarea> tag. The default is "rows=5 cols=60". The "name" attribute must not be included.

- `$(ftf_form_addresses "num" "attributes")`—This variable expands into a series of text boxes for entering the email addresses. The optional `num` parameter specifies the number of text boxes; the default is `3`. The optional attributes parameter specifies HTML attributes that will be included on each `<input>` tag. No syntax checking of these attributes is done; it is up to the user to make sure that they are correct and valid for the HTML `<input>` tag. The default is `"size=60"`. The `"name"` and `"type"` attributes must not be included.

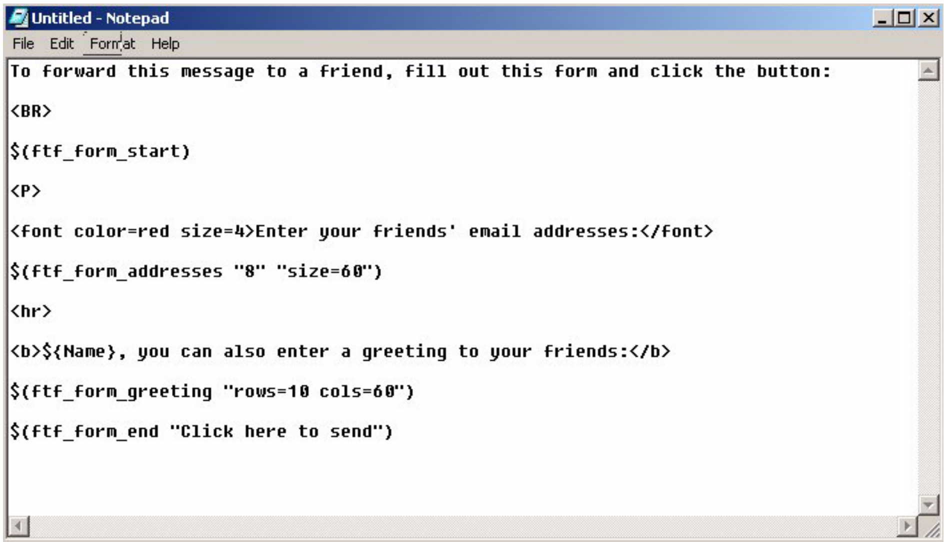
- `$(ftf_form_end "button text")`—This variable must come last. It expands into the HTML tag for the form submit button (an `<input type="submit">` tag), and the `</form>` tag. The optional parameter specifies the text that will be used as the name of the form's Submit button. The default is `"Submit"`.

You can use any text or other variables that you want between the functions. Most HTML can be used between the functions, except for any form-related tags (`<form>`, `</form>`, `<input>`, `<textarea>`, and so on).

The `$(ftf_form_greeting)` and `$(ftf_form_addresses)` variables may be placed in either order, but there must only be one of each.

Figure 22 is an example of using inline FTF in a content template:

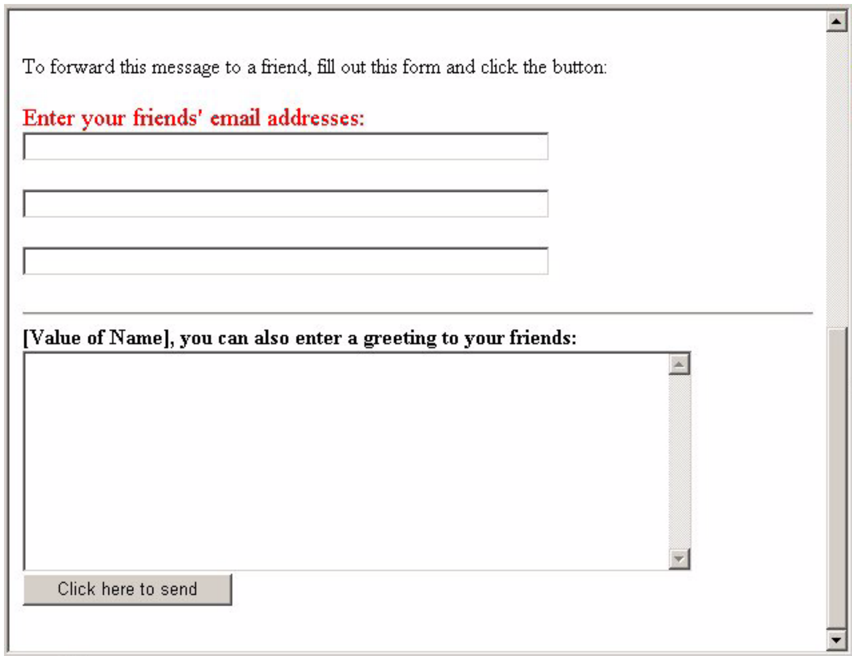
Figure 22. FTF Content Template



```
To forward this message to a friend, fill out this form and click the button:

<BR>

$(ftf_form_start)

<P>

<font color=red size=4>Enter your friends' email addresses:</font>

$(ftf_form_addresses "8" "size=60")

<hr>

<b>${Name}, you can also enter a greeting to your friends:</b>

$(ftf_form_greeting "rows=10 cols=60")

$(ftf_form_end "Click here to send")
```

By using the preceding example, a message would look something like Figure 23:

Figure 23. FTF Content Template Email



The recipient need only enter the email address of the person for which they would like to forward the message, and click the Click here to send button. The browser then displays a *Thank You* page.

FTF Reporting

You can view the forwarding statistics of a mailing that included FTF. For more information, see "FTF Reporting" on page 154.

Populating Template Variables 8

In order to personalize a mailing with template variables, all that you need to do is define a query, through the Query Setup screen, that retrieves the data to be merged into the content. The template variables are simply the names of the fields, or their aliases, as selected from the database.

This is best illustrated by the examples on the following pages.

For more information about Query Setup, see "Setting up a Query" on page 69.

This chapter covers the following topics:

Template Variables and Aliases

In this example, assume the following tables, `customer_acct`, `customer_acct_history`, and `person_customer`, exist (see Table 2, Table 3, and Table 4):

Table 2. customer_acct

customer_id	int	NOT NULL,
acct_num	varchar(20)	NOT NULL,
credit_card_number	varchar(20)	NOT NULL,
email_address	varchar(255)	NOT NULL,
email_address_valid	char(1)	NOT NULL,
preferred_email_format	varchar(5)	NOT NULL,
acct_creation_date	datetime	NOT NULL,
PRIMARY KEY	(customer_id, acct_num)	

Table 3. customer_acct_history

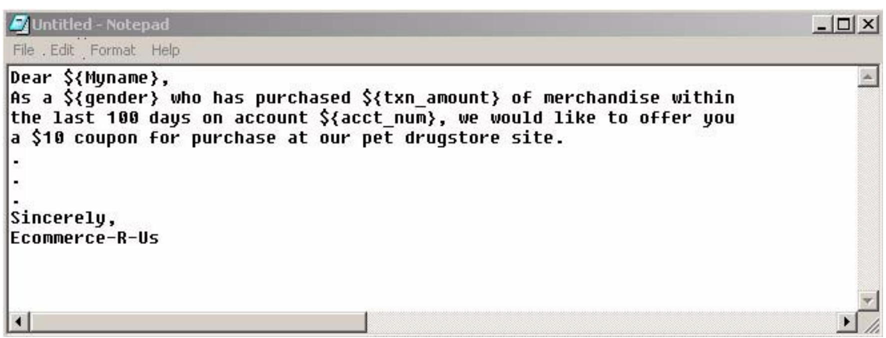
customer_id	int	NOT NULL,
acct_num	varchar(20)	NOT NULL,
txn_date	datetime	NOT NULL,
txn_amount	numeric(11,2)	
order_id	int	NOT NULL,
PRIMARY KEY	(customer_id, acct_num, txn_date)	

Table 4. person_customer

customer_id	int	NOT NULL,
preferred	char(1)	NOT NULL,
last_name	varchar(50)	NOT NULL,
first_name	varchar(50)	NOT NULL,
gender	char(1)	NOT NULL,
address1	varchar(50)	NOT NULL,
address2	varchar(50)	NOT NULL,
phone_number	varchar(15)	NOT NULL,
PRIMARY KEY	(customer_id)	
customer_id	int	NOT NULL,

Now assume the mailing will contain text along the lines of Figure 24:

Figure 24. Example Mailing



The following query, which—as defined through the Query Setup screen—is used to supply data for the template variables in the content.

It returns data for customers who have made a purchase of more than $100 within the last 100 days. This requires joining three tables. The first item selected is the `email_address`, as required.

After the email address, the first and last names are concatenated into the single template variable, `Myname`. Of course, one could define two template variables, `first_name` and last_name and accomplish the same effect in the mail by having "Dear `${fname} ${lname} . . .` " Again, though, one is not required to do so.

The next item uses the characteristic function approach to convert the *M* or *F* in the `pc.gender` field to *man* or *woman*, respectively. This would be impossible to accomplish directly.

NOTE: The use of string functions requires internal commas. However, the Siebel Email Marketing Stand-Alone parser uses commas for tokenization. Therefore, if the item being selected is calculated using functions with internal commas, replace these commas with a back quote (‘). They will be translated before execution.

Next, the amount of the transaction is retrieved for use in the `${txn_amount}` template variable.

Last selected is the account number, named `acct_num` in the database.

Note the use of the `&mode` template variable and the back quote (`‘`) in the substring function of the query as well (see Figure 25).

Figure 25. Example Code in Mailing

```
SELECT ca.email_address,
        pc.first_name + pc.last_name AS Myname,
        substring('woman'‘2*charindex('M'‘ pc.gender) + 1‘ 5) AS gender,
        cah.txn_amount,
        ca.acct_num,
FROM customer_acct ca,
        person_customer pc,
        customer_acct_history cah
WHERE pc.customer_id = ca.customer_id
AND ca.customer_id = cah.customer_id
AND cah.txn_date >= dateadd(day, -100, getdate())
AND cah.txn_amount > 100.0
AND ca.preferred_email_format = '&mode'
```

NOTE: The preceding query is written for Sybase, but could easily be converted for Oracle or other supported relational database management systems.

Selecting this query as the basis for a posting automatically results in the merging of the data into the content.

Conditional Template Variables with an External Database

It is possible to use conditional functions for template variables. If a template variable is an argument to one of these functions, its *trueness* or *falseness* is determined by whether it evaluates to `0`, `null`, `false`, or anything else.

If it is a `0`, `null`, or `false`, it is *false*; otherwise it is *true*. In terms of retrieving values from external databases, it is most often simplest to return a `0` or `1`. This can often be accomplished with combinations of characteristic functions, such as a *substring*, an *index of string in a string*, an *absolute value*, a *signum*, and an *isnull*. These functions have differing implementations depending on the database platform in question.

The following example uses the `INSTR` function native to Oracle.

In this example, Table 5 exists in the following manner.

Table 5. member_data

member_email	varchar2(255)	NOT NULL,
dob	date	NOT NULL,
member_name	varchar2(30)	NOT NULL,
member_age	number(3)	NOT NULL,
member_gender	char(1)	NOT NULL,
pref_sports	number(1)	NOT NULL,
pref_music	number(1)	NOT NULL,
pref_cars	number(1)	NOT NULL,
pref_motorcycles	number(1)	NOT NULL,
pref_movies	number(1)	NOT NULL,

This table stores simple demographic data for subscribers. By means of the Query Setup screen, the following query, as shown in Figure 26, could be defined:

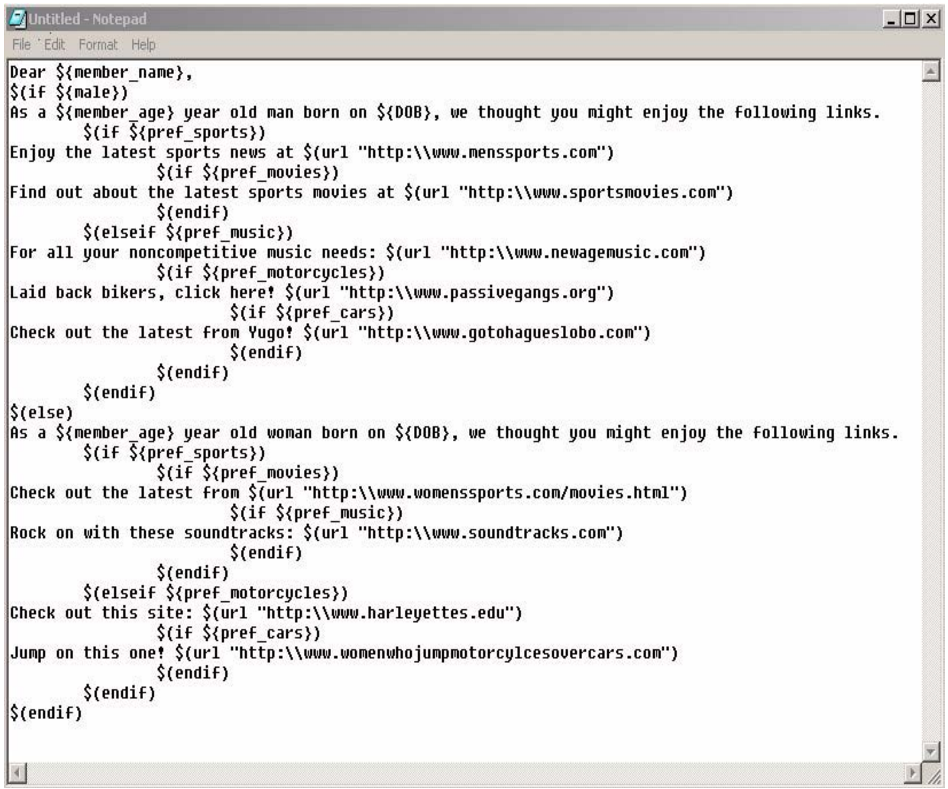
Figure 26. Example Query

Note that the internal comma in the `INSTR` function would have to be converted to a back quote (‘) as discussed earlier. Because the `member_gender` field contains either an `M` or an `F`, the `INSTR` function as defined returns a *1* for `M` which defaults to *true* and a *0* for `F` which evaluates to *false*.

The other numeric fields contain either a *0* or *1* in the database itself.

Thus, the following content could be constructed and used in conjunction with the preceding query (see Figure 27).

Figure 27. Example Content




```
Dear ${member_name},
$(if ${male})
As a ${member_age} year old man born on ${DOB}, we thought you might enjoy the following links.
        $(if ${pref_sports})
Enjoy the latest sports news at $(url "http:\\www.menssports.com")
                $(if ${pref_movies})
Find out about the latest sports movies at $(url "http:\\www.sportsmovies.com")
                $(endif)
        $(elseif ${pref_music})
For all your noncompetitive music needs: $(url "http:\\www.newagemusic.com")
                $(if ${pref_motorcycles})
Laid back bikers, click here! $(url "http:\\www.passivegangs.org")
                        $(if ${pref_cars})
Check out the latest from Yugo! $(url "http:\\www.gotohagueslobo.com")
                        $(endif)
                $(endif)
        $(endif)
$(else)
As a ${member_age} year old woman born on ${DOB}, we thought you might enjoy the following links.
        $(if ${pref_sports})
                $(if ${pref_movies})
Check out the latest from $(url "http:\\www.womenssports.com/movies.html")
                        $(if ${pref_music})
Rock on with these soundtracks: $(url "http:\\www.soundtracks.com")
                        $(endif)
                $(endif)
        $(elseif ${pref_motorcycles})
Check out this site: $(url "http:\\www.harleyettes.edu")
                $(if ${pref_cars})
Jump on this one! $(url "http:\\www.womenwhojumpmotorcylcesovercars.com")
                $(endif)
        $(endif)
$(endif)
```

This example illustrates how a mailing can be tailored to the gender of the recipient as well as their preferences for various activities. Clearly, with increasingly complex content, one could specify content for a certain age group or specific age, and so forth. Granted, one could define multiple queries to accomplish the same goals. The use of conditional template variables with external databases merely allows a balance of personalization in a single mailing against the total number of queries defined and mailings sent.

Limitations

If a table alias uses `tablename.columnname` in the content file, Siebel Email Marketing Stand-Alone MTA will not be able to parse the string in the content file, and will generate an empty list of email addresses.

For example,

```
select
   ABC.EMAIL_ADDRESS,
   ABC.CUSTOMER_ID
from customer_acct abc
where abc.preferred_email_format='&mode'
```

with content file:

```
${ABC.CUSTOMER_ID}
```

No email will be sent, and the status is returned as `NOOP`.

The workaround for the preceding example would be to use the actual variable name, `${CUSTOMER_ID}`.

URL Tracking 9

URL tracking allows users to track if and when recipients click on embedded hyperlinks. Hyperlinks provide an easy way to measure the response rate to an email campaign.

With only a minimum amount of setup, and only a simple modification to the content being sent, valuable information can be collected, such as:

- Which links are being accessed
- How often links are being accessed
- When links are being accessed
- By whom links are being accessed

The way that Siebel Email Marketing Stand-Alone measures URL click-throughs is quite simple. A *redirector* is used to catch the click-through before it reaches the ultimate Web page. For example, if you have an embedded hyperlink, such as http://www.yourcompany.com, in your email, recipients who click on that hyperlink will be redirected to your Siebel Email Marketing Stand-Alone public Web server *before* being routed to the desired Web site. Your Siebel Email Marketing Stand-Alone public Web server will count and log the click-through information into a special file which you can later analyze. This will happen almost instantaneously; the recipient will most likely not realize that they were redirected to your Siebel Email Marketing Stand-Alone public Web server before being routed to the desired Web site.

The steps involved in setting up click-through analysis are as follows:

- "Create a New Public Web Server" on page 114.
- "Associate List(s) with the New Public Web Server" on page 115.
- "Alter Message Content with Tracked URLs" on page 116.

- "Send Your Message" on page 120.

Create a New Public Web Server

The first step in URL tracking is to create a public Web server in Siebel Email Marketing Stand-Alone that will be used for collecting the click-through statistics.

To create a public Web server

1. From the Webmaster screen, click the Create Website hyperlink

   The Create a Website screen appears.

2. From here you are presented with three fields that you must complete in order to create a new public Web server:

   - **Website Description**

   Enter a short description for the Web site. You can associate any name with a Web server. This name will be used in the interface when you have to choose a Web server.

   - **Website Hostname**

     Enter the hostname of the machine. This is the hostname of the Web server used in the HTTP 1.1. Protocol to determine which virtual Web server you are trying to contact. It is usually the part of the site prefix before the port number and after the `http://` part.

     For example, if the site prefix is `http://lists.mymachine.com:8080`, the hostname is `lists.mymachine.com` (do not include `:` or port number).

- **Website Port**

  Specify a port number to be used for this Web server, such as `8888`, `9999`, or any available number greater than `25`.

  The Siebel Email Marketing Stand-Alone Web server port must be a number below `32768`.

  TCP Ports for Web servers are usually `80` or `8080`, but can be any number.

  Be careful to specify a port number you can easily remember. If you set this number and forget it, you will have no way to point your browser to this server without opening the global configuration file to see what the server port has been set to.

3. After you have specified these three fields, click Submit to create the new public Web server. No other Web server configuration changes are required for use with the URL tracker.

Associate List(s) with the New Public Web Server

In order to track click-throughs, you must associate the list that will be used for the mailing with the new public Web server you just created. This must be done for an existing list or any new list that you plan on creating in the future.

To associate a list with the new public Web server

1. Click List Owner.

   The List Owner Options screen appears.

2. Select the list you want to use for the mailing and click configure.
3. The Configuring List screen appears.
4. Click the General hyperlink.

   The General Configuration screen appears.

5. From the Web Server drop-down list, choose the new public Web server you previously created.

6 Click Submit or Submit & Go.

You have now associated your list with the new public Web server.

Alter Message Content with Tracked URLs

The next step is to alter the content of your email message so that your URL links will be counted when they are clicked on.

NOTE: If you are using short-tracked URLs in your content, you must specify the variable `Userid` in your `select` statement. For more information regarding `select` statements, see “Define a Query” on page 71.

In order to place a tracked URL template command in an email message, enter the URL in the content template in the following format:

```
$(url "<URL>" ["<mapID>"] ["<description>"])
```

In the preceding example, the quotes are required where indicated; the square brackets should *not* be included; they serve only to indicate optional parameters.

- <URL> is the URL the user will be redirected to. For example, “http://www.yourcompany.com”. This is referred to as the *destination URL*.
- <mapID> is an optional identifier used for grouping different occurrences of the same URL for reporting purposes. Tracked URLs with the same <mapID> must have the same destination URL. URLs that have been grouped by specifying the same <mapID> will be displayed together, as one URL, for reporting purposes. Clicks on any member of a group will be aggregated and reported as a total on that line.
- The <mapID> may consist of letters, digits, the underscore (_), or dash (-). Nothing else should be used.
- <description> is an optional description. This is displayed by the Reporting, Statistics, Response Analysis screen under the destination URL. It can be used to distinguish occurrences of the same URL that have not been grouped through a <mapID>.

If the `<mapID>` parameter is not specified, then the tracked URL will be an independent occurrence. Two tracked URLs with the same destination URL but no `<mapID>` will be reported separately in the Reporting section of Siebel Email Marketing Stand-Alone.

For example, suppose the following occur in the same template:

[1] `$(url "http://www.yourcompany.com" "company-one")`

[2] `$(url "http://www.yourcompany.com" "company-one")`

[3] `$(url "http://www.mycompany.com")`

[4] `$(url "http://www.mycompany.com")`

[1] and [2] have been grouped, [3] and [4] are independent. Suppose further that 50 people click on each of the four links. The URL Analysis section of Siebel Email Marketing Stand-Alone's Reporting functionality would look something like this:

URL and Description	Total Clicks
http://www.yourcompany.com	100
http://www.mycompany.com	50
http://www.mycompany.com	50

The URLs for [1] and [2] have been combined, and the clicks on each have been totaled.

The URLs for [3] and [4] are reported separately.

Grouping by `<mapID>` can also be done across mail modes within a mailing. For example, you could include [1] in your TEXT mode template and [2] in your HTML mode template.

In order to distinguish independent occurrences of the same URL, the description parameter can be used, for example:

[3] `$(url "http://www.mycompany.com" "" "top of message")`

[4] `$(url "http://www.mycompany.com" "" "bottom of message")`

Even though the `<mapID>` is not specified, a placeholder consisting of empty quotes *must* be included (otherwise the description would be interpreted as the `<mapID>`).The URL Analysis section of Siebel Email Marketing Stand-Alone's Reporting functionality will look something like the following table.

URL and Description	Total Clicks
http://www.yourcompany.com	100
http://www.mycompany.com bottom of message	50
http://www.mycompany.com top of message	50

This example also shows that you cannot depend on the order of the tracked URLs as they occur in the template matching their order. This is demonstrated in Siebel Email Marketing Stand-Alone's Reporting functionality.

Parameters on URLs

You can include HTML query parameters in the URL. The values of the parameters can be template variables, and thereby personalized. This can be useful, for example, if you have a login-type Web page that is set up to accept the name and password as query parameters on the URL. You can then include a hyperlink in your email with the customer's name and password already in the URL so that when the customer clicks the hyperlink, the login is done automatically.

As an example, suppose there is a *customers only* part of your Web site. The login page at www.mycompany.com/login is an HTML form that asks for two parameters, called *name* and *password*. This form then invokes the www.mycompany.com/welcome page, which verifies the name and password. This means that the latter URL would expect something like this:

http://www.mycompany.com/welcome?name=john&pass=rover

Assuming that the names and passwords are stored in your database and that you have defined the appropriate query, you could then set up a tracked URL like this:

```
$(url “http://www.mycompany.com/
welcome?name=${name}&pass=${password}”)
```

Each recipient of the email would have their name and password filled in, and a single click on the resultant hyperlink would take them directly to the Welcome page of your Web site.

Dynamic Tracked URLs

It is possible to use a template variable in the actual URL part of a tracked URL. This allows the destination URL to be different for different recipients.

For example, if you are running a sports-related Web site and you have URLs set up like the following:

baseball.mycompany.com

football.mycompany.com

basketball.mycompany.com

golf.mycompany.com

and so on

Further, the database that is used to do your mailings includes a column that identifies a favorite sport, which will be “baseball,” “football,” “basketball,” and so on. You want to include a hyperlink in your email that will take recipients to the site corresponding to their respective favorite. Assuming that the database column is called “favorite_sport,” you could set up a URL command like the following:

```
$(url “http://${favorite_sport}.mycompany”)
```

When the mailing is sent, John, whose favorite sport is basketball, will have a hyperlink to http://basketball.mycompany.com. Mary, whose favorite sport is football, will have a hyperlink to http://football.mycompany.com.

Template variables can be used in any part of the URL, or even as the entire URL; for example:

```
$(url “${website_name}”
```

In all cases, you must make sure that the string that results after the value(s) of the variable(s) have been substituted is a complete and valid URL, including the *http://*. In the first example, the values of the `${favorite_sport}` variable were just sports names, because the *http://* and the *.mycompany.com* parts were included directly on the parameter to the `$(url)` command. In the second example, the values of `${website_name}` would have to be complete URLs (as in or http://www.mycompany.com).

NOTE: When a variable is used within a URL, the resultant URL that appears in the recipients' email will be significantly longer than the resultant URL when no variables are used. This is normal behavior.

The $(trackMsgOpen) Template Command

The `$(trackMsgOpen)` template command allows Siebel Email Marketing Stand-Alone to track whether or not the user has opened a given message.

You can place this template command anywhere in your message—after your message has been sent, you can conduct "Statistical Analysis" on page 148 to track the number of messages opened by your recipients.

The `$(trackMsgOpen)` template command is only valid in an HTML message.

Do not use the `$(trackMsgOpen)` template command in a text message.

Send Your Message

After you have created the public Web server, have associated the list, and have modified the content, you are ready to send the email message. The posting of the message is done exactly as you normally would. For more information about sending mailings, see "Sending a Mailing" on page 121.

Sending a Mailing 10

The following chapter details the Siebel Email Marketing Stand-Alone five-step posting process.

The process of sending a mailing is as follows:

1. "Selecting Recipients" on page 121—Choose who will receive the mailing.

   The list of recipients can be a predefined list or a list of recipients that resulted from a predefined query.

   Additionally, you can upload a file of recipients who are not currently in your database.

2. "Providing Content" on page 125—Upload the body of your message.

3. "Defining Appearance" on page 128— Specify the introductory content of your email campaign.

4. "Preview the Mailing" on page 129 —Preview your mailing to see exactly how it will appear to your recipients.

5. "Sending the Mailing" on page 131—Send the mailing to your recipients.

Selecting Recipients

You can select recipients from the Recipient Source screen.

To select recipients

1. Click Post.

   The Recipient Source screen appears.

2. Specify who will receive your mailing:

- If you select a list from the Internal lists field, your mailing will be sent to a predetermined list of people.

For more information about internal lists, see "Setting up a List" on page 43.

- If you select a list from the Predefined queries field, your mailing will be sent to each recipient in your database who meets the criteria specified within the query.

For more information about predefined queries, see "Setting up a Query" on page 69.

- If you want to send your mailing to an external file of recipients, see "Sending to an External File of Recipients" on page 122.

The view of the Recipient Source screen depends on whether or not the user has previously defined at least one query. If the user has previously defined a query, then the Recipient Source screen will appear as shown in the preceding image. However, if the user is exclusively relying on internal lists, then only that section of the Recipient Source screen will be visible.

In the Recipient Source screen is a highlighted message indicating whether or not the list you are sending to adheres to the agreed-upon size specified to in the license agreement.

3 Click Next.

The Provide Content screen appears.

Sending to an External File of Recipients

If you want to send your mailing to a external file of recipients, complete the following steps.

To send to an external file of recipients

1. From the Recipient Source screen, click Upload.

   The Upload External File of Recipients dialog box appears.

   This dialog box allows you to upload external files of recipients according to how they receive incoming email (*Text*, *HTML*, *AOL*, *Text & HTML*, or *Wireless*), and assign configuration values to those files.

   For a discussion of the different types of messages, see "An Overview of Message Types" on page 161.

2. Specify the location of the external file(s) of recipients in the field, or click the Browse button and navigate to the file as usual.

Template Variable Ordering

When uploading an external file of recipients, it is necessary to assign template variables to your recipients. This is done by means of a *template variable ordering* file. The template variable ordering file identifies the name and order of your template variables.

For example, a template variable ordering file might be structured along the following lines:

(template)

```
emailaddress|fullname|gender|age|interests
```

(content)

```
john.simpson@yourcompany.com|John Simpson|Male|37|Bowling

bill.simpson@yourcompany.com|Bill Simpson|Male|10|Skateboarding

lily.simpson@yourcompany.com|Lily.Simpson|Female|8|Saxophone
```

NOTE: You must specify an email address in the first column.

To assign template variables to your recipients

1. In the Template Variable Ordering field, enter the location of your template variable ordering file, or click Browse and navigate to the file as usual.

   For more information about template variables, see "Define a Query" on page 71, "Template Variables" on page 86, and "Populating Template Variables" on page 105.

   If your template variable ordering file is in a language other than your operating system's native language character set (which is usually English), you must specify the proper character set.

2. Specify the character set of the Template Variable Ordering file in the Content-Type-CharSet field.

   For more information, see "Sending Mailings with Internationalized Content" on page 132.

Configuration Value

If you are uploading a external file of recipients, you need to assign configuration values to the file.

NOTE: Be aware that if you upload an external file of recipients and assign Default Flights List as the configuration value, the list of recipients could be viewed by those without permission or authorization. Therefore, do not to leave a list of recipients in the Default Flights List over time.

To assign configuration values to a file

1. Select an existing list so that its configuration values will be assigned to the external file of recipients.

2. Click OK.

   The External File of Recipients dialog box disappears, and the Provide Content screen appears.

Providing Content

After you have specified who will receive your mailing, you can specify the content of the mailing.

The Provide Content screen allows you to specify the following types of email as the body of your mailing:

- A *Text* message—Refers to messages that contain ASCII characters. Plain text messages do not contain formatting codes (such as **bold** or *italics*), and the font is usually plain with a fixed width. (The width of the font might vary from email client to email client.)
- An *HTML* message—Refers to messages that contain HTML (Hypertext Markup Language), the authoring language used on the Internet. You can also use HTML to write email that contains the same formatting as Web pages. This will allow you to create graphically media rich email to send to your subscribers.
- An *AOL* message—Refers to messages that are designed to be read through an AOL browser.
- A *Wireless* message—Refers to very short text messages intended for cell phones, *personal digital assistants* (PDAs), and other wireless devices.

If you have recipients who have specified *Text & HTML* as their mail mode, make sure you provide *Text* and *HTML* versions of your content. Siebel Email Marketing Stand-Alone will automatically build *Text & HTML* messages as long as you have specified the component parts. Otherwise, those recipients will not receive the mailing.

For more information about content types, see "An Overview of Message Types" on page 161.

To specify content of a mailing

- Complete the Provide Content screen as desired:

  For each mail method that you are sending, specify the location of your mailing's body in the appropriate field, or click the Browse button and navigate to the file as usual.

The preferred mail mode for a given list is specified in the List Owner, Subscriptions screen. (Additionally, you can add subscribers—and specify a preferred mail mode—to an existing list from the Subscription Manager screen.)

If you are sending a Web page as the body of your mailing, click the URL button and enter the URL you wish to send.

The URL buttons can be used when providing content as long as the specified URL points to content of the proper format. For example, if you click on the (Text) URL button, the URL must point to a text message.

If you want to include attachments with your mailing, see "Including Attachments" on page 127.

Content Type Character Set

If your template is in a language other than your operating system's native language character set (which is usually English), you must specify the proper character set.

To specify the proper character set

1. Specify the character set of the template in the Content-Type-CharSet field.
2. Click Next.

NOTE: For more information, see "Sending Mailings with Internationalized Content" on page 132.

Unspecified Format

The Unspecified Format dialog box may appear on the Provide Content screen.

The Unspecified Format dialog box allows you to specify a mail mode format for those recipients who have specified a mail mode not provided for by the settings on the Provide Content screen.

To specify mail mode format for recipients who have an unspecified format

- Select an alternative mail mode for each type displayed, then click OK.

  The Unspecified Format dialog box disappears from the Provide Content screen.

  The Define Appearance screen appears.

Including Attachments

If you want to include an attachment as part of your mailing, complete the following procedure.

To include attachments

1. From the Provide Content screen, click Attachments.

   The Add Attachments dialog box appears.

2. Specify the attachment's location in the Add File field, or click Browse and navigate to the file as usual.

3. Click Add.

   The attachment appears under Current Attachments.You can add as many attachments as necessary by following this procedure.

4. Click Close.

5. Click Next.

   The Define Appearance screen appears.

Removing Attachments

If you want to remove an attachment from a mailing, complete the following steps.

To remove attachments

1. From the Provide Content screen, click Attachments.

   The Add Attachments dialog box appears.

2 Highlight the attachment you want to remove from the Current Attachments list, and click Delete.

   The attachment will disappear from the Current Attachments list. You can remove as many attachments as necessary by following this procedure.

3 Click Close.

4 Click Next.

   The Define Appearance screen appears.

Defining Appearance

After you have selected who will receive the mailing, you will have to specify the introductory content of your email campaign.

To specify the introductory content of an email campaign

1 Complete/modify the Define Appearance screen as desired:

   - To—This field is automatically filled in; however, you can have each recipient's email address used in place of the default text by checking Recipient's Address.

     If you select the Recipient's Address check box, Siebel Email Marketing Stand-Alone will send out email one at a time, whereas if you do not check Recipient's Address, Siebel Email Marketing Stand-Alone will send out email in blocks of 100.

     If you check Recipient's Address, the value in the To field will be replaced with *Recipient's email address will be used*.

   - **From.** This field is automatically filled in with the email address of the person who logged in to the system. However, you can modify this field.

   - **Subject.** Enter a title for the email campaign.

     NOTE: This is a *required* field.

- **Bounces Sent To.** This field is automatically filled in.

  The email address specified in the Bounces Sent To field is where bounces go.

- **Reply To**. Enter the email address of the person you want replies to go to.

- **Campaign ID**. Enter a unique identifier for the mailing.

  You can select a campaign ID from the list of previous campaign IDs. However, the ability to do so is dependant upon the level of reporting functionality built into Siebel Email Marketing Stand-Alone at the time of installation.

  NOTE: This is a *required* field.

  Make sure to use only alphanumerics in the Campaign ID field. All nonalphanumeric characters will be replaced with an underscore (_).

2 Click Next.

The Preview Mailing screen appears.

Preview the Mailing

After you have specified who will receive your mailing, how it will be titled, and have uploaded the body of your mailing (including any attachments), you can preview your mailing to see exactly how it will appear to your recipients in the Preview Mailing screen.

To preview your mailing

1. Select how you want to receive the preview mailing by checking the appropriate email method (Text, HTML, AOL, and so on).

   By default all Select Content to View check boxes are selected.

   You can choose to receive a preview for each email method that you are sending. For example, if you are sending *text*, *HTML*, and *AOL* versions of the same mailing and wish to preview all three, simply select the appropriate email methods in the Select Content to View check box. Just keep in mind that in doing so you will receive three separate preview mailings.

2. Enter the email address of the preview recipient(s) in the Email Address(es) field.

   By default, the Preview Mailing screen will list the email address you specified when you logged in.

3. Check whether you want the preview mailing to be sent locally or over the Siebel Email Marketing Network.

   The Local Network selection will not be available if you have a license that specifies that mailings be sent through the Siebel Email Marketing Network.

   For more information about the Siebel Email Marketing Network, see “Siebel Email Marketing Network” on page 21.

4. Click Preview.

   The preview will be emailed to you shortly, and the Send Mailing screen appears.

   Keep in mind that any template variables that you have specified for your mailing will appear in the preview as follows: [Value of firstname], for a variable called firstname.

   You can also choose to not receive a preview either by unchecking all boxes under Select Content to View or deleting all email addresses in the Recipient field.

Sending the Mailing

By now you have received your preview mailing. If you are satisfied, you can now send the mailing to your recipients.

Your mailing will be sent in the same manner that you specified for your preview mailing. For example, if you specified that your preview mailing be sent to the Siebel Email Marketing Network, the actual mailing will be sent to the Siebel Email Marketing Network as well. (For more information about the Siebel Email Marketing Network, see "Siebel Email Marketing Network" on page 21.)

To specify when you want to send a mailing

1. Specify when you want to send your mailing. You have the following three options: immediately (*Now*), in the future (*Later*), or when you want to send it (*Scheduled Mailing*).

   It is important to remember that if you specify that your mailing be sent at a later date (anything other than *now*), the mailing will be sent at the specified date as determined by the server on which Siebel Email Marketing Stand-Alone is installed. Make sure you correct for variances due to different time zones, inaccurate clock settings in the server, and so on.

2. Click Send Mailing.

   Your mailing has been sent.

3. From here you can view delivery status, explore control options for your mailing, or view a detailed mailing report.

See Also

For more information regarding delivery statistics, see "Mailing Delivery Status" on page 146.

For more information regarding mailing control, see "Mailing Control" on page 143.

For more information regarding mailing reports, see "The Mailing Report" on page 148.

Sending Mailings with Internationalized Content

You can send a mailing with internationalized content.

Siebel Email Marketing Stand-Alone supports the following character sets as shown in Table 6.

Table 6. Supported Character Sets

Big5 (Traditional Chinese)	EUC-KR (Korean)	ISO-2022-JP (Japanese)
ISO-8859-2 (Latin 2 E European)	ISO-8859-5 (Cyrillic)	ISO-8859-8 (Hebrew)
ISO-8859-15 (Latin 9 W European)	Shift_JIS (Japanese)	UTF-8 (Unicode)
windows-1252 (W European)	windows-1255 (Hebrew)	windows-1258 (Vietnamese)
EUC-CN (Simplified Chinese)	EUC-TW (Traditional Chinese)	ISO-2022-KR (Korean)
ISO-8859-3 (Latin 3 S European)	ISO-8859-6 (Arabic)	ISO-8859-9 (Latin 5 Turkish)
KO18-R (Cyrillic)	US-ASCII (U.S. English)	windows-1250 (Central European)
windows-1253 (Greek)	windows-1256 (Arabic)	windows-874 (Thai)
EUC-JP (Japanese)	GB2312 (Simplified Chinese)	ISO-8859-1 (Latin 1 W European)
ISO-8859-4 (Latin 4 Baltic)	ISO-8859-7 (Greek)	ISO-8859-13 (Latin 7 Baltic Rim)
KO18-U (Cyrillic)	UTF-7 (Unicode)	windows-1251 (Cyrillic)
windows-1254 (Turkish)	windows-1257 (Baltic)	

You can send a mailing with internationalized content in the body of your message as well as in the Subject line.

Sending a mailing with internationalized content is very similar to the regular posting process. The only difference is that you must be careful to specify what character set was used for each file you upload. Otherwise, Siebel Email Marketing Stand-Alone will not be able to correctly read the contents of those files.

Specific exceptions to the regular posting process are shown in the section that follows.

External Files of Recipients

When sending to an external file of recipients, upload your external file as specified in "Sending to an External File of Recipients" on page 122, but make sure you identify the proper content type in the Content-Type-CharSet field.

Additionally, you can specify a *template variable ordering* file, as outlined in "Template Variable Ordering" on page 123, as long as the content type is the same as the uploaded file of recipients, and the first column (which will be the email address of the recipient) is in your operating system's native language character set (which is usually English).

NOTE: According to generally-accepted email standards, email addresses must be in simple ASCII. Therefore, the first column of the template variable ordering file cannot contain internationalized characters. However, any of the other template variable fields can freely use internationalized characters.

Providing Content

When specifying internationalized content, make sure you identify the proper content type in the Content-Type-CharSet field.

If sending a URL for a Web site that is written in internationalized content, likewise make sure you specify the proper content type in the Content-Type-CharSet field.

Defining Appearance

You can specify the mailing's Subject in the same character set as used in the body of the message, as shown in Figure 28.

Figure 28. Defining your Email Appearance

You can enter internationalized content directly into Siebel Email Marketing Stand-Alone user interface as long as you have previously set up your operating environment to read and write in the desired character set. Otherwise, you can create content in an editor that supports your desired character set, and then *cut and paste* the Subject from your internationalized content.

The rest of the posting process is the same.

Any Siebel Email Marketing Stand-Alone functionality you wish to utilize regarding a mailing sent with internationalized content will be identified by the internationalized subject line you specified during the posting process.

Scheduled Recurring Mailings

The Scheduled Recurring Mailings feature allows you to send a mailing more than once. This is useful if you have a static, but highly personalized, content template that you want to send to recipients on a regular basis. From the Scheduling Options dialog box you can set up your recurring mailing by specifying the following options: title, start date, time of day, recurrence pattern (daily, weekly, monthly, or yearly), and end date.

For more information about setting up a recurring mailing, see "To schedule a recurring mailing" on page 135.

After you set up a recurring mailing, you can select Mailing Control > Scheduled Mail to further manage your mailings, for example:

- Delete a recurring mailing (For more information, see "To delete a recurring mailing" on page 138.)
- Review a recurring mailing (For more information, see "To review a recurring mailing" on page 138.)
- Replace content files (For more information, see "To replace a scheduled mailing's content file" on page 139).
- Add or remove attachment files (For more information, see "To add or remove a scheduled mailing's attachment file" on page 140.)

To schedule a recurring mailing

1 Select Set up a Recurring Mailing from the Send Mailing screen.

The Scheduling Options dialog box appears.

2 Complete the following fields:

Field	Description	Example
Title	Enter the name of the recurring mailing here.	ABC Reminder
Start Date	From the drop-down lists, select the month, day of month, and year here.	September 21, 2003
Time of Day	From the drop-down lists, select the time of day in hours and minutes.	8:00 a.m.

3 Choose the recurrence pattern of the recurring mailing by completing one of the following fields:

Field	Description	Example
Daily	Select which day you would like the mailing to be sent by selecting either of the following options:	
	Every X days. Select this option if you want your mailing to be sent on certain (or X) days (where X is the number of days).	Every 2 days
	Every weekday. Select this option if you want your mailing to be sent every weekday.	Monday though Friday
Weekly	If you want your mailing to be sent out on a weekly basis, select the *Every X weeks* option (where X is the number of weeks).	Every 4 weeks
	Also, select which day of the week you would like the mailing to be sent.	Thursday

Field	Description	Example
Monthly	Select which day of the month you would like the mailing to be sent by selecting either of the following options:	
	On day X of every Y months, where X is the day of the month, and Y is the number of months.	On day 1 of every 2 months
	On the X Y of every Z months, where X is the ordinal number, Y is day of the week, and Z is the month.	On the first Sunday of every 3 months
Yearly	Select which day of the year you would like the mailing to be sent by selecting either of the following options:	
	Every X Y, where X is the month and Y is the day of the month.	January 10
	On the X Y day of month Z, where X is the ordinal number, Y is day of the week, and Z is the month.	On the first Sunday of every January

4 Choose the end date for the recurring mailing by selecting from the following fields:

Field	Description	Example
No end date	Select *No end date* if your mailing has no known end date.	
End after X occurrences	Where *X* is the number of occurrences.	End after 5 occurrences
End by X Y Z	Where *X* is the month, *Y* is the day of the month, and *Z* is the year.	June 20, 2004

5 Click OK.

The Send Mailing dialog box appears with a hyperlink next to the Set up a Recurring Mailing option. The hyperlink details the recurring pattern for the mailing.

6. If you are not satisfied with the recurrence pattern, click the hyperlink to edit your mailing.
7. If you are satisfied with the recurrence pattern, click Send Mailing.
8. The Your Mailing has been scheduled screen appears. You have successfully scheduled a recurring mailing.

To delete a recurring mailing

1. Navigate to Mailing Control > Scheduled Mail.

   The Scheduled Mailings screen appears.

2. Click Delete in the mailing screen to delete a mailing.

   A dialog box appears asking you to confirm the deletion.

3. Click OK.

   You are returned to the Scheduled Mailings screen, where your mailing no longer appears listed.

To review a recurring mailing

1. Navigate to Mailing Control > Scheduled Mail.

   The Scheduled Mailings screen appears.

2. From here you can review the following fields:

Field	Description	Example
Schedule ID	The system-assigned unique identifier for a scheduled mailing.	48
Campaign ID	The user-selected identifier for a scheduled mailing. **NOTE:** The campaign ID can be associated with more than one mailing.	Reminder
List Name	The list name of a scheduled mailing.	abclist

Field	Description	Example
Subject	The subject or title of a scheduled mailing.	ABC Reminder
Address Source	The address source of a scheduled mailing.	Database Query
Start Date	The start date of a scheduled mailing.	September 21, 2003
Recurrence Pattern	The recurrence pattern of a scheduled mailing.	Every two weeks on Wednesday and Thursday at 8:00 A.M., ending December 21, 2003
Number Sent	The number of scheduled mailings that have been sent to date.	0
Next Send Date	The date that a scheduled mailing will next be sent on.	September 21, 2003
Content Files	Text Attachments	

To replace a scheduled mailing's content file

1. Navigate to Mailing Control > Scheduled Mail.

   The Scheduled Mailings screen appears.

2. Click the Text hyperlink.

   The Scheduled Mailing Content dialog box appears.

3. In the File Name field, click Browse.

   The Choose file dialog box appears.

4. Locate and select the file to attach, then click Open.

   The Scheduled Mailing Content dialog box appears with the name of the file, including the path to the file, in the File Name field.

5 Click OK.

The Scheduled Mailing content dialog box appears, indicating the file has been successfully added.

6 Click OK.

To add or remove a scheduled mailing's attachment file

1 Navigate to Mailing Control > Scheduled Mail.

The Scheduled Mailings screen appears.

2 Click Attachments.

The Scheduled Mailing Attachments dialog box appears.

3 Complete or review the following fields:

Field	Description
Schedule ID	The system-assigned unique identifier for a scheduled mailing.
Add Attachment	Click Browse to locate the file (or files), then click Add.
Remove Attachment	Click Delete to remove an attachment.
Attachment Count	Lists the number of attachments for the mailing.

4 Click OK.

Moderation

There is a feature of Siebel Email Marketing Stand-Alone that allows you to add an additional level of control for your mailing. The Moderator feature is similar to that of, say, a newspaper editor who has approval authority over what is included in a newspaper. Likewise, the Siebel Email Marketing Stand-Alone moderator has approval authority over what mailings are sent out.

Enabling the Moderator feature is as simple as assigning a moderator on the List Owner > People screen.

After you have assigned a moderator for a given list, that person will control the sending of mailings to that list. For example, suppose that a user wanted to send a mailing to a list that had an assigned moderator. The posting process would be exactly the same as previously described in this chapter. However, after the user reached the final step of the posting process and clicked the Send Post button, a special message would be sent to the moderator.

After reviewing the content of the message, the moderator replies to the message (following the instructions contained in the message body) giving permission to send the mailing or not. When Siebel Email Marketing Stand-Alone receives the approval response from the moderator, the mailing is sent.

NOTE: It is possible to assign more than one moderator. In case there is more than one moderator, the mailing will be sent if any moderator approves.

Mailing Control 11

You can monitor the status of mailings that are currently running on the Mailing Control screen.

The Mailing Control screen consists of the following columns:

- **Name**. The name of the list, query, or text file to which the mailing was sent.
- **Subject.** The name of the mailing, taken from the Subject line.
- **Action.** From here you can suspend or cancel a mailing that is currently running.
- **Mail Mode.**The mail mode(s) of the mailing.
- **Status.** From here you can see how much of the mailing has actually been sent.

If you want to *suspend* a mailing, simply select suspend from the Action column for the desired mailing, and click Go!.

NOTE: You can choose to suspend a particular mode by choosing [this only] or suspend all modes by choosing [all modes].

You can also *resume* a previously suspended mailing or *cancel* a mailing in the same manner.

NOTE: The *suspend*, *resume,* and *cancel* commands do not work over the Siebel Email Marketing Network.

Reporting 12

Siebel Email Marketing Stand-Alone reporting functionality is divided into two sections: Mailing Delivery Status and Statistics.

Siebel Email Marketing Stand-Alone reporting functionality is detailed in the following topics:

- "Mailing Delivery Status" on page 146

  This section provides you with information regarding the success of a mailing's delivery.

- "Statistical Analysis" on page 148

  This section provides you with statistical analysis for a mailing, campaign, or subscriber.

It is important to understand that Siebel Email Marketing Stand-Alone might or might not have the statistics reporting functionality, depending on the needs identified by the user at the time of installation.

For the purposes of this documentation, it is assumed that the user has the advanced reporting functionality.

Mailing Delivery Status

From the Mailing Delivery Status screen, you will find:

- The number of messages queued for delivery
- The number of messages delivered
- The number of soft bounces
- The number of hard bounces

To navigate to the Mailing Delivery Status screen, click the Mailing Delivery Status hyperlink from the Reporting screen.

Mailings are presented in a chronological order, with the most recent (as determined by when the mailing was queued for delivery) on top.

Use the drop-down list to specify a desired period of time.

The following items of information are presented on the Mailing Delivery Status screen:

- **Author.** This is the author of the message for which statistics are being displayed.
- **Subject.** This is the subject of the message for which statistics are being displayed.
- **Campaign ID.** When posting, it is possible to associate a campaign ID with a posting. You can use this campaign ID to associate similar posts.
- **Transfer Started**. This is the time that email distribution of the message for the list started.

- **Transfer Ended**. This is the time that the last email was sent for this message. If the message is still partially distributed, then the current time will appear in this column. You can also see (*stalled*) if there have been no new messages queued for one minute or more.

  Statistics collection is done *asynchronously* for text and HTML recipients. It is possible that one delivery may complete before the other is started, causing the stop time to appear prematurely. This is normal; statistics collection will resume for the new job, and the stop time will appear again at the end of that job.

  Deliveries are never marked complete if there are no subscribers in the list.

- **Messages Queued.** This is the number of email messages that have been queued for delivery.

- **Total Number of Messages Queued.** This is the number messages that will be delivered.

- **Messages Delivered.** This is the number of queued messages that have actually completed delivery. When all messages in the queue have been processed, this number should be equal to the total queued.

  Keep in mind that the actual number of messages delivered is affected by the number of bounced messages. For example, if you sent a mailing to 1000 recipients and 50 messages bounced, then the total number of messages delivered was 950.

- **Soft Bounces.** Soft bounces are error messages due to temporary problems, such as a mail server machine being unavailable.

- **Hard Bounces.** Hard bounces are permanent errors that have been received by the system.

- **Status (of the Mailing).** Possible values are as follows:

  - `INIT` — Initialization phase
  - `ACTV` — Mail is being delivered
  - `DONE` — Deliveries completed with no errors
  - `NOOP` — Mailing produced no mail items to deliver
  - `DTXFER` — Either getting users from db or sending to the hub

- `SUSP` — User requested mailing to be suspended
- `DONE+ERR` — Mailing completed with errors
- `KILLED` — Mailing killed

Statistical Analysis

The Statistics screen allows you to view statistical analysis for a mailing, campaign, or subscriber.

To access the Statistics screen

- From the Reporting screen, click the Statistics hyperlink.

  The Choose Report Category screen appears.

The Choose Report Category screen is the launching point for three different categories of reports. The type of report you receive depends on which icon you select: Mailing, Campaign, or Subscriber. Each type of report is discussed in the following sections.

The Mailing Report

The Mailing Report provides delivery, response, and error information regarding your email campaign.

To access Mailing Report Search

1. From the Choose Report Category screen, select Mailing.
2. Enter a Campaign ID in the Campaign ID field.

   If you are not sure of the Campaign ID, you can use a wildcard (*) to narrow your search.

   For example, if you think the Campaign ID is *Summer_06*, but are not sure of the number, you can enter *Summer** in the field. Siebel Email Marketing Stand-Alone would return *all* campaigns that start with *Summer*. Then you can select the desired campaign.

3 Click Next.

The Filter Mailings by Campaign ID screen appears.

From here you see a list of all campaigns that meet the criteria specified earlier. If the list is too unwieldy, you can narrow the list by searching again for a Campaign ID.

4 Select the Campaign ID for which you want to view mailings and click Next.

The Choose Mailing for Report screen appears.

From here you will see the list of mailings that were sent for the specified Campaign ID. Again, if the list is too unwieldy, you can sort the list by date, subject, or author.

5 Click the Mailing icon of the mailing you want to see.

The Mailing Report screen for the specified mailing appears.

The Mailing Report Screen

The Mailing Report screen is divided into three sections: Delivery Statistics, Response Analysis, and Forwarding Statistics. The following sections cover each section in detail.

The Delivery Statistics Section

From here you will find information about message delivery, bounce detail, soft bounce analysis, and mail mode statistics. Each of the previously-listed categories will be discussed in detail.

Message Statistics

From here you see the total number of messages delivered and opened, and the estimated open rate of the specified mailing (based on the total HTML messages opened).

This will only include opened messages that include the `$(trackMsgOpen)` variable. For more information about the `$(trackMsgOpen)` variable, see "The $(trackMsgOpen) Template Command" on page 120.

This information is in the form of a numeric value, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent.

Bounce Detail

From here you see the total number of messages that bounced.

A bounced messaged can be in the form of a hard bounce, which represents a message that is undeliverable (such as a message to a nonexistent address), a soft bounce, which represents a message that is temporarily undeliverable (such as a message to a recipient whose mailbox is full), or an unparsable bounce, which represents a bounced message that cannot be categorized as either a soft or hard bounce.

This information is in the form of a numeric value, a percentage of the total sent, a percentage of the total number of bounces, and in the form of a bar graph that represents a percentage of the total number of bounces.

You can also see the summary information about the total number of bounced messages, which will be the total of the hard and soft bounces.

Soft Bounce Analysis

From here you see the messages that were classified as soft bounces.

This information is in the form of a numeric value, a percentage of the total number of soft bounces, and in the form of a bar graph that represents a percentage of the total number of soft bounces.

Possible reasons for a soft bounce are as follows:

- Unknown Code
- Bad Address
- Address Moved
- Bad Sender
- Mailbox Problem
- System Problem
- Network Problem
- Protocol Problem
- Security Problem

- Message Too Large
- Vacation
- Last Resort

You can also see summary information regarding the total number of soft bounced messages, which will be the total of all soft bounces.

Hard Bounce Analysis

You can see the messages that were classified as hard bounces.

This information is in the form of a numeric value, a percentage of the total number of hard bounces, and in the form of a bar graph that represents a percentage of the total number of hard bounces.

Possible reasons for a hard bounce are as follows:

- Unknown Code
- Bad Address
- Address Moved
- Bad Sender
- Mailbox Problem
- System Problem
- Network Problem
- Protocol Problem
- Security Problem
- Message Too Large
- Vacation
- Last Resort

You can also see the summary information about the total number of hard bounced messages, which will be the total of all hard bounces.

Mail Mode Statistics

From here you can see the total number of messages sent according to the recipient's preferred mail mode.

You can also see the summary information about the total number of messages sent, which will be the total of all messages in each mail mode category.

For more information regarding mail modes, see "An Overview of Message Types" on page 161.

The Response Analysis Section

From here you can find information about response statistics, URL summary statistics, and URL analysis. Each of the previously-listed categories are discussed in detail in the following sections.

Response Statistics

From the Response Statistics subsection you can see the total number of messages delivered and the total number of messages that bounced.

This information is in the form of a numeric value, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent.

From the Percentages out of Total Messages Delivered subsection you can see the total number of recipients who unsubscribed, the total number of respondents and response rate, and the average number of clicks per respondent. (For more information about recipients who unsubscribe, see *The List of Recipients Who Have Unsubscribed*, in the following section.)

> A *respondent* is defined as any recipient who clicks on one or more URLs in an email message.
>
> The *response rate* is defined as total respondents divided by total messages delivered.

This information is in the form of a numeric value, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent.

The List of Recipients Who Have Unsubscribed

One of the items of information provided under the Percentages out of Total Messages Delivered subsection is the total number of recipients who have unsubscribed. By clicking the see list hyperlink, the Unsubscriber List screen appears.

From here you can see a list of every recipient who has unsubscribed from the specified email campaign.

You can view a Subscriber Report for a given recipient by clicking the appropriate icon.

URL Summary Statistics

From here you can see information regarding the URLs and click-throughs in your email message.

URL Analysis

From here you can see a list of the URLs that were embedded in your email message. The number of times each URL was clicked is also included.

You can click each URL for a list of the recipients who clicked that hyperlink.

This information is in the form of a numeric value, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent.

The Forwarding Statistics Section

From here you can find information about Response Statistics, Forwarding Statistics, and URL Analysis. Each of the previously-listed categories are discussed in detail in the following sections.

Response Statistics

From the Response Statistics subsection you can see the total number of messages sent, delivered, and bounced.

This information is in the form of a numeric value, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent.

Forwarding Statistics

From the Forwarding Statistics subsection you can see the total number of recipients who forwarded the mailing (click the see list hyperlink to see the actual email addresses of those who forwarded the mailing), the total number of times the mailing was forwarded, and the number of recipients of the forwarded-message who subsequently subscribed to the list (click the see list hyperlink to see the actual email addresses of those who subsequently subscribed to the list).

URL Analysis

From here you will see a list of the URLs that were embedded in your email message. The number of times each URL was clicked is also included.

You can click each URL for a list of the recipients who clicked that hyperlink.

This information will be in the form of a numeric value, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent.

FTF Reporting

You can view the forwarding statistics of a mailing that included an FTF hyperlink by means of the Forwarding Statistics and URL Analysis subsections.

As a simple example, a mailing is sent to 10 people, including Anna and Bert. The mailing includes an FTF hyperlink, a hyperlink to subscribe to the list, and two URL links “A” and “B”. Anna then uses the FTF hyperlink to forward the email to two of her friends, and Bert uses it to forward it to three of his friends. Both of Anna’s friends and one of Bert’s friends then subscribe to the list. One of Anna’s friends and two of Bert’s friends click hyperlink “A”; all five forwardees click hyperlink “B”.

The Forwarding Statistics subsection repeats the total messages sent, total messages delivered, and total bounce statistics from the Delivery Statistics screen, and then includes:

- **Recipients who forwarded.** This number is the count of all recipients who forwarded at least one message. In the preceding example, the number would be 2.
- **Total number of times the mailing was forwarded.** In the preceding example, the number would be 5.

- **Forwardees subscribed.** This is a count of the people to whom the email was forwarded and who then used the subscribe hyperlink. In the preceding example, the number would be 3.
- **A URL analysis section, showing each hyperlink in the mailing.** This section shows the click-through statistics only for forwardees (click-through statistics for regular recipients are reported on the Response Analysis screen). For this section, the *Click Rate* is the number of clicks relative to the total number of forwardings, which in the preceding example is 5. In the preceding example, there would be a line for the “A” hyperlink and one for the “B” hyperlink. The “A” hyperlink would show 3 clicks and a 60% click rate (3 out of 5); the “B” hyperlink would show 5 clicks and a 100% click rate (5 out of 5).

The Campaign Report

The Campaign Report provides you with message statistics, bounce detail, and mail mode statistics information regarding your email campaign.

To choose a campaign ID

1. From the Choose Report Category screen, select the Campaign icon.
2. Enter a Campaign ID in the Campaign ID field, and then click Next.

   If you are not sure of the Campaign ID, you can use a wildcard (*) to narrow your search.

   For example, if you think the Campaign ID is *Summer_06*, but are not sure of the number, you could enter *Summer** in the field. Siebel Email Marketing Stand-Alone would return **all** campaigns that start with *Summer*. Then you can select the desired campaign.

   The Choose Campaign ID for Report screen appears.

3. From here you can see a list of all campaigns that meet the criteria specified in the preceding section. If the list is too unwieldy, you can narrow the list by searching again for a Campaign ID.

To view the Campaign ID

- Click the Campaign icon for the Campaign ID you want to view.

  The Campaign Report screen appears.

The Campaign Report Screen

The Campaign Report screen is divided into four sections: Delivery Statistics, Response Analysis, Top Ranked URLs, and Campaign Mailings.

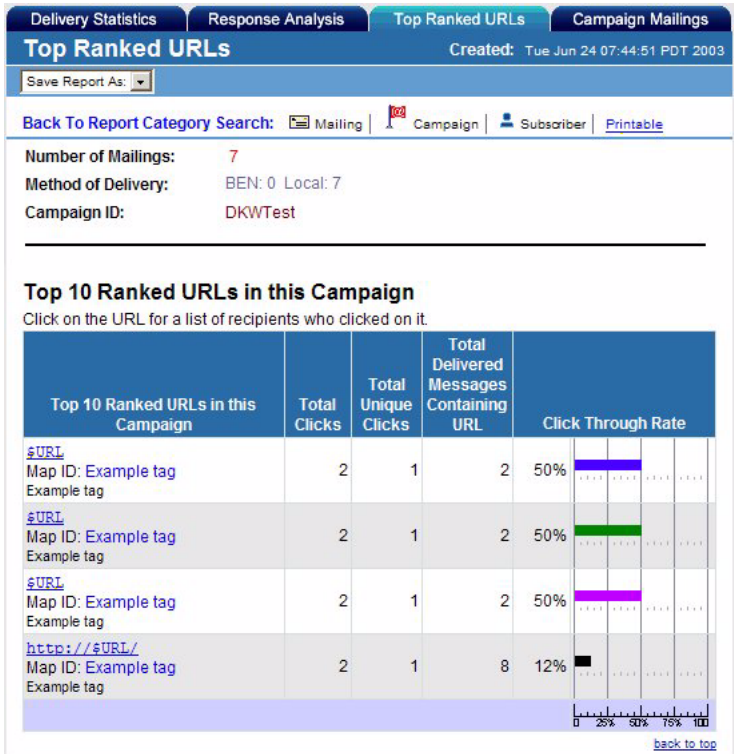
For complete information regarding the Delivery Statistics and Response Analysis sections, see "The Delivery Statistics Section" on page 149 and "The Response Analysis Section" on page 152.

The Top Ranked URLs Section

The Top Ranked URLs section shows the URLs most often clicked in an email campaign.

This information is in the form of numeric values, a percentage of the total sent, and in the form of a bar graph that represents the percentage of the total sent (see Figure 29).

Figure 29. The Top Ranked URLs Section



The Campaign Mailings Section

The Campaign Mailings section provides a list of the mailings that comprise the specified Campaign ID. Click on the Mail icon for any of the listed mailings to see the associated mailing report.

The Subscriber Report

The Subscriber Report provides you with summary information about mailings sent to the specified subscriber, including a total list of mailings.

To access Subscriber Search

1. From the Choose Report Category screen, select the Subscriber icon.

   The Choose Subscriber for Report dialog box appears.

2. Enter the email address of the subscriber in the Email Address field.

   If you are not sure of the email address, you can use a wildcard (*) to fine-tune your search.

   For example, if you think the domain of the email address is `simpson.com`, but are not sure of the address, you can enter `*simpson.com` in the field. Siebel Email Marketing Stand-Alone returns *all* subscribers that contain `simpson.com` as part of the email address. Then you can select the desired subscriber.

3. Click Search.

   The Subscriber Search screen appears.

4. From here you can see a list of all subscribers that meet the criteria specified earlier. If the list is too unwieldy, you can narrow the list by searching again for an email address. Click the Subscriber icon of the subscriber you want to view.

   The Subscriber Mailing History Report screen appears.

The Subscriber Mailing History Report

The Subscriber Report is divided into two sections: Mailing History, and Response History.

The Mailing History Section

From here you are presented with summary information about mailings sent to the specified subscriber, including a total list of mailings.

To view a mailing report

- Click the Mailing icon of the desired Campaign ID to see the Mailing Report for that campaign.

The Response History Section

From here you are presented with a complete list of each URL that was clicked for the specified campaign.

To view the response history

1. Click the Mailing icon of the desired Campaign ID to see the Mailing Report for that campaign.
2. Click the URL hyperlink to go to that Web site.

An Overview of Message Types A

Users of opt-in communication are constantly using new techniques to get their message across. While plain text is a simple, clean format in which to get your message out that is readable by everyone, a variety of other format options are available to relay information to your recipients. The appropriate message type can enhance your campaign efforts, while an inappropriate message can detract from your campaign efforts. This chapter covers the different types of messages that are available today, as well as some troubleshooting tips to make the most of the medium.

Why is Message Type Important?

The message format in which you choose to email your recipients can dramatically affect your response rates. The message format is capable of making your customers embrace—or reject—your message. Recipients are very particular about the types of information they receive through email, and they are also particular about the format in which they receive it. They might prefer certain formats based on the technology that their email client supports, their company policy (some companies do not allow certain message formats through their firewall), or because they tend to read their email while offline.

Different message formats are ideal for different types of promotions and different types of recipients. For example, plain text messages are a wonderful vehicle for publishing content. On the other hand, a HTML message with a photo of your product will give a clearer picture of the product that you are offering and will probably increase your response rate. However, an HTML message is useless to a wireless recipient, as they will not have the capability to view your message. By offering your recipients the choice of message format, and providing your information in the format they desire, you will be well on your way to developing and keeping a solid relationship with your subscribers.

What Types of Message Formats Are Available?

There are quite a few formats in which you can send email messages. By offering a variety of options to subscribers, you are sure to find a good fit for the recipient, based on their personal (and their email client's) preference. The following sections provide you with a brief overview of some of the message types that are available.

Plain Text

All email recipients can read and understand plain text messages. Plain text messages refer to messages that contain ASCII characters. Plain text messages do not contain formatting codes (such as **bold** or *italics*), and the font is usually plain with a fixed width. (The width of the font might vary from email client to email client). Some email clients automatically turn URLs into clickable items. These types of text messages are also known as *Clickable Text* messages. Other email clients require the user to cut and paste URLs into their Web browser.

When laying out a text message, keep in mind that if you do not include line breaks or hard returns at approximately 70 characters, your rows may automatically break, making your message appear haphazard. Also, in the event that the line does not break, making your reader incessantly scroll to the right could make your subscriber stop reading your message and unsubscribe from your mailing list.

HTML

HTML is the authoring language used on the Internet. You can also use HTML to write email that contains the same formatting as Web pages. This will allow you to create graphically media rich email to send to your subscribers.

Jupiter Communications, a worldwide authority on Internet commerce, reports that HTML messages receive twice the response rate of their text counterparts. However, Jupiter estimates that only about 60% of email users use email clients that are able to read HTML messages. Besides, just because a person can read an HTML message, it does not mean they want to receive them. If they tend to read messages offline or have a slow connection to the Internet, odds are, they would prefer to receive plain text messages. So you should give your readers a choice. Ask them if they would prefer to receive your message in HTML or text. You will make your readers happier and will see your response rates rise.

America Online (AOL)

AOL users should have no problem reading plain text messages without formatting. It is when you decide to send URLs within your text messages or HTML messages to AOL users that you run into problems. Older versions of AOL do not render Web addresses and URLs clickable. `Http://` or `mailto:` placed before addresses are ignored, and your URL or email address will appear as plain text. Many valid HTML tags are not supported, so messages are often rendered incomplete when it is sent to recipients. While AOL version 6.0 is said to bring relief and allow users to receive HTML messages that automatically recognize `Http://` or `mailto:`, you can expect that most users will be using older versions for some time to come.

So what are you to do if you have AOL recipients on your list? First of all, you can send them strictly text messages. Next, you can include specific language when formatting your HTML tags in your message. For example, to include a hyperlink to Siebel Email Marketing Stand-Alone in a regular HTML message, instead of placing:

```
http://www.yourcompany.com/response.html
```

in your email, or a relative URL such as:

```
<a href="response.html">Ways to Measure Email Campaign Response
Rates</a>
```

in the HTML code of your message, you would insert the following instead:

```
<a href="http://www.yourcompany.com/response.html">

Ways to Measure Email Campaign Response Rates</a>
```

or:

```
<a href="http://www.yourcompany.com/response.html">

http://www.yourcompany.com/response.html</a>
```

The URLs would appear in your message as:

Ways to Measure Email Campaign Response Rates

or:

http://www.yourcompany.com/response.html

To include a clickable email address, instead of the standard `mailto:editor@yourcompany.com`, you would now drop in the following HTML tag:

`<a href=mailto:editor@yourcompany.com>editor@yourcompany.com</a>`.

When you format a message for AOL users, be sure to test the message before sending it out to ensure that it appears as you would like it to for the user.

Multipart MIME (Text & HTML)

Multipart MIME (Multipurpose Internet Mail Extension) is a format that detects which type of format your recipient email client is capable of reading and provides it with the appropriate version of the message. In other words, Multipart MIME allows you to transmit both plain text and HTML content within the same email. The recipient's email client then determines which version of the message to show the recipient, based on the user's settings.

You can accomplish this by inserting multipart section separators. The recipient's email client would then view the message in the content that is preferred by the recipient. While this may seem like a great idea, especially the thought of being able to send one message to your entire HTML and Text list, there are some cons to consider. Multipart MIME message sizes are typically bigger because they include two messages in one. Also, just because someone can read HTML does not mean they want to, and their client may be set to read your message as HTML. In a worst case scenario, recipients who have clients that do not support Multipart MIME messages would see both parts of your message, which looks confusing, as the Text and HTML copy will appear to the reader.

Wireless

Wireless devices use what is called the *Wireless Application Protocol* (WAP). This is the protocol that allows hand held devices (mobile phones, pagers, and so on) to communicate with the outside world. WAP supports HTML and XML, but there is an emerging language, *Wireless Markup Language* (WML), which was created to accommodate small screens and enable simpler navigation. There is not a formal standard for WAP or WML, so developing messages in this medium could be challenging for novices. If you would like to provide this format, use plain text with minimal formatting, and insert the appropriate line breaks. This is something to think about if a good deal of your recipients will be accessing your messages through their handheld device, such as a PDA or cellular phone. This will make sure that your message is received clearly and in its entirety. Above all, when creating messages test all aspects of formatting (line breaks, type size and type, message length, and so on) before you send to your list.

Determining the Format to Use

How do you determine what type of message to send your recipients? Ask your recipients what format they want. Whenever a new subscriber submits their email address, ask them to give you their format preference. Then, respect the wishes of your recipient. While you may want to offer all the bells and whistles possible, think about your recipient trying to decipher HTML on their PDA (that is, if the message actually makes it that far). Giving recipients the information they want in the format they desire shows the recipient that you respect their preference.

The Basics of Email Campaign Development B

Proper planning is the key to a successful email campaign. This appendix takes you through the many factors that you should keep in mind when planning your campaign—whether you are an expert or a beginner, you can use these general guidelines to keep you on the right track.

Overview

Opt-in email campaigns are arguably the most powerful tool available to get your message across to your target market. Opt-In Email campaigns are a highly effective, low-cost medium that gets immediate responses. The beauty of email is that responses are typically generated within 48-72 hours, so the effectiveness of a campaign is known quickly, as opposed to several months for a direct mail or advertising campaign.

Where to Begin

Opt-in Email campaigns are ideal for a variety of purposes, including increasing sales, building branding awareness, up selling, cross selling, and improving your relationship with your customers.

You are probably already familiar with the benefits of opt-in email campaigns, which is why you are ready to begin an email campaign of your own. Regardless of the end-result you desire, there are some guidelines that you should follow when planning your campaign. The following roadmap will keep you on track towards a future of successful email campaigns.

Determine the Goals of Your Campaign

You might know that you want recipients to download your data sheet, but do you have a number in mind? Do you have a sales goal? Do you want a certain number of individuals to sign up for your newsletter? Decide what you feel would make a successful campaign as a benchmark for your efforts. Having solid but realistic goals in mind will make it much easier for you to determine if your campaign was a success.

In many cases, the goals you set may be exceeded. In others, maybe not, but they may uncover new goals for future mailings. For example, you might have initially wanted your recipients to download a white paper from your Web site. Instead of clicking on the URL to download the white paper, more recipients may have opted to sign up for the newsletter you are offering. As a result of this mailing, you can create specialized content in your newsletter that will promote your white paper. Or alternately, you might want to revisit the copy you used to describe the white paper, or even more simply, change the name of your white paper to make it more enticing.

Determine Your Target Market

Who exactly are you trying to reach? This, along with your call to action, can be one of the most important aspects of your campaign. Think long and hard about the demographic you are trying to reach, because if you start a campaign not knowing this, you will miss a key ingredient for the rest of your planning. Not only will it shape the type of message you send, it will also shape your call to action, the list segments you choose, and ultimately, your campaign's success.

Determine Your Call(s) to Action

What exactly do you want those who receive your email to do? Should the ultimate action be to:

- Buy a product?
- Download a whitepaper?
- Cross-sell or up-sell other products or services?

- Encourage individuals to register on your site?
- Encourage individuals to sign up for a new newsletter you are offering?
- Visit a specific Web page?

You might be merely trying to build a solid relationship with the individual, for which email is an excellent tool, but is harder to quantify. Determining your call to action will ultimately help you to determine the success of your campaign, so you will want to focus on this early in the planning process.

Develop Your Privacy Policy and Anti-Spam Policies

Recipients will be much more responsive (and happier) if you are very clear about how you got their email address, how you will be using it, and how they can unsubscribe from your email list. Briefly explain your privacy policy within the context of your message, and place a hyperlink to your full privacy policy in all communications, right next to the unsubscribe hyperlink.

By providing a way for recipients to opt-out of future mailings, you are being a responsible email marketer and will have much happier readers. Make the process as painless and easy as possible. For more on this topic, see "Plan for Unsubscribes and Bounced Messages" on page 174.

Choose Your List

Mailing to the appropriate individuals is of the utmost importance. If you have an in-house list that you will be mailing to, you are ahead of the game on two counts.

To choose your list

1. You know that your audience will recognize you (since they have already given you permission to send them correspondence from you).

2 You will avoid the possibility of high costs that come with renting a high-quality opt-in list.

   If you do not have an in-house list to mail to, you can contact a list broker who can help you to choose the appropriate lists for your mailing. The list segments that list brokers offer are becoming increasingly specialized, so that you can really drill down to the types of individuals you would like to reach. As a bonus, many will allow you to test your mailing on a portion of their list. You can find out very fast if your offer is a dud, or if the list is a dud. Be aware that you might have to give up the control of mailing to the list yourself, and mail through their designated facility, as most reputable list brokers will not hand a list over to you or your mail house (or outsourcer). This may limit the types of messages you send to your recipients as well, so be sure to get all the facts about their mailing policies before signing on the dotted line.

3 Last but not least, if you use a list broker, do not forget to have at least a proof of the creative you would like to send, so that your list request can be approved in a timely manner.

The Importance of Permission

Regardless of whether you are renting a list, or using your house list for your mailing, make sure you have the recipients' permission to mail to them. If you are renting a list, do your very best to learn how the names were acquired and exactly what the recipients asked to receive.

Many organizations define Spam (unsolicited commercial email) as a mass mailing, but technically that is not the case. Spam is in the eye of the receiver. If you send one message to a person who has not asked for information from you, even if their email address is in your database, it will probably be construed as Spam. To avoid this kind of trouble, when individuals register on your site, make sure you ask them if they would like to receive correspondence from you in the future. And make sure you rent lists from a reputable list broker who can provide you with the reassurance that the names you are getting are actually opt-in.

Decide on Your Message Format

Most email marketers create their message in a variety of formats to appeal to all users on their list. Decide what types of messages you would like to create for your campaign. These could include HTML, Text, AOL, Wireless, and Rich Media formats. For more information about the different message types available today, as well as the pros and cons of each, see "An Overview of Message Types" on page 161.

Determine Your Content

Let your creativity run wild. Keep the copy as tight as possible, and your call to action clear and concise. However, do not forget the housekeeping items. When determining the content you will include in your message, include the following items:

- How you got their name, and how you intend to use it.
- An easy and clear unsubscribe mechanism.
- A hyperlink to your privacy policy.
- It is always a good idea to personalize the content of your message if possible. For more information about personalizing the content of your message, see "Populating Template Variables" on page 105. For more information about developing the best content possible for your recipients, see "How to Build Effective Email Messages" on page 177.
- An email address within your organization to which comments can be sent.

Ultimately, be sure that the message you are sending is relevant to your recipients. Based on the list segments you have chosen, develop the appropriate content. For example, do not send a women's shoe sale announcement to a male segment of your list (that is, unless they have specifically asked for this type of information).

Determine Who Will Manage Your Creative

Will you keep the creative in-house, or will you contract a designer to do the work for you? If you decide to look outside of your organization, keep in mind that it may take longer to get your creative completed. Also keep in mind that your creative may need to be completed before a list broker will allow you to mail to their list.

Decide on a Sending Method

Will your mailing be sent through your in-house system, outsourced entirely, or will you choose a mix of both? If you plan to send your mailings using your in-house system, make sure that your network can handle the load. Many marketers send a message without notifying their IT department, and subsequently bring the house down. Make sure your infrastructure is sound enough to handle the loads you will be placing on it, including the outbound messages, as well as the inbound responses you will receive as a result of your mailing. Purchasing a software package to send emails yourself may be a good idea, especially if you have the infrastructure available for mailings, if your list is large (25000+ subscribers), and if you plan to mail to your list often.

If you are new to email marketing, using an outsourcer may be a good solution. If you decide to go with an outsourcer, determine the extent of their services. Will they be developing the creative for the messages and Web landing pages? Will they only be doing the sending for you? Will you provide your list for mailing, or will they be renting names for you? If they use your list, will they return a cleaned version based on bounced messages and unsubscribes that are received? Can they provide you with campaign response rates, such as click-through and conversion rates? Decide what services they offer, and the services you will be taking advantage of well in advance of your mailing. Lastly, if you are outsourcing, be sure to ask them the right questions.

How Many Mailings Will Be in Your Campaign?

Will your campaign consist of a single mailing or will it be a series of messages over a given period of time? For instance will you send the same message once, the same message spaced over time with different offers, or a campaign of many different messages all relating to the same call to action?

Deciding on your overall campaign strategy, and knowing the number of messages you will be sending could allow you to negotiate better list rental prices, and better outsourcing fees. This is especially true if your mailings will be of larger volume, and can guarantee repeat business for the vendor.

Implement Response Tracking

Determine what response rates you will want to know for this campaign at the beginning of the planning process, ideally in conjunction with your goal setting and deciding on a call to action.

What information do you need at the end of this campaign to determine if it is a success? What statistics would you like from the campaign:

- Message open rates?
- Click-through rates?
- Unsubscribe rates?
- Bounce rates?
- The number of individuals who forwarded the message to a friend?

Most outsourcers will have the capability to give you a variety of response statistics. A majority of the high-end software packages will also give you the tracking features that you need. Do your homework, and choose a solution that gives you the information you need.

Organize Internal Resources for Handling Responses

In the best-case scenario, your email campaign is a phenomenal success. People are breaking down your door to buy your product, or download your white paper. But here is something to ask yourself:

- Are you capable of handling this response?
- Do you have the resources in place to handle the incoming calls or inquiries (or sales!) that result from your campaign?
- Also, can your network handle the possible hits to your site?

If you are unsure, speak with your IT and Customer Service departments to determine what your systems can handle. If you are at all unsure, you might want to throttle your messages so that any responses generated can be handled in a timely manner. Lastly, do not forget to notify your Sales and Customer Service departments (or the department that will be handling the responses to your call to action) when a campaign is set to drop. They will appreciate the advanced notice, and will be able to offer better service to those who respond.

Plan for Unsubscribes and Bounced Messages

What is your plan for individuals who want to unsubscribe from your mailings in the future? Will you have an automated process? An email address to which people will send their requests? It may seem like a minor detail (and one you do not want to think about), but it is necessary to include. Make it as easy as possible for a recipient to be removed from your list.

What about all those bounces that will come back to you? Can your servers handle it? You can be sure that 2-20% of your messages *will* come back to you in the form of a bounced message. A bounced message will either be hard (meaning the email address does not exist), or soft (meaning their server is down, or their mailbox is full). How will you update your database? Can you distinguish between hard and soft bounces? If possible, designate a specific email address within your company to which bounces can be sent for processing. Determine what you will do with hard bounces, such as deleting them immediately from your database, and with soft bounces, such as resending the message a certain number of times before deleting from your database.

Develop a Message Testing Plan

Make sure your message can be read by a variety of browsers and clients outside of your network. Many times an organization will send a message out, and not check to make sure that the message comes through as intended.

Many times you might have spelling errors in your message, coding errors in your HTML, or a broken hyperlink within a message. Test your message on a variety of platforms and systems (PC and Mac) including MS Outlook™, Netscape™, Eudora®, America Online, and even Web-based email clients, such as www.mail2web.com, if possible. Testing your message will make sure that your recipients receive the message that you intended to send. Those few extra minutes will make the difference in a recipient's perception of your organization.

Manage Your Expectations

This is an important step in campaign development. Many industry analysts report that email marketing is the most effective way to market your company, and imply that anyone who undertakes an email campaign will be rewarded with sky-high response rates.

On one hand, email marketing may give you the highest response and conversion rates you have ever seen in a campaign. But, you should also keep in mind that email marketing may not work for you. The type of product or service you are promoting may not be a good fit for the medium. If your campaign is a dud, do not despair—give it one more try and tweak your copy, your subject line, or the offer itself. If that is a dud as well, you might want to revisit including email marketing in your plans.

How to Build Effective Email Messages

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When you are emailing a large recipient base, you want to do everything to make your email as effective as possible, from designing the right content to analyzing the results of the mailing. This appendix provides some basic guidelines to help you build effective email messages and make your email campaigns a success.

Set Objectives

It is important to set objectives for both the overall campaign and the mailing. You can later measure your results against your objectives to judge the success of your campaign. Setting objectives for the individual mailing will help you hone your message for the email itself. The following are some potential objectives:

- *Branding*—You can enhance your brand by providing useful and timely information to your customers. For example, banks provide financial information; clothing retailers provide fashion advice. By adhering to that paradigm, your customers will start to associate your brand with information that helps them in their life.
- *Brand recognition*—Email is a good way to keep your name in front of customers. Your customers may know your company, but not the entirety of your business. By making them more aware of you, you increase your brand recognition. If you provide highly useful information, customers will forward the email to friends and associates, which further increases your brand recognition.
- *Sales*—For some organizations, email is a direct way to increase sales by providing promotions, merchandise awareness, and specials.
- *Drive Web hits*—For companies that sell advertising, email is a way to drive Web hits. Click-through from the email to the Web site is the primary purpose of the email, and can be an excellent measure of the success of an email campaign.

Designing the Email

The following basic strategies will provide your email with maximum impact. Use the following guidelines as a checklist for every email to make sure that your message is effective.

To design an email

1. *Create a clear, simple message*—Recognize that your reader is in a rush and will not take the time to dig through your email to extract the most useful information. Make sure you make your message apparent in the first hyperlink of the email.

2. *Make an impression*—Look at the format of the email and see what impression your first glance gives you. Make the message well formatted (text or HTML) with a message that is both obvious, compelling, and one that inspires action on the part of the reader; such as visiting your site to take advantage of a special offer or to read your organization's latest press release.

3. *Make it relevant*—It is very important to keep your subscribers and keep them from opting out. To do this it is important to make the mail relevant and informative to your customers. Use information in your database to segment your recipient list and provide relevant data. A good example is a clothing retailer who lets customers opt-in for receiving specials on men's clothes, women's clothes, children's clothes, or some combination thereof.

4. *Build confidence in your company*—Make your message recognizable, relevant and worth reading.

5. *Take advantage of the medium*—Use the full power of email by personalizing the message with the recipient's name and, if possible, other identifying characteristics. For more information about personalization, see "Populating Template Variables" on page 105. Use HTML (for those who have requested it) and graphics. Provide links so that readers can obtain more information with very low effort.

Compose the Email

This section covers how to compose the email for your campaign.

The Envelope

The message envelope consists of the headers that the customer sees in their inbox and when they click on the message. These headers include the *From* line, the *Date*, the *To* line and the *Subject* line.

The From Line

When deciding on the *From* header, it is best to use your company name. If you want to make the email seem more personal, you should send your message from an actual person, but then you should use your company name in the subject. It is very important that people can identify that the email is from your company without opening it.

The Date

The time of day and the day of the week that you send your message may be important for your target audience. If you are selling merchandise for hobbies, such as gardening or golf, you probably want to time your email to go out on Friday afternoon when people are starting to think about the weekend.

The To Line

When someone opts-in for your list, be sure to get his or her name. Personalize the email by using their real name in the *To* header. For more information about personalization, see "Populating Template Variables" on page 105.

The Subject Line

If you are using a person's name in the *From* header, then you should use your company name in the subject. If you are using your company name in the *From* header then you can create an enticing subject line that compels the reader to open your message. Make sure the subject is not much longer than 25 characters. You want the entire subject and sender's identity to be seen in the mailbox before the message is opened.

The Title Bar

In addition to the subject, you will probably include a title bar at the top of the email that clearly identifies your company and provides a tag line. This is an opportunity to make a bold statement and provide an active hyperlink to your company information.

The Greeting

Always personalize the mail going out. For example, start your message with *Dear [name]*. This creates the sense that you know who you are talking to and that the mail is more personal, creating more of a relationship between you and the recipient. For more information about personalization, see "Populating Template Variables" on page 105.

The Body

Explain the details in the body, but make it easy to read. Short paragraphs with links to your Web site for more information are ideal. Include a call to action, even if it is just clicking through to the Web site to get more information. By inserting links in your message, you can analyze the effectiveness of your email by the number of recipients who choose to follow the links to their destinations.

The Offer

If you are making an offer, be sure to place it at the top of the email and also in the subject line. Be sure to create a unique hyperlink for your offer so that you can analyze the effectiveness of your offer, and determine how much your email contributed to its success.

The Footer

Recipients should always be aware of how they can unsubscribe (or opt-out) from your mailing list. Make sure your opt-out clause is included at the bottom of your message. If you are using a list that has not been used in more than a month, include the opt-out clause at the top as well. The following are some guidelines for the opt-out clause.

To include in your opt-out clause

1. *Include the recipient's email address.* Most people have multiple email addresses. They need to know which address you are sending to so that they can effectively unsubscribe.
2. *Make sure the opt-out clause is clear and obvious*. Do not hide it with small text.
3. *Provide information about how the recipient opted-in*. They may not remember how or when they opted in to your list, but it is easy for you to store this information in your database and provide it to them.
4. *Let people opt-out through both email and the Web site.* Provide a hyperlink to unsubscribe through your Web site as well as an email address to which people can unsubscribe in your messages and on your Web site.

Test Your Message

Test your email message on an internal list to make sure it is formatted correctly and that all of your links work. Ask opinions from the internal list on content. Ask them to grade the email based on the design criteria outlined in the preceding example. You might want to test your email on a subset of your list to see if you get the click-through rates you desire. This can be an effective and cost-efficient way to try out different offers on your customers. Different messages can be developed and tested on various demographic markets and can be an effective part of your email campaigns.

Analyze Your Message

When your email campaign is completed, be sure to collect the data on how many people opted out and what the click-through rates were for each hyperlink. It is only though this type of analysis that you can perfect your message and increase your response rates.

Build On Your Success

The more information you gather on your customer base, the more relevant you can make your email campaigns. By mining your database or providing additional opt-in services you can create promotions that are extremely relevant.

How to be Opt-In Compliant D

Sending volume email is one of the most powerful marketing tools available, but like all powerful tools it has the potential for abuse, or even the perception of abuse. The following are several guidelines to follow in order to keep your opt-in list happy, and to make sure that the recipients of your email never think of your mail as spam.

What is Spam

Spam is mostly commercial advertising, often for dubious products, get-rich schemes, or quasi-legal services. Spammers flood the Internet with multiple copies of the same message, forcing the message on people who would otherwise choose not to receive it. Adding insult to injury, spam messages typically cost recipients money to receive. Many people—anyone with measured phone service—read or receive their email while the meter is running, so to speak. Spam costs them additional money. On top of that, it costs money for ISPs and online services to transmit spam, and their costs are transmitted directly to subscribers.

Some examples of spam are:

- Any email message that is sent to a recipient who had previously signed up to receive newsletters, product information or any other type of bulk email, but later opted-out by indicating to the sender that they did not want to receive additional email.
- Any email message that is sent to a recipient that have had no prior association with the organization or did not agree to be emailed by the organization.
- Any email message that is sent to a recipient without a way for a person to opt-out or request that future mailings be discontinued.
- Any email message that does not have a valid email address in the reply-to line.
- Any email that says you can earn $1000s each week from home.

- Any email message that promotes an adult Web site, unless the recipient has specifically requested information from that Web site.
- Any message that contains *ADV ADLT*, or *ADV ADULT* in the subject.
- Any message that the recipient feels was sent to them unsolicited.

What is Not Spam

An email message is *not* spam if the recipient, in any way, has requested email to be sent to them from the sender or the sender's organization. However, be warned that just because someone has signed up to receive information through email on *product A*, it does not mean that you can send them information on *product B*. If you do, it is spam.

An email message is *not* spam when it is sent to a recipient who has agreed to receive information or promotions from a partner organization (as long as there is a clear opt-out option).

Unfortunately, spam is not as black and white as we have laid it out here. Most of the pieces that get sent out do not fall into any of the categories outlined in the preceding example; rather they fall into the gray area of spam where one person may consider the message to be spam—while another may not. What it comes down to is that if the recipient says it is spam, it is spam.

Why You Do Not Want to Spam

If you or your organization sends out spam or are labeled as an organization that spams, you will run into some, if not all, of the following problems:

- **Upset customers—**Many people get extremely angry about spam and will probably stop conducting business with your organization.
- **Listed on anti-spam blacklists—**Anti-spam blacklists list various organizations that have been labeled as spammers. Many ISPs block all incoming mail from the companies that are listed on anti-spam blacklists. If your company gets listed on anti-spam blacklists, your email can and will be blocked by ISP sites, never to reach its destination.

- **Loss of Internet access—**If just a few of your recipients complain to your ISP, your ISP can, and often will, shut down your Internet access, Web site and all.
- **Lawsuits—**Some recipients may even go as far as to sue you for your unsolicited email.

How to Avoid Being Thought of as a Spammer

- Keep an opt-in only list.

  Make sure that your opt-in email list consists solely of subscribers that have explicitly given you permission to send them the type of message that you will be sending them. If possible, you should keep a record of how and when people opted-in to your list, so that if someone ever accuses you of sending spam you can easily point to the time and date that they requested to be added to your list.

- Make your opt-out clause obvious.

  In every email that you send out, make sure that the customer knows how to get off your list. There should be a URL or email instructions included at the top or bottom of each message.

  If you only send email to your list occasionally, people may forget that they opted-in to your list. In this case, it is best to state how they got on your list within your opt-out clause.

  For example:

  "You are receiving this email because you opted-in on our Web site. If you do not wish to receive any additional messages from us, unsubscribe by visiting `www.myco.com` or by replying to this email with the word "unsubscribe" in the message body."

- Use your company name in headers.

  Make sure that your company name is listed in the Subject or From header. This way the recipient will recognize who the mail is from before they open the message. Legitimate businesses identify themselves clearly in the email headers.

  Also, make sure that your From and Reply-to address is valid. Spammers commonly send email with invalid From or Reply-to addresses. If you use an invalid email address, your subscribers may consider you a spammer and complain to your ISP.

- Create aliases for complaints.

  Make sure you have set up `abuse@myco.com` (where `myco` is the domain name for your company) to receive email.

  NOTE: The `abuse` alias has become the standard alias for people to complain about spamming.

  By creating this alias and giving your readers a place to be heard, you can often resolve your subscriber problems before they report you to your ISP.

- Use a current list.

  Make sure your list is fairly recent. After time, people tend to forget that they opted-in to a list and can easily mistake a message they opted to receive for spam. As a general rule, you should send them something within a week or so of opting-in and at regular intervals afterwards.

- Coordinate your mailings with your ISP.

  Contact your ISP before you send out a large mailing so that they will understand what's happening when they see the burst of email traffic from your site. If you do not, you run the risk of your ISP assuming something's wrong and cutting off your email traffic.

What to Do if You are Labeled as a Spammer

In spite of all your best efforts, you might make a mistake and end up being labeled a spammer. This can happen, for example, if you forget to include an opt-out clause. If you do get any angry email, be sure to address it immediately by taking the following measures:

- Apologize to the recipient(s) regardless of whether you think they are right.
- Call your ISP and tell them about the situation.
- Contact their ISP and let them know what happened.
- Contact various anti-spam organizations, including:
  - CAUCE — `http://www.cauce.org`
  - MAPS — `http://maps.vix.com`

Background Information E

Although Siebel Email Marketing Stand-Alone requires very little administrative knowledge to operate, it is a good idea to learn about some Internet technologies and how they relate to Siebel Email Marketing Stand-Alone. In the sections that follow are some of the topics that are good to know.

DNS Records

The Internet uses a hostname to IP address translation table so that people do not have to remember IP numbers when they access machines. The DNS records contain this information.

When you enter a URL in your browser, your machine asks the DNS server:

What is the IP address associated with the hostname: `<domain.com>`*?*

Many times, you can cache this information in your local `hosts` file:

- Under Windows, this file is located at `\winnt\system32\drivers\etc\hosts`.
- On UNIX machines, this file is located in `/etc/hosts`.

When you enter site prefix information for your site, you must make sure that the hostname you have chosen is listed in the DNS entries and that it is visible to the outside world, if they need to see your site.

HTML

All Web pages on the Internet use HTML to present information to the user. Whenever possible, Siebel Email Marketing Stand-Alone allows you to edit a template that will get filled in with information before it is served up to the viewing public.

Editing these templates requires that you understand HTML or that you can use a good HTML editor. Like any language, it is always better to be conversant then to let a translator do it for you. You will get better results, but if you do not know HTML, an editor will get you going quickly.

Image Server

All Web pages on the Internet have a Web server that transmits to your browser. Because images are so much larger then regular text, they consume most of the bandwidth on the Internet.

If you are concerned that your images are using up too much bandwidth, and you cannot reduce their size, you can specify an *image server*.

The image server will service all image requests and can be located anywhere on the network.

You can specify an image server by editing your `global_config` file and restarting the server.

Look for entries called:

```
LWD.HTTP.imageURL=
```

- On NT, the `global_config` file is located under:

  ```
  \Program Files\bes\
  ```

- On UNIX, the file is located in the root level of your Siebel Email Marketing Stand-Alone installation.

NOTE: Only enter the URL for the image server of the Web server in question. You should also copy the entries from the images directory onto that server.

JavaScript

JavaScript is a non-compiled language, developed by Netscape Communications Corporation, that is transmitted in Web pages. If the end user's browser understands JavaScript, then it will run any program written in JavaScript.

When you compose your Web pages, you can place JavaScript functions that will do most anything, from changing images when a mouse moves over it to putting up an alert box when you click on something. JavaScript programs are entirely visible to anyone who wishes to see how it works.

If you would like to imbed JavaScript on your site, place the JavaScript code in the appropriate page template.

Mailing List Managers

Since the beginning of email, Mailing List Managers, or *MLM*, have been a cornerstone for creating Internet communities. The most popular of these have come from diverse backgrounds and have been written in languages ranging from Perl to REXX to Fortran.

The role of a Mailing List Manager is to send email to multiple recipients and provide the ability to add and remove email addresses. Most of the traditional Mailing List Managers, however, fail when it comes to ease of use and high performance.

Siebel Email Marketing Stand-Alone extends the Mailing List Manager paradigm by adding a Web interface and a high performance email engine. Written in Java, you can reuse many of the components to build your own solution.

MX Records

When you send an email to a particular host, the MX record for that domain specifies which host will eventually get the email. MX records are specified in the DNS entries for each domain name. It is possible to route email for a domain to a specific host and route email for a specific host in that domain to a different machine.

In the case of Siebel Email Marketing Stand-Alone, you will probably want to set up a host called:

```
lists.yourdomain.com
```

Then you will want to route email for `email@lists.yourdomain.com` to that machine. At this point, if you run Siebel Email Marketing Stand-Alone with its inbound SMTP Server *on*, the server will receive live email from the Internet.

SMTP Protocol

The Internet standards define a protocol that all email clients and servers use to communicate. The protocol that defines how email is transmitted is called the Simple Mail Transfer Protocol. SMTP was originally defined by RFC 821 in August 1982. Since then, several enhancements have been made. If you are choosing technologies that will cooperate with Siebel Email Marketing Stand-Alone, choose one that supports ESMTP with pipelining and DSN. Although Siebel Email Marketing Stand-Alone runs quite well with SMTP, ESMTP with pipelining and DSN allows Siebel Email Marketing Stand-Alone to have larger throughput.

SMTP Gateway

The SMTP gateway transmits email to the end user's mail host. Siebel Email Marketing Stand-Alone talks to your SMTP Gateway and lets your gateway do the final delivery. Because there are many SMTP Gateways in the market, when looking for one, choose one that supports ESMTP with pipelining and DSN.

Virtual Hosts

The built-in Web server in Siebel Email Marketing Stand-Alone allows subscribers to log onto your server and to view campaign archives. Web servers require an IP addresses and a port number to run. The URL for the Web server looks like:

```
http://www.yourcompany.com:80
```

The default port number for the Web severs is `80` and can be omitted. Normally, you cannot run multiple Web servers on the same machine with the same port numbers unless your software supports virtual hosts.

Siebel Email Marketing Stand-Alone allows you to have *named* virtual hosts as well as *port* virtual hosts. In the named case, you will need to name each Web server by a different hostname and in a port case, you need to assign a different port number to your Web server. All of this is easily specified when you create a Web server and can be changed on the HTTP settings page for each Web server.

If you want to host many different lists and find that you want to group them according to topic or other designation, you can create virtual hosts. For example, you might want to host `sprockets.yourcompany.com` and `news.yourcompany.com` on the same machine. In order to do this, you will need to log in to the system as a Site Manager or as a Webmaster. The screens that allow you to create a new Web server are listed under Webmaster Options.

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