



# ListManager Basic Training

Presented by Ana DeLeón

## Before We Begin

- Shared audio
- State your name when asking questions

Please share:

- Your name
- Your experience with ListManager
- How many lists are you working with?
- What kinds of campaigns will you be sending from ListManager?

# What You'll Learn To Do



- Become familiar with interface and workflow
- Add and manage members
- Create simple targeted audience subgroups
- Create content and personalize messages
- Schedule and approve mailings
- View reports
- Create automated messages and web forms

# Agenda



- Overview of interface
- Add and manage members
- Create segments
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form

# Agenda



- Overview of interface
- Add and manage members
- Create segments
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form

# Log In

A screenshot of the Lyris login interface. The window has a blue title bar with the word "Login" in white. Below the title bar, there are two input fields: "User Name:" and "Password:". Below the password field, there is a link that says "If you have forgotten your password, [click here.](#)". At the bottom right of the form area, there is a "Login" button. At the bottom of the window, there is a footer that reads "Lyris Technologies, Inc. | Email Marketing Software".

- Use the URL given to you by your ListManager admin
- Use your email address (not your name) and password to log in
- Each admin should have a separate account

# Home Page Overview



**ListManager** Welcome ana@lyris.com | Logout  
List: lm10sales Language: English

Expand Collapse **Home**

Home Members Content Segments Mailings Reports Utilities Shortcuts

- New List
- Mail Streams
- Discussion Forum
- List Settings Map
- Site Map
- Help

Home

Member Count Normal: 79 Held: 5 Unsub: 11 Other: 5

Show All [New Mailing](#)

Mailing Name	ID	Sender	Status	Date Sent	
SFT Deals - Week 12	14089140		Completed	2008-06-06 14:06:03	<a href="#">Overview</a>
SFT Deals - Week 11	14089139		Completed	2008-05-30 14:05:59	<a href="#">Overview</a>
SFT Deals - Week 10	14089138		Completed	2008-05-23 14:05:53	<a href="#">Overview</a>
SFT Deals - Week 9	14089137		Completed	2008-05-16 14:05:46	<a href="#">Overview</a>
SFT Deals - Week 8	14089136		Completed	2008-05-09 14:05:33	<a href="#">Overview</a>
SFT Deals - Week 7	14089135		Completed	2008-05-02 14:05:26	<a href="#">Overview</a>
SFT Deals - Week 6	14089134		Completed	2008-04-25 14:05:20	<a href="#">Overview</a>
SFT Deals - Week 5	14089133		Completed	2008-04-18 14:05:15	<a href="#">Overview</a>

**SF Travel Newsletter**  
Weekly Bulletin Volume IV • Issue 12 • June 06, 2008

Hot Spots

- [Fisherman's Wharf](#)

Dear %%firstname%%:  
It's that time of year again -- time to think about travel plans

Unsubscribes 0 (0%)  
Forwards 10  
Referrals 0  
Unique Opens 26  
Total Clicks 10  
Unique Clicks 5 (9%)  
Transactions 4  
Conversion 3%  
Where mails sent [Click here](#)

Avg Mailings Delivered (78%) Delivered 52/68 (76%)

Lyris Technologies, Inc. | Email Marketing Software **POWERED BY LYRIS**

## Home Page:

- Navigate to the appropriate list
- See how your mailings are performing

# List Navigation



The screenshot shows the Lyris ListManager interface. At the top right, a user is logged in as 'ana@lyris.com' with the list 'lm10sales'. A red box highlights this user information. Below it, a table lists various mailings, including 'SFT Deals - Week 12' through 'Week 5'. A red arrow points from the user information box to a preview window of a mailing titled 'Weekly Bulletin'. The preview shows a header with 'Welcome training@lyris.com | Logout' and 'List: analuz Language: English'. The interface also includes a sidebar with navigation options like Home, Members, Content, Segments, Mailings, Reports, and Utilities, and a bottom section with 'Hot Spots' and 'Avg Mailings Delivered (78%)'.

Mailing Name	ID	Sender	Status	Date Sent	Overview
SFT Deals - Week 12	14089140		Completed	2008-06-06 14:06:00	<a href="#">Overview</a>
SFT Deals - Week 11	14089139		Completed	2008-05-30 14:05:00	<a href="#">Overview</a>
SFT Deals - Week 10	14089138		Completed	2008-05-23 14:04:00	<a href="#">Overview</a>
SFT Deals - Week 9	14089137		Completed	2008-05-16 14:03:00	<a href="#">Overview</a>
SFT Deals - Week 8	14089136		Completed	2008-05-09 14:02:00	<a href="#">Overview</a>
SFT Deals - Week 7	14089135		Completed	2008-05-02 14:01:00	<a href="#">Overview</a>
SFT Deals - Week 6	14089134		Completed	2008-04-25 14:00:00	<a href="#">Overview</a>
SFT Deals - Week 5	14089133		Completed		<a href="#">Overview</a>

**Quickly  
navigate to the  
desired list**

# Workflow



Expand Collapse

Welcome ans@lyris.com | Logout  
List: m10sales Language: English

Member Count: Normal: 79 Held: 5 Unsub: 11 Other: 5

ID	Sender	Status	Date Sent	
14089140		Completed	2008-06-06 14:06:03	Overview
14089139		Completed	2008-05-30 14:05:59	Overview
14089138		Completed	2008-05-23 14:05:53	Overview
14089137		Completed	2008-05-16 14:05:46	Overview
14089136		Completed	2008-05-09 14:05:33	Overview
14089135		Completed	2008-05-02 14:05:26	Overview
14089134		Completed	2008-04-25 14:05:20	Overview
14089133		Completed	2008-04-18 14:05:13	Overview

New Mailing

### SF Travel Newsletter

Weekly Bulletin Volume IV • Issue 12 • June 06, 2008

Dear %firstname%:

It's that time of year again -- time to think about travel plans

Unsubscribed: 0 (0%)  
Forwards: 10  
Referrals: 0  
Unique Opens: 26  
Total Clicks: 10  
Unique Clicks: 5 (9%)  
Transactions: 4  
Conversion: 3%  
Where mails sent: [Click here](#)

Delivered (78%)  
Delivered 52/68 (76%)

POWERED BY LYRIS

**Send the right message to the right audience**

- **Add *Members***
- **Create *Segment***
- **Include *Content***
- **Deploy a *Mailing***
- **View *Reports***

# Utilities



ID	Sender	Status	Date Sent	Overview
k 12	14089140	Completed	2008-06-06 14:06:03	Overview
k 11	14089139	Completed	2008-05-30 14:05:59	Overview
k 10	14089138	Completed	2008-05-23 14:05:53	Overview
k 9	14089137	Completed	2008-05-16 14:05:46	Overview
k 8	14089136	Completed	2008-05-09 14:05:40	Overview
k 7	14089135	Completed	2008-05-02 14:05:26	Overview
k 6	14089134	Completed	2008-04-25 14:05:20	Overview
k 5	14089133	Completed	2008-04-18 14:05:15	Overview

**SF Travel Newsletter**  
Weekly Bulletin Volume IV • Issue 12 • June 06, 2008

Dear %firstname%:

It's that time of year again -- time to think about travel plans

Unsubscribes: 0 (0%)  
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Unique Clicks: 5 (9%)  
Transactions: 4  
Conversion: 3%  
Where mails sent: [Click here](#)

- **Modify list settings**
- **Automate messages**
- **Web forms**
- **And MORE...**

# Home Page Statistics



The screenshot shows the LYRIS ListManager interface. At the top, it says "ListManager" and "Welcome ana@lyris.com | Logout". Below that, there's a navigation menu with options like Home, Members, Content, Segments, Mailings, Reports, Utilities, and Shortcuts. The main area displays a table of mailings for the list "\_mailings". The table has columns for Mailing Name, ID, Sender, Status, and Date Sent. Below the table, there's a preview of an email newsletter titled "SF Travel Newsletter" with a "Hot Spots" section. To the right of the preview, there's a statistics panel showing metrics like Unsubscribes, Forwards, Referrals, Unique Opens, Total Clicks, Unique Clicks, Transactions, and Conversion. At the bottom, there are two progress bars for "Avg Mailings Delivered (78%)" and "Delivered 52/68 (76%)".

Mailing Name	ID	Sender	Status	Date Sent	
SFT Deals - Week 12	14089140		Completed	2008-06-06 14:06:03	<a href="#">Overview</a>
SFT Deals - Week 11	14089139		Completed	2008-05-30 14:05:59	<a href="#">Overview</a>
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SFT Deals - Week 5	14089133		Completed	2008-04-18 14:05:15	<a href="#">Overview</a>

Statistics:

- Unsubscribes: 0 (0%)
- Forwards: 10
- Referrals: 0
- Unique Opens: 26
- Total Clicks: 10
- Unique Clicks: 5 (9%)
- Transactions: 4
- Conversion: 3%
- Where mails sent: [Click here](#)

Avg Mailings Delivered (78%) Delivered 52/68 (76%)

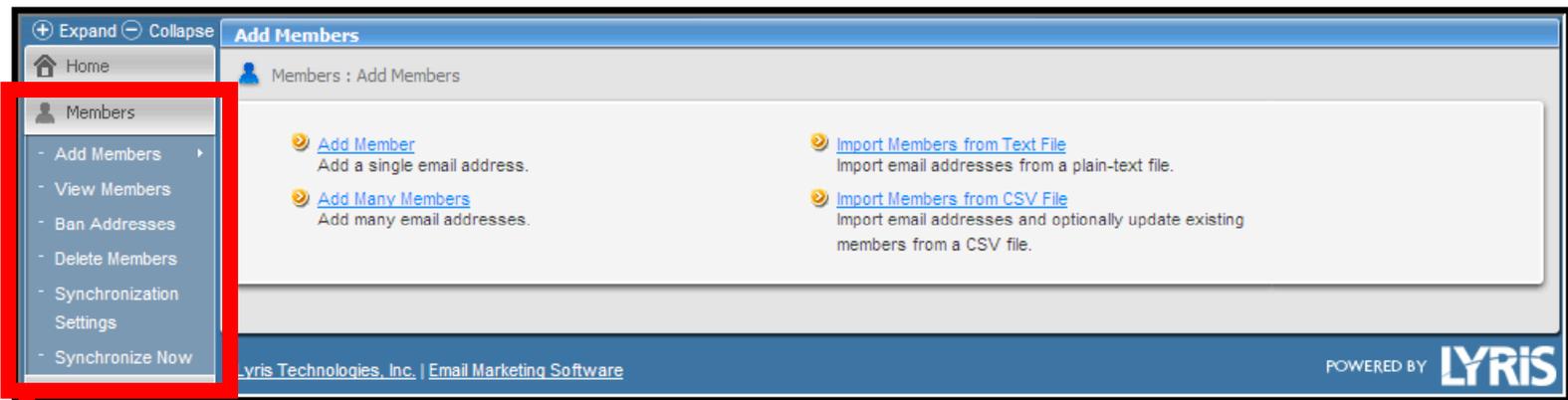
The reporting statistics area displays recent mailings at a glance

# Add and Manage Members



- Overview of interface
- Add and manage members
- Create segments
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form

# Members Overview



## Members

- Easily add and manage members
- Typically subscribe to join the list
- Information saved in ListManager's database
- Only “normal” members receive email

# Add Members



## Add members in a variety of ways

- Using the LM interface, or
- Importing members from Text or CSV file

# Add a Single Member

A screenshot of a software application window titled "Add Member". The window has a blue header bar with the title. Below the header, there is a breadcrumb trail: "Members : Add Members : Add Member". A tabbed interface is visible with tabs for "Basics", "List Admin", "Settings", "Advanced Settings", "Information", and "Demographics". The "Basics" tab is selected. Inside the main area, there are two text input fields: "Email address:" and "Name:". At the bottom right of the window, there are two buttons: "Save" and "Cancel".

1. Enter *Email Address* (\*required)
2. Click *Save*

Note that the total number of members you may have on your server is determined by your license.

# Import Members Via Text File

A screenshot of a software dialog box titled "Import Members from Text File". The dialog box has a blue header bar with the title. Below the header, there is a breadcrumb trail: "Members : Add Members : Import Members from Text File". The main content area contains three radio buttons under the label "Action": "Import quietly as regular members" (selected), "Import as regular members and send list hello doc", and "Import as unconfirmed members, and send confirmation request". Below this is a "Terminate import:" label followed by a dropdown menu currently showing "After 10 consecutive malformed addresses". At the bottom left, there is a "Select file:" label, an empty text input field, and a "Browse..." button. At the bottom right, there are "Import" and "Cancel" buttons.

1. Choose the status of the members
2. Select the file
3. Choose Import

# Import Members Via Text File (2)



Members : Add Members : Import Members from Text File

Import quietly as regular members

**Action:**  Import as regular members and send list hello doc

Import as unconfirmed members, and send confirmation request

**Terminate import:** After 10 consecutive malformed addresses

**Select file:**

- One member per line
- Name can be added

```
File Edit Format View Help
ani@maileater.lyris.net Ani Vizcaino
avi@maileater.lyris.net Avi Lyman
gabrie@maileater.lyris.net Gabriel
mikaela@maileater.lyris.net|
```

# Import Members From CSV File



Members : Add Members : Import Members from CSV File

Action:

- Import quietly as regular members
- Import as regular members and send list hello doc
- Import as unconfirmed members, and send confirmation request
- Use type setting in CSV file

Update existing members?:

yes  no

Terminate import: After 10 consecutive malformed addresses

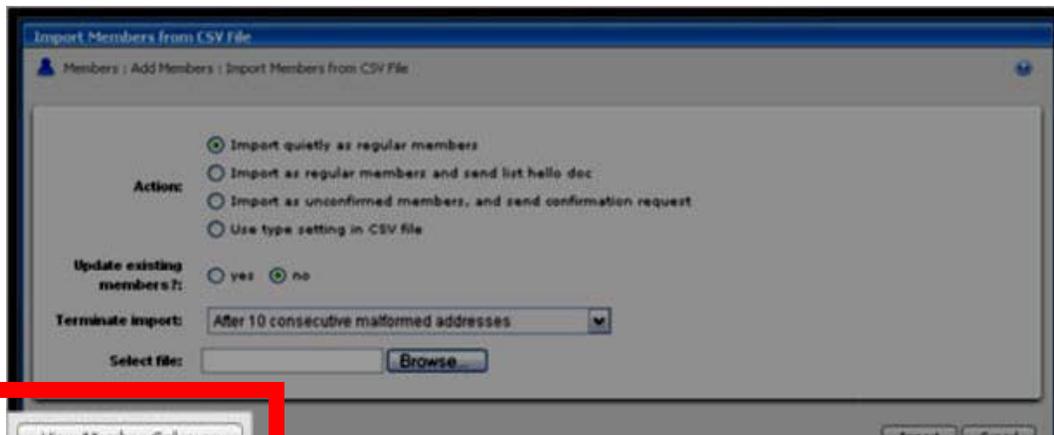
Select file:

	A	B	C	D	E	F	G	H	I	J
1	EmailAddr	ExpireDate	FullName_gender	homeAirp	depart_city	state	news	specials		
2	1jhs986719@maileater.lyris.net	M	Los Angel	LAX	CA	Y	Y			
3	4583368@maileater.lyris.com	M	Newark	EWR	NJ	N	N			
4	aa600950922@maileater.shelby	M	Miami	MIA	FL	N	Y			
5	aburn53382368@maileater.mails	F	New York	JFK	NY	Y	N			
6	adkirby49@maileater.sparklist.c	M	Los Angel	LAX	CA	N	Y			
7	adkirby928@maileater.sparklist.c	M	Miami	MIA	FL	N	Y			
8	adorizas432@maileater.shelby.c	M	Oakland	OAK	CA	Y	Y			
9	adrian.butler467@maileater.mail	M	New York	LGA	NY	N	Y			
10	ainvarior70@maileater.shelby.c	F	Los Angel	LAX	CA	N	Y			
11	ajrock780@maileater.lyris.net	F	Oakland	OAK	CA	N	Y			
12	alar509@maileater.sparklist.com	M	New York	LGA	NY	Y	N			
13	albo1000119@maileater.lyris.net	M	Chicago	ORD	IL	N	N			
14	alejandrofernandez890@maileate	F	Los Angel	LAX	CA	Y	N			
15	AngelHeart4ever848@maileater.l	M	Dallas Ft.	DFW	TX	N	Y			

- Import a CSV file with demographic information
- Duplicates are either updated or skipped
- The status of the member will not be changed

# Import Members From CSV File

(2)



Column Name	Native Type	Length	Has Default?	Can be empty?
Additional_	text	(unlimited)	no	yes
Address_1_*	char	100	no	yes
Address_2_*	char	100	no	yes
AppNeeded_	char	1	yes	no
CanAppPend_	char	1	yes	no
City_*	char	50	no	yes
CleanAuto_	char	1	yes	no
Comment_	text	(unlimited)	no	yes
ConfirmDat_	smalldatetime	4	no	yes
Country_*	char	30	no	yes
DateBounce_	smalldatetime	4	no	yes
DateHeld_	smalldatetime	4	no	yes
DateJoined_	smalldatetime	4	no	yes
DateUnsub_	smalldatetime	4	no	yes
depart_city*	char	3	no	yes

## Before Importing:

- See what fields are available on your server
- Required field: *EmailAddr\_*
- Recommended field: *FullName\_*

# Import Members From CSV File



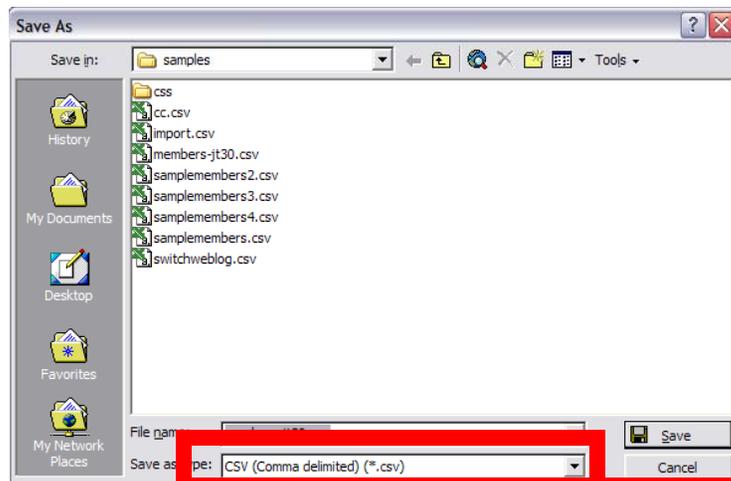
(3)

1	EmailAddr	ExpireDate	FullName	gender	state/province	field1	field2
2	1hs986719@maileater.lyris.net			M	CA	Y	Y
3	4583368@maileater.lyris.com			M	NY	N	N
4	aa600950922@maileater.shelby.com			M	FL	N	Y
5	abum53382368@maileater.mailshield.com			F	NY	Y	N
6	adkirby49@maileater.sparklist.com			M	CA	N	Y
7	adkirby920@maileater.sparklist.com			M	FL	N	Y
8	adonizas432@maileater.shelby.com			M	CA	Y	Y

**In Excel: Indicate the field name in the first row**

# Import Members From CSV File

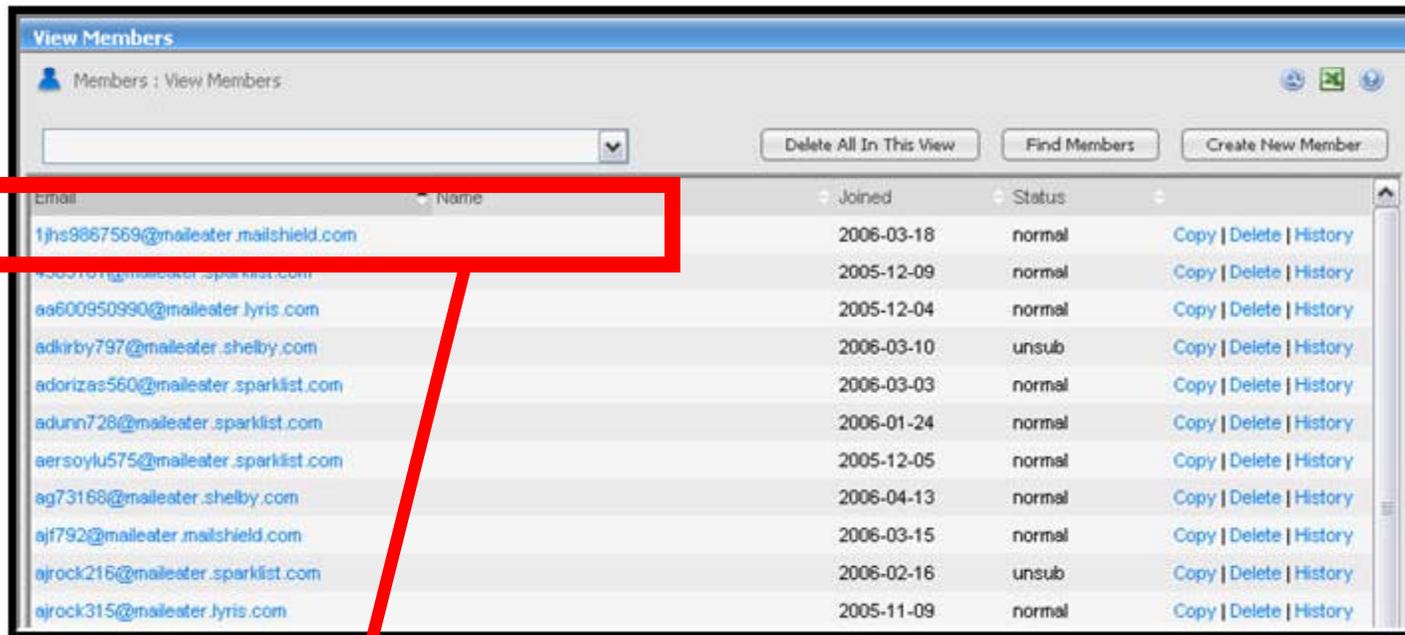
(4)



Save as type: CSV (Comma delimited) (\*.csv)

- Click *File*, then *Save As...*
- Save as type, *select CSV*

# Mange Members



View Members

Members : View Members

Delete All In This View Find Members Create New Member

Email	Name	Joined	Status	
<a href="#">1jhs9867569@maileater.mailshield.com</a>		2006-03-18	normal	Copy   Delete   History
<a href="#">4303107@maileater.sparklist.com</a>		2005-12-09	normal	Copy   Delete   History
<a href="#">aa600950990@maileater.lyris.com</a>		2005-12-04	normal	Copy   Delete   History
<a href="#">adkirby797@maileater.shelby.com</a>		2006-03-10	unsub	Copy   Delete   History
<a href="#">adorizas560@maileater.sparklist.com</a>		2006-03-03	normal	Copy   Delete   History
<a href="#">adunn728@maileater.sparklist.com</a>		2006-01-24	normal	Copy   Delete   History
<a href="#">aersoylu575@maileater.sparklist.com</a>		2005-12-05	normal	Copy   Delete   History
<a href="#">ag73168@maileater.shelby.com</a>		2006-04-13	normal	Copy   Delete   History
<a href="#">ajf792@maileater.mailshield.com</a>		2006-03-15	normal	Copy   Delete   History
<a href="#">ajrock216@maileater.sparklist.com</a>		2006-02-16	unsub	Copy   Delete   History
<a href="#">ajrock315@maileater.lyris.com</a>		2005-11-09	normal	Copy   Delete   History

**Click on the link of the email address to edit member information**

# Mange Members

The screenshot shows a web interface titled "View Members". At the top, there is a search bar highlighted with a red box and a drop-down arrow. To the right of the search bar are three buttons: "Delete All In This View", "Find Members", and "Create New Member". Below the search bar is a table with columns for "Email", "Name", "Joined", "Status", and a set of actions. A red arrow points from the drop-down menu to the "Status" column header.

Email	Name	Joined	Status	
<a href="mailto:1jhs9867569@maileater.mailshield.com">1jhs9867569@maileater.mailshield.com</a>		2006-03-18	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:4583161@maileater.sparklist.com">4583161@maileater.sparklist.com</a>		2005-12-09	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:aa600950990@maileater.lyris.com">aa600950990@maileater.lyris.com</a>		2005-12-04	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:adkirby797@maileater.shelby.com">adkirby797@maileater.shelby.com</a>		2006-03-10	unsub	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:adorizas560@maileater.sparklist.com">adorizas560@maileater.sparklist.com</a>		2006-03-03	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:adunn728@maileater.sparklist.com">adunn728@maileater.sparklist.com</a>		2006-01-24	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:aersoylu575@maileater.sparklist.com">aersoylu575@maileater.sparklist.com</a>		2005-12-05	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:ag73168@maileater.shelby.com">ag73168@maileater.shelby.com</a>		2006-04-13	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:ajf792@maileater.mailshield.com">ajf792@maileater.mailshield.com</a>		2006-03-15	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:ajrock216@maileater.sparklist.com">ajrock216@maileater.sparklist.com</a>		2006-02-16	unsub	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>
<a href="mailto:ajrock315@maileater.lyris.com">ajrock315@maileater.lyris.com</a>		2005-11-09	normal	<a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">History</a>

**Use drop down box to view members by status**

# Mange Members

The screenshot shows a web application window titled "View Members". At the top, there is a search bar and three buttons: "Delete All In This View", "Find Members" (highlighted with a red box), and "Create New Member". Below the buttons is a table with columns for "Email", "Name", "Joined", and "Status". Each row represents a member and includes a "Copy | Delete | History" link. A red arrow points from the "Find Members" button to the table.

Email	Name	Joined	Status	
1jhs9867569@maileater.mailshield.com		2006-03-18	normal	Copy   Delete   History
4583161@maileater.sparklist.com		2005-12-09	normal	Copy   Delete   History
aa600950990@maileater.lyris.com		2005-12-04	normal	Copy   Delete   History
adkirby797@maileater.shelby.com		2006-03-10	unsub	Copy   Delete   History
adorizas560@maileater.sparklist.com		2006-03-03	normal	Copy   Delete   History
adunn728@maileater.sparklist.com		2006-01-24	normal	Copy   Delete   History
aersoyle575@maileater.sparklist.com		2005-12-05	normal	Copy   Delete   History
ag73168@maileater.shelby.com		2006-04-13	normal	Copy   Delete   History
ajt792@maileater.mailshield.com		2006-03-15	normal	Copy   Delete   History
ajrock216@maileater.sparklist.com		2006-02-16	unsub	Copy   Delete   History
ajrock315@maileater.lyris.com		2005-11-09	normal	Copy   Delete   History

**Find your members across the lists**

# Create Segments



- Overview of interface
- Add and manage members
- **Create segments**
- Become familiar with the content area
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form

# Segments Overview



**Create targeted mailings through segments**

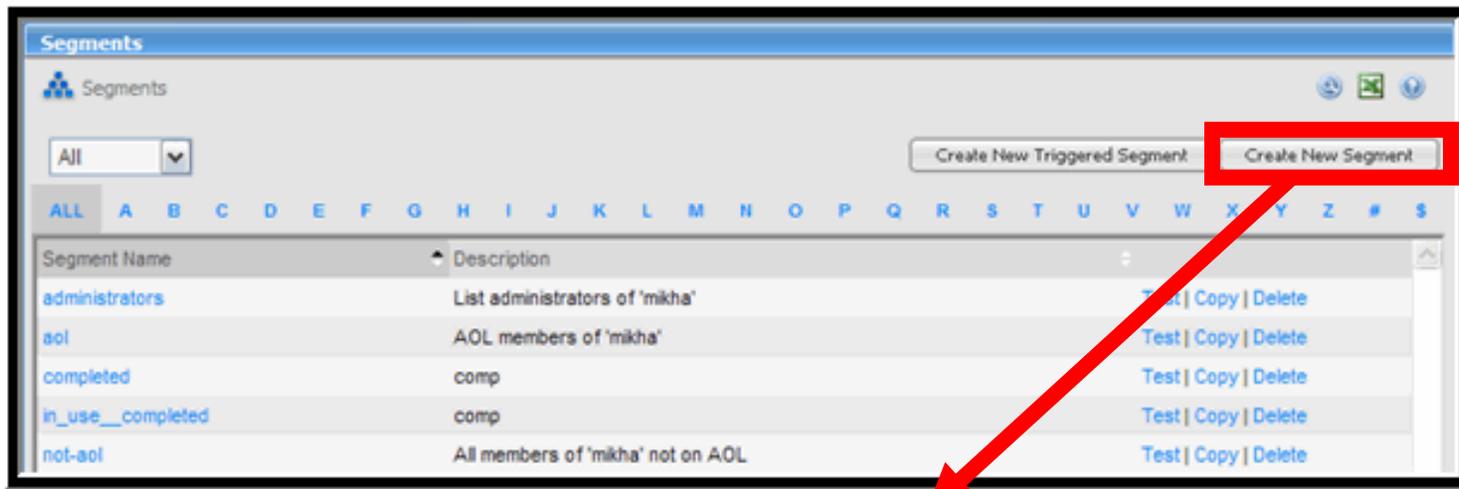
# Creating Simple Segments



## **Four Easy Steps:**

- 1. Select “Create New Segment”**
- 2. Include Name and Description**
- 3. Use the Insert Clause Wizard**
- 4. Save and Test**

# Segments (Step1)



**Select Create New Segment**

# Segments (Step 2)



The screenshot shows a web interface with three tabs: 'Essentials', 'Advanced', and 'Boundaries'. The 'Essentials' tab is active. It contains the following fields and controls:

- Segment name:** A text input field, highlighted with a red box.
- Description:** A text input field, also highlighted with a red box.
- Mail stream:** A dropdown menu currently set to 'No override'.
- Buttons:** 'Insert Clause', 'and', 'Or', 'Not', '(', ')', and 'Clear'.
- Summary:** A partially visible text input field at the bottom.

- **Include Segment Name**  
*(no spaces, no capitals)*
- **Write a description**

# Segments (Step 3)

The screenshot displays the Lyris Segments configuration interface. The main window has tabs for 'Essentials', 'Advanced', and 'Boundaries'. The 'Essentials' tab is active, showing fields for 'Segment name', 'Description', 'Mail stream' (set to 'No override'), and 'Summary'. A red box highlights the 'Insert Clause' button. An arrow points from this button to a secondary 'Insert Clause' dialog box. This dialog box has tabs for 'Text', 'Numeric', 'Date', 'Action', 'Clickthrough', 'Clickstream', 'Purchase', 'Interest', and 'Survey'. The 'Text' tab is selected, showing the configuration for a clause: 'If member text field: members\_\_state', 'Is: = equal to', and 'This value: CA'. There is also a 'Match case' checkbox which is unchecked. 'Insert' and 'Cancel' buttons are at the bottom right of the dialog.

## Read the Clause Like a Sentence:

- Select all members for whom the state field equals to CA
- Fields available depend on your database, license

# Segments (Step 3)

The screenshot shows the 'Essentials' tab of the Lyris Segments configuration interface. It includes the following elements:

- Segment name:** A text input field.
- Description:** A text input field.
- Mail stream:** A dropdown menu currently set to 'No override'.
- Buttons:** An 'Insert Clause' button and a row of logical operator buttons: 'and', 'Or', 'Not', '(', ')', and 'Clear'. This row is highlighted with a red border.
- Summary:** A section at the bottom with a corresponding row of logical operator buttons: 'and', 'Or', 'Not', '(', ')', and 'Clear'. This row is highlighted with a black border.

A red arrow points from the 'Not' button in the callout box to the 'Not' button in the main interface's operator row.

Use *and*, *or*, *not*, ( ) buttons to add more clauses

# Segments (Step 4)

Segment name: state-co  
Description: California residents

Save and Test Cancel

Segment name: ana's segment  
Description: ana's segment  
Total: 60  
Your query:  
SQL query: SELECT DISTINCT member\_EmailAddr, member\_MemberID FROM members WHERE members\_Lit\_='jodemo' AND members\_MemberType\_='normal' AND member\_SubType\_='naif' AND member\_EmailAddr\_ IS NOT NULL

EmailAddr_	MemberID_	
1jcs9867569@maleater.maltshield.com	353242	view
4503161@maleater.sparklist.com	353193	view
adorizas560@maleater.sparklist.com	353214	view
aersoytu575@maleater.sparklist.com	353286	view
aj1792@maleater.maltshield.com	353182	view
ajrock315@maleater.lyris.com	353217	view
ana@lyris.com	353687	view
andyn69694@maleater.lyris.net	353230	view
anzelstrickland196@maleater.lyris.net	353234	view
anthony.cook449@maleater.lyris.net	353215	view

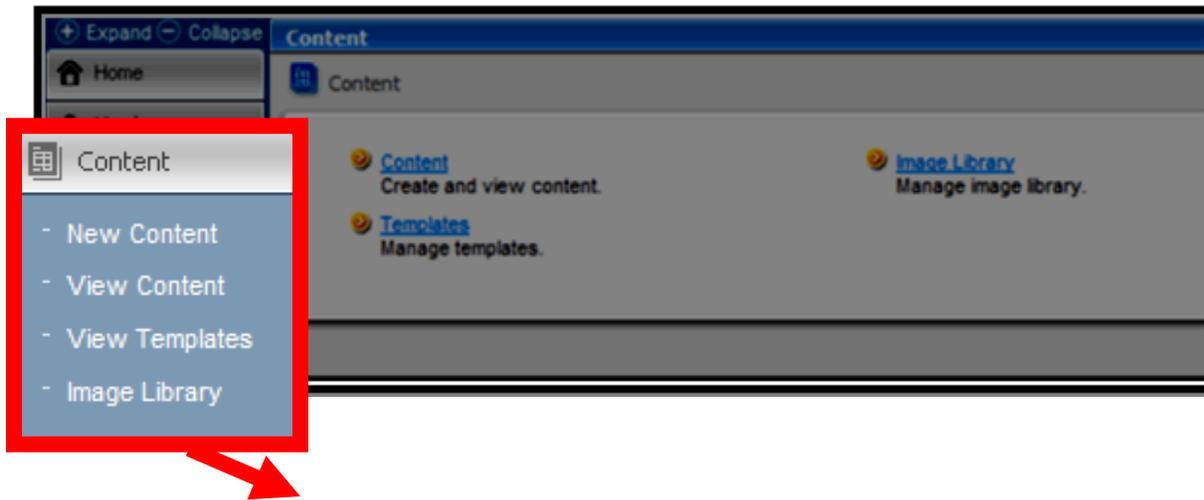
**Save and Test  
your segment to  
make sure you're  
pulling the right  
people**

# Become Familiar with the Content Area



- Overview of interface
- Add and manage members
- Create segments
- **Become familiar with the content area**
- Schedule/Deploy mailings
- Interpret results through reports
- Create automated messages
- Design a new subscriber form

# Content Overview



## Create Messages With:

- The built-in HTML editor
- Templates
- Remote images in the Image Library

## **Six Easy Steps**

- 1. Header information**
- 2. Create multipart message**
- 3. Manage your images**
- 4. Add attachments (optional)**
- 5. Select character set**
- 6. Create the mailing**

# New Content (Step 1)

**Create New Content**

Content : Create New Content

Essentials HTML Message Images Text Message Advanced Internationalization

Content name:

Description:

From: "admin|' <ana@lyris.com>

To: %%nameemail%%

Subject:

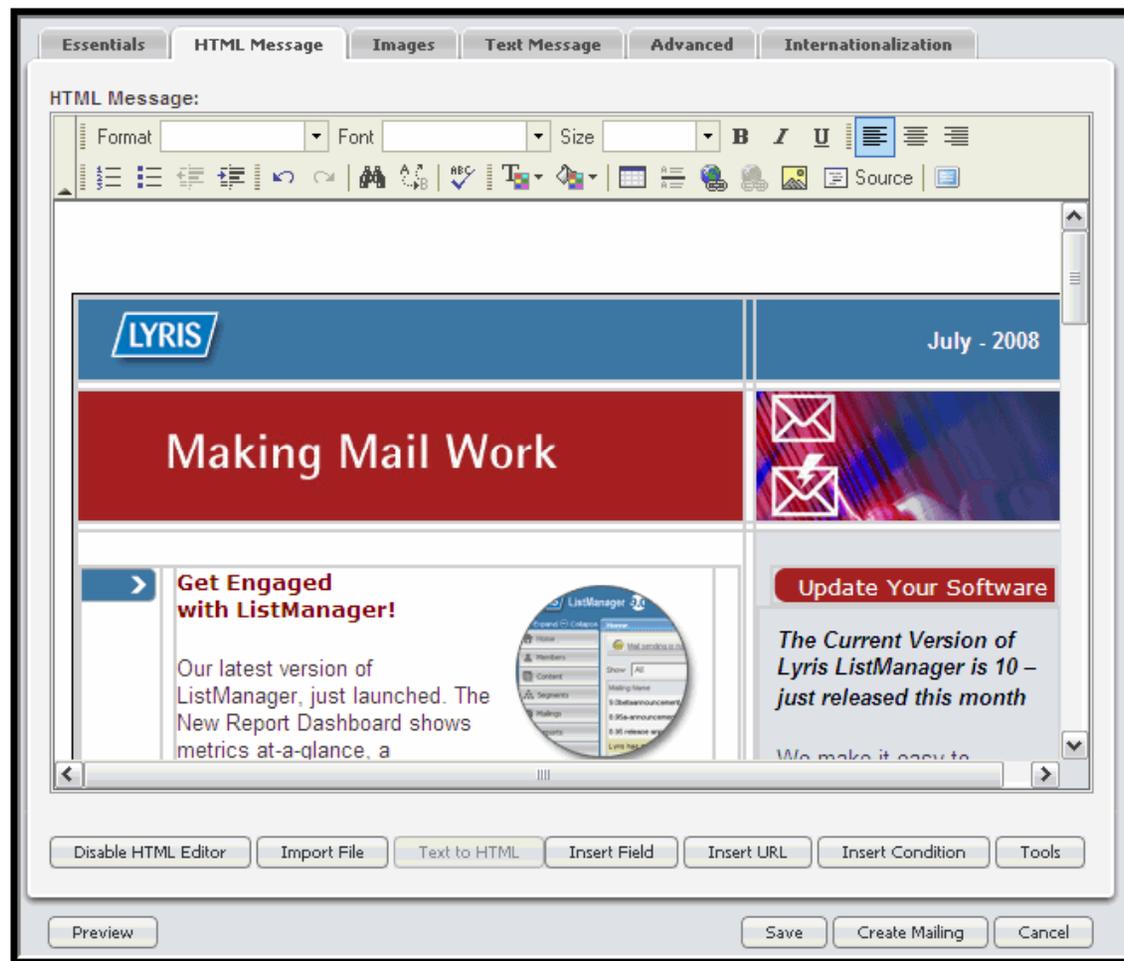
- **Fill in Content name & Description**
- **Edit header information**

# New Content (Step 2)

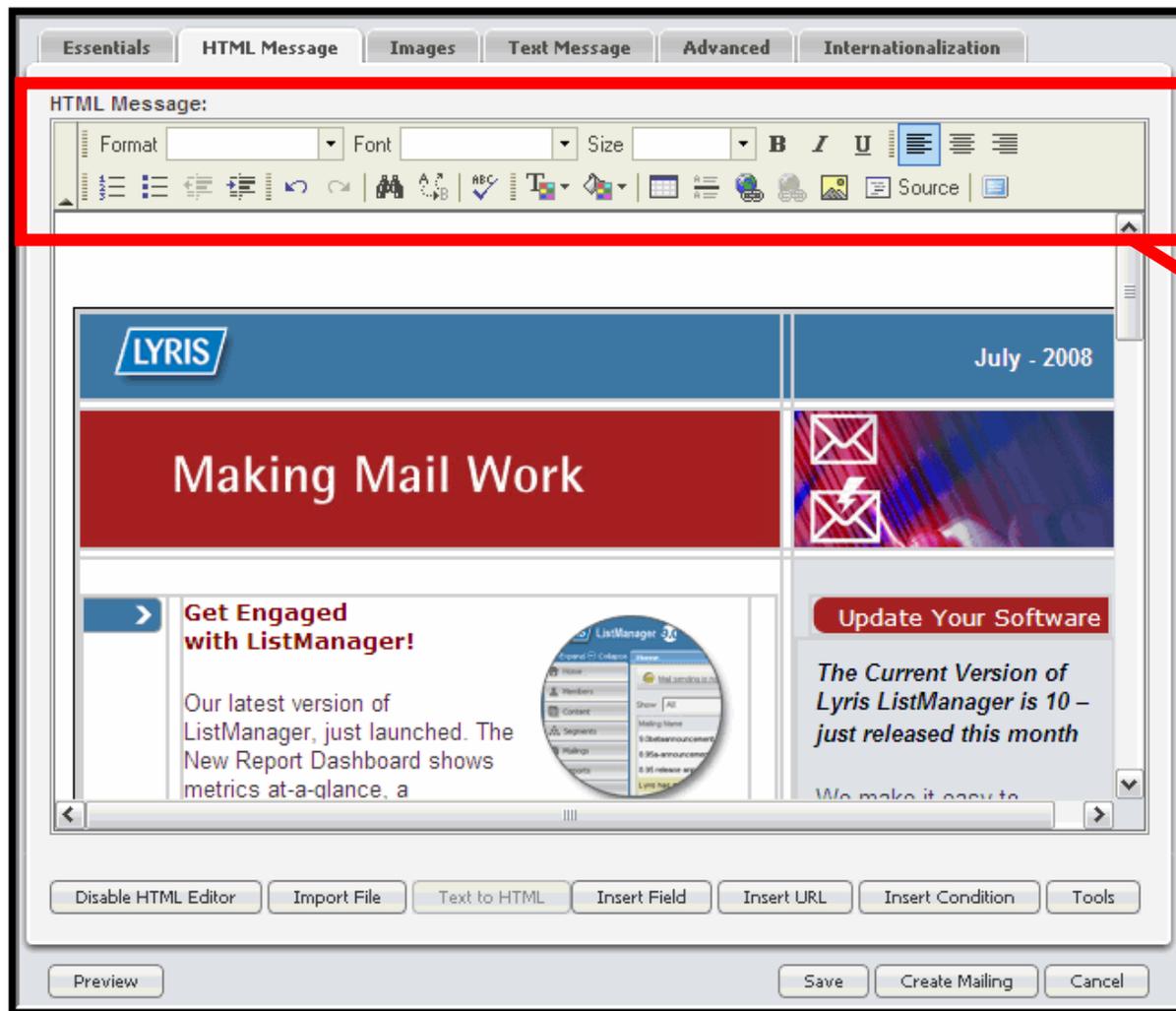


## Enhance Your Content

- Customize
- Personalize

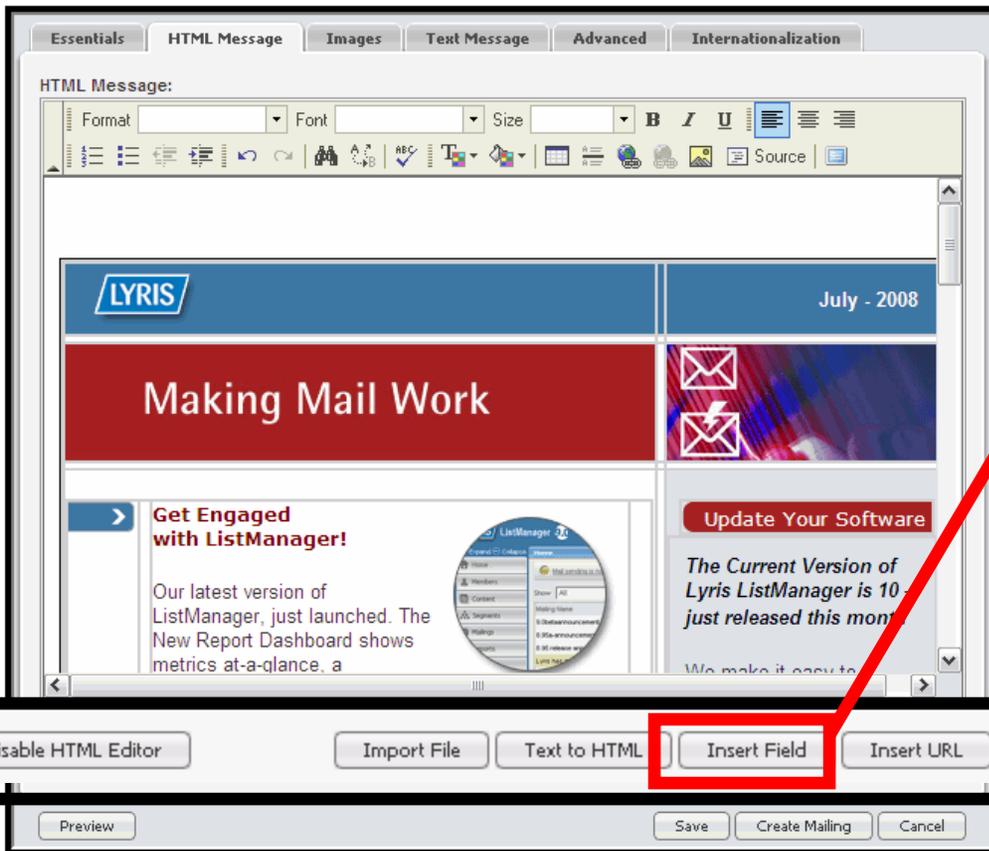


# HTML Editor



The HTML editor allows easy change to the content

# Mail-merge Tags



**Use mail-merge tags to personalize the content**

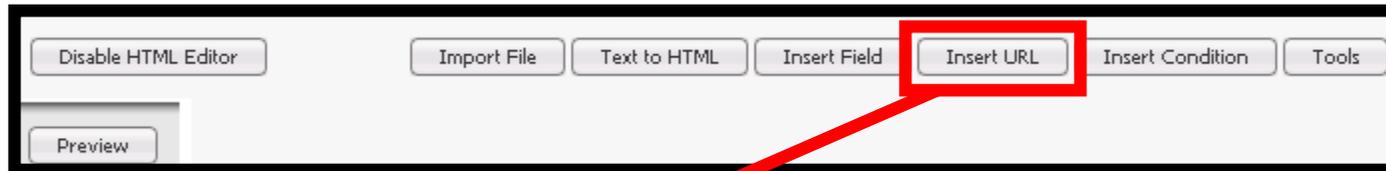
# Insert Field



**Insert Field Give You the Option to Insert:**

- **Mail merge fields**
- **Database fields**
- **Unsubscribe email address**

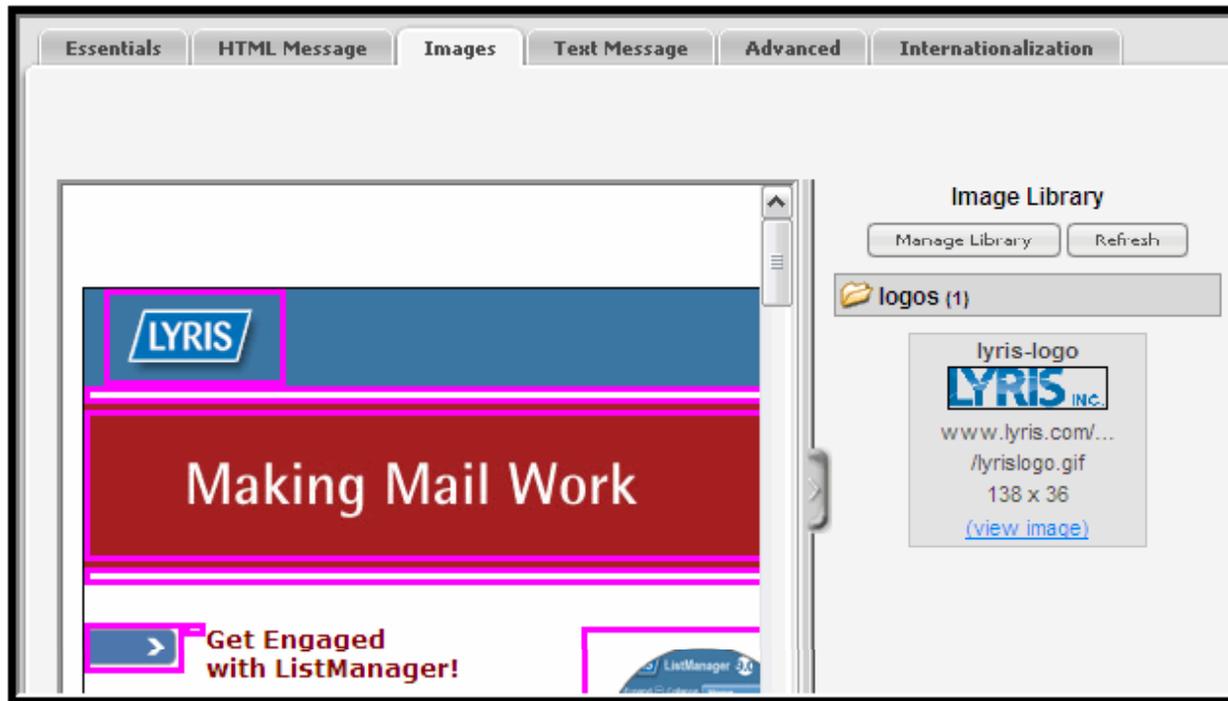
# Insert URL



## **Insert URL Gives You the Option to Insert:**

- **Clickthrough URL: Text & Image**
- **URL to unsubscribe**
- **URL to forms**
- **URL to web fetch**
- **URL to rich media**

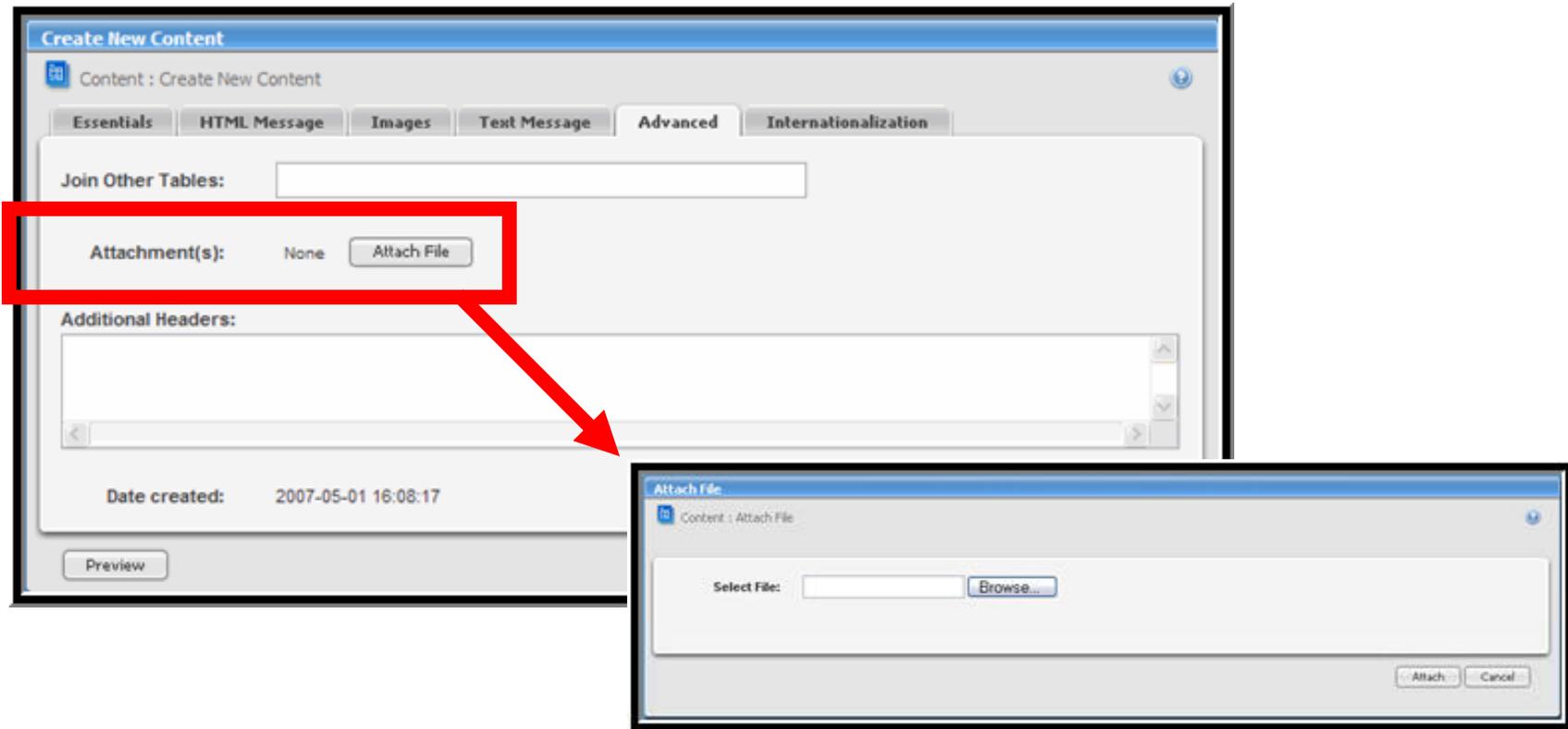
# New Content (Step 3)



## Manage Your Images

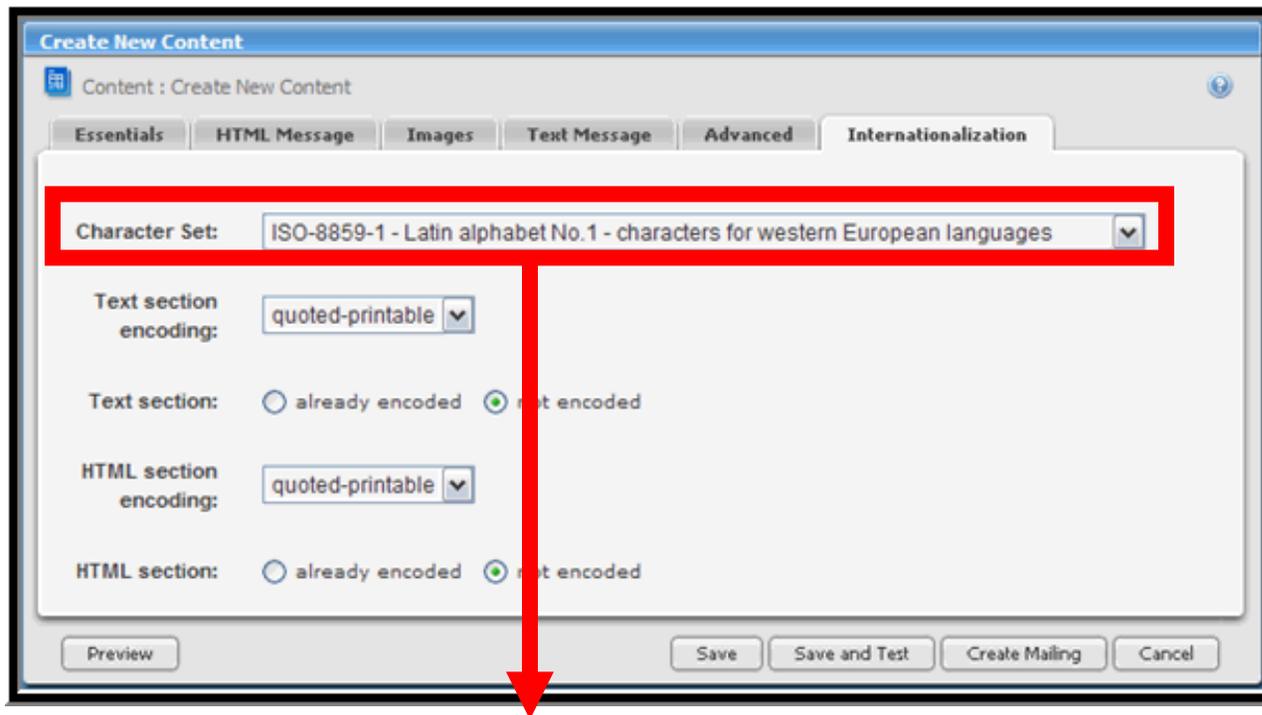
- **Resize, or**
- **Swap**

# New Content (Step 4)



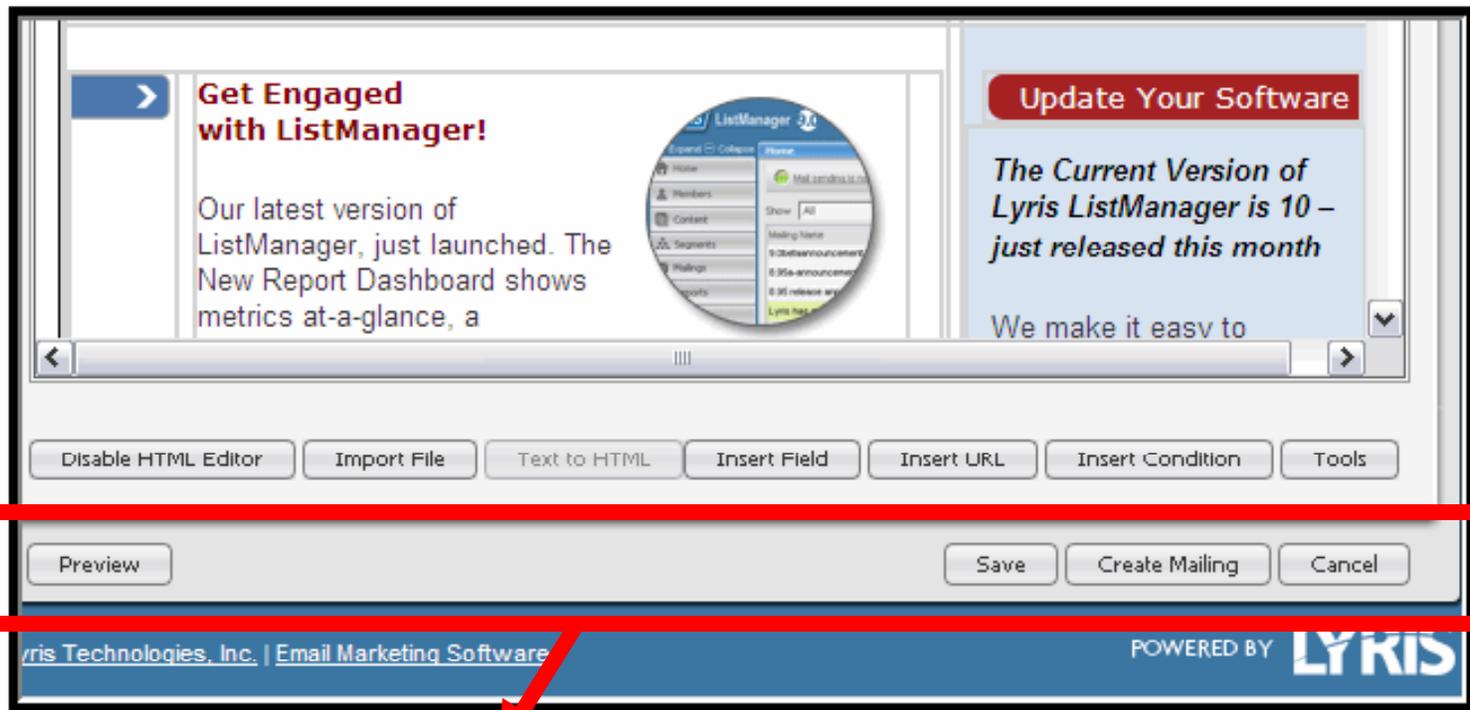
**Add attachments on the *Advanced Tab***

# New Content (Step 5)



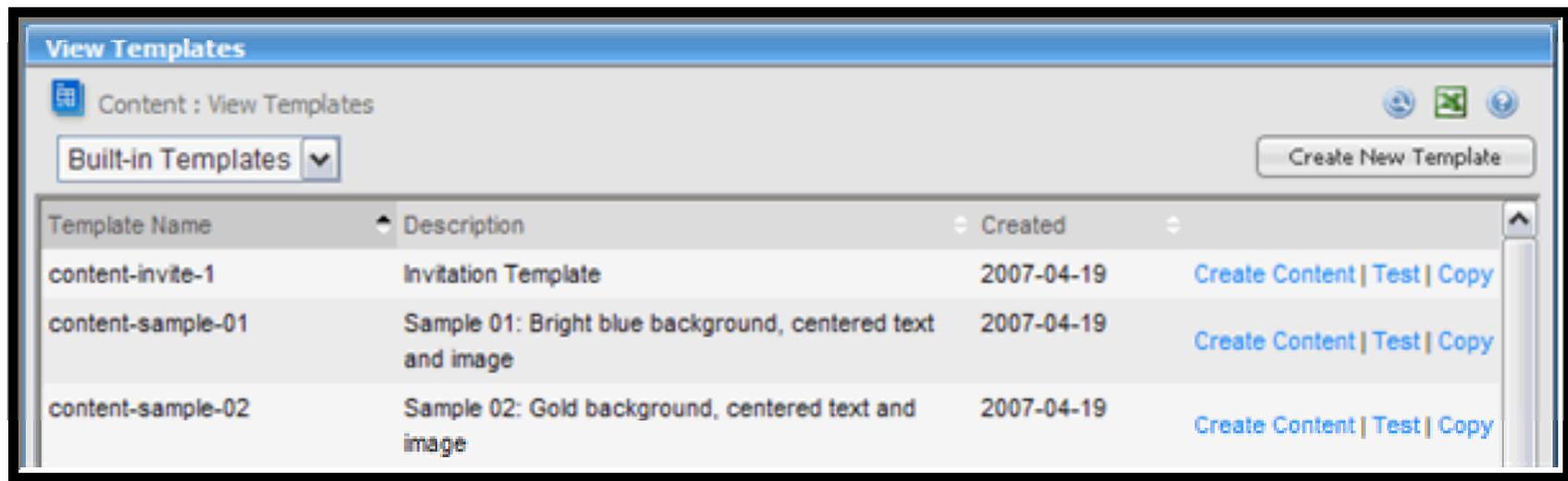
**Internalization:**  
**Click the Character Set box and  
choose a set from the list.**

# New Content (Step 6)



**Preview the content or use the  
“Create Mailing” shortcut**

# Templates



## Templates

- Create content from templates
- Design your own template

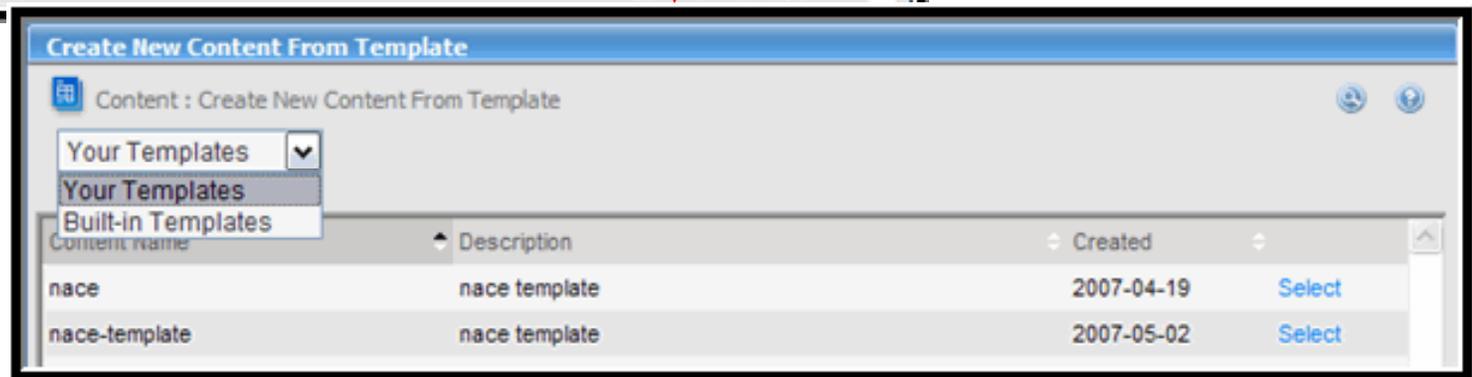
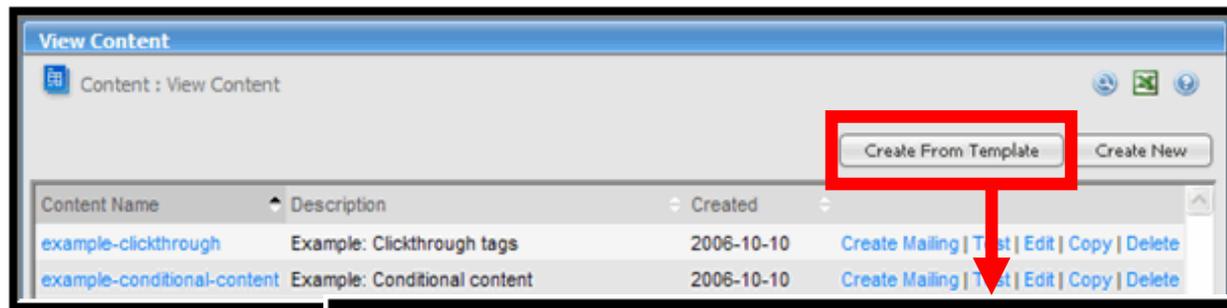
# Create Content From Template



## **Four Easy Steps:**

- 1. Choose Create From Template**
- 2. Fill in the Essentials Information**
- 3. Edit Editable Region**
- 4. Preview or Create Mailing**

# Content from Template (Step 1)



## Select Your Template:

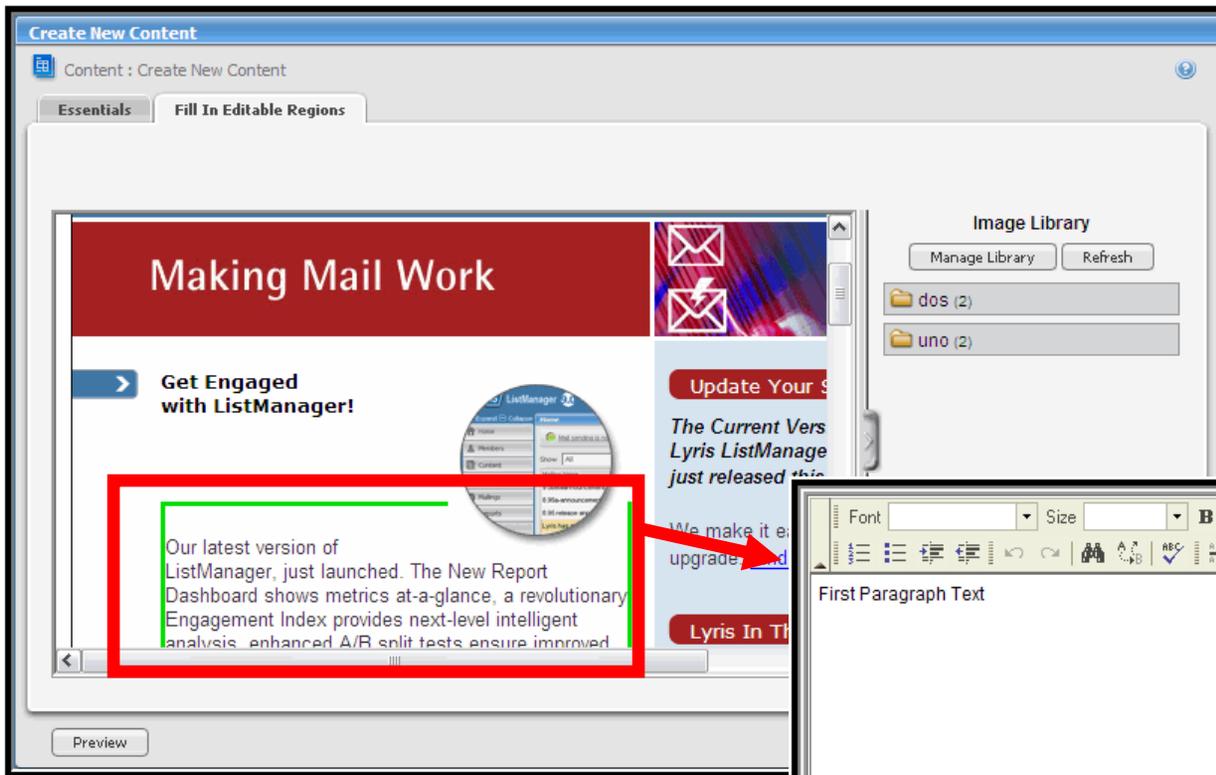
1. Select ***“Create From Templates”***
2. Select ***“Your Templates”*** or ***“Built-in Templates”***

# Content from Template (Step 2)

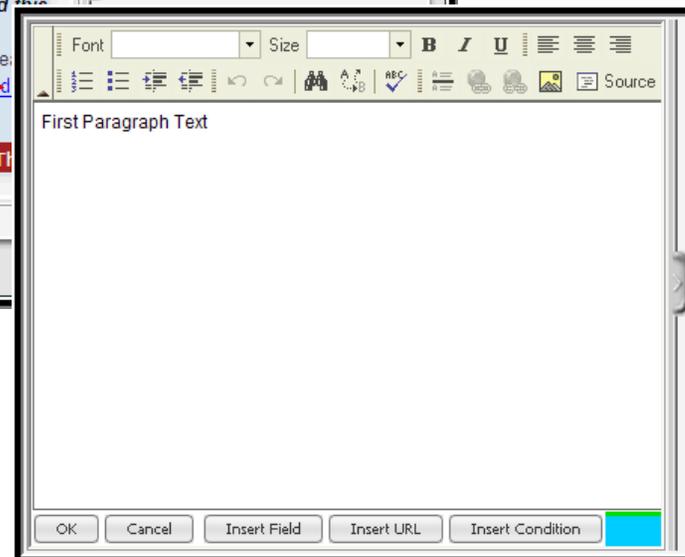
A screenshot of a software dialog box titled "Create New Content". The dialog has a blue header bar with the title and a small icon on the left. Below the header, there are two tabs: "Essentials" (selected) and "Fill In Editable Regions". The main area contains several input fields: "Content name:" with an empty text box; "Description:" with an empty text box; "From:" with a text box containing "(Insert From Address Here)" and an "Insert Field" button; "To:" with a text box containing "% %nameemail% %" and an "Insert Field" button; and "Subject:" with a text box containing "Insert Message Subject Here" and an "Insert Field" button. At the bottom of the dialog, there are four buttons: "Preview", "Save", "Save and Test", and "Create Mailing".

Fill in “*Content name,*” “*Description,*”  
and header information

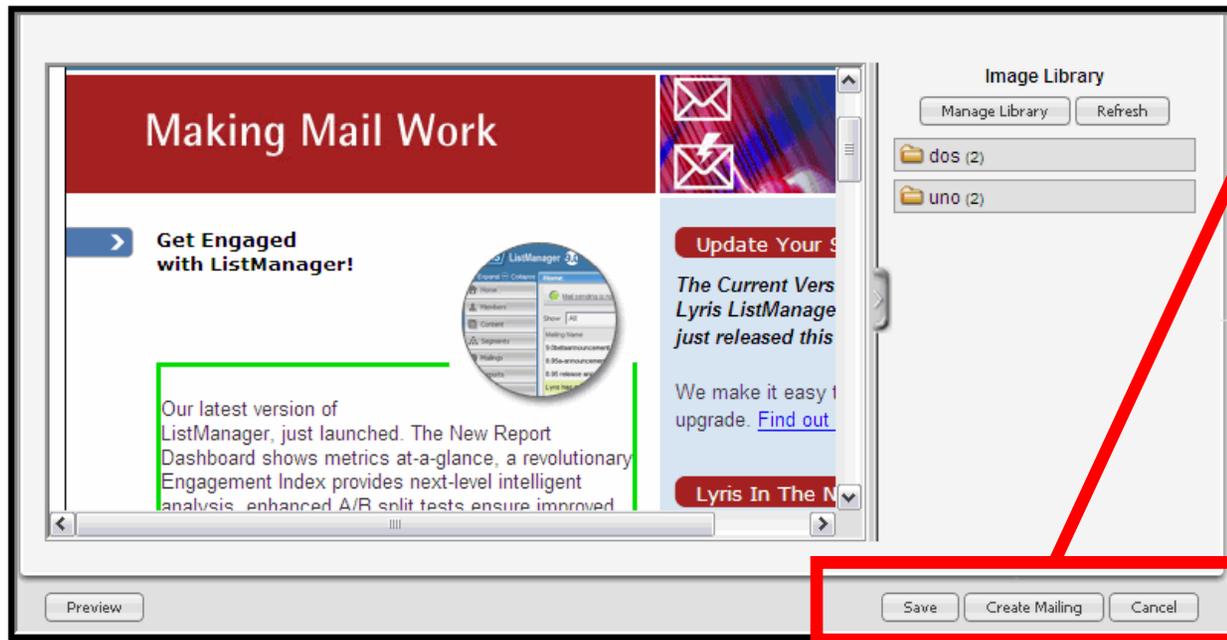
# Content from Template (Step 3)



**Editable regions have a green border. Click inside to edit region**



# Content from Template (Step 4)



**When finished,  
“Create  
Mailing”**

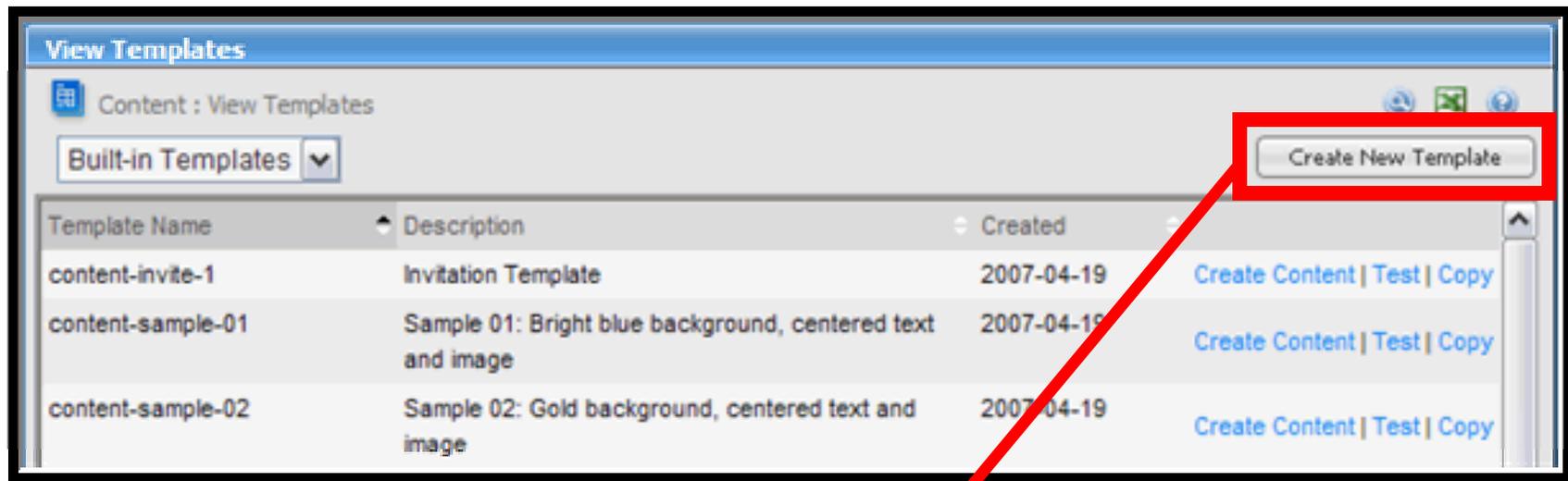
# Create a New Template



## **5 easy steps**

- 1. Choose Create New Template**
- 2. Fill in the Essentials Information**
- 3. Insert Your Content**
- 4. Specify the Editable Regions**
- 5. Create mailing**

# Create a New Template (Step 1)



**You can use your own HTML to design templates. Choose *“Create New Template.”***

# Create a New Template (Step 2)



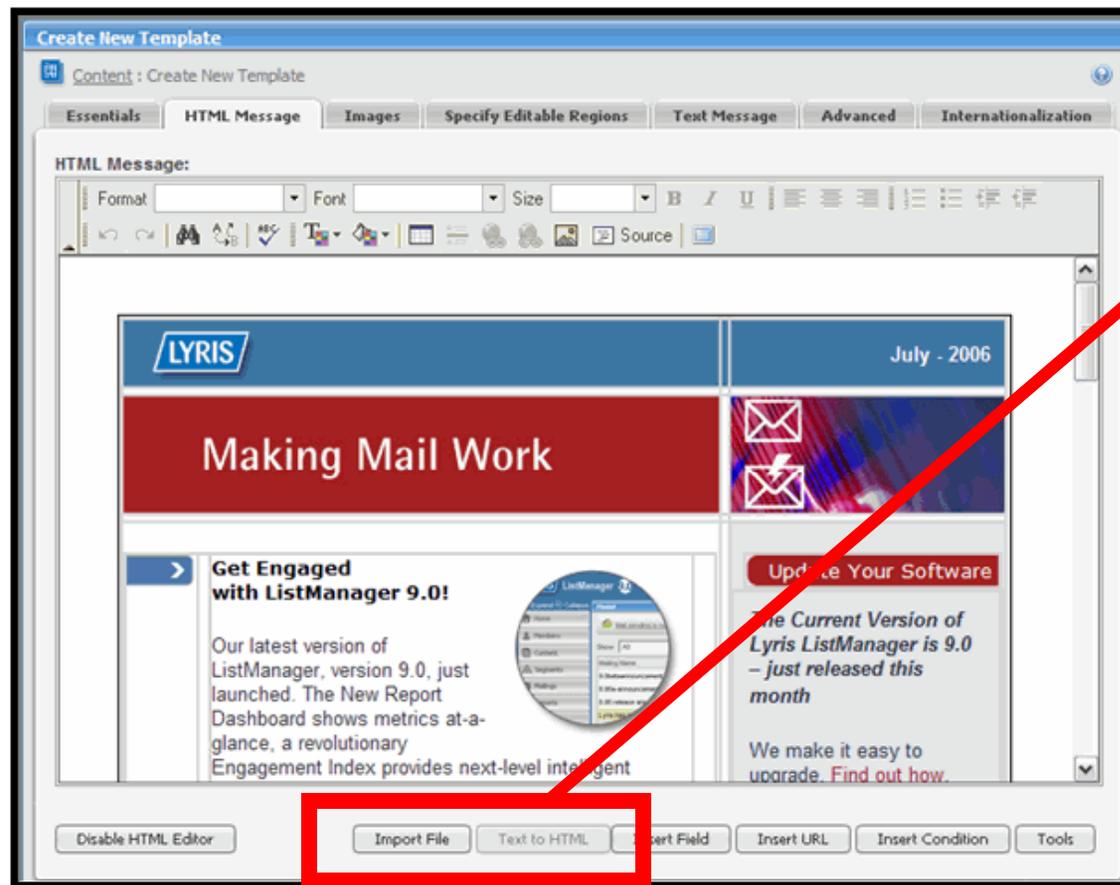
The screenshot shows a dialog box titled "Create New Template" with a tabbed interface. The "Essentials" tab is selected. The dialog contains the following fields and controls:

- Template name:** An empty text input field.
- Description:** An empty text input field.
- From:** A text input field containing the value `"Ana DeLeon" <ana@lyris.com>`, followed by an "Insert Field" button.
- To:** A text input field containing the value `%%nameemail%%`, followed by an "Insert Field" button.
- Subject:** An empty text input field, followed by an "Insert Field" button.

At the bottom of the dialog, there are four buttons: "Preview", "Save", "Save and Test", and "Cancel".

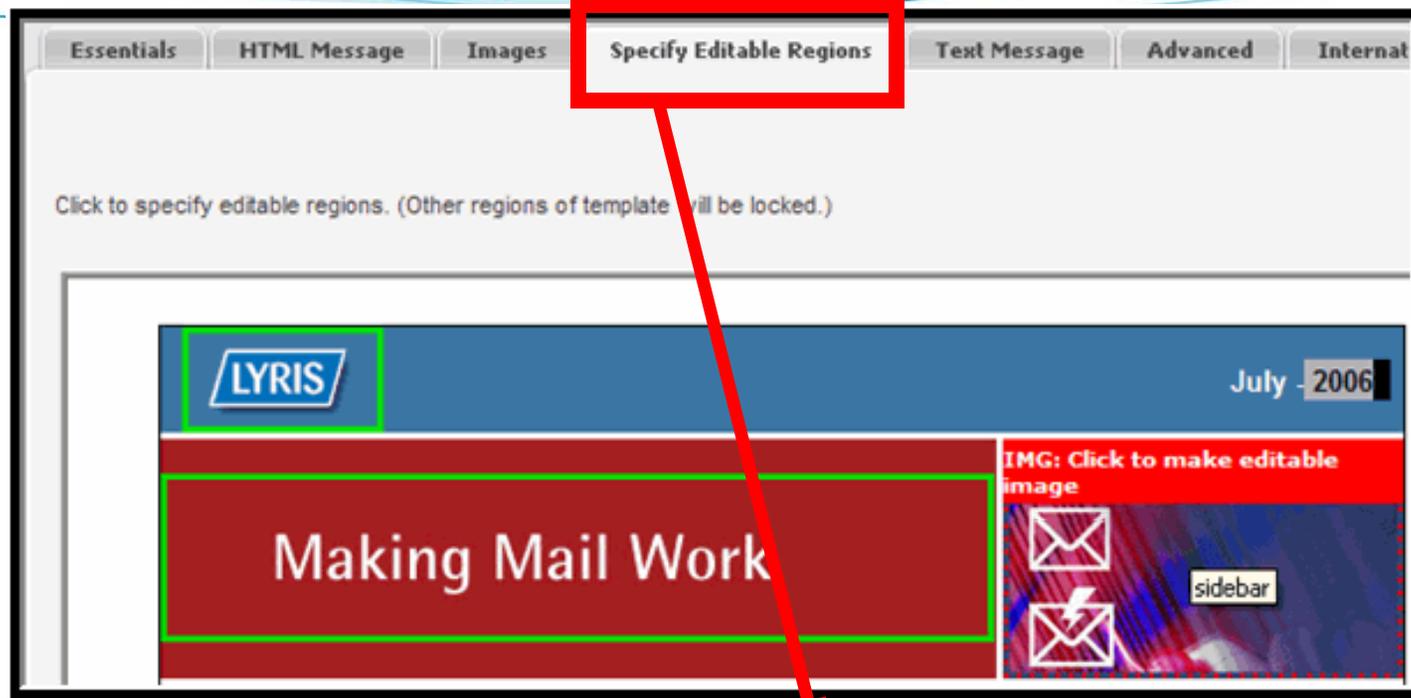
**Just like in the content creation, fill in the name, description, and header information**

# Create a New Template (Step 3)



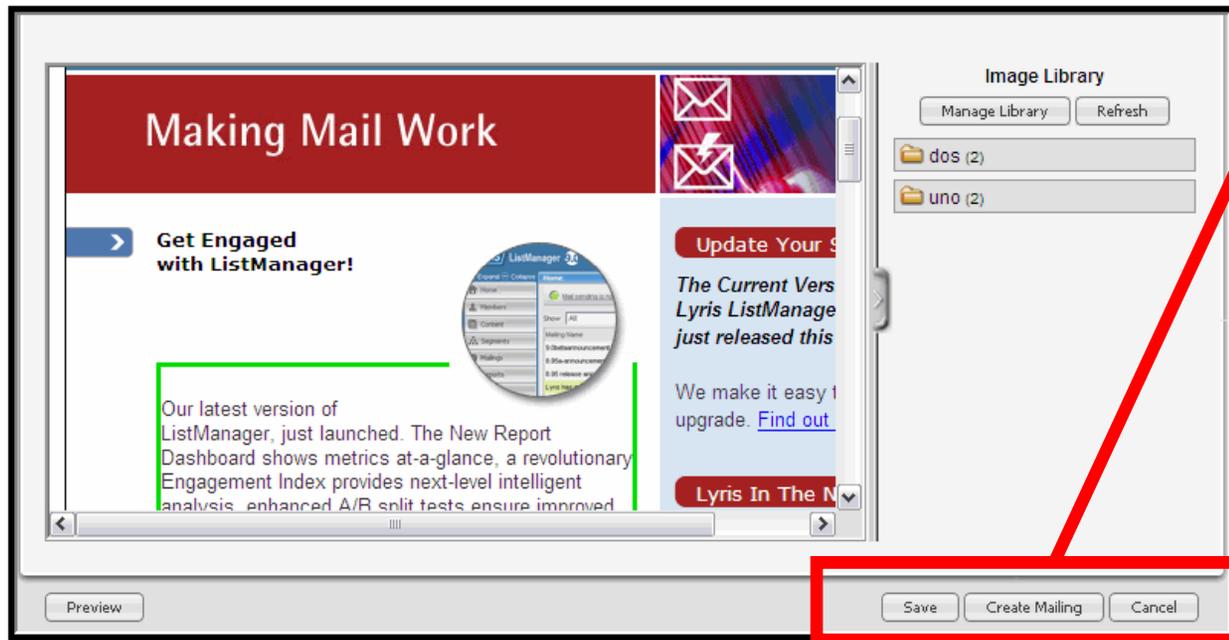
Import your file

# Create a New Template (Step 4)



**Click on the region to make it editable. You can select images or text**

# Create a New Template (Step 5)



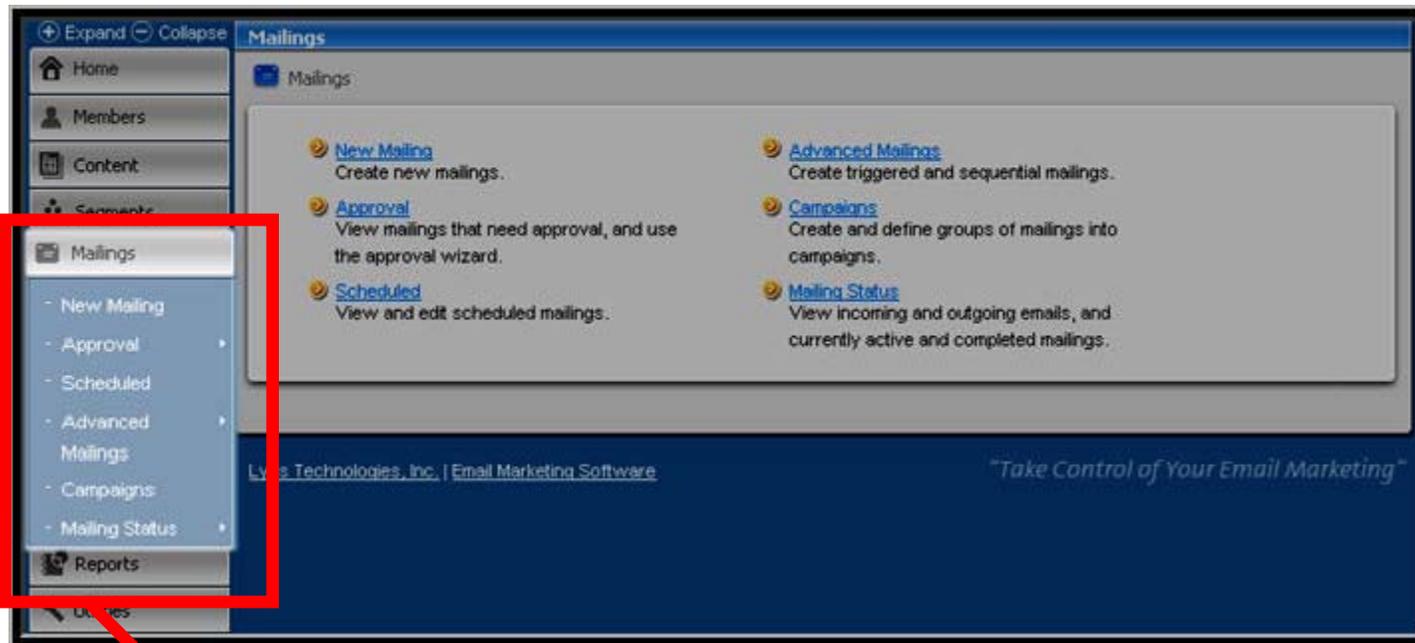
When finished,  
***“Create Mailing”***

# Build a Mailing



- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion

# Mailing Overview



**Define what content goes out, who gets it, and how it is tracked**

## **Six Easy Steps**

- 1. Choose the Content to be sent**
- 2. Select the desired Segment**
- 3. Enable Tracking**
- 4. Schedule your mailing**
- 5. Preview the mailing**
- 6. Save and Test the mailing**

# Mailing (Step 1)

New Mailing

Mailings : New Mailing

Message Recipients Tracking Deliverability Schedule Internationalization

Mailing name: 5/12/2006 3:06:10 PM

From: "ana" <ana@lyris.com>

To: %%nameemail%%

Subject:

Text message:

Show More

HTML message:

— font — — size — B I U [List Bulleted] [List Numbered] [List None] [List Indent] [List Outdent] [List Toggle] [List Undo] [List Redo] [List Refresh] [List Help] [List Close]

Show More Disable HTML Editor

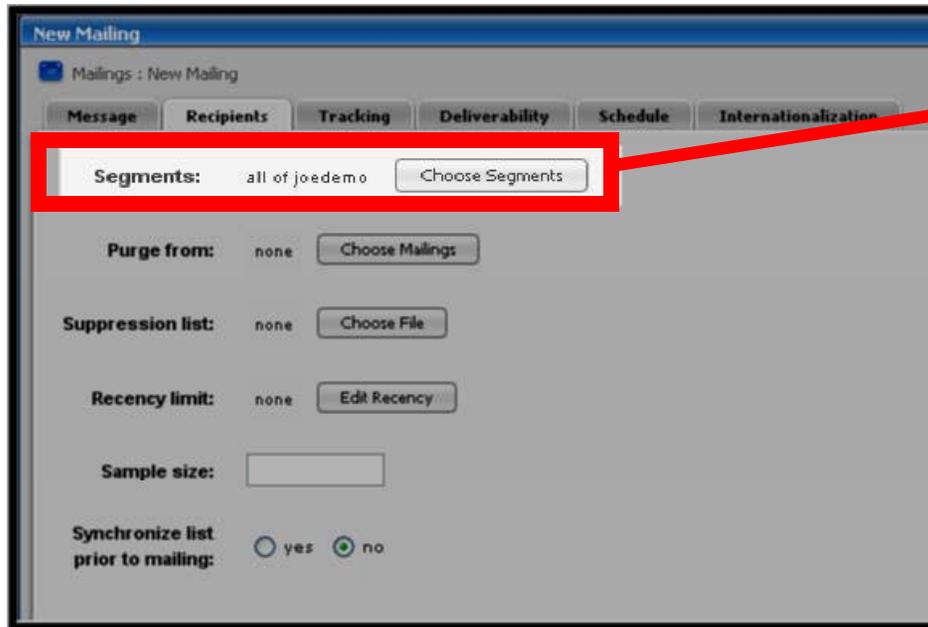
Import Content

Preview Save Save and Test Cancel

**Two ways to insert content:**

- **Compose on the fly**
- **Import saved content**

# Mailing (Step 2)



The screenshot shows the 'New Mailing' configuration window. The 'Segments' field is highlighted with a red box and contains the text 'all of joedemo' and a 'Choose Segments' button. Other fields include 'Purge from: none', 'Suppression list: none', 'Recency limit: none', 'Sample size: [input field]', and 'Synchronize list prior to mailing: [radio] yes [radio checked] no'. A red arrow points from the 'Choose Segments' button to the text on the right.

**With ListManager  
you can send to:**

- **The entire list**
- **A specific segment**
- **Across lists**

# Mailing (Step 3)

The screenshot shows the 'New Mailing' dialog box with the following settings:

- Track opens:  yes  no
- Detect HTML capability:  yes  no
- Track all URLs:  yes  no

Other visible options include 'View Current Totals', 'Campaign: Not part of a campaign', and buttons for 'Preview', 'Save', 'Save and Test', and 'Cancel'.

## Track your:

- Tracking is enabled by default
- Keep track of who has opened your message and who has clicked on a URL

# Mailing (Step 4)

New Mailing

Mailings : New Mailing

Send when:  wait for approval  schedule for 2006-05-12 23:59:00 yyyy-mm-dd hh:mm:ss

Rewrite date when sent:  yes  no

Resend after this many days:

Don't attempt after date:  yyyy-mm-dd hh:mm:ss

Preview Save Save and Test Cancel

## ***Schedule* sending time**

- **Hold for approval (default)**
- **Schedule for certain date and time**

# Mailing (Step 5)

LYRIS<sup>INC.</sup>

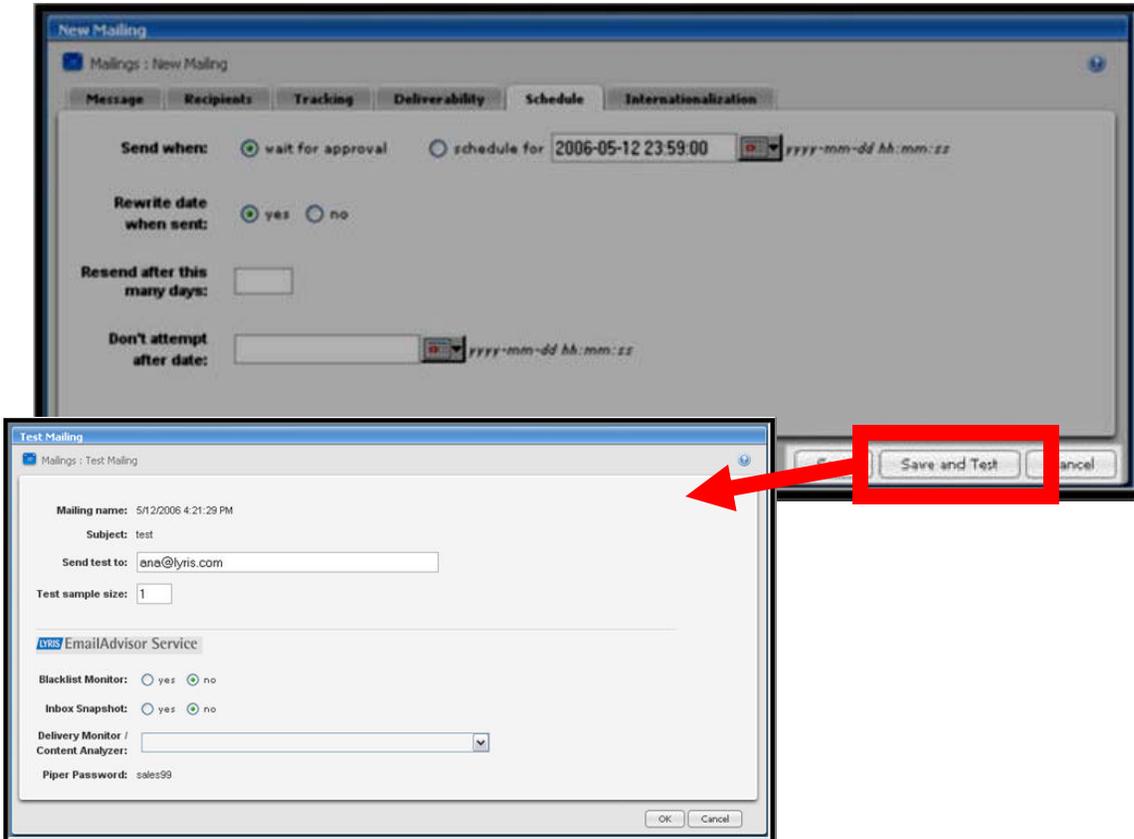
The screenshot displays the 'New Mailing' configuration window. On the left, there are settings for 'Send when', 'Rewrite date when sent', 'Resend after this many days', and 'Don't attempt after date'. A red box highlights the 'Preview' button. An arrow points from this button to a preview window on the right. The preview window shows the email header and HTML content. The header includes 'Member: View Random or bwilliams709@maileater.lyris.com View', 'From: "Melissa's Newsletter" <training@lyris.com>', 'To: bwilliams709@maileater.lyris.com', and 'Subject: Melissa Here'. The HTML message content includes a LYRIS logo, the date 'July - 2006', the headline 'Making Mail Work', a salutation 'Dear customer,', the LYRIS logo, and a promotional message: 'Update Your Software. The Current Version of Lyris ListManager is 9.0 - just released this month'.

***“Preview”***  
shows content  
merged for  
random or  
particular  
recipient

# Mailing (Step 6)

## *Save and Test* shows real tests

- Sends “real” messages to admin
- Tags and scripting fully activated



# Send Via E-mail

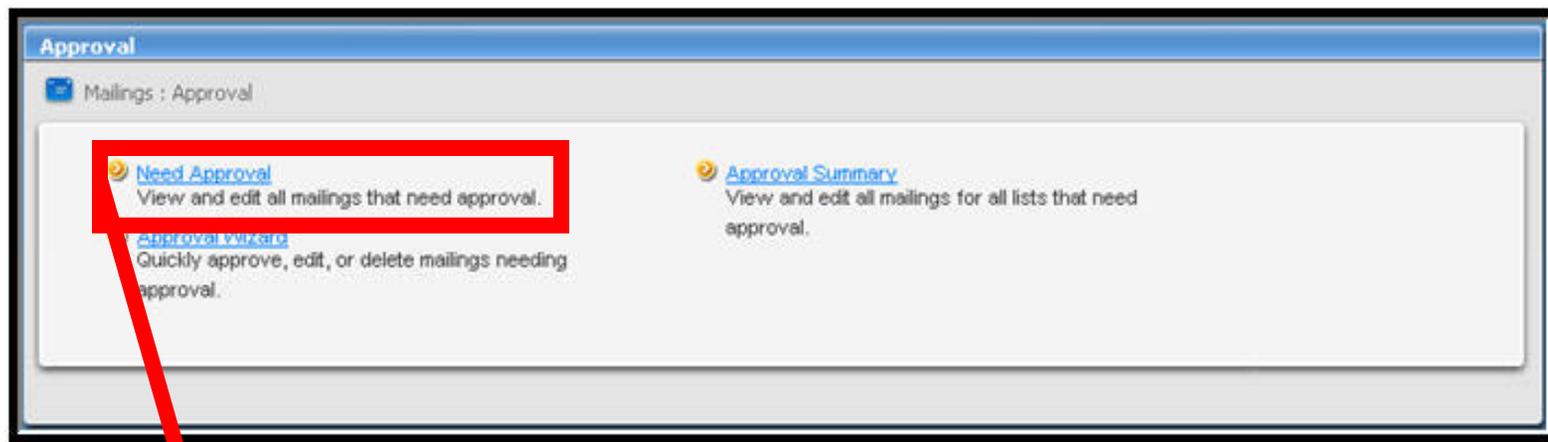


- You can also send a message to be distributed to your list by sending it to the [listname@yourservername.com](mailto:listname@yourservername.com) address. Example:

*newsletter@listmanager.example.com*

- Send to a segment by sending to [listname.segmentname@yourservername.com](mailto:listname.segmentname@yourservername.com)
- List and membership settings determine who is allowed to post mailings via email and whether they need approval.

# Need Approval



**Messages, by default, are set to wait for approval**

# Need Approval (2)

ID	Mailing Name	Subject	
1675	Espana-copy 4/3/2008 3:29:24 PM	Espana	<a href="#">Send</a>   <a href="#">Test</a>   <a href="#">Schedule</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
1711	Split Test 31 Winner: maricia content	maricia content	
1730	unsw content 4/17/2008 10:39:20 AM	unsw content	<a href="#">Send</a>   <a href="#">Test</a>   <a href="#">Schedule</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
1755	eliresearch content 4/29/2008 10:47:19 AM	eliresearch content	<a href="#">Send</a>   <a href="#">Test</a>   <a href="#">Schedule</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
1770	Split Test 34 Winner: anson copy line 1	30%	<a href="#">Send</a>   <a href="#">Test</a>

**To approve click on “*Send*” or “*Schedule*”**

# View Reports



- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- **View reports**
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion

# Home Page



Home

Mail sending is normal - there are no delayed or failed mailings

Member Count: Normal: 16700 Held: 317 Unsub: 33 Other: 585

Show: All New Mailing

Mailing Name	ID	Sender	Status	Date Sent
9.0betaannouncement_1 4/26/2006 3:39:42 PM	8409924	"Lyris Technologies" product@lyris.com	Completed	2006-04-26 15:46:16
8.95a-announcement 2/15/2006 12:30:05 PM	8080102	Lyris Technologies product@clo.lyris.net	Completed	2006-02-17 15:23:34
8.95 release announcement 12/28/2005 11:54:59 AM	7812426	"Lyris Technologies" product@lyris.com	Completed	2005-12-28 12:15:42
<b>Lyris has moved 12/22/2005 9:56:03 AM</b>	<b>7784731</b>	<b>"Lyris Technologies" editor@lyris.com</b>	<b>Completed</b>	<b>2005-12-22 10:00:26</b>
8.95betaannouncement 12/15/2005 9:51:32 AM	7766678	"Lyris Technologies" product@lyris.com	Completed	2005-12-15 12:10:43
8.9c-announcement 12/5/2005 12:32:00 PM	7706074	Lyris Technologies product@clo.lyris.net	Completed	2005-12-05 12:32:55
8.9b-announcement 11/3/2005 3:20:51 PM	7529289	Lyris Technologies product@clo.lyris.net	Completed	2005-11-03 15:23:53

7784731 - Lyris has moved!

Can't read this? [Click here](#)

Unsubscribes	0 (0%)
Forwards	43
Referrals	7
Unique Opens	1397
Total Clicks	789
Unique Clicks	79 (10%)
Transactions	7
Conversion	5.53%

Avg Mailings Delivered (97%)

Delivered 939/940 (98%)

**Key statistics  
available from  
homepage**

# Reports Overview



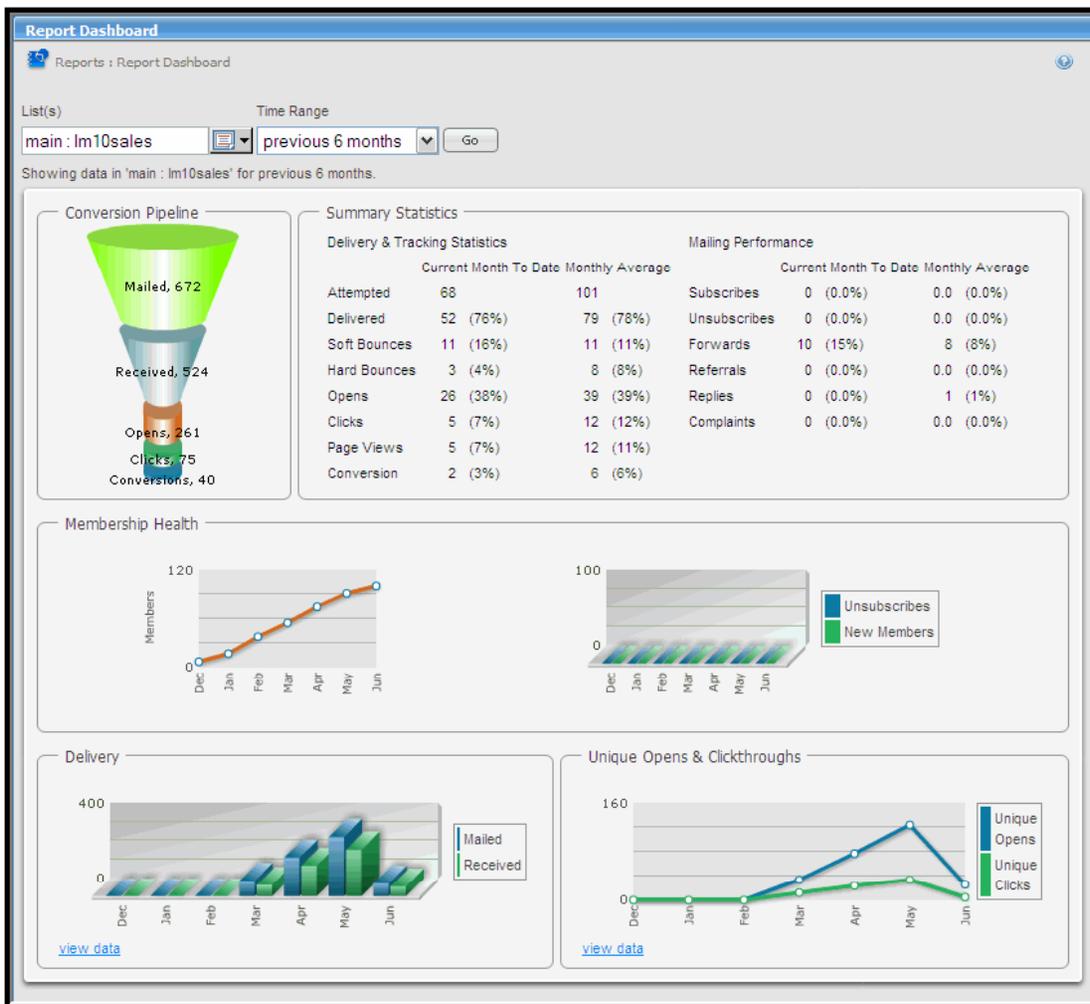
## Quick access to reports

The screenshot shows the LYRIS Reports Dashboard interface. The left sidebar contains a 'Reports' menu highlighted with a red box. The main content area displays a 'Report Dashboard' for the list 'ani: analuz' over the 'previous 6 months'. It includes a 'Conversion Pipeline' and 'Summary Statistics' section with the following data:

Delivery & Tracking Statistics		
	Current Month To Date	Monthly Average
Attempted	0	0.0
Delivered	0 (0.0%)	0.0 (0.0%)
Soft Bounces	0 (0.0%)	0.0 (0.0%)
Hard Bounces	0 (0.0%)	0.0 (0.0%)
Opens	0 (0.0%)	0.0 (0.0%)
Clicks	0 (0.0%)	0.0 (0.0%)

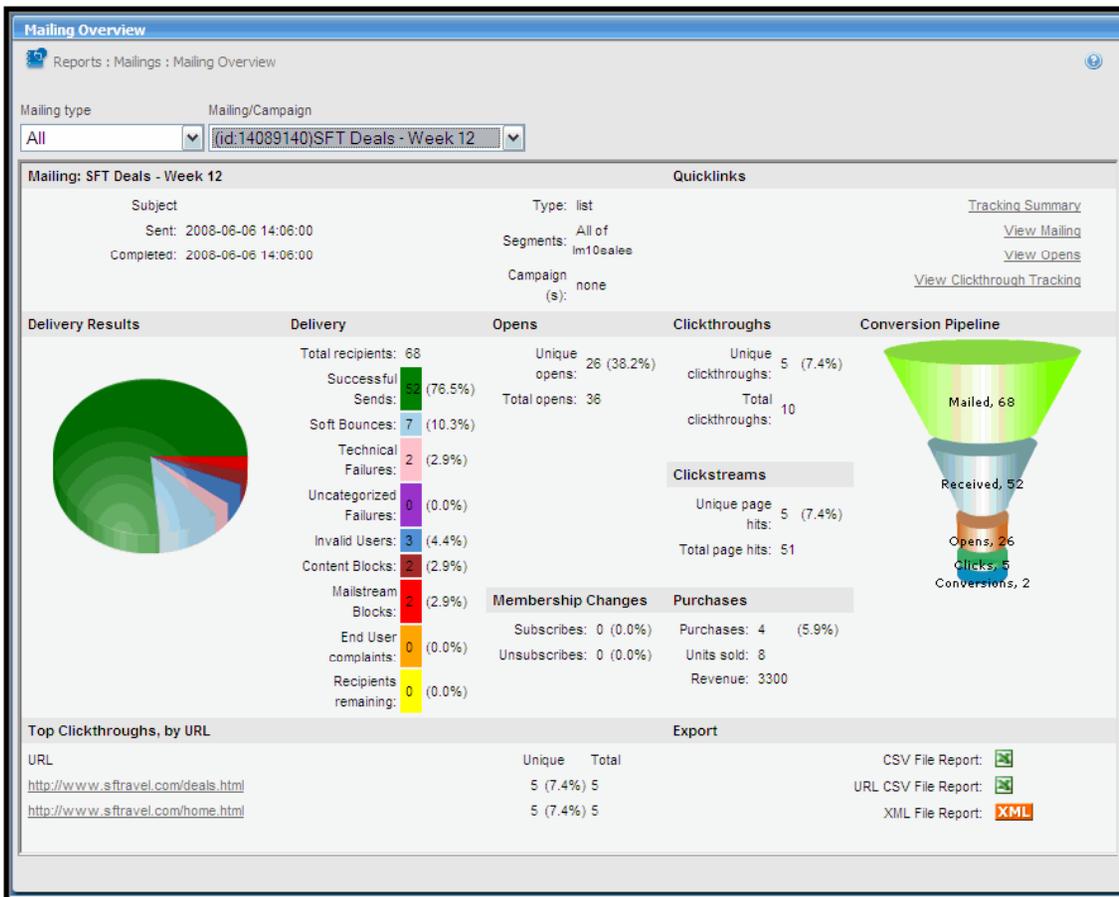
- Report Dashboard
- Mailing Overview
- Delivery Tracking
- Email-Advisor
- And MORE

# Reports Dashboard



**The Report Dashboard is an aggregate report that allows you to see how the list, site, or campaigns are doing and view monthly averages**

# Mailing Overview Report



**This report provides an overview for mailing's success and failure rates with deliverability for 9 distinct categories**

# Delivery Statistics Report



**Delivery Table**

Reports : Mailings : Delivery Statistics : Delivery Table

Mailing type: All | List(s): main : lm10sales | From: 2007-12-16 | To: 2008-06-16 | Go

Showing data for 'all' mailings in 'main : lm10sales' from 2007-12-16 to 2008-06-16.

ID	Mailing Name	Total	Attempted %	Completed %	Success %	Fail %	Complaint %	Created
14089140	SFT Deals - Week 12	68	100.0%	100.0%	76.5%	23.5%	0.0%	2008-06-06
14089139	SFT Deals - Week 11	64	100.0%	100.0%	71.9%	28.1%	0.0%	2008-05-30
14089138	SFT Deals - Week 10	66	100.0%	100.0%	84.8%	15.2%	0.0%	2008-05-23

**This report tells you the progress of your mailing and how successful they have been**

# Tracking Statistics Report



Tracking Summary: Sends, Opens & Clickthroughs (All Mailings)

Reports : Mailings : Tracking Statistics : Tracking Summary: Sends, Opens & Clickthroughs (All Mailings)

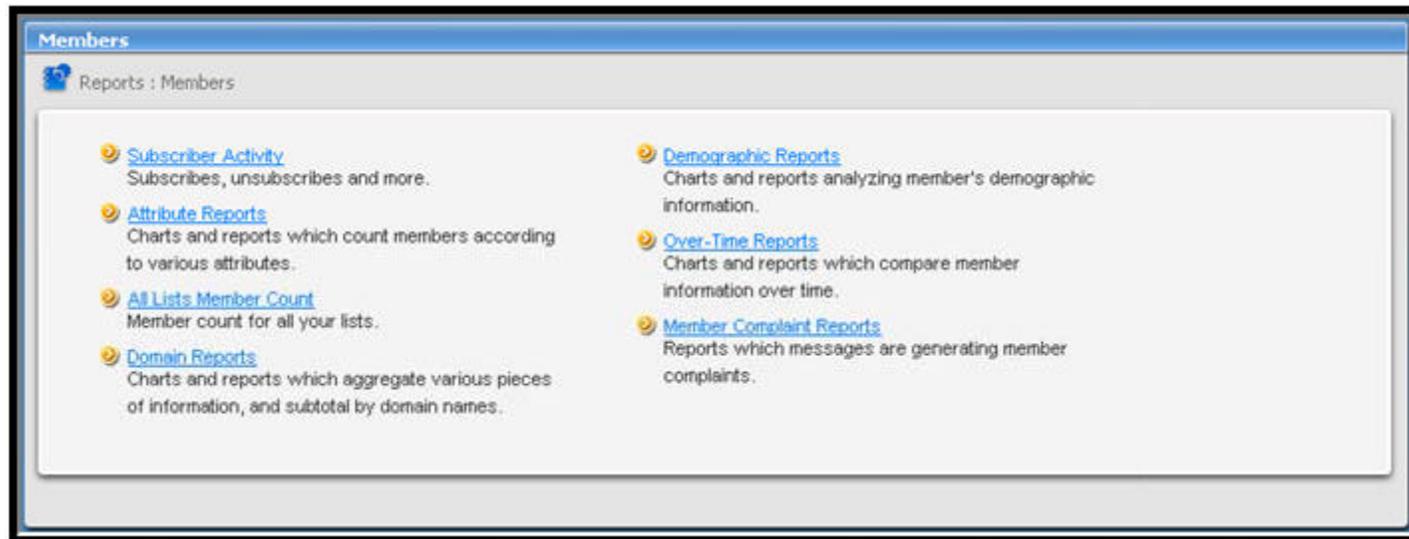
ID	Mailing Name	Sent#	Open#	Open%	CT#	CT%	CS#	CS%	Created
2015	anancstest 5/16/2006 9:26:38 AM	26	2	7%	0	0%	0	0%	2006-05-16
2014	sfttravel-specials-2006-05-05 5/16/2006 9:15:12 AM	68	1	1%	0	0%	0	0%	2006-05-16
2013	test of mailing 488 on 5/16/2006 9:28:58 AM	1	1	100%	0	0%	0	0%	2006-05-16
2012	test of mailing 486 on 5/16/2006 9:16:19 AM	1	1	100%	0	0%	0	0%	2006-05-16
1646	test of mailing 477 on 5/12/2006 4:30:19 PM	1	1	100%	0	0%	0	0%	2006-05-12
1557	test of mailing 439 on 5/9/2006 9:55:13 AM	1	1	100%	0	0%	0	0%	2006-05-09
1507	5/8/2006 2:17:03 PM	0	3	0%	0	0%	0	0%	2006-05-08
1493	sfttravel-sweepstakes 5/7/2006 8:05:24 PM	4	2	50%	0	0%	0	0%	2006-05-07
1460	Split Test 1 Part 2: sfttravel-sweepstakes	3	2	66%	0	0%	0	0%	2006-05-05
1459	Split Test 1 Part 1: sfttravel-news-2006-05	3	2	66%	0	0%	0	0%	2006-05-05
1450	SFT Deals - Week 12	60	50	83%	25	41%	23	30%	2006-04-20
1457	SFT Deals - Week 11	52	47	90%	33	63%	31	59%	2006-04-21
1456	SFT Deals - Week 10	58	50	86%	31	53%	31	53%	2006-04-14
1455	SFT Deals - Week 9	54	51	94%	28	51%	25	46%	2006-04-07
1454	SFT Deals - Week 8	50	45	90%	29	58%	27	54%	2006-03-31
1453	SFT Deals - Week 7	53	49	92%	29	54%	29	54%	2006-03-24
1452	SFT Deals - Week 6	52	48	92%	27	51%	26	50%	2006-03-17
1451	SFT Deals - Week 5	48	42	87%	25	52%	22	45%	2006-03-10

Show fewer | [Show more](#) Previous Next

See

- How successful have individual mailings been in reaching members?
- Who has opened or clicked on the mailings?

# All Reports : Members



## See member activity:

- How many people have joined recently?
- What is the total membership count for each list?
- What is the status of the member?

# Subscriber Activity



Subscriber Activity

Reports : Members : Subscriber Activity

Choose Dates

Date	New Members	Unsubscribes	Bad Addresses	Net Change
2007-05-04	0	0	0	0
2007-05-05	0	0	0	0
2007-05-06	0	0	0	0
2007-05-07	0	0	0	0
2007-05-08	0	0	0	0
2007-05-09	0	0	0	0
2007-05-10	0	0	0	0
Total for period	0	0	0	0
Grand totals *	180	14	7	159

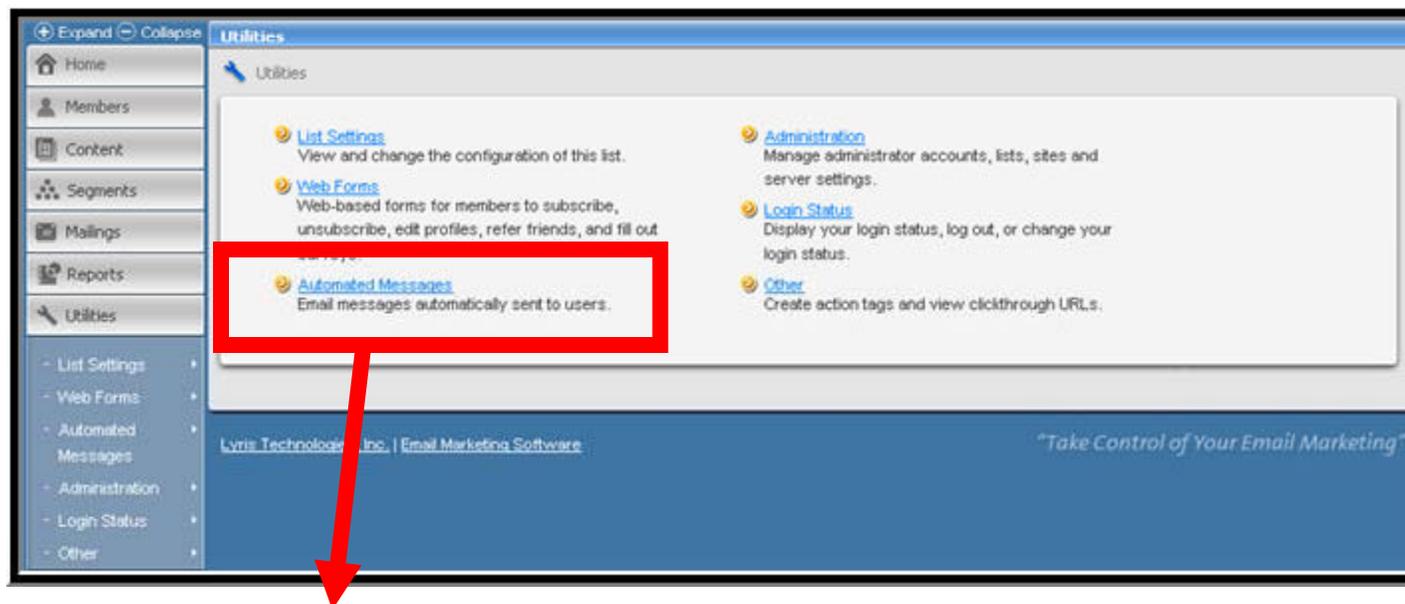
**See a table of subscription activity**

# Create Automated Messages



- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- **Create automated messages**
- Create a subscription form
- Q & A / in-depth discussion

# Automated Messages

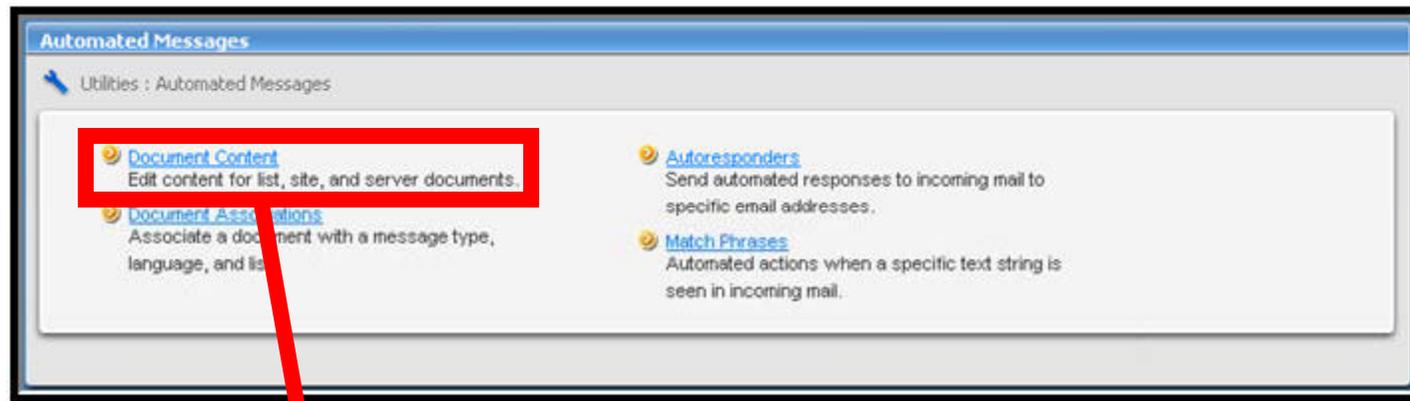


**Setup Automated Messages to send hello, double opt-in, goodbye messages automatically**

## **Two Easy Steps**

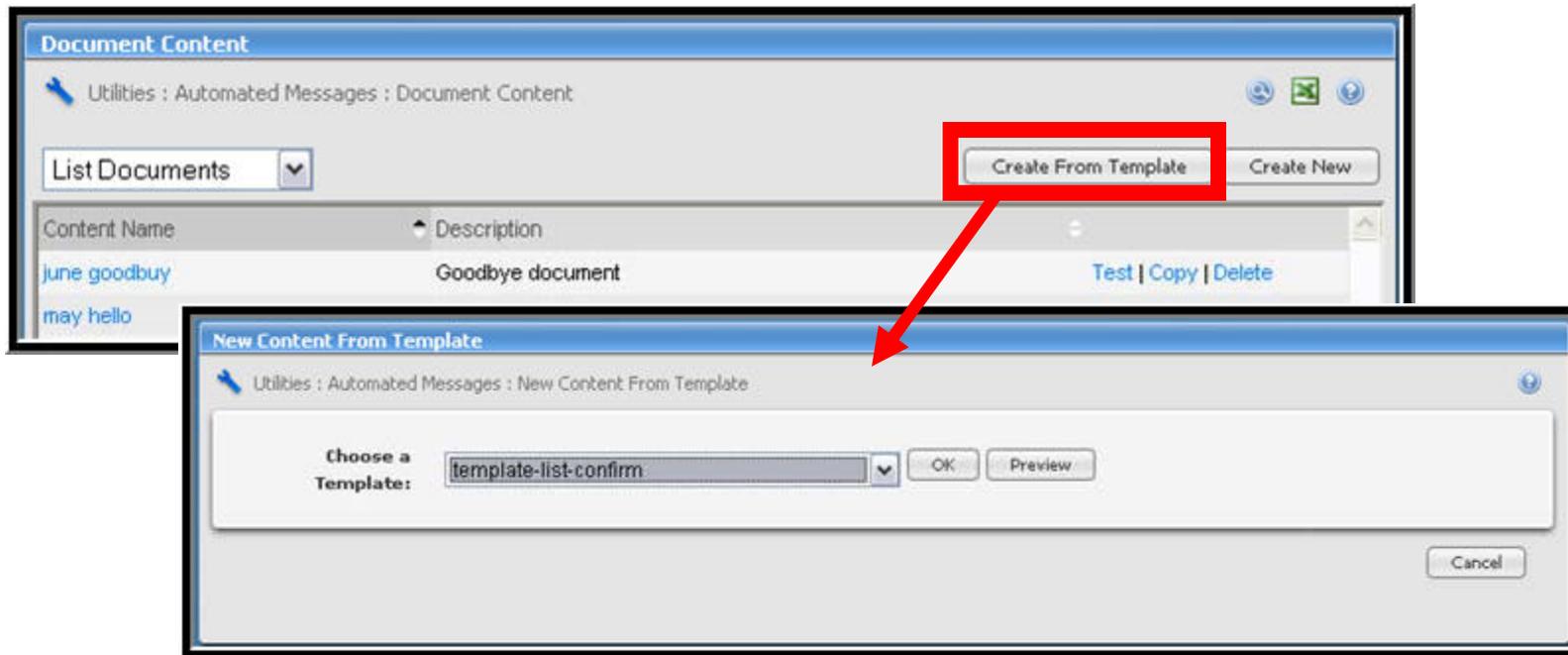
- 1. Create new *Document Content***
- 2. Create new *Document Association***

# Automated Messages (Step 1)



**Start with Document Content**

# Automated Messages (Step 1)



1. Click ***“Create from Template”***
2. Select the appropriate template

# Automated Messages (Step 1)

New Content

Content : New Content

Essentials Text Message HTML Message Advanced Internationalization

Content name:

Description:

From: \*ana\* <ana@lyris.com>

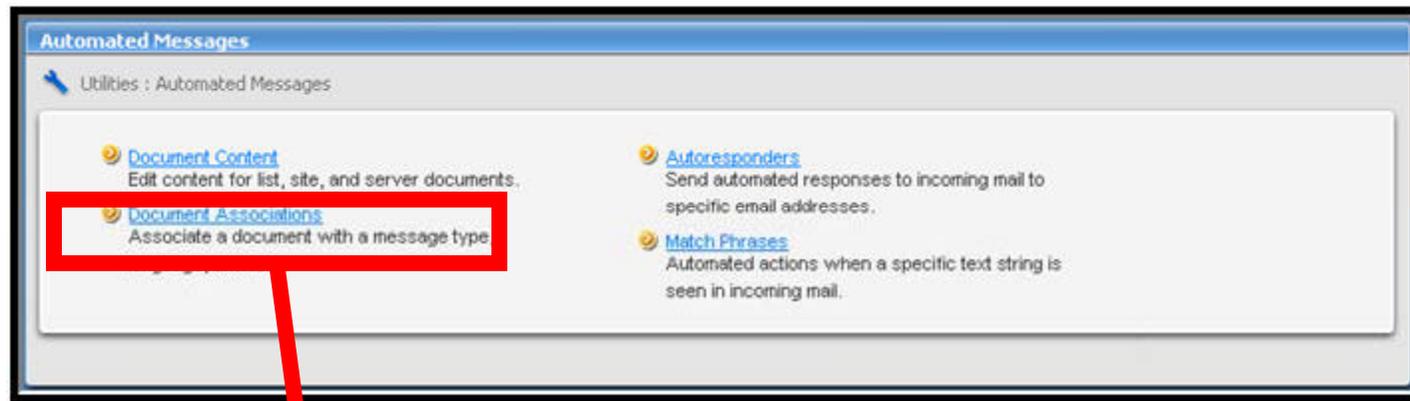
To: %%nameemail%%

Subject:

1. Select a name and description to help you identify your doc

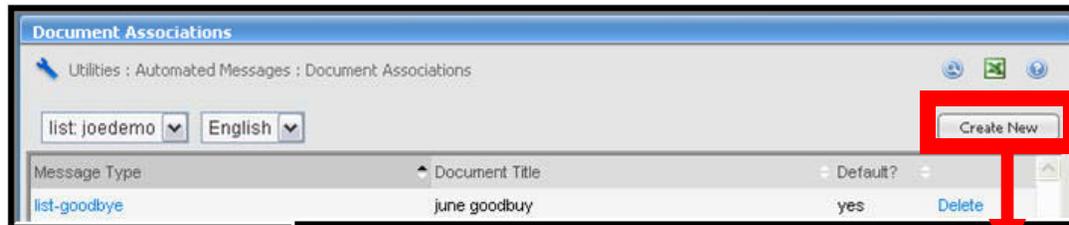
2. From, To, and Subject are the header of message
3. Select the Text Message Tab to customize your message
4. Save and Test

# Automated Messages (Step 2)

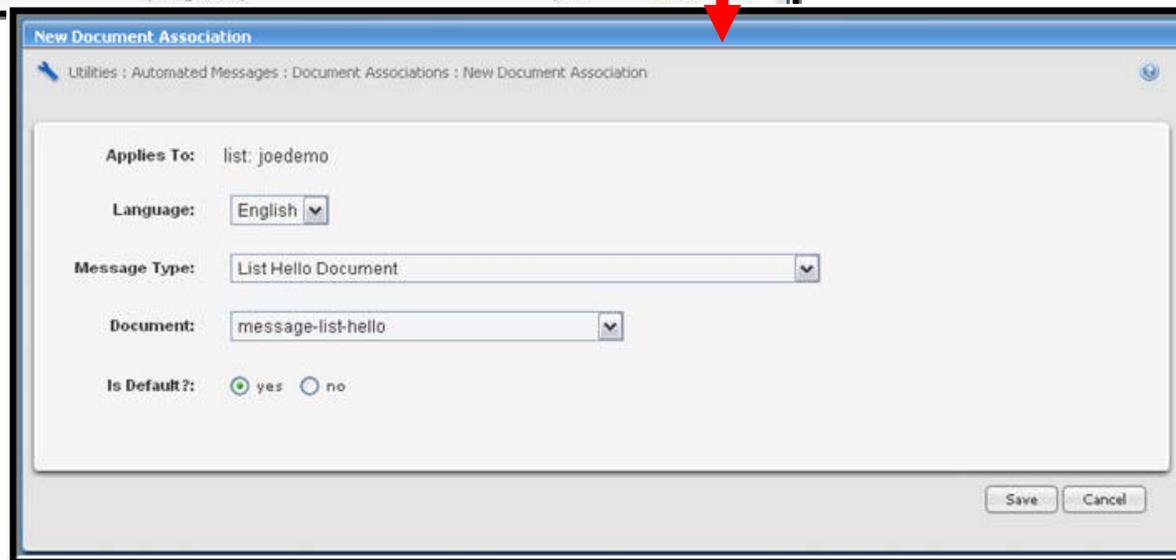


**Choose Document Association**

# Automated Messages (Step 2)



1. Click “*Create New*”



2. Documents available to you will automatically appear on this page

3. Save

# Create a Subscriber Form



- Overview of interface
- Manage members
- Create segments
- Create content
- Build a mailing
- View reports
- Create automated messages
- Create a subscription form
- Q & A / in-depth discussion

# Create a Subscriber Form



**Drive members to  
your list by adding a  
subscription form to  
your website**

A screenshot of a subscriber form for "SF Travel The Bay Area Travel Experts". The form is set against a light blue background with a black header bar. The header bar contains a small image of the Golden Gate Bridge on the left and the text "SF Travel The Bay Area Travel Experts" on the right. Below the header, the text "To start receiving our weekly newsletter, please join our mailing list:" is centered. The form fields include: "Your Email Address:" with a text input field; "First Name:" with a text input field; "Last Name:" with a text input field; "City:" with a text input field; "Your State:" with a dropdown menu showing "CA"; "Sex:" with radio buttons for "Male" and "Female"; "Preferred Departure Airport:" with a dropdown menu showing "SFO - San Francisco International"; "Interests:" with checkboxes for "Newsletter" and "Special Offers"; and a "subscribe" button with a right-pointing arrow.

# Create a Subscriber Form



## **Two Easy Steps**

- 1. Choose desired information to include in the form**
- 2. Copy & paste HTML in to your web site**

# Create a Subscriber Form (Step 1)

The screenshot shows a web-based configuration interface for creating a new subscriber form. The title bar reads 'New Subscribe Form' and the breadcrumb path is 'Utilities : Web Forms : New Subscribe Form'. The interface is divided into several sections:

- Ask subscribers for name:** A dropdown menu set to 'Ask for name when joining, but make it optional'.
- Require password:** A dropdown menu set to 'Ask for password, but make it optional'.
- Confirmation:** A dropdown menu set to 'Send one confirmation message'.
- (optional) Destination URL:** An empty text input field.
- Append subscribe information to destination URL:** Radio buttons for 'yes' and 'no', with 'no' selected.
- Show confirming web page:** Radio buttons for 'yes' and 'no', with 'yes' selected.
- Lists:** A text input field containing 'joedemo' and a 'Choose Lists' button.
- Demographics:** A text input field containing 'none' and a 'Choose Demographics' button.

At the bottom right, there is a 'Preview Form' section with a 'Refresh' button. Below this is a 'Preview of your form' section showing a sample form with three input fields: 'Email address:', '(optional) Your name:', and '(optional) Set Your Password:'. A 'Subscribe' button is positioned to the right of the first field. At the very bottom of the interface are 'Get HTML' and 'Done' buttons.

## Form can:

- **Confirm new members**
- **Add to multiple lists**
- **Request additional demographic information**

# Create a Subscriber Form (Step 2)

The screenshot shows a web utility window titled "New Subscribe Form". The window has a breadcrumb trail: "Utilities : Web Forms : New Subscribe Form".

**Preview of your form:**

The preview shows a form with the following fields and a button:

- Email address:
- (optional) Your name:
- (optional) Set Your Password:
- specials:
- gender:
- Subscribe button

**Form HTML**

You can cut-and-paste the contents of this field into your web page.

```
<form action="http://demoent.lyris.com/subscribe/subscribe.t
<table border=0 cellspacing=0 cellpadding=3>
  <tr>
    <td align="right">
      <font size=1>Email address: </font>
    </td>
    <td>
      <input type="text" name="email" value="" SI2
    </td>
  </tr>
```

**Copy and paste the form's source code into your web page**

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The logo for LYRIS INC. features the word "LYRIS" in a large, bold, blue, sans-serif font. The letters have a slight 3D effect with a lighter blue gradient on the right side. To the right of "LYRIS" is the word "INC." in a smaller, blue, sans-serif font. The logo is centered in the upper half of the image, which has a white background with several curved lines in shades of blue and orange arching over it.

**LYRIS** INC.

**Support:**  
**888-LYRIS-CS**  
**(888-597-4727)**

[www.lyris.com/customer-service/](http://www.lyris.com/customer-service/)



**Self-Serve Portal.**

**If you do not have a Self-Serve Portal Username, please go to:**

**[http://www.lyris.com/support/support\\_signup.html](http://www.lyris.com/support/support_signup.html)**

The logo for LYRIS INC. features the word "LYRIS" in a large, bold, blue, sans-serif font. The letters have a slight 3D effect with a lighter blue gradient on the right side. To the right of "LYRIS" is the word "INC." in a smaller, blue, sans-serif font. The background of the slide is white with several curved lines in shades of blue and orange arching across the top. The bottom portion of the slide is a solid light blue gradient.

# LYRIS<sub>INC.</sub>

Questions about this presentation contact:

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[www.lyris.com](http://www.lyris.com)