Hodfords
Unleashing the Power of Technology to Businesses

SendSmith

Version 4.00 Index

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MEMBERS (FORMERLY EMAIL)

The Members section allows you to manage your contacts, add / edit / remove subscribers. Import and Export contacts to/from your local computer.

In this section, you can also create Interest Groups. Each subscriber can belong to a different set of Interest Groups. Emails can be sent to defined Interest Groups.

Add Interest Group

Basic

Enter the Interest Group you would like to add and then press submit.

Please note that only numbers and letters of the Alphabet are allowed for the names of Interest Groups, Spaces are also allowed.

Add Internal/External Interest Groups

Basic

From Version 2.00 onwards, interest groups are differentiated by Internal and External. Internal Groups are the user's own categorisation of the subscribers and such information will not be available to subscribers. External Groups are the subscribers' own choice of which interest groups they want to join.

Edit Interest Group

Basic

To Change the name of an existing Interest Group, enter in the new Interest Group name at the input box and then press submit.

Please note that only numbers and letters of the Alphabet are allowed for Interest Group Names, Spaces are also allowed.

Remove Interest Group

Basic

To remove the Interest Group, you must press confirm. Please note that when removing Interest Groups, the actual subscribers under the Interest Group will not be removed. However all the subscription information to that particular Interest Group will be lost.

Add Subscriber

Basic

Enter in all the information for the subscriber, the email address entered must be a valid email address. (e.g. info@hodfords.com)

The field “Mobile number” can be left blank, but, the information may be used for SMS functions, hence the Mobile number must be entered in the following format :

Country Code   Area code   Mobile Number

(e.g. 44 958 761741 – For a one 2 one mobile in the UK)

If the area code does not exist, you can just enter (e.g. 852 99991111 – For a mobile number in Hong Kong)

Please note that brackets, dashes, hyphens or any punctuation marks are not allowed.

The field “Unsubscribed” should not be checked, if you check it, then, the subscriber will not receive emails- because it will tell Hodfords Sendsmith that this particular subscriber is not subscribed.

Edit Subscriber

Basic

First, search for the subscriber through the “DATABASE SEARCH” function. You can search by First Name, Last Name, Email Address, etc. When searching, you do not need to enter complete words, you can just enter the 1st three letters of the First Name or even just single letters to perform the search.

Once the search results display the subscribers whose details you need to edit, press edit next to the name. When editting the subscriber information, please note that the same content integrity requirements as for adding subscriber apply.

The field “Delivery Error” (added version 1.30) refers to the integrity of the subscriber’s email address. The default state is “No Error” which means that the subscriber’s email address appears to be a valid email address.

When an email campaign is sent out, invalid email addresses will be returned to Hodfords Sendsmith. If a permanent error such as ‘Email does not exist’ is returned for a particular email address then the “Delivery Error” of that particular subscriber would become “Permanent Error” and the subscriber will be excluded from all future email campaigns.

“Temporary Errors” can also be encountered, and they include situations whereby a subscriber’s email box is full, but the delivery error is not permanent. In such circumstances, the subscriber will not be excluded form future email campaigns.

Remove Subscriber

Basic

Search for the subscriber through the “DATABASE SEARCH” function. Once the subscriber can be found, you can delete the subscriber, by pressing remove.

Import

Intermediate

Hodfords Sendsmith accepts CSV (Comma Separated Values) formats, which can be accessed and used by personal computer softwares such as Microsoft Excel.

The CSV file must conform with the database structure used by Hodfords Sendsmith. To ensure that the database structure is valid, you can download the skeleton CSV.

Once you have entered in all the information onto the spreadsheet, you are then ready to upload the spreadsheet back into Sendsmith. You must first save the file in CSV format first and then you can upload the file through the input box.

Import Options

Intermediate

When duplicated records are found whilst importing data, in instances where the imported table contains email addresses that are already in existence in the current database, the user is presented with several choices as to how these duplicate records should be treated.Under the heading "Import Option (when duplicated record found)", there are 3 sub-headings:-

(i) Member Detail

(ii) Interest Groups

(iii) Address Under **(i) Member Detail**, there are 2 options: (i) update all details- which will update and overwrite records in SendSmith with the uploaded table and (ii) no update- the existing data on SendSmith will be kept and no update of the information will occur. Please note that unsubscribe information will also be updated in the process, so if a user unsubscribed and his/her details are updated without the unsubscribe marked then he/she would become subscribed again.Under **(ii) Interest Groups**, there are 3 options: (i) override all Interest Groups- which will alter all of the interest group settings for the existing members with the uploaded table and delete members from a certain interest group if they are not assigned to that interest group in the uploaded table, (ii) supplement all Interest Groups- which will only add the uploaded member to new interest groups and all of the interest groups that a member belongs to in the SendSmith database will be retained and (iii) no update- none of the interest group settings for any members will changed. Under **(iii) Address**, there are 3 options: (i) override all addresses- which will update all of the address information for the existing members with the uploaded table and overwrite any member information from the existing SendSmith data with the uploaded table, (ii) supplement all addresses- which will only add address information to the SendSmith database with the uploaded table and no address information will be overwritten and (iii) no update- none of the address information for any members will changed.

Export

Basic

You can export the entire database into CSV, for backup purposes or for printing address labels or conducting offline analysis.

When exporting, you can either choose to export the entire database or just the subscribers with addresses. Generally, for printing address labels, it is advisable to export just the database with addresses. You can also export only subscribers belonging to a particular interest group.

Empty Table

Intermediate

We do not advise that you use this function unless you have all the subscriber information backed up.

Emptying table means delete all the subscribers information, before doing so, please ensure that you have a backup locally. It is not reversible.

CIRCULARS

Within Circulars, you can create different identities each having different preferences and configurations. Within each identity you can create circular emails and send them to specified recipients.

Add Identity

Basic

When adding a new identity, please note that the identity name must only contain letters of the alphabet and numbers. Spaces, punctuation marks, etc. are not allowed. The name of the identity cannot be left blank either.

“Email Display Name” is the name that your recipients will see as the sender of the email.

“Your Email Address”is the email address that your recipients will see and reply to.

“Include Unsubscribe in Footer”when checked will include a link in the footer of every email sent to recipients to allow them to unsubscribe to the circulars or to change their subscription information.

Please note when creating an HTML circular within a particular identity the “Default background colour” can only be changed at the identity level and not when creating the HTML circular.

Add Identity with Bounce Back Manager

Advanced

The "Reply Email Box Settings" if filled out refers to the information that will be displayed to recipients of your email campaigns. **Sender Email address** refers to the Email Address that will appear on emails that you send to your members. You are recommended to use a non-personal email address such as "sendsmith@hodfords.com". However this email address must have a valid email box so that when people reply to it the emails will be collected into the mailbox. In other words, sendsmith@hodfords.comcannot be an email forwarder. **Email Server type** refers to your mailbox type which can be either pop3 or IMAP. **Port**refers to the port that allows users to access your email box. Typically it is 110 for POP3 and 143 for IMAP. **Require SSL**if checked will cause SendSmith to make a secure connection to your email server. **Login**refers to the login required to access your mailbox **Password**refers to the password required to gain access to your mailbox **Forward subscriber replies only** - Because SendSmith will access this mailbox to check all the replies and bounce backs, you can set it so that only people on your members' list are fowarded thus reducing the chance of your genuine mailbox being flooded with spam messages. SendSmith will use the above information to access your reply email box and forward any genuine replies and look at bounce back emails and mark any member that is no longer valid. **Genuine Email Box**Information refers to the email address where any genuine replies from the reply email box will be forwarded.

Edit Identity

Basic

When Editting identities, the same rules and requirements apply as with adding identities.

Remove Identity

Basic

Please note that after you remove an identity all the message within the identity will also be removed, so please ensure that you are absolutely sure before doing so. It is not reversible.

Create Email

Basic

To create a new Email, you must click into the particular identity first.

You can create 3 types of emails:- **(a) Plain**, **(b) HTML**and **(c) URL**

(a) Plain

A Plain email is literally a text email, with no graphics, no colours and no font variations. It has the advantage of being very fast to send and receive and also it is compatible with all email programs, even the very outdated ones.

Check the Interest Groups that you wish to send the email to, if “ALL” is checked that means, the circular will be sent to everyone within the subscribers database.

Enter the Email message within the “Plain Body” text area.

(b) HTML

An HTML email is the most popular email type, because it can allow for font variations, hyperlinks, colours, etc and also you can attach an image to the message, if necessary.

Check the Interest Groups that you wish to send the email to, if “ALL” is checked that means, the circular will be sent to everyone within the subscribers database.

“HTML Email width”refers to the overall width of the email, (e.g. Use Full Width would mean that when the recipient views the email, the email stretch across the entire width of the viewer.

The entire Email Message is divided into three Parts, HTML Header, HTML Body and HTML footer. They appear on the page in that order respectively.

Within the HTML Footer, the information for the particular identity will appear as default, but the information can easily be deleted if needed.

“HTML Plain Text”will not be visible to most recipients, but just in case the recipient cannot view rich-text emails, then this is the message they would see.

“HTML Image Position”refers to the position where the image would appear if an image was uploaded. Below the select box, there are 4 layouts which describe how the image would appear in the email message.

“HTML Image URL”refers to where the image would link to when clicked. You can enter your website address or a particular page within a website that you would like recipients to see when they click on the image.

Please note the “HTML Image URL” must begin with http:// or https://

“HTML Image Width”and **“HTML Image Height”**allows you to change the width or the height of the image. To avoid pixelation, you should upload a reasonably large picture.

To avoid disproportionate scaling, it is advisable to change either the **“HTML Image Width”**or **“HTML Image Height”**and not both.

To upload the image, please ensure that the file is of the following format :-
- Jpeg format
- RGB (not CMYK)
- 72 Pixels / Inch
- under 1500 pixels wide and under 1500 pixels high

(c) URL

Creating a URL Email allows you to send a webpage of your choice as the email to your recipients.

Check the Interest Groups that you wish to send the email to, if “ALL” is checked that means, the circular will be sent to everyone within the subscribers database.

Enter the webpage address (URL) into the “URL Link” box and then submit. Please ensure that the website address is a valid webpage address (starting with http:// or https://) and that the webpage is accessible.

“URL Plain Text”will not be visible to most recipients, but just in case the recipient cannot view rich-text emails, then this is the message they would see.

Edit Email

Basic

After having created the email, if you need to revise the email then you can use the edit email function.

The same rules apply to editting as they do to Creating Email.

Please note that, once an email has been sent to the recipients, it cannot be editted.

Remove Email

Basic

This function is used for deleting email messages. Please note that when you remove, it is not reversible. Secondly, it is worth noting that once the email has been sent out, it is not possible to delete.

Duplicate

Basic

This function allows you to make a duplicate of an email that you created before for re-sending.

Create Personalised Messages

Intermediate

Personalised messages can be created for all email types. In order to create a personalised message, choose the field you want to add at the "Add Merge Field" drop-down box, e.g. <@First_name@>. When the email is sent out, the merge field will be replaced with the First Name of the subscriber. N.B. - It is important that the database contains all the information.

Send Test

Basic

After having created an email, you can send a test email to a specified email address to assess how the email appear in the email program. Simply, enter the email address into the box where you want the test to be sent.

Send Final

Once you are satisfied with the appearance of the test email, then you are ready to send the final email to all the recipients.

Please note that once you submit the final email for sending, the email will enter into a mail queue. Once in the mail queue, the emails will be sent out at the beginning of each hour. (e.g. if you submit an email to be sent at 5:35p.m., the actual sending time of the email will be at 6:00p.m.)

View Statistics

Basic

The View Statistics function allows you to view the statistics of the email sent. It will tell you the number of recipients for the email sent, the number of emails opened, the number replies and which interest groups the email was sent to.

It will also give you information on how many times the email were clicked so that you can monitor the effectiveness of the email campaign.

To view statistics, simply click on the blue envelope next to the Email subject.

Unsubscribe & Subscription Changes
Basic

For subscribers to unsubscribe, they can simply click on the link in the footer of the email and then follow the instructions. Subscribers can unsubscribe to future email campaigns or they can change their particulars, such as email address and interests.

Mailing List Form
Basic

A Mailing List form will come with each account, and you will be given the address of the mailing list at the start. The mailing list form allows users to enter in their information to become a subscriber or to join your mailing list.

View Opened Emails
Basic

The View Opened Email function allows you to view the exact number of times an email has been opened by a particular user. To view this information, click on the number in white corresponding to the No of Opened emails in the View Statistics pagePlease note that this function is not available to text-based emails.

View Click-Through Statistics
Basic

The View Click-Through Statistics function allows you to view the exact number of times a link has been clicked by a particular user. To view this information, click on the number in white corresponding to the link under the No of Clicks in the View Statistics page.

- End -