

KB Email Suite

KB Bulk Mail

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1. Contact Us

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2. What is KB Email Suite?

KB Email Suite is a family of products, which enable businesses to manage the complete life cycle of all customer marketing and relationship correspondence.

The KB Email Suite is a unique product as unlike all other bulk email packages currently available there is **no fee per email**. Instead there is a one off cost for purchasing each component of the KB Email Suite and a yearly support charge which provides all upgrades as well as product support. The components can be used either together or on their own with each component available to purchase individually if preferred.

The KB Email Suite is comprised of 3 solutions.

- KB Bulk Mail
- KB Clean Mail
- KB Affiliate Tracker



3. KB Bulk Mail features

KB Bulk Mail creates and sends bulk email campaigns to your customers from your email address lists

- ✓ You can import your email address list from a variety of sources in different file formats
- ✓ You can identity and fix invalid email addresses or duplicate email addresses
- ✓ You can tidy the appearance of email list information
- ✓ You can create email campaigns in plain text or HTML email formats or both
- ✓ The powerful merge field functionality enables you to customise your campaign
- ✓ You can preview each email prior to sending your campaign
- ✓ You can schedule campaigns for subsequent delivery
- ✓ You can review the status of each campaign to ensure emails were delivered successfully
- ✓ KB Bulk mail contains optimised logic for rapid delivery of emails

4. Customer Comments

Birmingham

"We tested many products and found them cumbersome and unreliable, KB Email Suite is easy to use and extremely reliable, tasks that used to take us hours to set up now only take minutes."

"If you're looking for a bulk emailing product and want to increase sales I can highly recommend KB Email Suite" .

Stephen Ebanks - Information and Sales Manager - Birmingham Hippodrome

Sadler's Wells

"Last year, KB Group replaced our costly bulk emailing system with the streamlined, cost-effective and user-friendly KB Group Email Suite that has proved extremely successful."

"KB Group's flexible approach means they're always available to answer queries that arise, and quickly and efficiently able to determine the right solution."

Mark Doerfel - Web Manager - Sadler's Wells Theatre

5. How do I install KB Bulk Mail?

It is recommended that you close any applications you may be running before installing KB Bulk Mail.

- KB Group will send you a zip file that contains the software
- Unzip the file
- Double click setup.exe
- The setup.exe will install the KB Bulk Mail software and create a Microsoft Access database
- Below is the first screen that will appear after you click setup.exe

🗧 KB Bulk Ma	iil Setup		×
Setup can Before pro be running	Welcome to the KB Bulk M not install system files or up iceeding, we recommend th J.	Nail installation program. Indate shared files if they a Nat you close any applicatio	re in use. Ins you may

Press the OK button to continue

 The setup will automatically install KB Bulk Mail in c:\Program Files\KB Bulk Mail\. If you are happy with the default directory then press the computer icon button. If you want to change this directory then press the Change Directory button.



• The setup will automatically create a KB Group Program Group (this is the name of the menu item in your windows menu Start->All programs->...). If you would like the menu item to be called something different simply change the name in the Program Group box.

	Ň
Setup will add items to the group shown in the Program Group box. You can enter a new group name or select one from the Existing Groups list.	
Program Group:	
Existing Croups	
Accessories	
KB Group	
Microsoft Visual Studio .NET 2003	
Startup WinRAR	
	_

• Press the **Continue** button to continue

• The setup program will now install the KB Bulk Mail files.

Saik Plan Secup	
🛃 KB Bulk Mail Setup	×
Destination File:	
C:\WINDOW5\system32\MSCOMCTL.OCX	
43%	
Cancel	

• The following message may appear a few times when the setup is installing the individual files. If you receive this version conflict message then this means that a file on your computer is newer than the one being installed. Always keep the original file by choosing the **Yes** button.

Yersion Conflict					
A file being copied is not newer than the file currently on your system. It is recommended that you keep your existing file.					
File name: 'C:\WINDOWS\system32\vbscript.dll'					
Description: 'Microsoft (r) VBScript					
Your version: '5.6.0.8820'					
Do you want to keep this file?					
Yes No to All					

• If the KB Bulk Mail was setup successfully, the following will appear.

KB Bulk M	lail Setup
	KB Bulk Mail Setup
	ОК

6. How do I use KB Bulk Mail?

After successfully installing KB Bulk Mail, use the following guide to learn how KB Bulk Mail works. Each of these steps is described in more detail in subsequent pages.

- Invoke KB Bulk Mail from your Windows Start menu
- Do a one off SMTP configuration setup
- Do a one off database configuration setup (not usually required)
- Create an email address file for your campaign
- Import your email address file for your campaign
 - Select input email data file format and First Row detail
 - Select the raw email address data file you want to import
 - Enter the name to save this email list as
- Create a new email campaign
 - Enter campaign details
 - Select email address list
 - o Review/amend email list data
 - Order the results of your email list
 - Delete unwanted columns in your email list
 - Update data in your email address list
 - Add or delete email addresses
 - Validate your email address list
 - Identify and remove duplicates
 - Clean your emails capitalisation, remove spaces
 - Lookup key words in your email address list
 - Specify email contents
 - Subject for each email
 - Email type (plain, html or both)
 - Specify email file(s)
 - Add an attachment (optional)
 - Customise your campaign i.e. add customers name etc
 - Schedule email campaign delivery
- View your email campaign
- Use KB Clean Mail to manage email returned from your campaign. The KB Clean Mail guide is documented separately.
- Use KB Affiliate Tracker to track the success of your campaign. The KB Affiliate Tracker guide is documented separately.

6.1 Invoke KB Bulk Mail from the Windows Start menu

- Choose Start->All Programs->"your KB Email Suite program group" from your Windows Start Menu.
- The following KB Bulk Mail screen will appear.



6.2 Do a one off SMTP configuration setup

SMTP is an acronym for simple mail transfer protocol. This is an industry standard protocol for sending email.

The KB Bulk Mail SMTP configuration allows you to specify your mailbox configuration in order to send email from KB Bulk Mail.

- From the menu bar choose Setup then SMTP configuration.
- On the Mail Server Configuration screen choose the **Add New Profile** button.
- The following *Mail Server Configuration* screen will appear. Please note that the fields with purple text would normally be blank; they have been filled in here for example purposes.

🔀 KB Bulk Mail	
File Edit Setup Window Help	
🗅 😅 📊 SMTP Configuration	
Database Configuration	
Options	
	Mail Server Configuration
	Specify the mail box configuration to be used to send the emails. Contact your system administrator if you are unsure about what information to use here.
	You can test each profile by selecting the profile from the drop down list and clicking the Test Profile button. Click OK to save the SMTP profile details.
	Select Profile Simon Klinkhamer (simon@kbgroupuk.com)
	Mail Server Information
	SMTP Server: mailhost.zen.co.uk
	SMTP Port 25
	l imeout: Jou -
	Enter the sender's name and reply email address for the recipients email.
	From Information
	From Name: Simon Klinkhamer
	From Address: simon@kbgroupuk.com
	Use SMTP Login Authentication (optional)
	Mail Server Authentication
	User Accounc
	Password:
	Iest Profile Save Profile OK Cancel

Add your SMTP configuration details. Contact your system administrator if you are unsure about what information to use here.

- Select profile: Create a name for this profile. In the example above the profile name uses simply the "from name" with the "from address" appended.
- **SMTP Server:** This is the mail host address for your ISP.
- **SMTP Port:** This defaults to 25. This is the industry standard. There should be no need to change this.
- Timeout:This defaults to 60. This is the amount of time
the mail engine will wail while it attempts to
communicate to the recipients email system.
There should be no need to change this.
- From Name: This is the name that will appear as the sender in the actual email message for all email sent from this profile.
- **From Address:** This is the email address that is used to send the emails for this profile.

Use SMTP Login Authentication (optional): User Account:

Password:

If access to your mail server requires authentication then tick the "Use SMTP Login Authentication" box and enter the user account and password supplied by your system administrator.

- When you have finished entering your SMTP configuration details, press the **Save Profile** button.
- We strongly advise that you test your SMTP configuration. Press the **Test Profile** button. A message should appear on the screen indicating that a test email has been successfully delivered to the email address entered in your "From Address" field.
- Check this email account to ensure that a test email similar to the following has been received.

From: "Simon Klinkhamer" <<u>simon@kbgroupuk.com</u>> To: "Simon Klinkhamer" <<u>simon@kbgroupuk.com</u>> Sent: Thursday, August 11, 2005 9:21 AM Subject: Test Email from KB Bulk Mail

This is a sample email from KB Bulk Mail. If you can read this message then your SMTP configuration is correct.

You can use this configuration to send your KB Bulk Mail email campaigns using this profile as the delivery method.

6.3 Do a one off Database Configuration (not normally required)

When KB Bulk Mail is installed it creates a KB Bulk Mail Access (.mdb) database in the directory where the application was installed, typically c:\Program Files\KB Bulk Mail. This location is fine for most installations. However if you have multiple KB Bulk Mail installations you may prefer to have them all use the one central Access database. Use the Database Configuration to set this up.

- From the menu bar choose Setup then Database Configuration.
- The following *Locate KB Bulk Mail Database Tables* screen will appear.

🔀 KB Bulk Mail		
File Edit Setup Window Help		
D 🛩 👔 🗊 🖆		
	Locate KB Bulk Mail Database Tables	
	Disease selectives KD Dulls Mail database sentrations the second second	
	information necessary to run this application.	ОК
	Select the file containing the KB Bulk Mail data tables	
	C:\Program Files\KB Bulk Mail\KB Bulk Mail.mdb	Browse

• Change the location of your KB Bulk Mail Access database by using the **Browse** button.

6.4 Create an email address file for your campaign

You need to create a file that contains your email address data. You could create the file by extracting the information from your Back Office system. The file needs to be in the following file formats.

- An Access table (.mdb)
- A text file (.txt or .csv)
- An excel file (.xls)

The email address file itself is usually structured or formatted as follows:

- Email address
- Customer name
- Customer number (the customer number is useful for de duping when you are reviewing your email campaign details).

Below is an example of what an email address text .cvs file would look like.

Email Address, Customer Name, Customer Number

simon@kbgroupuk.com,Simon Klinkhamer,10365 tania@kbgroupuk.com,Tania Chapman,44567 andrew@kbgroupuk.com,Andrew Klinkhamer,67123

We will be using this example file (saved for example purposes as C:\Program Files\KB Bulk Mail\AugustEmail.txt) throughout the rest of this document.

The first row of the example file (in bold text above) contains the field names. We strongly recommend that you also have the field names as the first row of your file.

6.5 Import your Email Address file for your Campaign

In step 4 you created your email address file. Now you are ready to import this file into KB Bulk Mail so that you can use the data for your email campaign.

- From the menu bar choose File then Import Email Address List...
- The *following Import Email Address Information* screen will appear. Note, the fields with purple text would normally be blank; they have been filled in for by way of example.

🔀 KB Bulk Mail	
File Edit Setup Window Help	
🗅 😅 🎁 🚰	
	Import Email Address Information
	Step 1: Select input email data file format and First Row detail
	Text file (txt. csv) 🔽 🔽 First Bow Contains Field Names
	Step 2. Select the jaw email/address data hie you want to import.
	C:\Program Files\KB Øulk Mail\AugustEmail.txt
	Step 3: Enter the name to save this email list as
	AugustEmailFile
	5 orep 4: Select die specific Access table of Excel Workbook to import
	Import OK Cancel

Adding your email address information:

Step 1: \$elect input email data file format and First Row detail

- Choose the file format that your email address data file is in. Our example was a text file.
- Tick the box 'First Row Contains Field Names' if you put field names in the first row of your email address data file.

Step 2: Select the raw email address data file you want to import

• Press the **Browse** button to find your email address data file.

The C:\Program Files\KB Bulk Mail\AugustEmail.txt file has been chosen for this example.

Step 3: Enter the name to save this email list as

 Enter the name you would like your email list to appear as in your KB Bulk Mail Access database. The information in your data file will be saved in the KB Bulk Mail Access database. KB Bulk Mail requires a name for the imported data to allow you to readily access it in future email campaigns.

The name AugustEmailFile has been chosen for this example.

- Now press the **Import** button. Your email address list will then be imported into the KB Bulk Mail access database.
- If your email address list was imported successfully, the following message will appear on the screen.



6.6 Create a new email campaign

After you have imported your email address file you are ready to create an email campaign. To create and save a new email campaign, simply do the following:

- From the menu bar choose File then New Campaign...
- The *Enter Email Campaign Details* screen will appear. Please note that fields with purple text would normally be blank; they have been filled in here by way of example.

File Edit Setup Window Help Image: Setup Image: Setup <th>🔀 KB Bulk Mail</th>	🔀 KB Bulk Mail
Image: The second se	File Edit Setup Window Help
✓ Step 1 - Enter Email Campaign Details X Using this simple process you will be prompted to enter all the configuration details necessary to create and save a new email campaign. Fill in the details on each form and them clock the Next button to proceed to the next page. Campaign Details Campaign Details Campaign Description This campaign emails our customers the August shows Created By Simon Klinkhamer Simon Klinkhamer (simon@kbgroupuk.@nt) Campaign Status (for completed campaigns only) Date Created Date Sent Campaign Status Email Count Time Taken Profile	
	Image: Step 1 - Enter Email Campaign Details Image: Step 1 - Enter Email Campaign Details Using this simple process you will be prompted to enter all the configuration details necessary to create and save a new email campaign. Fill in the details on each form and then click the Next button to proceed to the next page. Campaign Details Campaign Details Campaign Details Campaign Details Campaign Details Campaign Details Campaign Description This campaign Details our customers the August shows Created By Simon Klinkhamer Mail Profile Simon Klinkhamer (simon@kbgroupuk.@n)) Campaign Status (for completed campaigns only) Date Created Date Sent Campaign Campaign Campaign Campaign Status Email Count Time Taken Profile Cancel

6.6.1 Enter email campaign details

Campaign Name	Name of your campaign.			
Campaign Description	Short description of your campaign.			
Created By	Who created the campaign.			
Mail profile	The profile of the sender for this campaign.			
Press the Next >> button, <i>Information</i> screen will appear.	the following Specify Email Address			

6.6.2 Select the email address list

The *Specify Email Address Information* screen enables you to select the email address list for your campaign.

The *Specify Email Address Information* screen will automatically show you all of your email address lists in your KB Bulk Mail access database. This example shows that there is an email address list named AugustEmailFile. Please note that the fields with purple text would normally be blank, and are filled in here for example purposes only.

🔀 KB Bulk Mail	
File Edit Setup Window Help	
🗅 🚅 🧌 🔂 😭	
	Select the email address list you wish to use in this email campaign. If the email address list you wish to use is not listed then use the Import Email Address List function to create a new email address list. You can remove any unrequired email address lists by selecting them and clicking the delete button. Exercise caution deleting email address lists at this cannot be undone. It is recommended that you periodically compact the KB Bulk Mail database after deleting email address lists to reduce the database size and improve performance.
	Select the column containing the email address in order to validate the email address information. You can click the preview button to display your email list.
	Delete Preview Cancel << Back

- Select the email address file you want to use
- Underneath the available address lists is a drop down list containing the names of the fields in your selected address list. Select the field containing the email address. In this example the email address is held in the *EmailAddress* column in the AugustEmailFile.
- At this stage you can either:

Press the **Preview** button to review/amend your email list data. The *Review Email Lists* screen will appear. You can also review/amend your email list data at a later stage by selecting Review Email Lists from the File Menu.

OR

Press the **Next** button. The *Specify Email Contents* screen will appear. This is documented in section 6.6.4

6.6.3 Review email list data

You can now update your email list data before sending out your email campaign.



The *Review Email List* screen allows you to do the following; each of these functions is documented in detail in the following pages.

- Order the results of your email list ascending or descending
- Delete unwanted columns in your email list
- Update data in your email address list
- Add or delete email addresses
- Validate your email address list
- **Duplicates** / identify and remove them
- List Cleaning check capitalisation and remove spaces
- Lookup key words

NOTE: The *Review Email List* screen can also be accessed by selecting the Review Email List from the File menu. This allows you to review your email list after creating your campaign.

6.6.3.1 Order email list results

On the *Review Email List* screen you can order the results in either ascending or descending order for any column (except binary fields) by clicking the column header and selecting either "sort ascending" or "sort descending" from the file menu, which pops up.

6.6.3.2 Delete unwanted columns

On the *Review Email List* screen you can delete any column by clicking the column header and selecting "delete" from the menu, which pops up. Exercise caution when deleting columns, as this cannot be undone. KB Bulk Mail automatically saves your deletes.

6.6.3.3 Update email address data

On the *Review Email List* screen you can update the information in any of the fields by modifying the data in the grid. KB Bulk Mail automatically saves your updates.

6.6.3.4 Add or delete email addresses

On the *Review Email List* screen you can add/delete records and delete existing records. Newly added records are not tested for uniqueness. KB Bulk Mail automatically saves your additions and deletions.

Please Note:

Below is an example of email addresses being added to the list (in purple). These have been added to the *Review Email List* screen in order to demonstrate the following pages of "Validate email addresses", "Duplicates – identify and remove them" and "List Cleaning".

✓ Review Email Lists Here are the contents of your se clicking the column header. You You can update the information	lected email list. You can or u can also delete any column in any of the fields by modify	der the results in either a 1. Exercise caution delet ing the data in the grid.)	scending or descending order for any column (except binary fie ing columns as this cannot be undone. You can add additional records and delete existing records. N	ids) by
newly added records are not tes	ted for uniqueness.			
	Email A	ddress List Informat	ion (AugustEmailFile)	
Email Address	Customer Name	Customer Number		
 anulew@kbgloupuk.com	Cianan Kinkhamer	10205		
simon@kbgroupuk.com	Simon Klinknamer	10363		
tania@kbgroupuk.com	i ania unapman	44367		
lottie@@hotmail.com	Lottie Woods	33509		
greg@yanoo	Greg Tinsel	12905		
tania@kbgroupuk.com	Tania Chapman	36790		
*				
Select the field containing the em address in order to validate the er address information. Email Address	nail Validate <u>E</u>ma Walidate Ema Addresses	ilis Duplicates ail <u>B</u> ernove Inva Email Address	List Cleaging Lookup	Close

6.6.3.5 Validate email addresses

This function allows you to identify invalid emails. Invalid emails are for example; emails that don't have one @, emails that don't have a dot after the @, emails that don't have at least one character or number before the @ sign; missing emails and so on.

 Press the Validate Email Addresses button. This process will validate each email address in the email address list. It will add a new column called Email Address Check to your email data, which you can sort on. This new column specifies whether or not the email address entry is valid.

Below is an example. KB Bulk Mail has identified lottie@@hotmail.com as an invalid email because it has two @ signs. It has also identified greg@yahoo as invalid because this email address doesn't have one dot after the @ sign.

🔀 KB Bulk Mail								
File Edi	t setup	windo	w нер					
0 🖻	1 🔰 🟥							
			Review Email Lists					
			Here are the contents of your s	elected email list. You can o	order the results in either	ascending or descending orde	r for anu column (excent h	inaru fields) bu
			clicking the column header. Yo	ou can also delete any colum	nn. Exercise caution del	eting columns as this cannot be	e undone.	and y noide y by
			r'ou can update the information newly added records are not te	in any of the fields by modify sted for uniqueness.	ying the data in the grid.	You can add addiitonal record	ds and delete existing rec	ords. Note that
				Email /	Address List Informa	ation (AugustEmailFile)		
			Email Address	Customer Name	Customer Numbe	r Email Address Check		
			andrew@kbgroupuk.com	Andrew Klinkhamer	67123	Valid email address		
			simon@kbgroupuk.com	Simon Klinkhamer	10365	Valid email address		
			tania@kbgroupuk.com	Tania Chapman	44567	Valid email address		
			lottie@@hotmail.com	Lottie Woods	33569	Error - Invalid email address		
			greg@yahoo	Greg Tinsel	12905	Error - Invalid email address		
			tania@kbgroupuk.com	Tania Chapman	36790	Valid email address		
		÷	*					
		L			~~~~		·	
		5	elect the held containing the ei ddress in order to validate the r	mail Validate <u>E</u> m	ails <u>D</u> uplicates	: List Clea <u>n</u> ing	Lookup	
		a	ddress information.	(Validate Las	Beneve Inv	-sa (
		E	imail Address 🔹		s Email Addres	anu		Close

At this stage you could:

- Fix up the invalid email addresses by updating the email addresses.
- Press the **Remove Invalid Email Addresses** button. This process will delete each email address in the email address list where the email is marked as missing or invalid in the Email Address Check column. Exercise caution running this process, as it cannot be undone.

6.6.3.6 Duplicates – identify and remove them

Identifying and removing duplicates allows you to avoid sending out an email to the same person twice. Duplicates generally occur due to a person being captured twice in your Back Office system.

- Press the **Duplicates** button.
- Then press **Identify Duplicates** button. This process will detect any duplicate email addresses in your email address list. It will add a new column called Duplicate Email Check to your email data, which you can sort on. This new column specifies whether or not the email address entry is a duplicate.

Below is an example. KB Bulk Mail has identified tania@kbgroupuk.com as appearing twice.

🔀 KB Bul	k Mail							
File Edit	Setup W	/indow	Help					
🗅 😅	🎦 🔂	P						
			teview Email Lists	elected email list. You can o	rder the results in either a	scendina or descendina orde	er for anv column (except bina	X
		cli Yo ne	cking the column header. Yo ou can update the information wly added records are not te	ou can also delete any colum i in any of the fields by modify sted for uniqueness.	n. Exercise caution dele ing the data in the grid.	ing columns as this cannot b You can add addiitonal recor	e undone. ds and delete existing record:	s. Note that
				Email A	ddress List Informa	ion (AugustEmailFile)		
			Email Address	Customer Name	Customer Number	Email Address Check	Duplicate Email Check	
			andrew@kbgroupuk.com	Andrew Klinkhamer	67123	Valid email address		
			simon@kbgroupuk.com	Simon Klinkhamer	10365	Valid email address		
			tania@kbgroupuk.com	Tania Chapman	44567	Valid email address	Duplicate Email Address (2)	
			tania@kbgroupuk.com	Tania Chapman	36790	Valid email address	Duplicate Email Address (2)	
		*						
		Sel	ect the field containing the e	nail Validate Ema	is Dunkicates	List Cleaning	Lookup	
		ado ado Em	dress in order to validate the e dress information. nail Address		ates <u>R</u> emove Duplic	ates	Lookap	Close

• Press the **Remove Duplicates** button. The following Remove Duplicates screen will appear.

🔀 KB Bulk Mail					
File Edit Setup Wi	ndow Help				
	J.				
	Review Email Lists	- de de de la companya de la compa	and an all a state of the state	.	
	clicking the column header. Y	selected email list. You can ('ou can also delete any coluri	order the results in either a nn. Exercise caution dele	scending or descending ord ing columns as this cannot	be undone.
	You can update the information newly added records are not to	n in any of the fields by modif ested for uniqueness.	ying the data in the grid. `	You can add addiitonal reco	ords and delete existing records. Note that
		Email /	Address List Informat	ion (AuqustEmailFile)	
	Email Address	Customer Name	Customer Number	Email Address Check	k Duplicate Email Check
	andrew@kbgroupuk.com simon@kbgroupuk.com	Simon Klinkhamer	10365	Valid email address Valid email address	
	tania@kbgroupuk.com	Tania Chapman	44567	Valid email address	Duplicate Email Address (2)
	tania@kbgroupuk.com	Tania Chapman	36790	Valid email address	Duplicate Email Address (2)
	* Remove Dup	icates		×	
	– Email Address F	ield			
	Select the field o	ontaining the email address in			
	order to remove	any duplicate email addresse:	s. Email Address		
	Uptional Identifie	er			
	to specify criteria	ally specify deduplication crite a then you will need to select	ria when removing duplica which field should be use	ates. If you wish d from the email	
	address list (this	cannot be the email address	field) and how the rule sh	ould be applied.	
	Select the Select how you	want the deduplication to ap	ply the criteria for your ch	osen field.	
	address in address in Do not appl	y any deduplication criteria			
	Email Add C Keep the hi	abest or latest value			<u>C</u> lose
	C Keep the la	grieter eldest velue			
	C Veeb the lo	west of oldest value			
	Select the field y	ou wish to use for the			
	selected dedupli	cation criteria.	1		
			OK	Cancel	

At this stage you could:

- Choose the default Email Address Field and the default "Do not apply any de duplication criteria".
- Choose a different Email Address Field
- Choose a different de duplication criteria

Press the **OK** button. This process will remove any duplicate email addresses in the email address list. Exercise caution running this process, as it cannot be undone.

6.6.3.7 List cleaning – capitalisation and remove spaces

List cleaning allows you to check capitalisation or remove unnecessary spaces on any field in your email address list. This will make your customer communication look more professional.

Capitalisation

- Press the **Listing Cleaning** button.
- Then press the **Capitalisation** button. The following *Capitalisation* screen will appear

dit Setup Wind	ow Help				
	Review Email Lists Here are the contents of you clicking the column header.	r selected email list. You ca You can also delete any col ing in any cittle field bu no	n order the results in eith umn. Exercise caution difinites the data in the c	er ascending or descending deleting columns as this canal	order for any column (except binary fields) by ot be undone.
	newly added records are no	tested for uniqueness.	anying the data in the g		solas ana doleto existing records. Hote triat
		Ema	il Address List Infor	mation (AugustEmailFile	e)
	Email Address	Customer Name	Customer Num	per Email Address Che	ck Duplicate Email Check
	andrew@kbgroupuk.cor	n Andrew Klinkhamer	67123	Valid email address	
	simon@kbgroupuk.com	Simon Klinkhamer	10365	Valid email address	
	tania@kbgroupuk.com	Tania Chapman	44567	Valid email address	Duplicate Email Address (2)
	*	Canitalisation			XI
Se ad Er	Select the field containin address in order to valid- address information. Email Address	leaning to. Case Capitalisation You can update the selected are applied to the information vofessional. Select how you want the cap hat this cannot be undone. UPPER CASE Proper Case Jower case Qeter for information with	I field above so that the . This will make your cu sitalisation rules to be ap	capitalisation rules specified t stomer communications look plied to your chosen field. No	below more ble
		Keep information prefixed	l with Mc or Mac intact (ation intact eg Jones-Sm	g McDonald or MacNamara ith	

At this stage you could:

- Choose the default list cleaning column and the default "UPPER CASE" case capitalisation.
- Choose a different list cleaning column.
- Choose a different case capitalisation criterion.

Press the **OK** button. This process will update the capitalisation in your selected email address list column. Exercise caution running this process, as it cannot be undone.

Remove spaces

- Press the List Cleaning button.
- Then press the **Remove Spaces** button. The following *Remove Spaces* screen will appear

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File Edit Setup Window Help					
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Review Email Lists					- D ×
Here are the contents of your	selected email list. You can o	rder the results in either a	scendina or descendina orde	er for anv column fexcept bina	rv fields) by
clicking the column header. *	'ou can also delete any colum	n. Exercise caution dele	ing columns as this cannot b	e undone.	,
You can update the information newly added records are not the second s	on in any of the fields by modify ested for uniqueness.	ing the data in the grid. `	r'ou can add addiitonal recor	ds and delete existing records	. Note that
	Email A	ddress List Informat	ion (AuqustEmailFile)		
Email Address	Customer Name	Customer Number	Email Address Check	Duplicate Email Check	
andrew@kbgroupuk.com	ANDREW KLINKHAMER	67123	Valid email address		
simon@kbgroupuk.com	SIMUN KLINKHAMER	10365	Valid email address		
tania@kbgroupuk.com	TANIA CHAPMAN	44567	Valid email address	Duplicate Email Address (2)	
*					
	Remove Spaces			×	
	- Choose Field				
	Calendalia Galduna mialata a				
	cleaning to.	ppiy the list	ail Address	-	
			or 1 [
-					
				·	
Select the field containing the address in order to validate the	email Validate <u>E</u> ma	ils <u>D</u> uplicates	List Clea <u>n</u> ing	Lookup	
address in order to validate the address information.	Cindi		_		
Email Address 💌	C <u>a</u> pitalisatio	n <u>R</u> emove Spac	es		Close
· · · · · · · · · · · · · · · · · · ·					

• Choose which column you wish to apply the remove spaces list cleaning to.

Press the **OK** button. This process will remove all leading and trailing spaces from your selected email address list column. Exercise caution running this process, as it cannot be undone.

6.6.3.8 Lookup key words

Lookup keyword allows you to look for any word or number in any of your email address list columns.

• Press the **Lookup** button. The following lookup box will appear at the bottom of the *Review Email List* screen.

🔀 KB Bulk Mail							
File Edit Setup \	Vindo	w Help					
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	N I	Review Email Lists Here are the contents of your st	elected email list. You can or u can also delete any columr	der the results in either a . Exercise caution dele	scending or descending orde	r for any column (except bina e undone.	ry fields) by
	1	You can update the information newly added records are not tes	in any of the fields by modifyi sted for uniqueness.	ing the data in the grid. '	You can add addiitonal recor	ds and delete existing records	s. Note that
			Email A	ddress List Informa	tion (AuqustEmailFile)		
		Email Address	Customer Name	Customer Number	Email Address Check	Duplicate Email Check	
	ĽĽ	andrew@kbgroupuk.com	Andrew Ninknamer	57123	Valid email address		
	LH	tania@kbgroupuk.com	Tania Chanman	44567	Valid email address	Duplicate Email Address (2)	
		4		11001			
		elect the field containing the op			Y		
	a a E	erect me rielia containing the en ddress in order to validate the e ddress information. imail Address	naii Validate <u>E</u> maii	ls <u>D</u> uplicates in C	List Cleaning List Cleaning Carall Address Customer Name Customer Number	Lookup	

• Enter your lookup keyword(s) in the Find column and then choose which column you wish to find the keyword(s) in.

6.6.4 Specify email contents

The following *Specify Email Contents* screen allows you to customise your email campaign message.

🔀 KB Bulk Mail	
File Edit Setup Window Help	
Select the Files Select the Files Select the Files Select the Email Files Select the Files Secify the subject as you want it to appear in the outbound email August Shows Specify how you would like to have the emails delivered Select the Email Files Select the Email Files Select the Files	your email message recipients. You can select either a Plain Text useful for sending emails to recipients who do not have email hail Ny © Send Both formats
C:\Program Files\KB Bulk Mail\August Plain Tex Select the file containing the HTML message you want to send [C:\Program Files\KB Bulk Mail\August HTML Me Specify the Attachment (optional) Select the file you wish to attach to the email	kt Message.txt Browse d essage.htm Browse Browse
Preview	Cancel << <u>B</u> ack <u>N</u> ext >>

- Specify the subject to appear in the outbound email Whatever you specify here will appear in the subject for each email.
- Specify how you would like to have the emails delivered Select Plain Text, HTLM or both formats.

• Select the Email Files

If you chose Send as Plain Text or Send Both formats then select the file containing the Plain Text message.

If you chose Send as HTML only or Send Both formats then select the file containing the HTML message.

Specify the Attachment (optional)

If you wish to send an attachment with your email campaign then specify the file here.

• Press the **Preview** button. The following *Preview Email Message* screen will appear.

6.6.5 Customise your Campaign - add customer name etc

The *Preview Email Message* screen allows you to check and customise your email before you send out your campaign.



In the Preview Email Message screen you can:

- Preview your email in plain text or HTML
- Add customised fields and links to each email. See the section below for detailed information. For instance you could add:
 - Dear '*customer name*' at the beginning of each email
 - An unsubscribe link
 - An update your preferences link
 - A forward to a friend link
- Scroll through each email in your campaign to check the customised fields, links and layout.

Add customised fields and links to each email

 Press the Edit Source Email File button. The following Edit Email Source File screen will appear. If you are previewing an HTML email then the HTML source will appear. If you are previewing a plain text email then the plain text source will appear. A plain text email has been chosen to document how to add customised fields. Use the same procedure to add customised field and links to an HTML email.

KB Bulk Mail	
	_
Preview Email Message	×
🖂 Edit Plain Text Email Source File	
You can edit the source email file. Once you have finished making any changes you want to the source file you can save the source file. Click the Cancel button if you do not wish to save the updates. Please note that HTML source is not valie I	it to update dated.
Test plain text message	
Dear ##Customer Name##	
We hope you have enjoyed seeing shows at our venue. We thought you might be interested in seeing these shows.	
Thank you	
Click below to update your preterences www.venue.co.uk/update.asp?pid==##Customer Number###	
Click below to unsubscribe www.venue.co.uk/unsubscribe.asp?email=##Email Address##	
	_
Eont Locate Merge Fields Cancel	Save

Any field within your Back Office database can be used as a customised field. You would need to have imported the customised fields you want to use – see section 7.5 Import your email campaign file.

- If you want to add a customised field put ## around the field i.e. ##customer name##
- If you want to see your email in larger print, press the **Font** button
- When you have finished adding customised fields, press the **Save** button. The following *Preview Email Message* screen will appear displaying your email with the customised field.

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File Edit Setup Window Help		
D 🚅 🎁 🖬 🖆		
🔀 Preview Email Message		×
Select the format of the email you list to see the formatted fields as	i wish to review. You can use the record selector at the bottom of the form to scroll throu they will appear in the outbound email.	ugh the email
Plain Text Email Preview HTM	L Email Preview	
Dear Andrew Klinkhamer		
We hope you have enjoyed seei	ng shows at our venue. We thought you might be interested in seeing these shows.	
Thank you		
Click below to update your prefer www.venue.co.uk/update.asp?p	ences id==67123	
Click below to unsubscribe www.venue.co.uk/unsubscribe.a	asp?email=andrew@kbgroupuk.com	
		_
Record 1 of 3	Edit Source Email File	ОК

- Press the **Record selector** to scroll through the email list to see the customised fields, as they will appear in the outbound email.
- Press the **OK** button. The *Specify Email Contents* screen will appear.
- Press the **Next** button. The following *Schedule Email Campaign Delivery* screen will appear.

6.6.6 Schedule email campaign email delivery

The *Schedule Email Campaign Delivery* screen allows you to schedule your campaign to be sent immediately or you can schedule it to be sent later as required.

For example purposes "Schedule this campaign" has been chosen below.

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File Edit Setup Window Help	
D 🚅 🕅 🛅 🖻	
	Step 4 - Schedule Email Campaign Delivery You can schedule the campaign to be sent immediately or you can schedule it to be sent later as required. Click below to configure when you want the campaign to be sent out. Campaign Schedule © Do not schedule this campaign © Chedule this campaign Octedule this campaign Date to send 19/08/2005 20 30 Calendar
	Cancel << Back Next >>

• Press the **Next** button. The following *Deliver Email Campaign* screen will appear.

6.6.7 Deliver email campaign

You have now successfully completed the creation of your email campaign. The *Deliver Email Campaign* screen is a summary of your email campaign details.

- Press the **Save** button to save your campaign.
- Press the **Send** button if you want to activate your campaign to send it at the scheduled time.

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File Edit Setup Window Help	
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Step 5 - Deliver Er	nail Campaign
You have successfully	completed the creation of your email campaign. You can save the campaign without sending it .
Here is a summary of ye	our campaign. If any of the details are incorrect then you must edit them before clicking send.
Campaign Details —	
Campaign Name:	August Email Campaign
Description:	I his campaign emails our customers the August shows
Email List	
Send Status	
– Campaign Email –	
Subject	August shows
Delivery Method	Both formats
Plain Text File	C:\Program Files\KB Bulk Mail\August Plain Text Message.txt
HTML File	C:\Program Files\KB Bulk Mail\August HTML Message.htm
Attachment	
– Campaign Schedule	
Schedule	Scheduled for Friday, August 19 2005 at 20:30
– Campaign Mail Profile	
Mail Profile	, Simon Klinkhamer (simon@kbgroupuk.com)
	Mail Options Cancel Save << Back

6.6.8 View your campaign

View your email campaign allows you to:

- Edit a campaign
- Resubmit the delivery of a campaign
- Resume sending any partially delivered emails
- Delete a campaign
- Copy an existing campaign
- View the send status of a campaign (date sent, number of emails sent, how long it took to send the emails, which email account sent the emails)

From the menu bar choose File then Open Campaign.

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File Edit Setup Window Help)				
🗅 🚅 🛍 🛅 😭 👘					
	🔀 Open Existing Mail Campai	gn			×
	Select the email campaign you w option to resume sending any pa	vish to open. You can edit the carr irtially delivered email campaigns.	npaign and resubmit the de	livery if required. `	r'ou can also use this
	You can also delete an existing (campaign. Exercise caution using l	this function because the o	campaign cannot l	pe restored once it has
	been deleted.				
	If you want to copy an existing c	ampaign, select the campaign you	wish to copy and click Ma	ke A Copy. This (will create a new
	campaign which can then be ed	itea as requirea.			
	Campaign Name	Created By	Date Created	Status	Key
	(August Email Campaign)	Simon Klinkhamer	19/08/2005	Sent	1
		- I		I	
	Delete Make	е а Сору		Cancel	<u>U</u> pen

The following *Open Existing Mail Campaign* screen will appear.

- To edit a campaign, resubmit delivery of a campaign, resume sending any partially delivered emails or to view the send status. Select the campaign and press the **Open** button. Follow the instructions in section "6.6 Create a new email campaign".
- To delete a campaign. Select the campaign and press the **Delete** button.
- To copy an existing campaign. Select the campaign and press the **Copy** button.