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1. Introduction

This user guide is designed to take you through the steps to create and send an email campaign using Alpha Systems Consultants' AlphaMail product.

2. The components of a campaign

A bulk email campaign requires the following components to be defined before it can be sent:

- Campaign information
- Message content
- Images
- Data

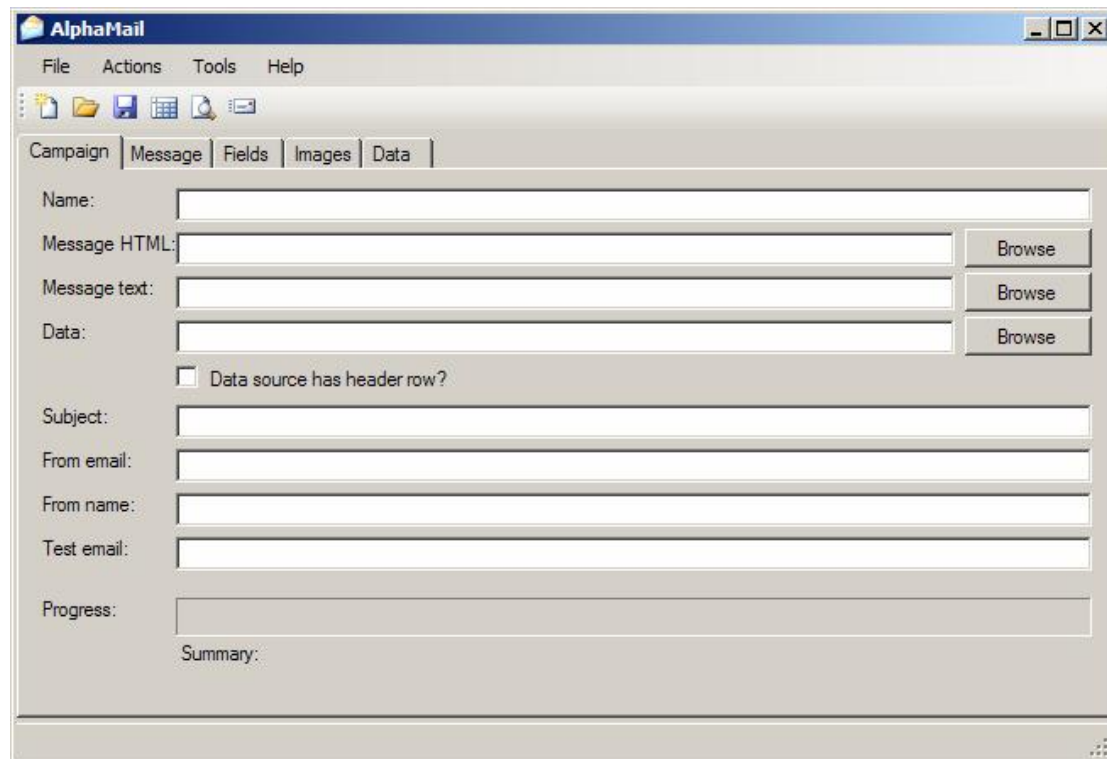
These are explained in more detail in future sections

3. Creating a campaign

This section describes the information you will need to provide to create a campaign.

3.1. Campaign information

To create a new campaign, use the File | New menu option or the New campaign toolbar button. The screen will clear to show the following, which you will also see when you start the system.



The screenshot shows the AlphaMail application window. The title bar reads 'AlphaMail'. The menu bar includes 'File', 'Actions', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for file operations. The main window has a tabbed interface with tabs for 'Campaign', 'Message', 'Fields', 'Images', and 'Data'. The 'Campaign' tab is active, displaying a form with the following fields and controls:

- Name: [Text input field]
- Message HTML: [Text input field] with a 'Browse' button to its right.
- Message text: [Text input field] with a 'Browse' button to its right.
- Data: [Text input field] with a 'Browse' button to its right.
- Data source has header row?
- Subject: [Text input field]
- From email: [Text input field]
- From name: [Text input field]
- Test email: [Text input field]
- Progress: [Text input field]
- Summary: [Text input field]

Each campaign needs a name, which is a descriptive name but is not used in the emails.

You must also specify a source file for the HTML version of the email message text and a source file for the plain text version of the email message. This will be described in more detail later. Use the relevant Browse button to select the relevant file.

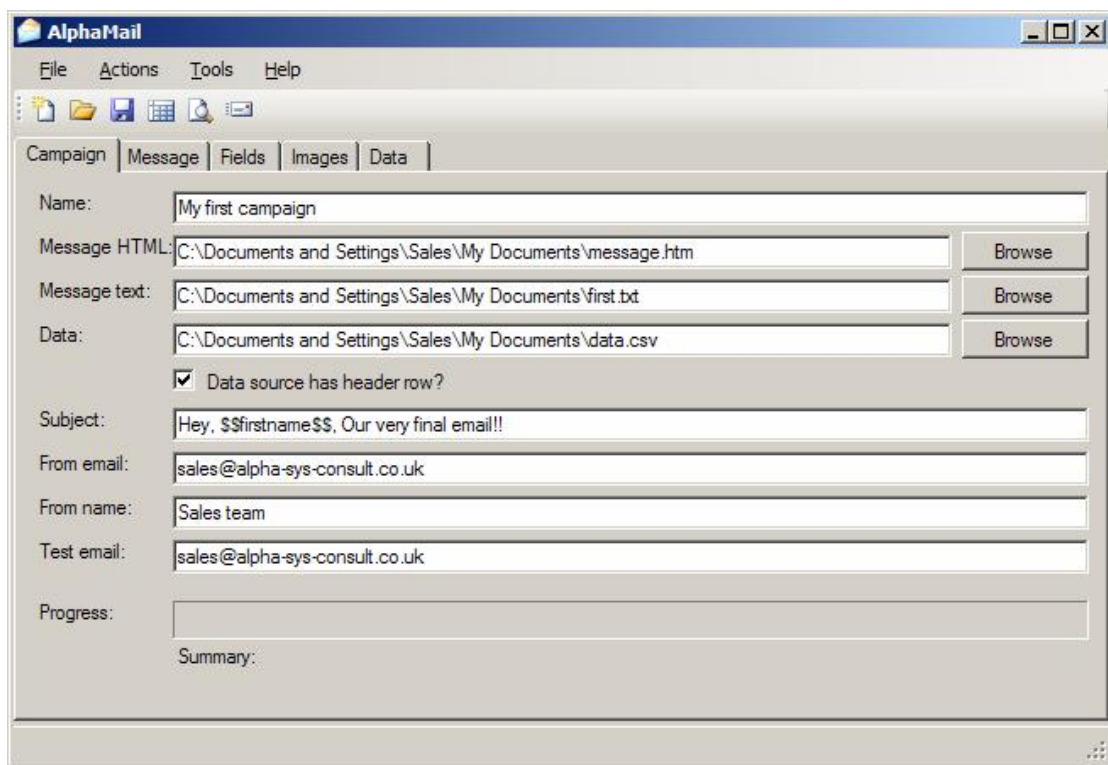
When you specify the data file name, you can also specify whether the CSV file for data has or does not have a header row at the top of the file. Use the Browse button to select the relevant file. More of this later.

You should now specify the subject line for the message, which can include mail merge fields to draw from the data file.

Specify the email address which is the From address, the address the recipient would reply to, and the name of the sender.

As AlphaMail allows you to test your email message before you send it to the entire database, you can also specify an email address to which to send the test message. Again, more of this later.

When you have made all the settings and selections for the campaign, the first tab of the screen will look something like this.



The key menu options are reproduced in the toolbar below the menu, and hovering the mouse over a button will summarise what the button does.

3.2. Message content

The second tab of the main screen shows you a raw view of the content of the message HTML and the plain text version. These are loaded up when you select a file with the browse buttons on the first tab, or when you open a pre-saved campaign file using the File | Open menu option or the Open toolbar button.

The example in this user guide takes the HTML file shown below. The source example is shown in one specific syntax-highlighting editor, but you can use your choice or a dedicated web page editing application to work with a file of extension “.htm”.

```
0 10 20 30 40 50 60 70 80
1 <html>
2 <body style="background-color: #FAFAFA;">
3 <table border="0" cellspacing="0" cellpadding="0">
4 <tr>
5 <td style=" font-family: Arial, Helvetica, sans-serif; font-size: 12px;
. color: black;">Dear Mr $$surname$$,<br>
6 Welcome, $$firstname$$, to this first email from AlphaMail.<br>
7 This email will help you understand something about the products we offer.
8 Please contact us via <a style="{color: #6699FF; text-decoration: none}
9 :visited {color: #6699FF; text-decoration: none}
10 :hover {color: #FF0000; text-decoration: none}"
. href="http://www.alpha-sys-consult.co.uk">our website</a>.<br><br>
11 Best regards,<br><br>
12 The sales team
13 </td>
14 <td##logo##</td>
15 </tr>
16 </table>
17 </body>
18 </html>
19
```

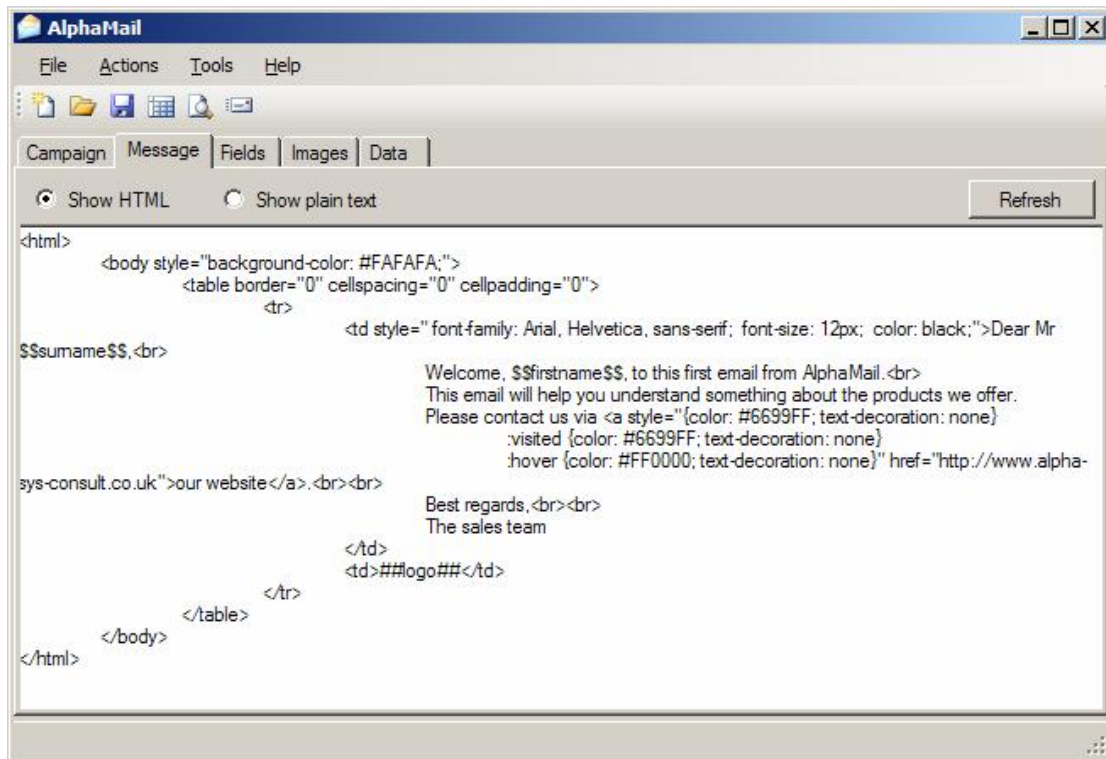
You will notice that the HTML version of the email message is very much a standard web page but there is no specific CSS section and none of the usual header fields.

You will notice the mail merge fields such as \$\$firstname\$\$ and \$\$surname\$\$, and this guide explains later how to map these to the columns of your data file.

You will also see an image to be embedded into the message, shown as ##logo##.

If you select the Show HTML radio button on the Message tab of the main screen you can see a raw view of the HTML source.

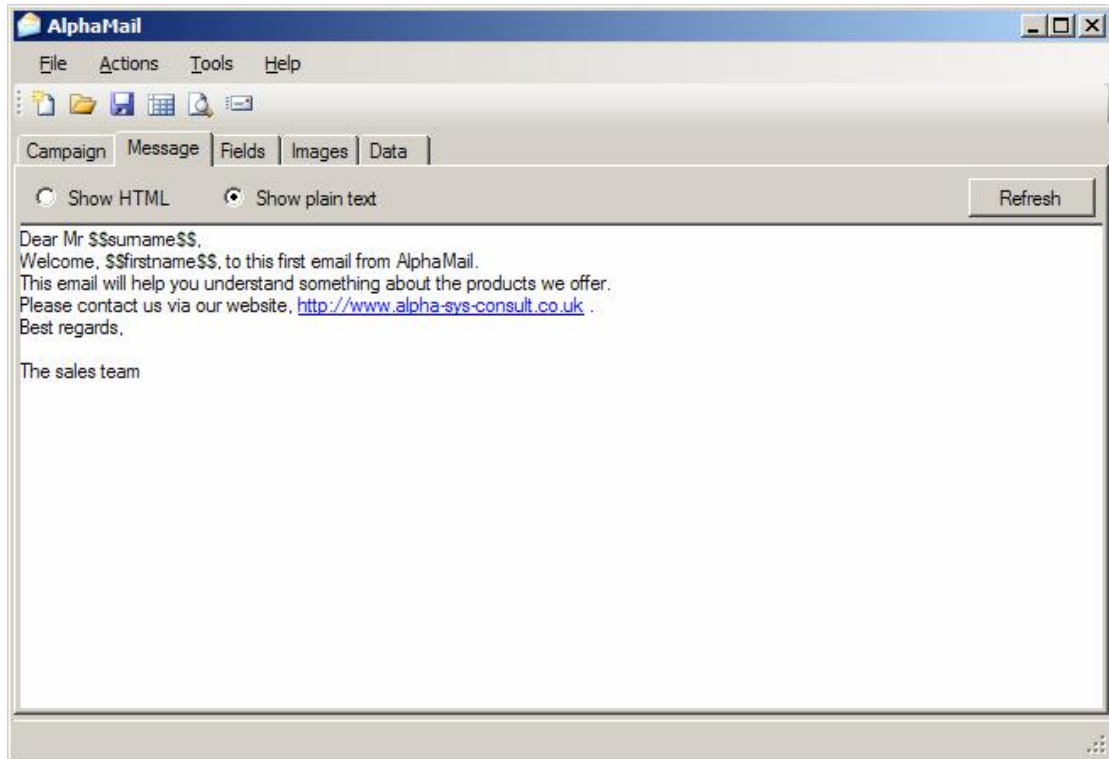
If you edit the source file, click the Refresh button to reload it and show the revised version.



An email message as HTML requires a plain-text version to show in mail readers which cannot render HTML, such as those on mobile devices or simple web-based mail services. You should prepare a text file, with extension “.txt” to contain this. Below you will see the text version in the editor.

```
0 10 20 30 40 50 60 70 80
1 Dear Mr $$$surname$$,
2 Welcome, $$$firstname$$, to this first email from AlphaMail.
3 This email will help you understand something about the products we offer.
4 Please contact us via our website, http://www.alpha-sys-consult.co.uk .
5 Best regards,
6
7 The sales team
```

If you click the Show plain text radio button you can alternate the view on the Message tab with the HTML version. Again, as with the HTML version, you can refresh the view if you edit the file by clicking the Refresh button.



As with the HTML version of the message, you can use \$\$...\$\$ placeholders for the fields of the data file, but of course you can't use the ##...## image placements.

4. Defining the data

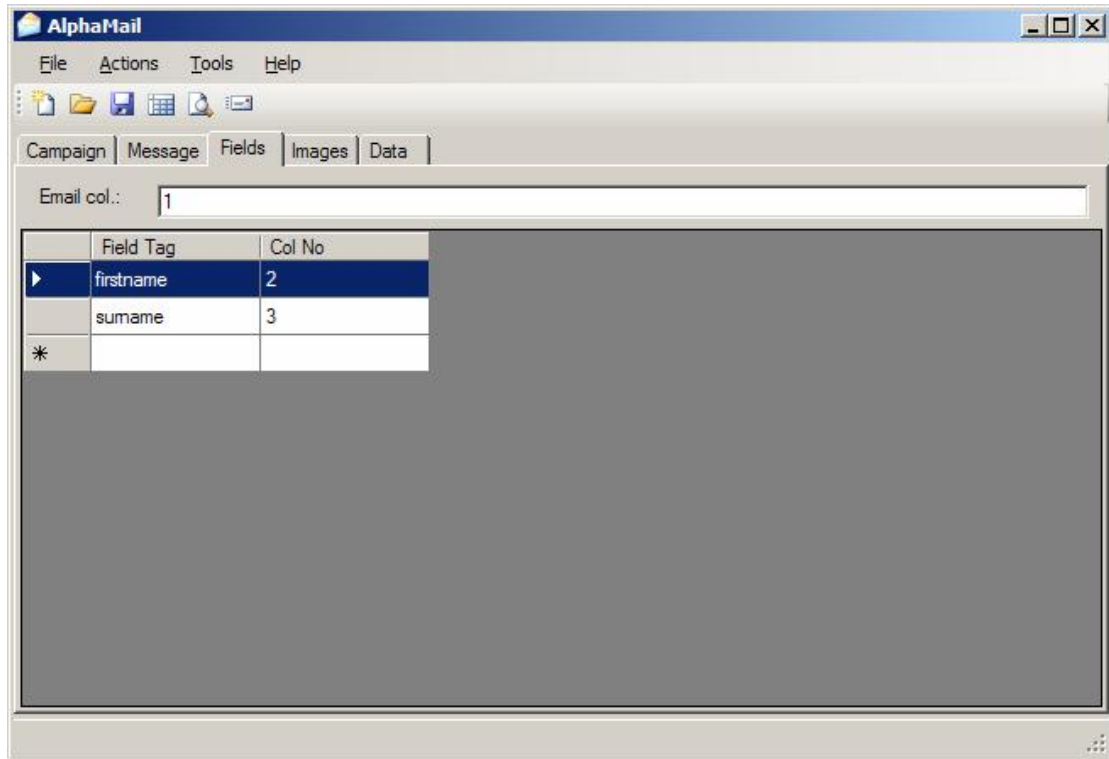
You can use your editor to create the HTML version and the plain-text version of the message, and in doing so you can define placeholders for the textual columns of the data file and images you wish to embed in the message. These are described in more detail below.

4.1. Fields

Your CSV data file contains one or more columns of data. One of these must be the email address to which to send the message. You must specify this at the top of the Fields tab of the main screen.

Below this is a grid in which you can enter the tag names and column numbers they may to.

In the example below, for each record in the data set, the email address is in column 1 of the file, while a field we will call `firstname` is in column 2 and a field called `surname` is in column 3. The column number starts with one and maps into the data file. The tag name can be any single word and should be matched in the same letter case by a placeholder in the text of the email body, so in this example, column 2 is called `firstname` and is placed into an email message at a placeholder marked `$$firstname$$`.



If you add an entry which is wrong, you can click back in the relevant cell of the grid and change the setting, or to delete the whole row, click on the left-hand end of the row and then press Delete on your keyboard.

4.2. Images

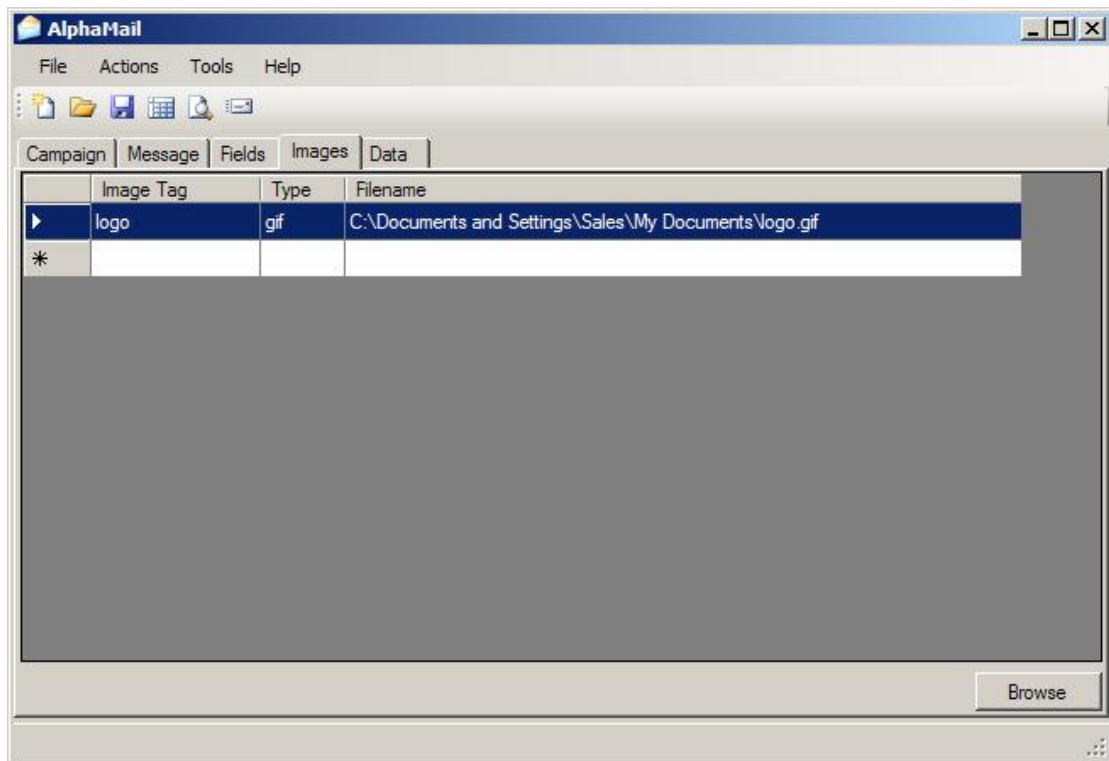
As any other piece of HTML, you can include a link to an image located on a web site – you could use this to link to your company logo or a product image, for example. Some people and some spam filters are suspicious of such links as they can be used by a spammer to validate your email address. To link to a file, use a standard `` tag that you would normally use in a standard web page.

However, you can also embed an image so that they are supplied in the actual email and they will be displayed with less suspicion by most mail readers.

To do this, insert a placeholder with the tag for the image, like so – an image tagged as logo has a placeholder ##logo## . Note that you do not need to include normal HTML tags such as in order to use an embedded image. If you want to use the embedded image as a link, use standard <a> tags around it:

```
<a href="http://www.mysite.com/about.htm">##logo##</a>
```

On the Images tab of the main screen click in the bottom row to add a new entry. Specify the tag to use in the body of the email and then specify the type of the image. This is normally discovered for you when you add a file, but you can override the selection made by AlphaMail. This type is necessary so that the image will render correctly in the email message. With the required row highlighted, use the Browse button to find the file you want to use. You can select from “.gif”, “.jpg” and “.png” files.

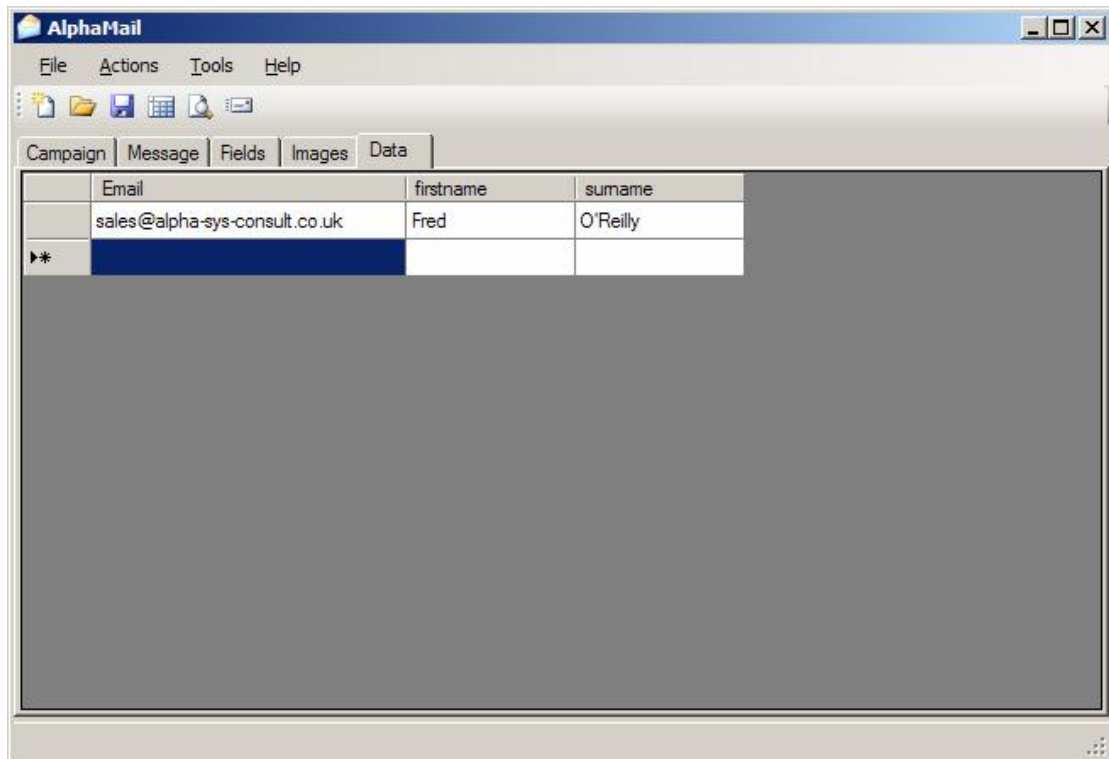


All the settings that you use on the Campaign tab, the Fields tab and the Images tab are saved into the campaign file when you use the Save toolbar button or the File | Save or File | Save as menu options.

4.3. Data preview

Before you send a message to your database of email addresses, you will want to preview the data. Having specified the data file and the fields to use, you can use the Actions | Preview data menu option or the Preview data toolbar button. You will then see all the records of your data file shown with all the columns you have defined.

You cannot edit the data in the grid so if you need to change the data, do so in the source application and re-export the data or manipulate the CSV file before you do the actual transmission.



5. Sending the test email

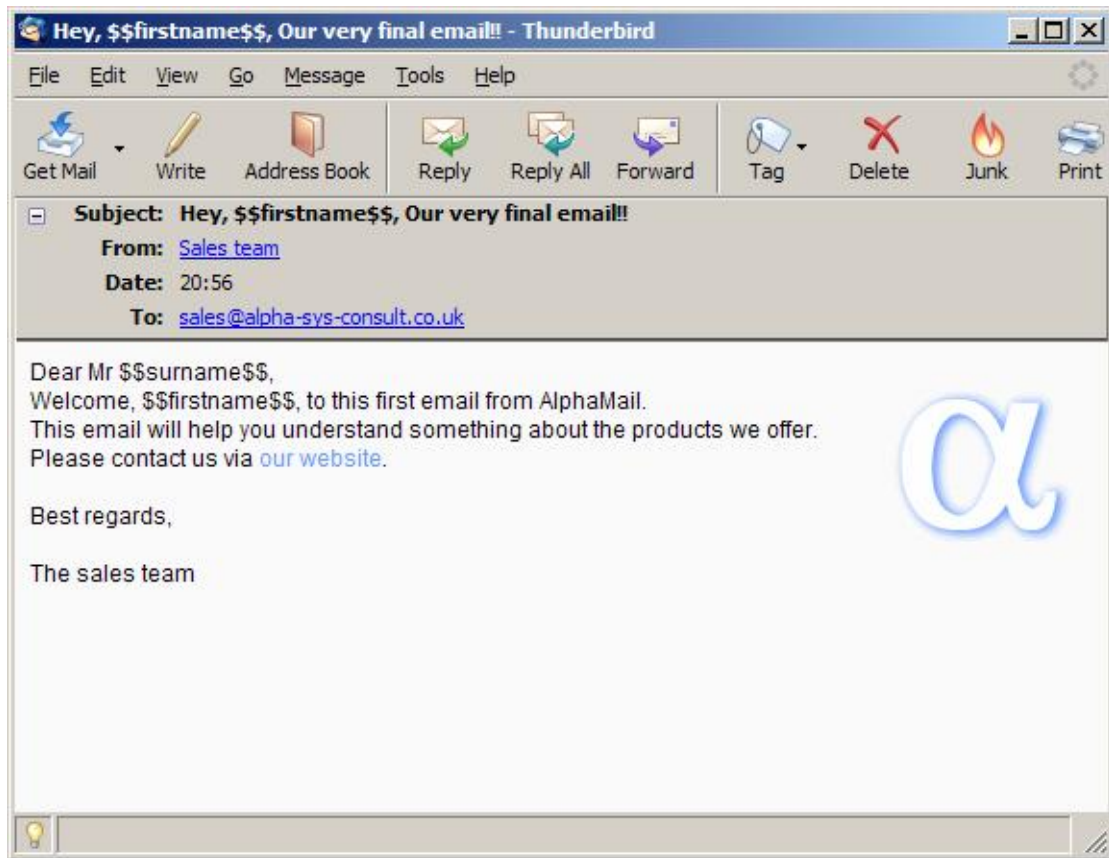
Before you send the message to all recipients send yourself a test message. You can receive this at any email address so send it to a variety of ones you hold, for example the Google service, the Hotmail service, etc. and to an email address you can view in a variety of mail clients such as Outlook, Windows Mail, Thunderbird, etc.

To send the test message, load the campaign file using the File | Load menu option or the Load file toolbar button, preview the message to check and then send the message using the Actions | Send test menu option or the Send test toolbar button. This will send a copy of the email message to the address you specified in the Campaign tab of the main screen. Once it has been sent you will see a confirmation message on the screen.



The message contains the placeholders as text, both in the body and the subject line. It does however include the embedded images for you to check the placement, etc.

Below is a copy of the test email shown in Thunderbird.



6. Sending the emails

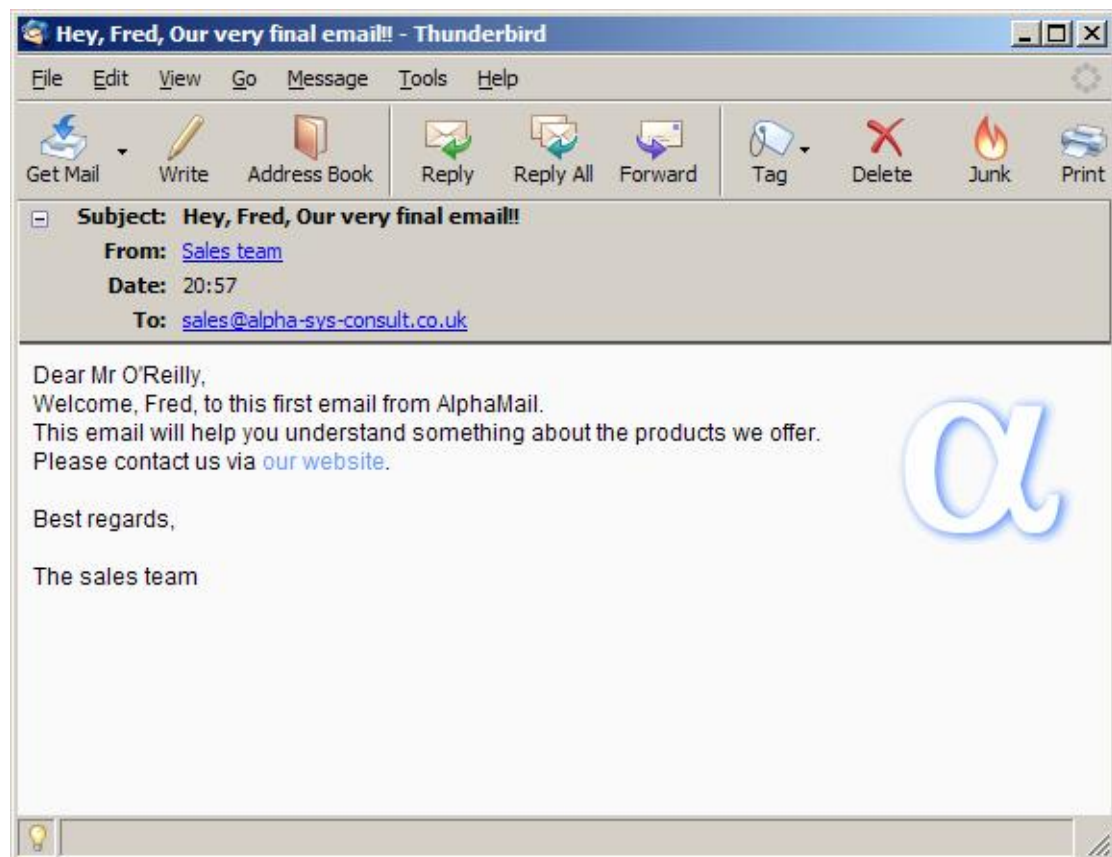
Once you are happy with the test email, you can send the real one to the recipients in your data source. To do this, select the Actions | Send menu option or click the Send emails toolbar button. As the emails are sent you will see the progress with a visual progress bar as well as a counter, as shown below. You can continue to use your PC while the emails are being sent. You can see an elapsed time while the emails are sent.



Once the emails have all been sent, you are advised as shown below.



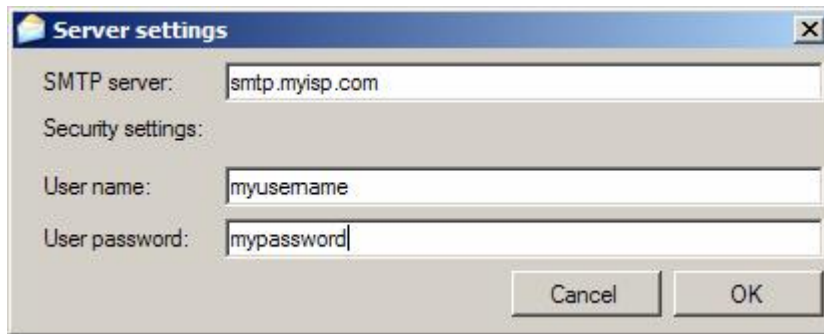
Below is a copy of our example email, again shown in Thunderbird.



7. Server settings

AlphaMail can use the SMTP server at your ISP, or one provided by a hosting company, or even one located in your office network. To specify the server to use, use the Tools | Server settings menu option. You will see the dialogue below in which you can enter the name of the server as well as the optional security settings to use if you have an authenticating server. If you do not need authentication leave the user name and password fields blank.

You must set the server details before you try to send a test message or a bulk message.



The image shows a 'Server settings' dialog box with the following fields and values:

- SMTP server: smtp.myisp.com
- Security settings: (empty)
- User name: myusername
- User password: mypassword

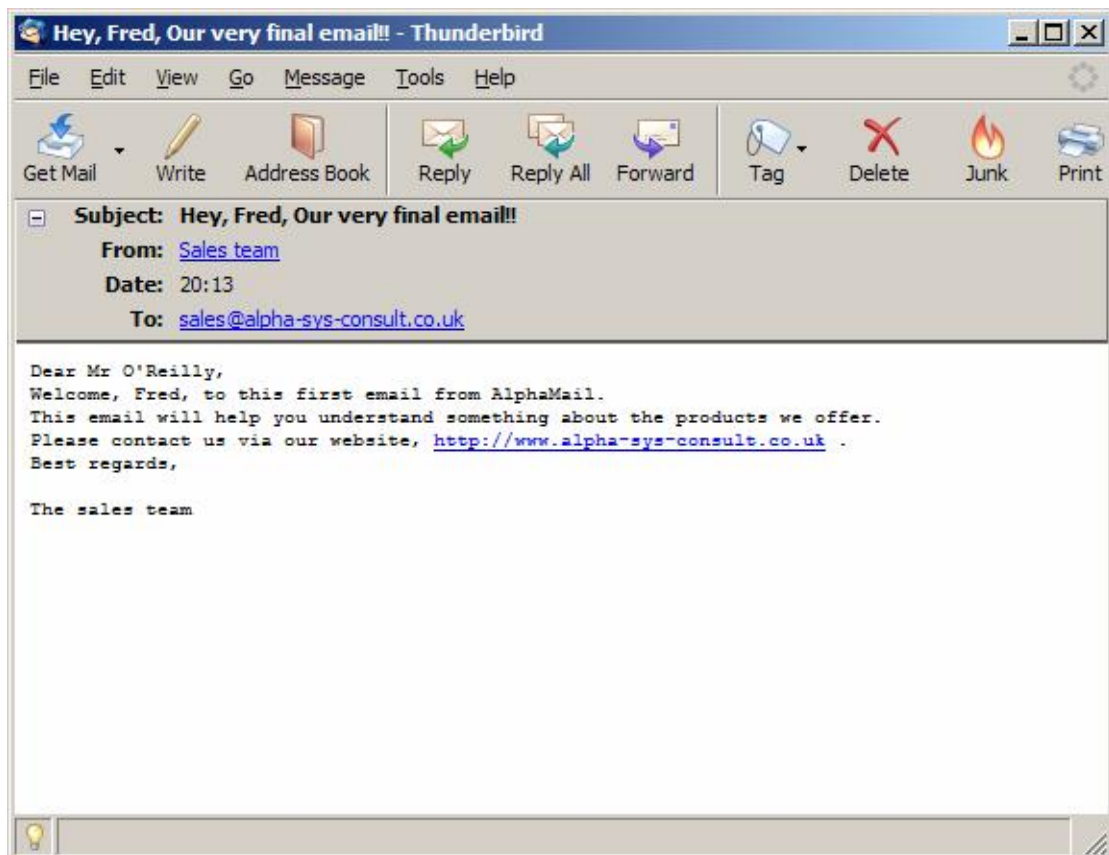
Buttons: Cancel, OK

8. Sending a plain-text email

So far the user guide has only spoken of HTML emails with a text-only version of use when necessary. However you can use AlphaMail to send just plain text, which can be useful if you find that HTML emails are being blocked by the spam filters of your recipients.

To do this, simply leave the name of the HTML file blank on the Campaign tab. When you preview the message on the Message tab you will see a blank when you preview the HTML version.

Below is the plain-text version of the sample message from this user guide, again shown in Thunderbird.



9. Product information

If you need to contact us for support on the product, please include the product version in your email to us. This information is available from the Help | About menu option, an example of which is shown below.

