



User Manual

Version 1.0

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About this Guide

Purpose of this Guide

The MailDirect User's Guide provides detailed instructions for performing day-to-day operational tasks associated with MailDirect. MailDirect helps the marketing executives of an organization to run personalized marketing and survey campaigns with pinpoint accuracy.

Who should read this Guide?

This guide helps Marketing & Sales personnel, authorized to use MailDirect, to efficiently execute promotional and survey campaigns for product or service of their organization.

Typographical Conventions

This guide complies with the following typographical conventions:

Table 1: TYPOGRAPHICAL CONVENTION

Typeface	Meaning
<u>Hyperlink References</u>	References to hyperlinked topics within or outside this guide
Bold	Menus and menu options, input fields, radio buttons, check boxes, drop-down lists, tabs, buttons, keys on the keyboard, links and messages displayed on the screen

Note: Figures in this guide are displayed with sample data in the fields for understanding of the user.

1 About MailDirect

This chapter introduces **MailDirect** and explains some of its core features in detail.

1.1 Introduction

MailDirect supports personalized Email Marketing Campaigns, personalized SMS Marketing Campaigns and Email & Website based Surveys. Users can create and manage a list of campaign recipients, with their email IDs and mobile numbers (if any/needed). They can personalize messages by adding 19 personal details about customers/recipients and can create, start, schedule, save, view and abandon campaigns.

The user-friendly GUI is specifically designed for business users across various industries. The user can create email and SMS based marketing campaigns from his/her email ID and mobile number respectively; customers can use these contact details to get in touch. This helps the organization to promote its products or services. **MailDirect** also allows the user to carry out email and website based surveys, providing instant customer response and feedback. Marketing and survey campaigns (if email based) can be sent to all prospects at the same time, by attaching a list of recipients.

Statistics are provided separately for email, SMS and survey campaigns. This makes the user aware of each campaign's effectiveness. **MailDirect** is offered in the Software-as-a-Service (SaaS) model, which spares the user from managing and keeping track of versions, updates and patches.

1.2 Email Campaign

MailDirect Email Campaign allows users to run personalized email marketing campaigns.

Users can send product or service promotions via email to any number of recipients, addressing them individually at the same time. They can attach EML to create campaigns or use HTML to create campaigns with graphics and images.

1.3 SMS Campaign

MailDirect SMS Campaign allows users to run personalized SMS marketing campaigns.

Users can send product or service promotions via SMS to any number of recipients (depending on the SMS quota available), addressing them individually at the same time. They can create campaigns to be sent by SMS, with one SMS containing 160 characters.

1.4 Survey Campaign

MailDirect Survey Campaigns allows users to conduct email and website based surveys.

Users can create survey questions to collect quantitative information or ask for the recipient's opinion. They can send a link to survey questions in the email to any number of recipients, or provide a link to questions on the website, or do both, and can instantly learn about responses.

2 Getting Started with MailDirect

In this chapter, users will learn how to:

- Start MailDirect
- Understand the MailDirect user interface
- Exit MailDirect

2.1 Starting MailDirect

To use MailDirect, the user needs to avail MailDirect services from QLC. The QLC administrator will create a user account and send login credentials using which the user can access MailDirect.

This section provides instructions on how to start MailDirect.

To Start MailDirect

1. In the web browser, type the MailDirect URL and press ENTER.

The URL is: <http://www.maildirect.co.in>.

The MailDirect login screen is displayed.



QLC prohibits the use of the Services in any manner associated with the transmission, distribution or delivery of any unsolicited bulk or unsolicited commercial e-mail ("Spam"). You may not use any Services to send Spam.

In addition, e-mail sent, or caused to be sent, to or through the Services may not:

- use or contain invalid or forged headers;
- use or contain invalid or non-existent domain names;
- employ any technique to otherwise misrepresent, hide or obscure any information in identifying the point of origin or the transmission path;
- use other means of deceptive addressing;
- use a third party's internet domain name, or be relayed from or through a third party's equipment, without permission of the third party;
- contain false or misleading information in the subject line or otherwise contain false or misleading content;
- fail to comply with additional technical standards described below; or
- otherwise violate the applicable Terms of Use for the Services.

QLC does not authorize the harvesting, mining or collection of e-mail addresses or other information from or through the Services. QLC does not permit or authorize others to use the Services to collect, compile or obtain any information about QLC's customers or subscribers, including but not limited to subscriber e-mail addresses, which are QLC's confidential and proprietary information. Use of the Services is also subject to the applicable Privacy Statement and Terms of Use.

QLC does not permit or authorize any attempt to use the Services in a manner that could damage, disable, overburden or impair any aspect of any of the Services, or that could interfere with any other party's use and enjoyment of any Service.

If QLC believes that unauthorized or improper use is being made of any Service, it may, without notice, take such action as it, in its sole discretion, deems appropriate, including blocking messages from a particular internet domain, mail server or IP address. QLC may immediately terminate any account on any Service which it determines, in its sole discretion, is transmitting or is otherwise connected with any e-mail that violates this policy.

Nothing in this policy is intended to grant any right to transmit or send e-mail to, or through, the Services. Failure to enforce this policy in every instance does not amount to a waiver of QLC's rights.

Unauthorized use of the Services in connection with the transmission of unsolicited e-mail, including the transmission of e-mail in violation of this policy, may result in civil, criminal, or administrative penalties against the sender and those assisting the sender.

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Figure 1: MAILDIRECT LOGIN SCREEN

Table 2: LOGIN SCREEN

Field	Description
Username	Type the appropriate username. This field is mandatory.
Password	Type the appropriate password. This field is mandatory.

2. Enter the appropriate details and click the **Login** button.

Note: If the user is already logged in, a message is displayed asking the user to re-enter the password and perform Force Login.
Force Login causes the user to log out of the previous session.

MailDirect displays the Home page.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Email Campaign Summary

Active - Campaigns currently launched	0
Planned - Campaigns ready for launch	176
Completed - Campaigns launched and completed	1294
Abandoned - Campaigns launched and abort mid-way	77
Total	1547

SMS Campaign Summary

Active - Campaigns currently launched	1
Planned - Campaigns ready for launch	18
Completed - Campaigns launched and completed	30
Abandoned - Campaigns launched and abort mid-way	1
Total	50

Survey Summary

Active - Survey currently launched	6
Planned - Survey ready for launch	5
Expired - Survey launched and completed	3
Total	14

List Manager Summary

Total Unique Email Ids	104028
Total Unique Mobile No	522
Number of Lists	30
Number of email Ids blocked	19534
Number of Mobile No blocked	0

By using this service, you agree to abide by our [Terms & Conditions](#).

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Grid of icons: Email Campaign, SMS Campaign, Survey, Email Statistics, SMS Statistics, Survey Statistics, List Home, Field Manager, Change Password, FAQs.

Figure 2: MAILDIRECT HOME PAGE

2.2 Understanding MailDirect User Interface

MailDirect is a browser independent service. The user interface consists of a menu and the area below the menu, organized according to the options selected from the menu.

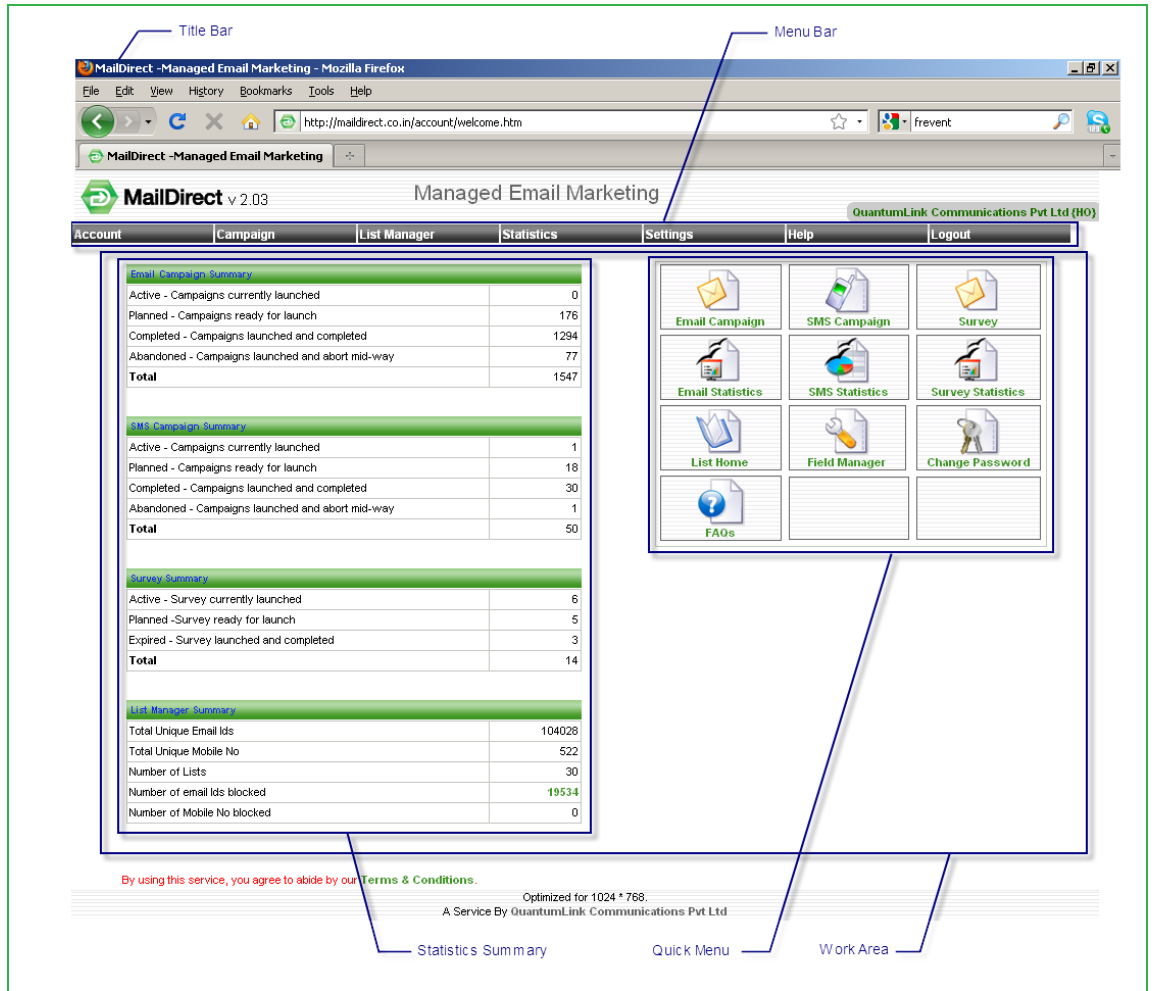


Figure 3: MAILDIRECT USER INTERFACE

Title Bar

The Title Bar displays the title of the window and additional information. In MailDirect, the Title Bar is divided into two parts.

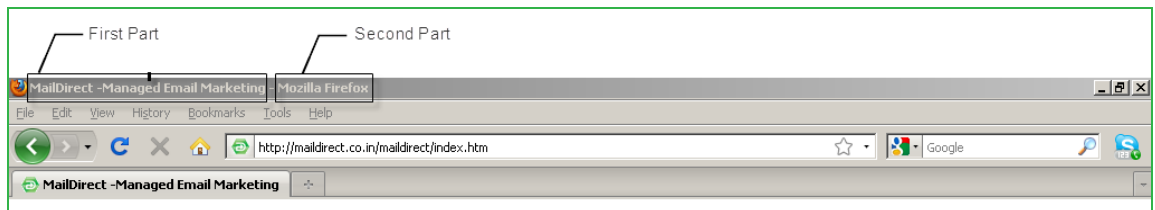


Figure 4: TITLE BAR

The first part displays the name of the service being used. The second part displays the name of the browser running MailDirect.

Menu Bar

The Menu Bar lists all the menu options available for selection in MailDirect.



Figure 5: MENU BAR

The commands available in the Account menu are:

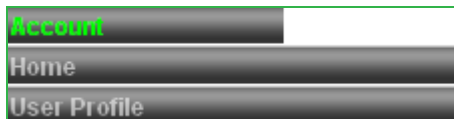


Figure 6: ACCOUNT MENU OPTIONS

The commands available in the Campaign menu are:



Figure 7: CAMPAIGN MENU OPTIONS

The commands available in the List Manager menu are:

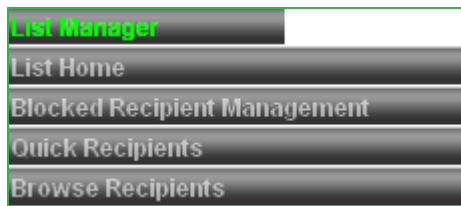


Figure 8: LIST MANAGER MENU OPTIONS

The commands available in the Statistics menu are:

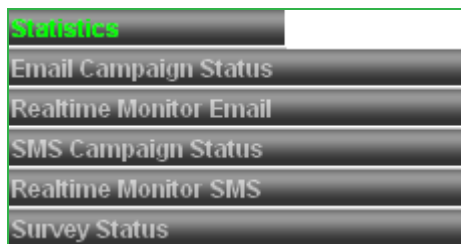


Figure 9: STATISTICS MENU OPTIONS

The commands available in the Settings menu are:

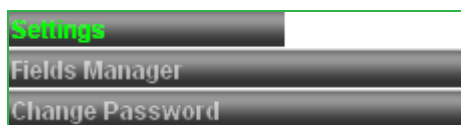


Figure 10: SETTINGS MENU OPTIONS

The commands available in the **Help** menu are:



Figure 11: HELP MENU OPTIONS

The Logout option is:



Figure 12: LOGOUT OPTION

Work Area

The Work Area is a rectangular space with content displayed based on the options selected in the Menu Bar. For the **Home page**, the Work Area is divided into two sections – Statistics Summary and Quick Menu.

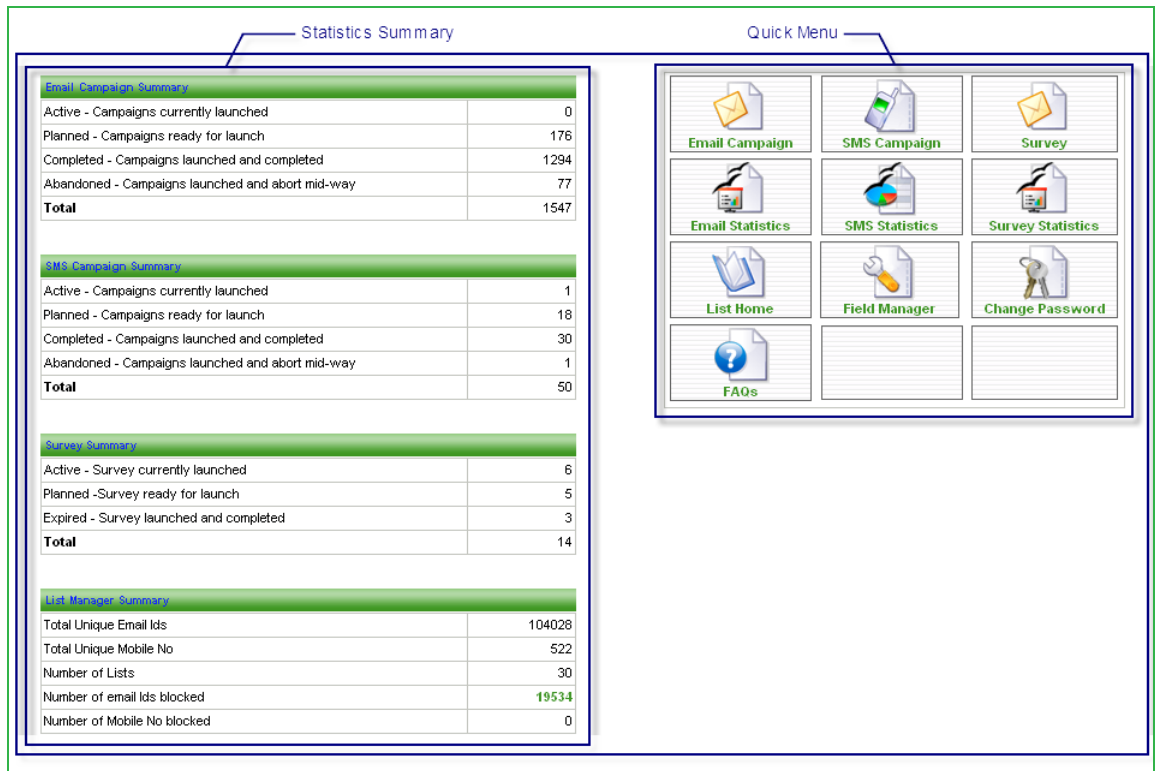


Figure 13: WORK AREA

2.3 Exiting MailDirect

This section provides instructions on how to exit MailDirect.

To exit MailDirect

1. On the Menu Bar, click Logout.

Note: The user must save the work related to managing lists before exiting MailDirect.

3 Working with List Manager

In this chapter, users will learn how to:

- Use Contact List
- Manage Recipients

3.1 Introduction

The **List Manager** menu enables users to create or search for a contact list, add recipients with their contact and other information, edit recipient information, subscribe or unsubscribe recipient/s to the selected list/s, manage recipients blocked from any campaign updates, delete recipients from the database and search for recipient/s in the database.

Users can add contact details and other basic information of recipients. The lists have to be attached to campaigns in order to send campaigns to recipients. A list can have a public name (that acts as an alias name).

3.2 Using Contact List

This section provides instructions on how to create a new contact list and search for & manage a contact list.

3.2.1 Creating a Contact List



To create a new contact list

1. On the List Manager menu, click the List Home option.

MailDirect displays the Contact List Management screen.

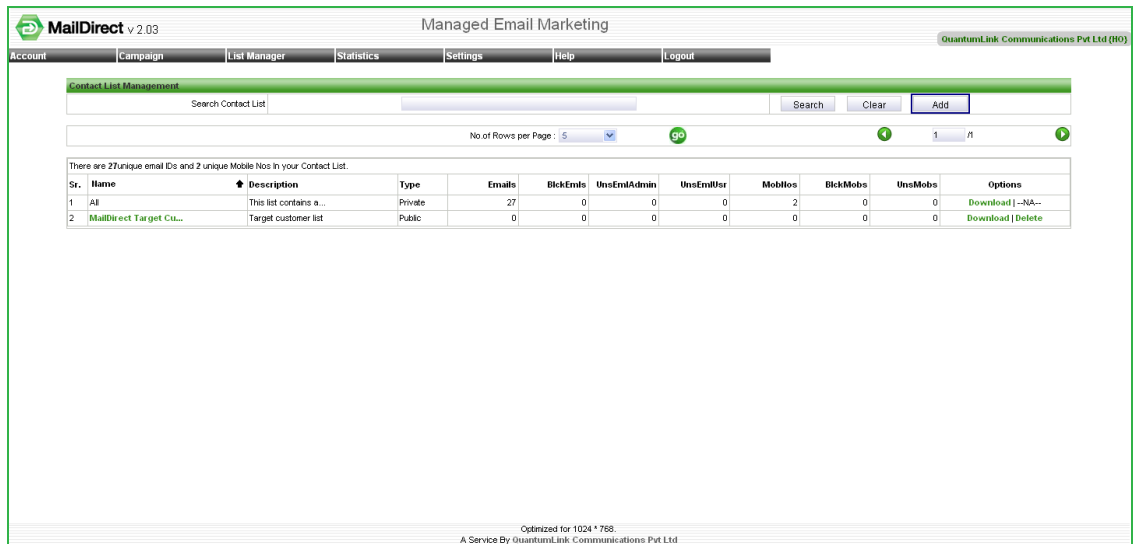


Figure 14: CONTACT LIST MANAGEMENT

- Click the Add button.
MailDirect displays the Add/Edit List screen.

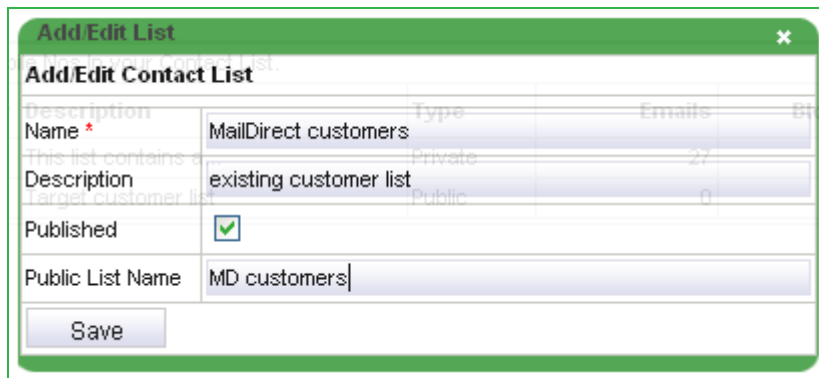


Figure 15: ADD/EDIT LIST

Table 3: CREATING/ADDING A CONTACT LIST

Field	Description
Name	Type an appropriate name for the contact list, not exceeding 30 characters. This field is mandatory.

Description	Type an appropriate description for the contact list, not exceeding 30 characters. This field is not mandatory.
Published	Select the check box to enable creation of a public name for the contact list. This field is not mandatory.
Public List Name	Type an appropriate public name for the list, not exceeding 30 characters. This field is mandatory only if the Published check box is enabled.

Enter/Select the appropriate details in the required fields.

- Click the **Save** button.

MailDirect displays the Contact List Management screen with the new list added.

The screenshot shows the MailDirect v 2.03 interface for Managed Email Marketing. The top navigation bar includes Account, Campaign, List Manager, Statistics, Settings, Help, and Logout. The main content area is titled 'Contact List Management' and features a search bar with 'Search Contact List' text, 'Search', 'Clear', and 'Add' buttons. Below the search bar, there is a 'No of Rows per Page' dropdown set to 5, a 'Go' button, and a page indicator showing '1 / 1'. A summary line states: 'There are 27 unique email IDs and 2 unique Mobile Nos in your Contact List.' The main table displays the following data:

Sr.	Name	Description	Type	Emails	BkckEmIs	UnsEmIAdmin	UnsEmIUsr	MobNos	BkckMobs	UnsMobs	Options
1	All	This list contains a...	Private	27	0	0	0	2	0	0	Download --NA--
2	MailDirect Target Cu...	Target customer list	Public	0	0	0	0	0	0	0	Download Delete
3	MailDirect customers	existing customer li...	Public	0	0	0	0	0	0	0	Download Delete

At the bottom of the interface, it says 'Optimized for 1024 * 768' and 'A Service By QuantumLink Communications Pvt Ltd'.

Figure 16: CONTACT LIST MANAGEMENT WITH THE NEW LIST ADDED

Note: The new contact list name and the new public name of the contact list should differ from existing list names (as displayed in the **Contact List** section). Otherwise, MailDirect displays the **Add/Edit List** screen with an error message.

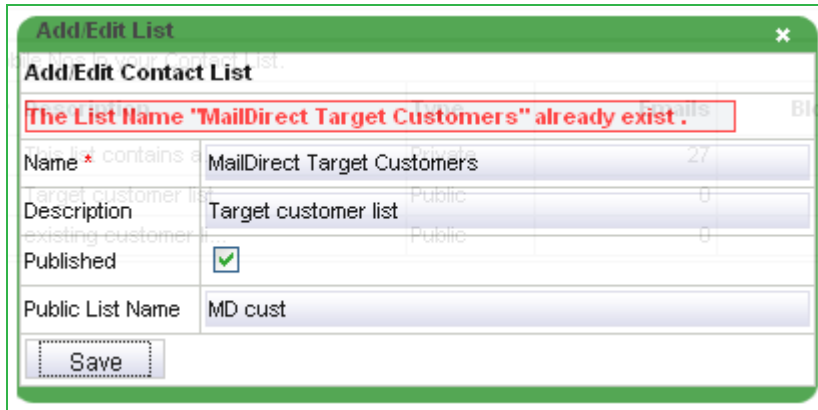


Figure 16: CONTACT LIST MANAGEMENT WITH ERROR MESSAGE

3.2.2 Searching for and Managing a Contact List



To search for and manage (Edit/Download/Delete) contact list

1. On the List Manager menu, click the List Home option. MailDirect displays the Contact List Management screen.

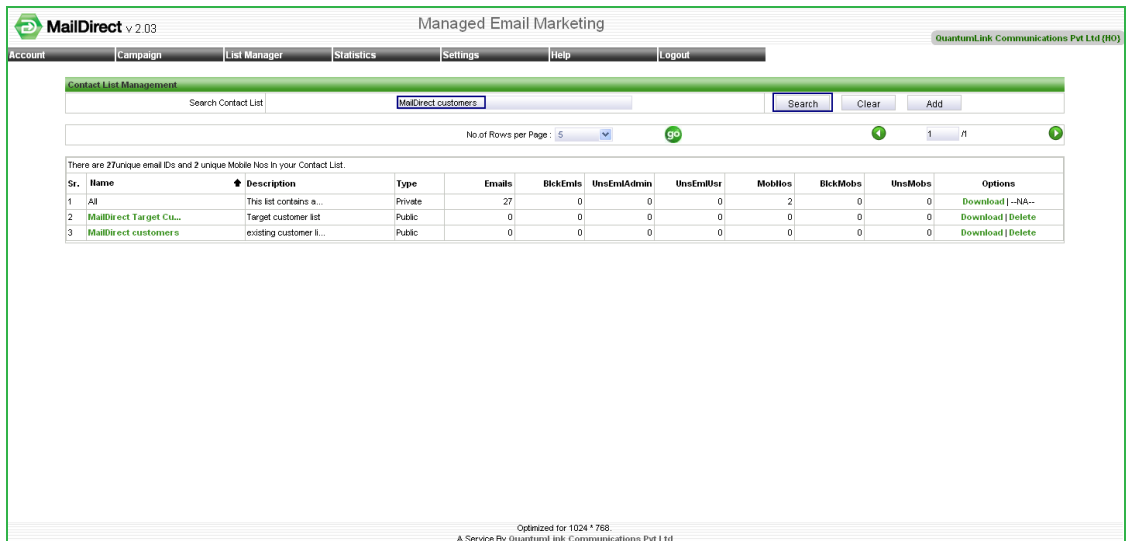


Figure 17: CONTACT LIST MANAGEMENT

Table 4: SEARCHING FOR A CONTACT LIST

Field	Description
Search Contact List	Type an appropriate keyword based on which a search will be conducted to match the keyword with the list name or description. This field is mandatory.

Enter the appropriate keyword in the required field.

- Click the **Search** button.

MailDirect displays the **Contact List Management** screen with the search results.

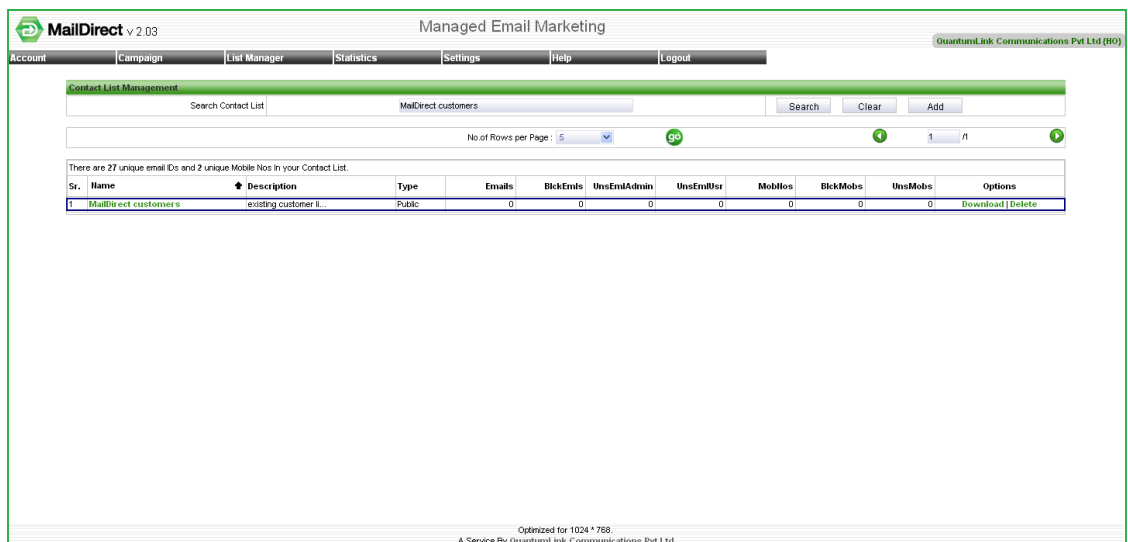


Figure 18: CONTACT LIST MANAGEMENT WITH THE SEARCH RESULTS

Note: If the keywords used do not match the name of the existing list/s or the description of the list/s, MailDirect displays the **Contact List Management** screen with an error message.

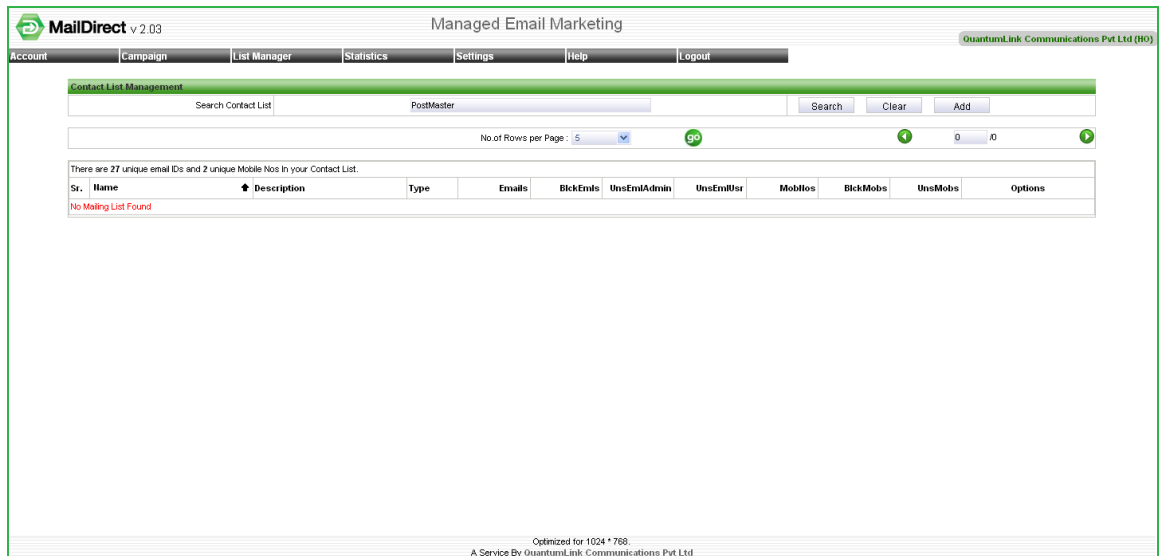


Figure 19: CONTACT LIST MANAGEMENT WITH ERROR MESSAGE

3. To manage a list:
Users are allowed to:
 - ◆ Modify a list
 - ◆ Download a list
 - ◆ Delete a list
- a. To modify a list:
 - i. Click the list name, which is a link, in the **Name** section.

MailDirect displays the ADD/EDIT List screen.

The screenshot shows a window titled "Add/Edit List" with a close button in the top right corner. Below the title bar is a sub-header "Add/Edit Contact List". The form contains several fields: "Name *" with the text "MailDirect customers", "Description" with the text "list of existing customers", "Published" with a checked checkbox, and "Public List Name" with the text "MD customers". A "Save" button is located at the bottom left of the form area.

Figure 20: ADD/EDIT LIST

Note: When multiple lists are displayed in the search results, click the name of the list to be edited.

Table 5: EDITING A CONTACT LIST

Field	Description
Name	Edit the name of the contact list as required. This field is not mandatory.
Description	Edit the description of the contact list as required. This field is not mandatory.
Published	Select/Clear the checkbox to enable/disable creation of a public name for the contact list. This field is not mandatory.
Public List Name	Type/Edit the public name for the list as required. This field is mandatory if the Published check box is enabled.

Enter the appropriate details in the required fields.

- ii. Click the **Save** button.

MailDirect displays the Contact List Management screen with the modified/revised list details.

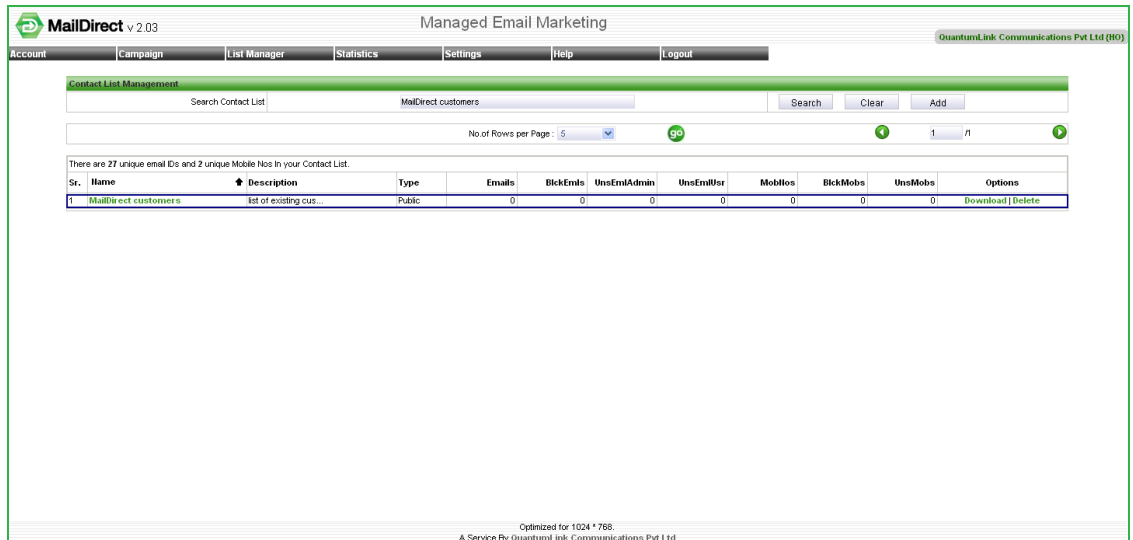


Figure 21: CONTACT LIST MANAGEMENT WITH THE MODIFIED LIST

- b. To download a list:
 - i. Click the **Download** link corresponding to the list to be downloaded. MailDirect displays the Opening List screen.

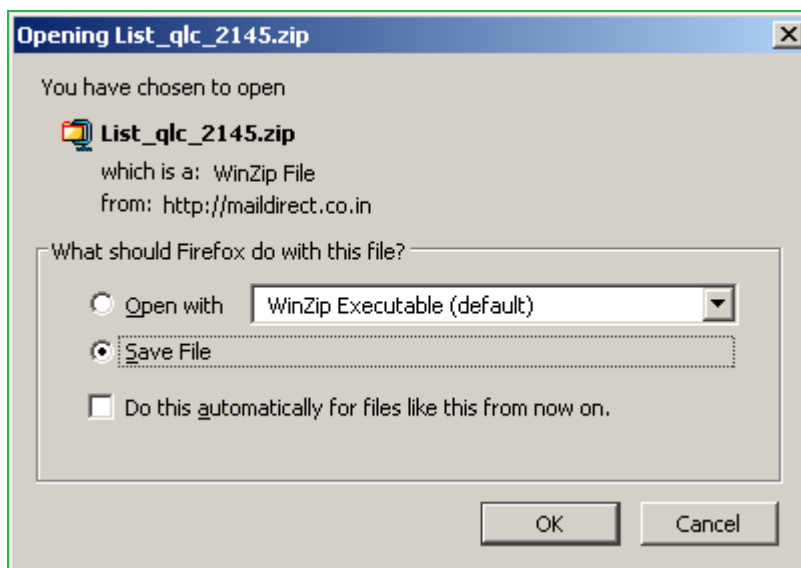


Figure 22: OPENING LIST

- ii. Select the **Save File** option and click the **OK** button to download the file.

Note: By default, the **Save File** option is selected. The user can also select the **Open with** option and select the suitable application using which the file can be viewed without saving it.

- c. To delete a list:
 - i. Click the **Delete** option corresponding to the list to be deleted. MailDirect displays the **Delete List** message.

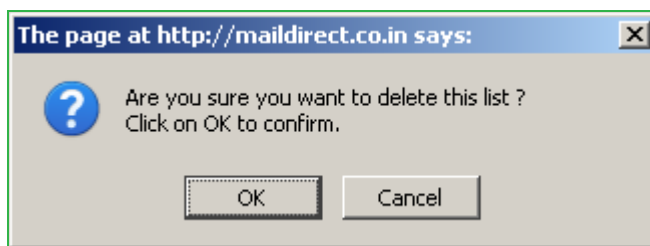


Figure 23: DELETE LIST MESSAGE

- ii. Click the **OK** button. The selected list is deleted.

3.3 Managing Recipients

This section provides instructions on how to use the quick recipient operation option to add or remove recipients to or from a list respectively, and to block, or unblock, or delete, or browse for existing recipients.

3.3.1 Quick Recipient Operation



To perform quick recipient operation

1. On the **List Manager** menu, click the **Quick Recipients** option.

MailDirect displays the List Management – Quick Recipient Operation screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HQ)

Account Campaign List Manager Statistics Settings Help Logout

List Management - Quick Recipient Operation

Important:

1. It could take some time, if you are uploading a CSV / ZIP file.
2. While the upload process is in progress, don't refresh or reload the screen or close the browser window till the "completed" message is shown.
3. For your information, the upload process take around 10 minutes for 100,000 recipient details.
4. You will have to estimate the time taken for the upload based on the above calculation. In future, the system will show the estimated time.

Action

Add / Subscribe Block
 UnSubscribe Unblock
 Delete

Advance Option

Update Records Based on Email Based on Mobile No

List

Add List

Selected	Name	Description	Email Ids	Mobile Nos
<input checked="" type="checkbox"/>	All	This list contains all recipients.	27	2

Data

Single Record Copy-& Paste Upload

Email ID Or Mobile No is Mandatory

Field Name	Data
Email	<input type="text"/>
MobileNo	<input type="text"/>
FirstName	<input type="text"/>
LastName	<input type="text"/>
Address	<input type="text"/>
DateofPurchase [YYYY-MM-DD]	<input type="text"/>

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Figure 24: LIST MANAGEMENT – QUICK RECIPIENT OPERATION

2. To perform quick recipient operations:

Users can:

- ◆ Add recipients to a list using the **Add/Subscribe** option
- ◆ Remove recipients from a list using the **Unsubscribe** option
- ◆ Block recipients using the **Block** option
- ◆ Unblock recipients using the **Unblock** option
- ◆ Delete recipients from the database using the **Delete** option
- a. To add/subscribe recipients to a list using the **Add/Subscribe** option:
 - i. In the **Action** section, select the **Add/Subscribe** option.

MailDirect displays the List Management – Quick Recipient Operation screen with the options for adding/subscribing recipients.

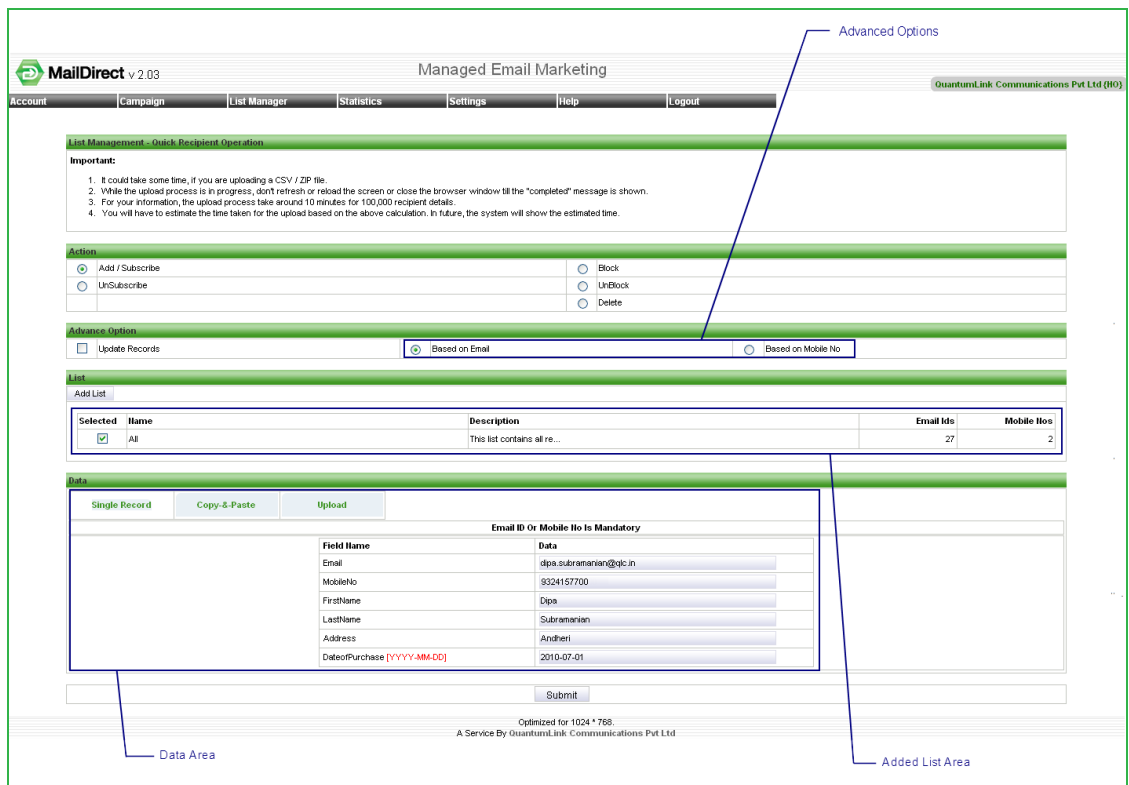


Figure 25: LIST MANAGEMENT – QUICK RECIPIENT OPERATION WITH THE OPTIONS FOR ADDING/SUBSCRIBING RECIPIENT/S

Table 6: ADDING/SUBSCRIBING RECIPIENT/S

Field	Description
Advance Option	
Update Records	Select/Clear this check box to enable/disable updating of records. <i>Note:</i> This check box should be selected if the corresponding recipient data is already present in the selected list/s.
Advanced Options	Select either Based on Email or Based on Mobile No according to which the recipient's data is to be added/subscribed to the selected list/s. <i>Note:</i> The recipient's data should contain the detail corresponding to the option selected in Advanced Options.

If recipients are added to the selected lists based on their email addresses, they will receive all the email campaigns addressed to the lists to which they have been added.
If recipients are added to the selected lists based on their mobile numbers, they will receive all the SMS campaigns addressed to the lists to which they have been added.

This field is mandatory.

List

Add List

Click this button to select the lists to which the selected recipients are to be added.

If this button is clicked, MailDirect displays the Select Lists screen.

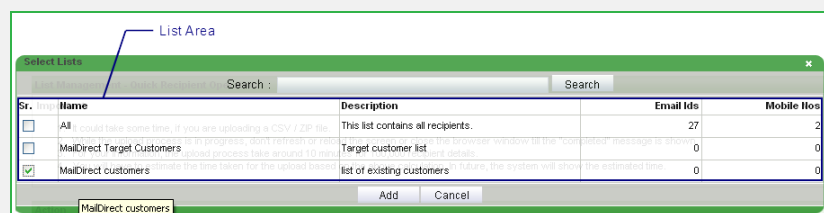


Figure 26: SELECT LISTS

The available options are explained below-

◆ Search:

Type an appropriate keyword for searching for the contact list from the lists in **List Area**. A search is conducted to match the keyword with the list name or description.

Click the **Search** button to search for the entered keywords. If a match is found, results will be displayed in **List Area**.

◆ List Area:

This area displays the lists available or lists matching the search keywords, with their details.

The available fields are explained below-

– Sr.:

Select this check box to select the corresponding list, to add recipients to this list.

– Name:

This field displays the name of the contact list.

– Description:

This field displays the description of the corresponding contact list.

– Email Ids:

This field displays the number of email addresses in the corresponding contact list.

– **Mobile Nos:**

This field displays the number of mobile numbers in the corresponding contact list.

Click the **Add** button to add the selected lists. The selected lists are displayed in the **Added List Area** of **List Management – Quick Recipient Operation** screen with the options for adding/subscribing recipients.

This field is not mandatory.

Added List Area

This area displays the selected lists with their details.

The available fields are explained below-

▪ **Selected:**

Select/Clear this check box to select/unselect the corresponding list to which the recipients are to be added.

Note: By default, the **All** contact list is selected and cannot be cleared.

▪ **Name:**

This field displays the name of the contact list.

▪ **Description:**

This field displays the description of the corresponding contact list.

▪ **Email Ids:**

This field displays the number of email addresses in the corresponding contact list.

▪ **Mobile Nos:**

This field displays the number of mobile numbers in the corresponding contact list.

Data

Data Area

This section provides the tabs and options according to the tab selected for entering the recipients' data, to add/subscribe recipients' to the selected list/s.

The available tabs are explained below-

▪ **Single Record:**

Click this tab to enter the data for a single recipient.

If this tab is selected, the options for the **Single Record** tab will be displayed in the **Data Area**.

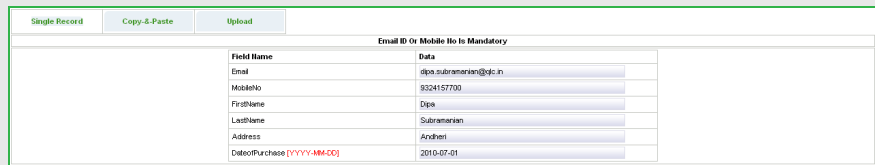


Figure 27: DATA AREA WITH THE OPTIONS FOR THE SINGLE RECORD TAB

Note: By default, the Single Record tab is selected.

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Data:**

Type the appropriate recipient data corresponding to the field name.

■ **Copy-&-Paste:**

Select this tab to paste/enter the recipients' data in the CSV format.

If this tab is selected, the options for the Copy-&-Paste tab will be displayed in the Data Area.

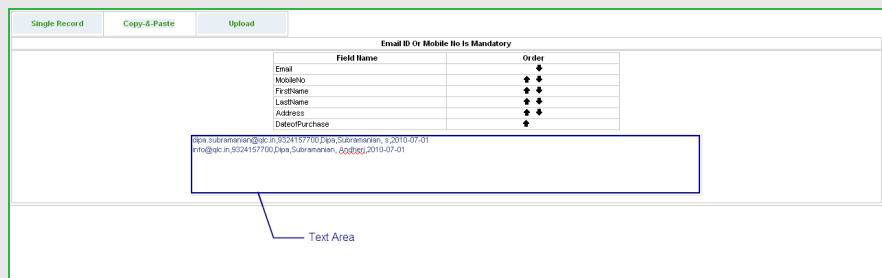


Figure 28: DATA AREA WITH THE OPTIONS FOR THE COPY-&-PASTE TAB

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field name up in the current order.

◆ **Text Area:**

Copy and paste or type the recipients' data in the CSV format according to the order for the corresponding field name.

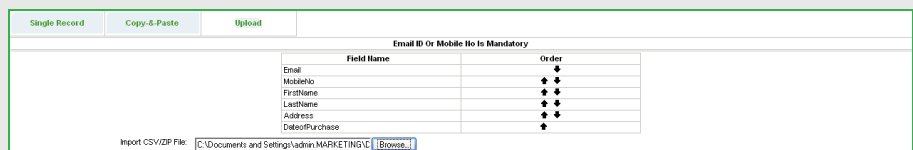
Note: Press the **Enter** key after filling in the last field of a recipient's data to enter data for the next recipient.

A comma should not follow the last field of a recipient's data if data is to be entered for more than one recipient.

■ **Upload:**

Select this tab to upload the CSV file with the recipients' data.

If this tab is selected, the options for the **Upload** tab will be displayed in the **Data Area**.



Email ID Or Mobile No is Mandatory	
Field Name	Order
Email	↕
MobileNo	↕
FirstName	↕
LastName	↕
Address	↕
DateofPurchase	↕

Import CSV/ZIP File: C:\Documents and Settings\admin\MARKETING\ [Browse...]

Figure 29: DATA AREA WITH THE OPTIONS FOR THE UPLOAD TAB

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field name up in the current order.

◆ **Browse:**

Enter the location of the file or click **Browse** to go to the location of the CSV file and attach an appropriate CSV file, or a ZIP file with the CSV file

inside.

Note: The order of the fields in the attached CSV file should be according to the order for the corresponding field name.

Select/Enter the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the **List Management>Records Added** screen.

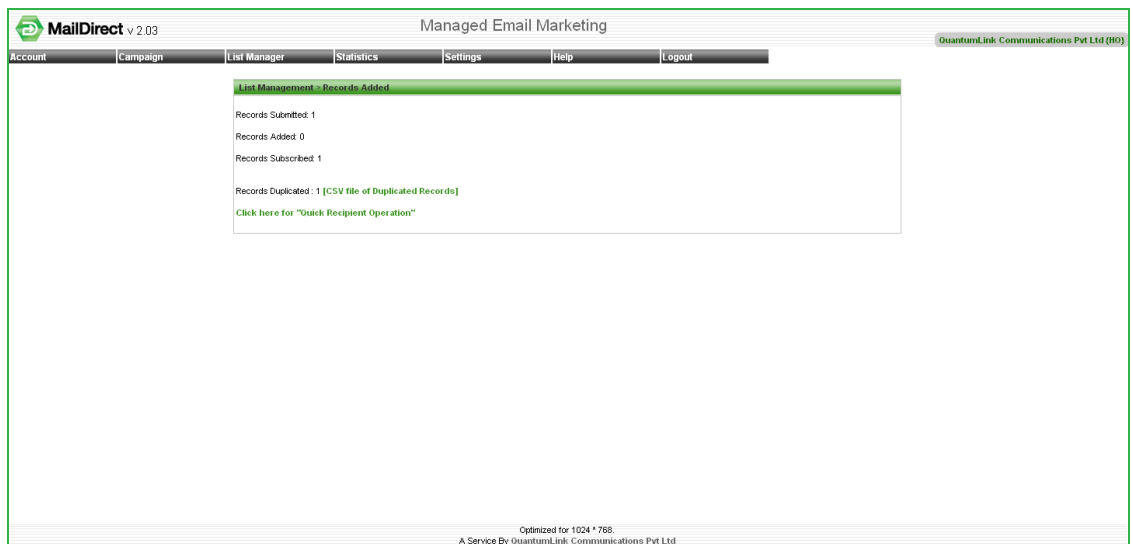


Figure 30: LIST MANAGEMENT>RECORDS ADDED

Table 7: RECORDS ADDED

Link	Description
[CSV file of Duplicated Records]	Click this link to view the records added/subscribed in the CSV format.
Click here for “Quick Recipient Operation”	Click this link to navigate to the List Management – Quick Recipient Operation screen.

b. To unsubscribe recipients from lists using the UnSubscribe option:

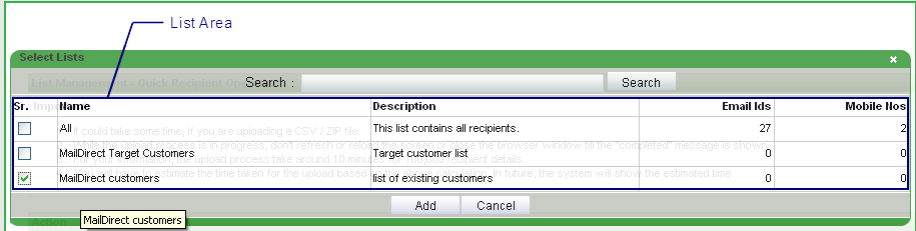
i. In the Action section, select the UnSubscribe option.

MailDirect displays the List Management – Quick Recipient Operation screen with the options for unsubscribing recipients.

The screenshot displays the MailDirect v 2.03 Managed Email Marketing interface. The main content area is titled "List Management - Quick Recipient Operation". It features an "Important" section with instructions, an "Action" section with radio buttons for "Add / Subscribe", "UnSubscribe", "Block", "UnBlock", and "Delete", and an "Advanced Option" section with radio buttons for "UnSubscribe Email ID Recipients" and "UnSubscribe Mobile No Recipients". Below this is a table listing existing lists, with "MailDirect customers" selected. A "Data" section shows a form for adding records with fields for Email, MobileNo, FirstName, LastName, Address, and DateofPurchase. A "Submit" button is at the bottom. Annotations include "Advanced Options" pointing to the radio buttons, "Data Area" pointing to the form fields, and "Added List Area" pointing to the list table.

Figure 31: LIST MANAGEMENT - QUICK RECIPIENT OPERATION WITH THE OPTIONS FOR UNSUBSCRIBING RECIPIENTS

Table 8: UNSUBSCRIBING RECIPIENTS

Field	Description
Advance Option	
Advanced Options	<p>Select either UnSubscribe Email ID Recipients or UnSubscribe Mobile No Recipients according to which the recipients are to be unsubscribed from the selected list/s.</p> <hr/> <p>Note: The recipients' data should contain the detail corresponding to the option selected in Advanced Options.</p> <hr/> <p>This field is mandatory.</p>
List	
Add List	<p>Click this button to select the lists from which the recipients are to be unsubscribed. If this button is clicked, MailDirect displays the Select Lists screen.</p>
	
	<p>Figure 32: SELECT LISTS</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ◆ Search: <p>Type an appropriate keyword for searching for a contact list from the available lists in List Area. A search is conducted to match the keyword with the list name or description.</p> <p>Click the Search button to search for the entered keywords. If the match is found, results will be displayed in List Area.</p> ◆ List Area: <p>This area displays the lists available or lists matching the search keywords, with their details.</p> <p>The available fields are explained below-</p> <ul style="list-style-type: none"> - Sr.: <p>Select this check box to select the corresponding list, to unsubscribe the recipients from this list.</p>

- **Name:**
This field displays the name of the contact list.
- **Description:**
This field displays the description of the corresponding contact list.
- **Email Ids:**
This field displays the number of email addresses in the corresponding contact list.
- **Mobile Nos:**
This field displays the number of mobile numbers in the corresponding contact list.

Click the **Add** button to add the selected lists. The selected lists are displayed in the **Added List Area** of **List Management – Quick Recipient Operation** screen with the options for unsubscribing recipient/s.

This field is not mandatory.

Added List Area

This area displays the selected lists with their details.

The available fields are explained below-

- **Selected:**
Select/Clear this check box to select/unselect the corresponding list to which recipients are to be added.
- **Name:**
This field displays the name of the contact list.
- **Description:**
This field displays the description of the corresponding contact list.
- **Email Ids:**
This field displays the number of email addresses in the corresponding contact list.
- **Mobile Nos:**
This field displays the number of mobile numbers in the corresponding contact list.

Data

Data Area

This section provides the tabs and options according to the tab selected, for entering the recipient/s data, to unsubscribe the recipients from the selected lists.

The available tabs are explained below-

- **Single Record:**
Click this tab to enter the data for a single recipient.

If this tab is selected, the options for the **Single Record** tab will be displayed in

the Data Area.

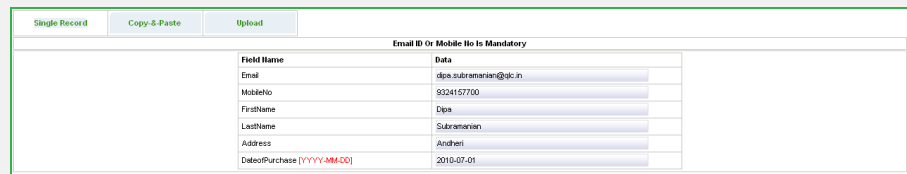


Figure 33: DATA AREA WITH THE OPTIONS FOR THE SINGLE RECORD TAB

Note: By default, the Single Record tab is selected.

The available options are explained below-

- ◆ **Field Name:**
This field displays the personalization field names.
- ◆ **Data:**
Type the appropriate recipient data corresponding to the field name.
- **Copy-&-Paste:**
Select this tab to paste/enter the recipients' details in the CSV format.
If this tab is selected, the options for the Copy-&-Paste tab will be displayed in the Data Area.

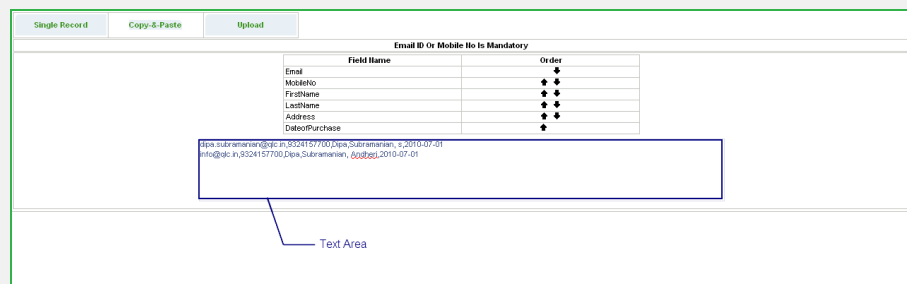


Figure 34: DATA AREA WITH THE OPTIONS FOR THE COPY-&-PASTE TAB

The available options are explained below-

- ◆ **Field Name:**
This field displays the personalization field names.
- ◆ **Order:**
Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field name up in the current order.

◆ **Text Area:**

Copy and paste or type the recipients' data in the CSV format according to the order for the corresponding field name.

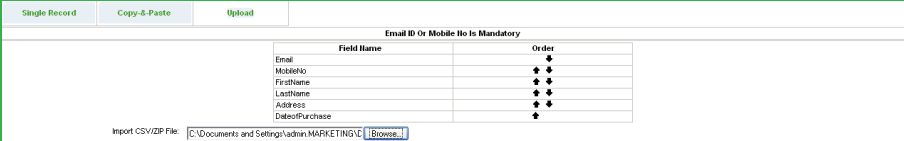
Note: Press **Enter** key after filling in the last field of recipient data to enter data for the next recipient.

The last field of the recipient data should not be followed by a comma, if data is to be entered for more than one recipient.

■ **Upload:**

Select this tab to upload the CSV file with the recipients' data.

If this tab is selected, the options for the **Upload** tab will be displayed in the **Data Area**.



Email ID Or Mobile No Is Mandatory	
Field Name	Order
Email	↓
MobileNo	↑ ↓
FirstName	↑ ↓
LastName	↑ ↓
Address	↑ ↓
DateofPurchase	↓

Import CSV/ZIP File: C:\Documents and Settings\Admin\My Recent Documents\Marketing\ Import CSV/ZIP File: [Browse...]

Figure 35: DATA AREA WITH THE OPTIONS FOR THE UPLOAD

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field up in the current order.

◆ **Browse:**

Enter the location of the file or click **Browse** to go to the location of the CSV file and attach an appropriate CSV file, or a ZIP file with the CSV inside.

Note: The order of the fields in the attached CSV file should be according to the order for the corresponding field name.

Select/Enter the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the **List Management>Records Unsubscribed** screen.

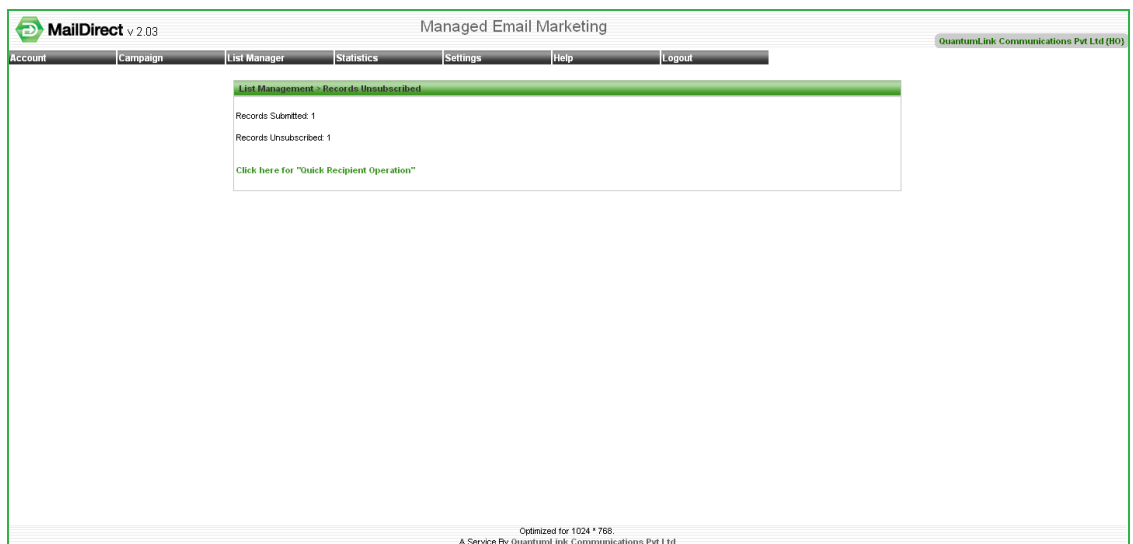


Figure 36: LIST MANAGEMENT>RECORDS UNSUBSCRIBED

Table 9: RECORDS UNSUBSCRIBED

Link	Description
Click here for “Quick Recipient Operation”	Click this link to navigate to the List Management – Quick Recipient Operation screen.

- c. To block recipients from lists using the Block option:
 - i. In the Action section, select the Block option.

MailDirect displays the List Management – Quick Recipient Operation screen with the options for blocking recipients.

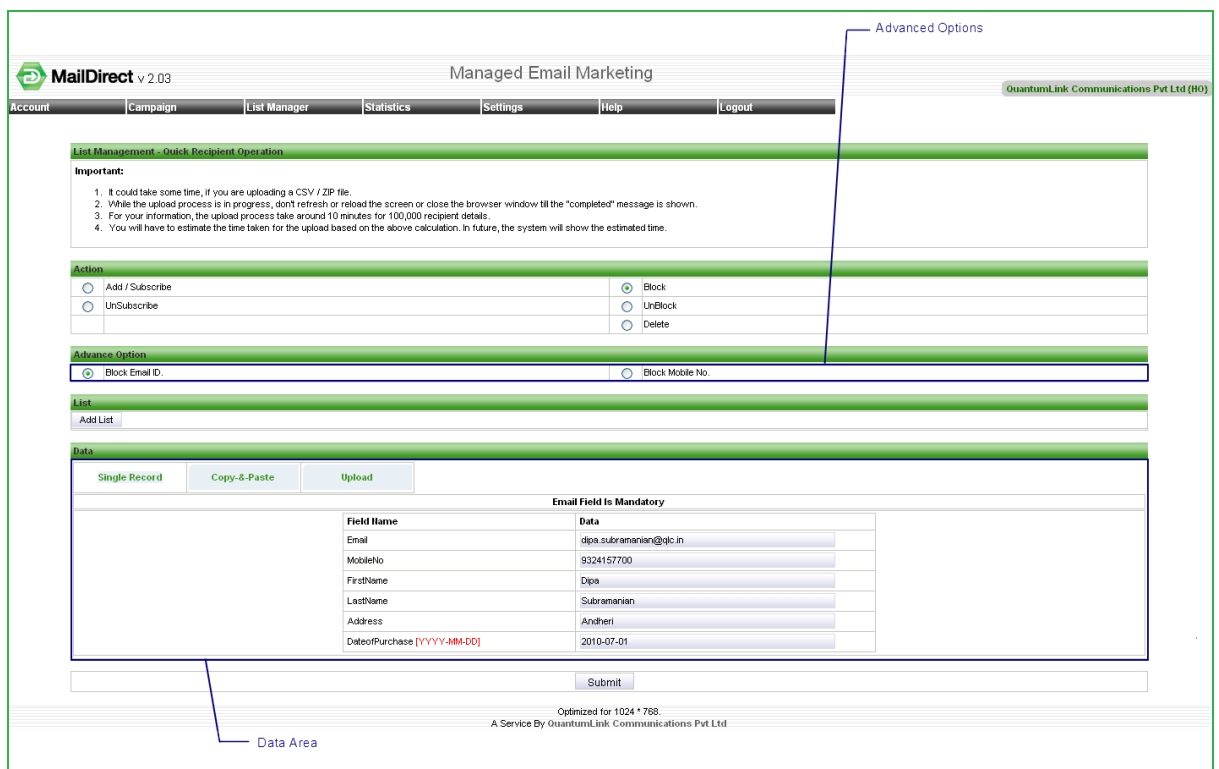
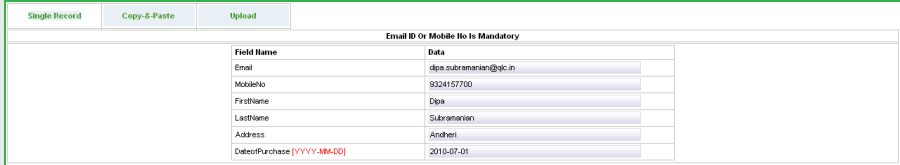


Figure 37: LIST MANAGEMENT - QUICK RECIPIENT OPERATION WITH THE OPTIONS FOR BLOCKING RECIPIENT/S

Table 10: BLOCKING RECIPIENT/S

Field	Description
Advance Option	
Advanced Options	<p>Select either Block Email ID or Block Mobile No according to which the recipients are to be blocked.</p> <hr/> <p>Note: The recipients' data should contain the detail corresponding to the option selected in Advanced Options.</p> <hr/> <p>This field is mandatory.</p>
List	
Add List	This button is disabled for the Block option.
Data	
Data Area	<p>This section provides the tabs and options according to the tab selected for blocking recipients.</p> <p>The available tabs are explained below-</p> <ul style="list-style-type: none"> ■ Single Record: <p>Click this tab to enter the data for a single recipient.</p> <p>If this tab is selected, the options for the Single Record tab will be displayed in the Data Area.</p>
	
<p>Figure 38: DATA AREA WITH THE OPTIONS FOR THE SINGLE RECORD TAB</p>	
<hr/> <p>Note: By default, the Single Record tab is selected.</p> <hr/>	
<p>The available options are explained below-</p> <ul style="list-style-type: none"> ◆ Field Name: <p>This field displays the personalization field names.</p> ◆ Data: <p>Type the appropriate recipient data corresponding to the field name.</p> 	

- **Copy-&Paste:**

Select this tab to paste/enter the recipients' details in the CSV format.

If this tab is selected, the options for the **Copy-&Paste** tab will be displayed in the **Data Area**.

Field Name	Order
Email	↓ ↑
MobileNo	↓ ↑
FirstName	↓ ↑
LastName	↓ ↑
Address	↓ ↑
DateOfPurchase	↓ ↑

ppa.subramanian@etc.in,9324157700,Deva,Subramanian, e,2010-07-01
 info@etc.in,9324157700,Deva,Subramanian, @06882,2010-07-01

Text Area

Figure 39: DATA AREA WITH THE OPTIONS FOR THE COPY-&-PASTE TAB

The available options are explained below-

- ◆ **Field Name:**

This field displays the personalization field names.

- ◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field name up in the current order.

- ◆ **Text Area:**

Copy and paste or type the recipients' data in the CSV format according to the order for the corresponding field name.

Note: Press **Enter** key after filling in the last field of recipient data to enter data for the next recipient.

The last field of the recipient data should not be followed by a comma, if data is to be entered for more than one recipient.

- **Upload:**

Select this tab to upload the CSV file with the recipients' data.

If this tab is selected, the options for the **Upload** tab will be displayed in the **Data Area**.

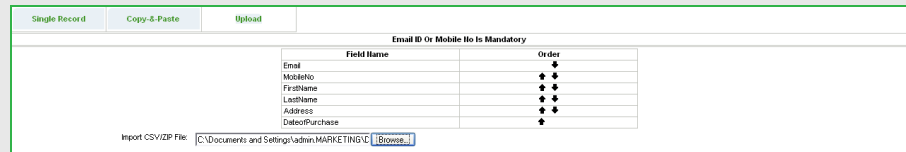


Figure 40: DATA AREA WITH THE OPTIONS FOR THE UPLOAD

The available options are explained below-

- ◆ **Field Name:**
This field displays the personalization field names.
- ◆ **Order:**
Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field up in the current order.

- ◆ **Browse:**
Enter the location of the file or click **Browse** to go to the location of the CSV file and attach an appropriate CSV file, or a ZIP file with the CSV inside.

Note: The order of the fields in the attached CSV file should be according to the order for the corresponding field name.

Select/Enter the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the List Management>Records Blocked screen.



Figure 41: LIST MANAGEMENT>RECORDS BLOCKED

Table 11: RECORDS BLOCKED

Link	Description
Click here for “Quick Recipient Operation”	Click this link to navigate to the List Management – Quick Recipient Operation screen.

- d. To block recipients from lists using the **UnBlock** option:
 - i. In the **Action** section, select the **UnBlock** option.

MailDirect displays the List Management – Quick Recipient Operation screen with the options for unblocking recipients.

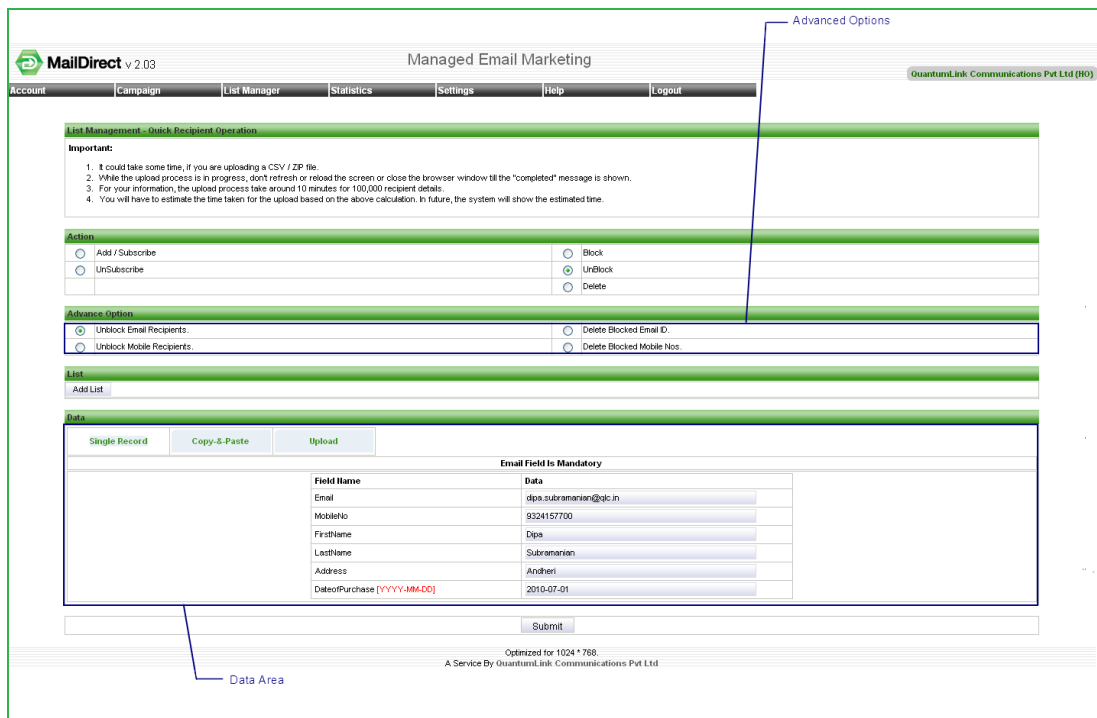


Figure 42: LIST MANAGEMENT - QUICK RECIPIENT OPERATION WITH THE OPTIONS FOR UNBLOCKING RECIPIENTS

Table 12: UNBLOCKING RECIPIENTS

Field	Description
Advance Option	
Advanced Options	Select either UnBlock Email Recipients, or UnBlock Mobile Recipients, or Delete Blocked Email ID or Delete Blocked Mobile Nos according to which the blocked recipients are to be unblocked or deleted.
<p>Note: The recipients' data should contain the detail corresponding to the option selected in Advanced Options.</p>	
<p>This field is mandatory.</p>	
List	
Add List	This button is disabled for the UnBlocking option.
Data	

Data Area This section provides the tabs and options according to the tab selected for entering the recipients' data, to unblock or delete the blocked recipients.

The available tabs are explained below-

- **Single Record:**

Click this tab to enter the data for a single recipient.

If this tab is selected, the options for the **Single Record** tab will be displayed in the **Data Area**.

Field Name	Data
Email	sps.subramanian@qc.in
MobileNo	9324157700
FirstName	Dipa
LastName	Subramanian
Address	Andheri
DateofPurchase (YYYY-MM-DD)	2016-07-01

Figure 43: DATA AREA WITH THE OPTIONS FOR THE SINGLE RECORD TAB

Note: By default, the **Single Record** tab is selected.

The available options are explained below-

- ◆ **Field Name:**

This field displays the personalization field names.

- ◆ **Data:**

Type the appropriate recipient data corresponding to the field name.

- **Copy-&Paste:**

Select this tab to paste/enter the recipients' details in the CSV format.

If this tab is selected, the options for the **Copy-&Paste** tab will be displayed in

the Data Area.

Field Name	Order
Email	↓
MobileNo	↕
FirstName	↕
LastName	↕
Address	↕
DateofPurchase	↑

sps.subramanian@yc.in,9324157700,Sps,Subramanian, s_2010-07-01
mra@yc.in,9324157700,Sps,Subramanian, s_2008-07-01

Text Area

Figure 44: DATA AREA WITH THE OPTIONS FOR THE COPY-&-PASTE TAB

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field name up in the current order.

◆ **Text Area:**

Copy and paste or type the recipients' data in the CSV format according to the order for the corresponding field name.

Note: Press **Enter** key after filling in the last field of recipient data to enter data for the next recipient.

The last field of the recipient data should not be followed by a comma, if data is to be entered for more than one recipient.

■ **Upload:**

Select this tab to upload the CSV file with the recipients' data.

If this tab is selected, the options for the **Upload** tab will be displayed in the **Data Area**.

Email ID Or Mobile No Is Mandatory	
Field Name	Order
Email	↓
MobileNo	↕
FirstName	↕
LastName	↕
Address	↕
DateofPurchase	↑

Import CSV/ZIP File: C:\Documents and Settings\Admin\ADMIN\MARKETING\G [Browse...]

Figure 45: DATA AREA WITH OPTIONS FOR UPLOAD

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field up in the current order.

◆ **Browse:**

Enter the location of the file or click **Browse** to go to the location of the CSV file and attach an appropriate CSV file, or a ZIP file with the CSV inside.

Note: The order of the fields in the attached CSV file should be according to the order for the corresponding field name.

Select/Enter the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the List Management>Records Unblocked/Deleted screen.

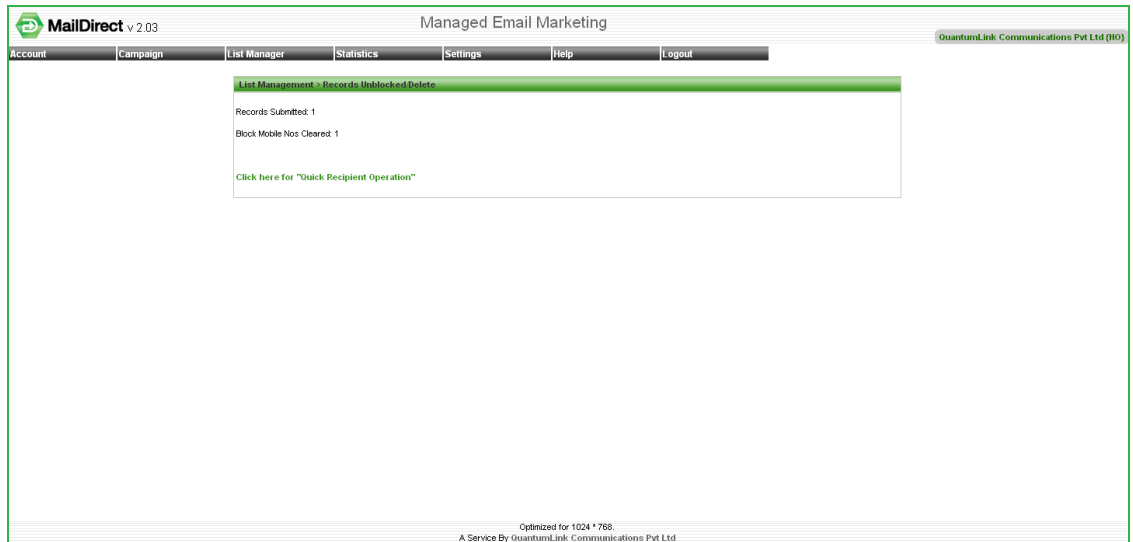


Figure 46: LIST MANAGEMENT>RECORDS UNBLOCKED/DELETED

Table 13: RECORDS UNBLOCKED/DELETED

Link	Description
Click here for “Quick Recipient Operation”	Click this link to navigate to the List Management – Quick Recipient Operation screen.

- e. To delete recipients from lists using the Delete option:
 - i. In the Action section, select the Delete option.

MailDirect displays the List Management – Quick Recipient Operation screen with the options for deleting recipients.

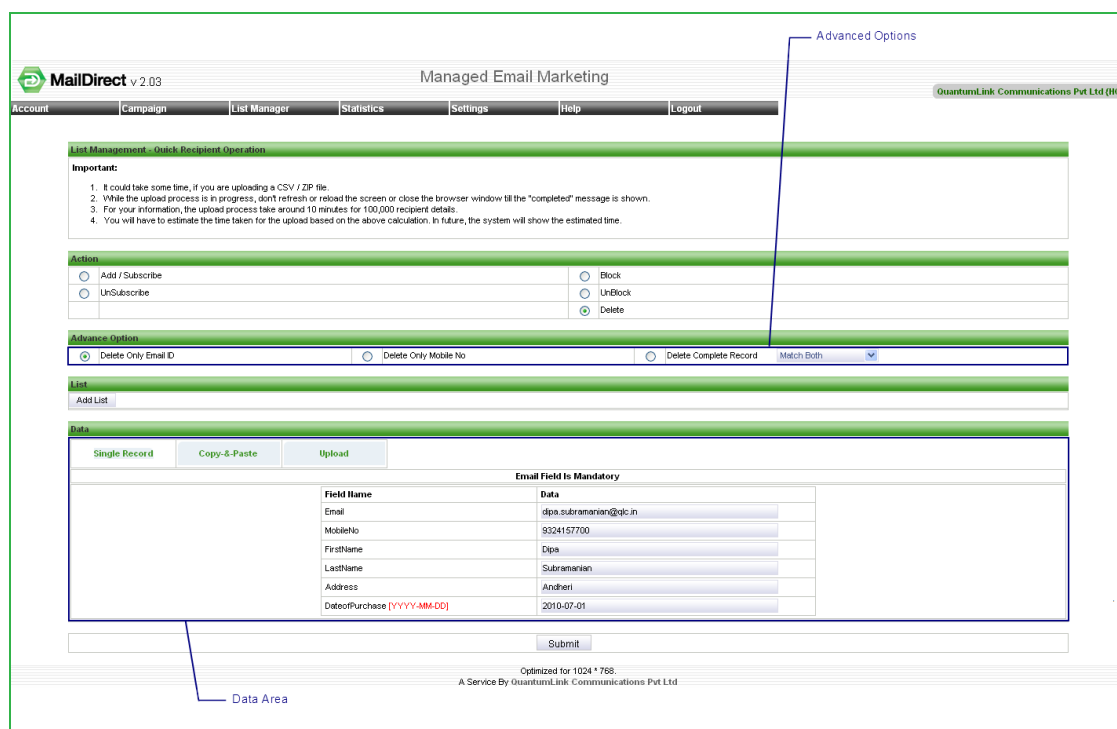


Figure 47: LIST MANAGEMENT - QUICK RECIPIENT OPERATION WITH THE OPTIONS FOR DELETING RECIPIENTS

Table 14: DELETING RECIPIENTS

Field	Description
Advance Option	
Advanced Options	<p>Select either Delete Only Email ID, or Delete Only Mobile No or Delete Complete Record according to which recipients are to be deleted.</p> <p>If the Delete Complete Record option is selected, a drop-down list is available. Select an appropriate option from the drop-down list according to which the complete record will be deleted.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ◆ Match Both: <p>Select this option to delete recipients whose email address and mobile number match the corresponding detail in the recipients' data in the Data Area.</p> ◆ Match Any: <p>Select this option to delete recipients whose email address or mobile number, matches the corresponding detail in the recipients' data in the Data</p>

Area.

◆ Match Only Email:

Select this option to delete recipients whose email address matches the corresponding detail in the recipients' data in the **Data Area**.

◆ Match Only Mobile No:

Select this option to delete recipients whose mobile number matches the corresponding detail in the recipients' data in the **Data Area**.

Note: The recipients' data should contain the detail corresponding to the option selected in **Advanced Options**.

This field is mandatory.

List

Add List This button is disabled for the **Delete** option.

Data

Data Area This section provides the tabs and options according to the tab selected for entering the recipients' data, to delete recipients.

The available tabs are explained below-

■ **Single Record:**

Click this tab to enter the data for a single recipient.

If this tab is selected, the options for the **Single Record** tab will be displayed in the **Data Area**.

Email ID Or Mobile No Is Mandatory	
Field Name	Data
Email	dps.subramanian@ac.in
MobileNo	9324157700
FirstName	Dipsa
LastName	Subramanian
Address	Andheri
DateOfPurchase [YYYY-MM-DD]	2010-07-01

Figure 48: DATA AREA WITH THE OPTIONS FOR THE SINGLE RECORD TAB

Note: By default, the **Single Record** tab is selected.

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Data:**

Type the appropriate recipient data corresponding to the field name.

- **Copy-&Paste:**

Select this tab to paste/enter the recipients' details in the CSV format.

If this tab is selected, the options for the **Copy-&Paste** tab will be displayed in the **Data Area**.

Email ID Or Mobile No Is Mandatory	
Field Name	Order
Email	↓
MobileNo	↕
FirstName	↕
LastName	↕
Address	↕
DateofPurchase	↑

spa.subramanian@ec.in.9524157700,spa.subramanian_s,2010-07-01
 info@ec.in.9524157700,Paas.Subramanian_008888,2010-07-01

Text Area

Figure 49: DATA AREA WITH THE OPTIONS FOR THE COPY-&-PASTE TAB

The available options are explained below-

- ◆ **Field Name:**

This field displays the personalization field names.

- ◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field name up in the current order.

- ◆ **Text Area:**

Copy and paste or type the recipients' data in the CSV format according to the order for the corresponding field name.

Note: Press the **Enter** key after filling in the last field of recipient data to enter data for the next recipient.

A comma should not follow the last field of the recipient data, if data is to be entered for more than one recipient.

- **Upload:**

Select this tab to upload the CSV file with the recipients' data.

If this tab is selected, the options for the **Upload** tab will be displayed in the **Data Area**.

Email ID Or Mobile No Is Mandatory	
Field Name	Order
Email	↓
MobileNo	↕
FirstName	↕
LastName	↕
Address	↕
DateofPurchase	↑

Import CSV/ZIP File: C:\Documents and Settings\Admin\ADMIN\MARKETING\G [Browse...]

Figure 50: DATA AREA WITH THE OPTIONS FOR THE UPLOAD

The available options are explained below-

◆ **Field Name:**

This field displays the personalization field names.

◆ **Order:**

Select the appropriate icon to change the order of field names.

The available icons are explained below-



Click this icon to move the corresponding field name down in the current order.



Click this icon to move the corresponding field up in the current order.

◆ **Browse:**

Enter the location of the file or click **Browse** to go to the location of the CSV file and attach an appropriate CSV file, or a ZIP file with the CSV inside.

Note: The order of the fields in the attached CSV file should be according to the order for the corresponding field name.

Select/Enter the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays a message.

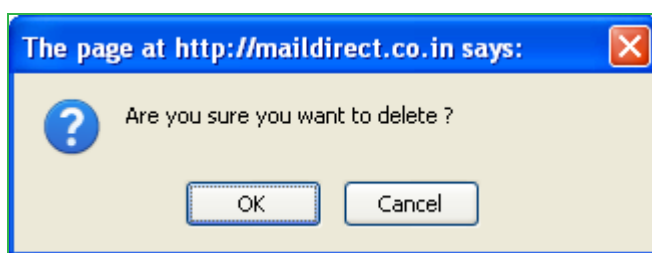


Figure 51: DELETE RECIPIENT/S

- iii. Click the OK button.

MailDirect displays the List Management>Records Deleted screen.

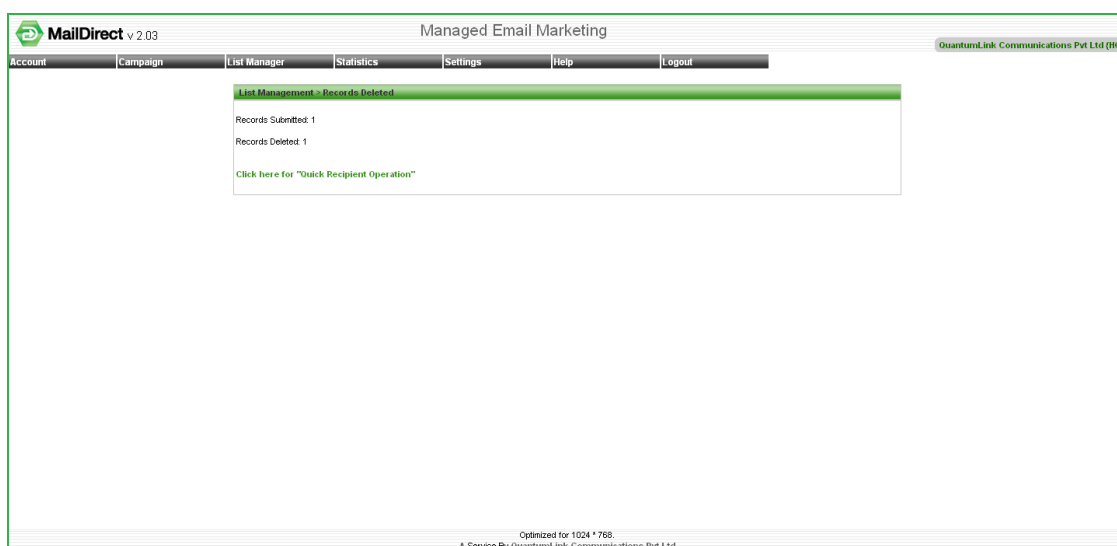


Figure 52: LIST MANAGEMENT>RECORDS DELETED

Table 15: RECORDS DELETED

Link	Description
Click here for “Quick Recipient Operation”	Click this link to navigate to the List Management – Quick Recipient Operation screen.

3.3.2 Blocked Recipient Management



To manage blocked recipients

1. On the List Manager menu, click Blocked Recipient Management. MailDirect displays the List Management>Blocked Recipient Management screen.

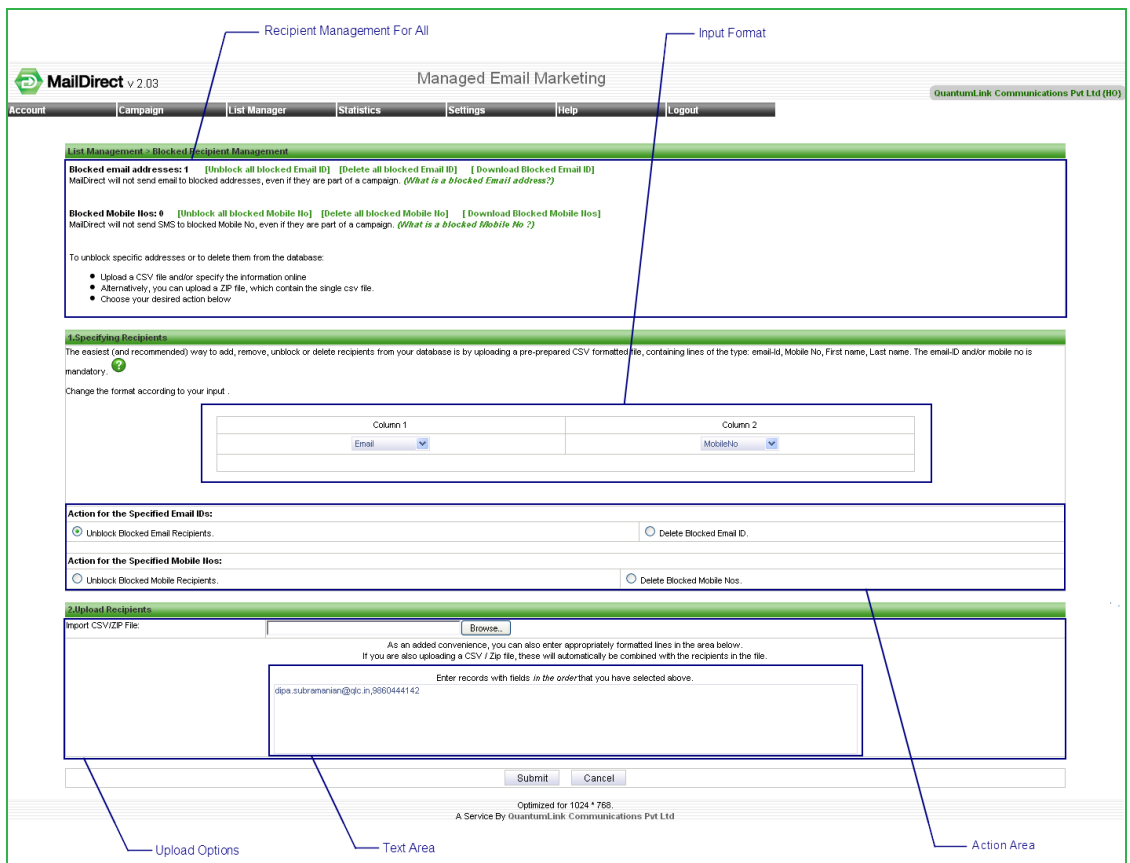


Figure 53: LIST MANAGEMENT>BLOCKED RECIPIENT MANAGEMENT

Table 16: BLOCKED RECIPIENT MANAGEMENT

Field/Link	Description
------------	-------------

Recipient Management For All	<p>This section provides links to manage all blocked recipients as explained below.</p> <ul style="list-style-type: none"> ■ Blocked email addresses: <p>This section provides the links for managing blocked email addresses. The available links in this section are explained below-</p> <ul style="list-style-type: none"> ◆ [Unblock all blocked Email ID]: <p>Click this link to unblock all the blocked email addresses.</p> <p>If this link is clicked, MailDirect displays the Blocked Recipients Management screen with all the blocked emails cleared.</p>
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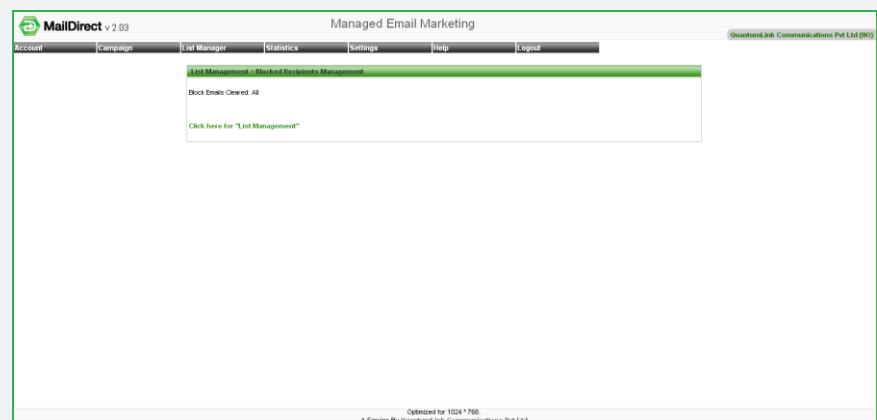


Figure 54: LIST MANAGEMENT>BLOCKED RECIPIENT MANAGEMENT WITH ALL THE BLOCKED EMAILS CLEARED

The available link is explained below-

- Click here for “List Management”:

Click this link to perform list management.

MailDirect displays the **Contact List Management** screen, as shown in the [Figure 14](#).

Instructions for list management are given in section [3.2](#).

- ◆ [Delete all blocked Email ID]:

Click this link to delete all the blocked email addresses.

If this link is clicked, MailDirect displays the **Blocked Recipients**

Management screen with all the blocked emails deleted.

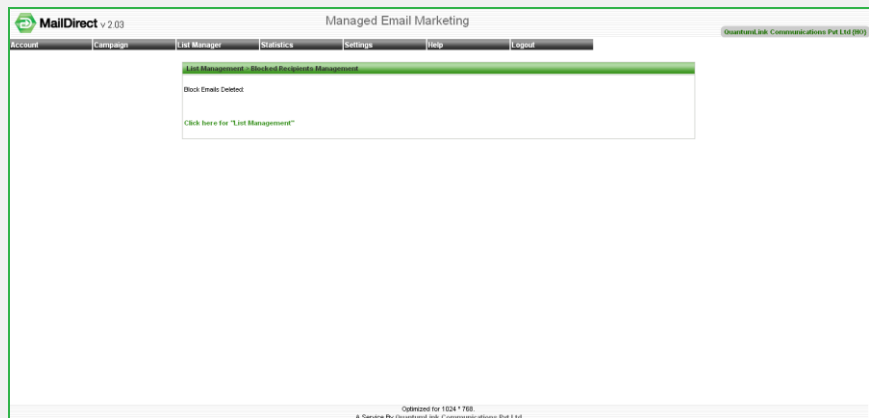


Figure 55: LIST MANAGEMENT>BLOCKED RECIPIENT MANAGEMENT WITH ALL THE BLOCKED EMAILS DELETED

The available link is explained below-

- Click here for “List Management”:

Click this link to perform list management.

MailDirect displays the **Contact List Management** screen, as shown in the [Figure 14](#).

Instructions for list management are given in section [3.2](#).

- ◆ [Download Blocked Email ID]:

Click this link to download the blocked email addresses.

If the link is clicked, MailDirect displays the **Opening Blocked Recipients** screen.

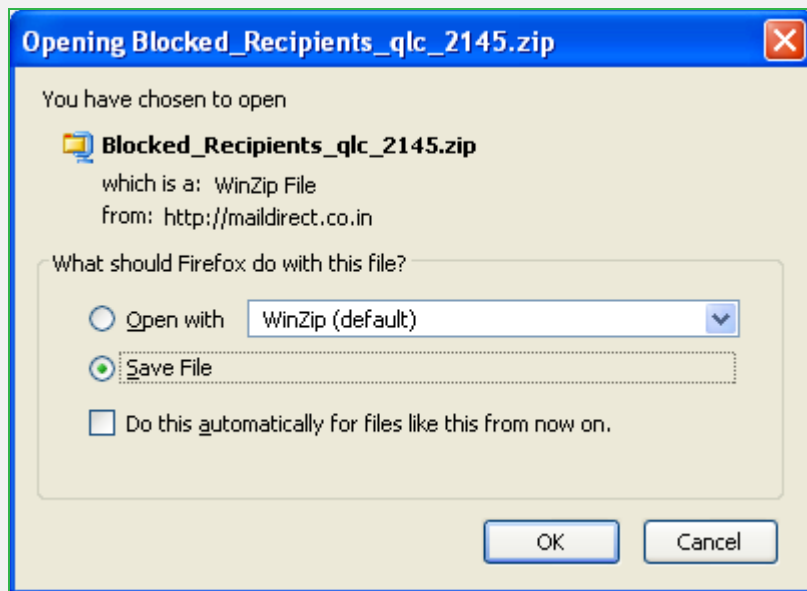


Figure 56: OPENING BLOCKED RECIPIENTS

Select the **Save File** option and click the **OK** button to download the file.

Note: The user can also select the **Open with** option and select the suitable application using which the file can be viewed without saving it.

◆ (What is a blocked Email address?):

Click this link to view brief information about blocked email addresses.

If this link is clicked, MailDirect displays the Blocked Email Addresses screen.

What is a blocked email address?

A blocked email address is part of your recipient database (and lists) to which no mail will be sent.

You can "unblock" recipients, which means that they will be included in the mail campaigns once again. On the other hand, if you are sure that the blocked addresses is "bad" (*user no longer exists, has changed his/her ID, etc.*), you can delete them from your database.

Why and when do email addresses get blocked?

Bulkmail services are a different ball game than regular email services. They cause huge amounts of data to flow across the Net, with a minimum of human intervention. In such a scenario, "bad" email addresses can unnecessarily increase traffic and strain other mailservers. This implies that a bulkmail server needs to behave differently from a regular email server.

In an attempt to be a good netizen and in an attempt to ensure the best possible service to you and our other clients, MailCampaign automatically blocks email-IDs of messages that may have bounced during a campaign.

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Figure 57: BLOCKED EMAIL ADDRESSES

- Blocked Mobile Nos:

This section provides the links for managing the blocked mobile numbers.

The available links in this section are explained below-

- ◆ [Unblock all blocked Mobile No]:

Click this link to unblock all the blocked mobile numbers.

If this link is clicked, MailDirect displays the Blocked Recipients Management screen with all the blocked mobile numbers cleared.

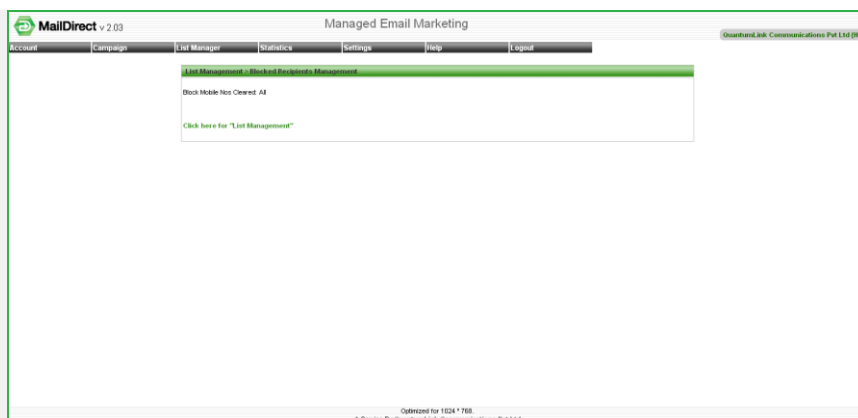


Figure 58: LIST MANAGEMENT>BLOCKED RECIPIENT MANAGEMENT WITH ALL THE BLOCKED MOBILE NUMBERS CLEARED

The available link is explained below-

- Click here for “List Management”:

Click this link to perform list management.

MailDirect displays the Contact List Management screen, as shown in [Figure 14](#).

Instructions for list management are given in section [3.2](#).

- ◆ [Delete all blocked Mobile No]:

Click this link to delete all the blocked email addresses.

If this link is clicked, MailDirect displays the Blocked Recipients Management screen with all the blocked mobile numbers deleted.

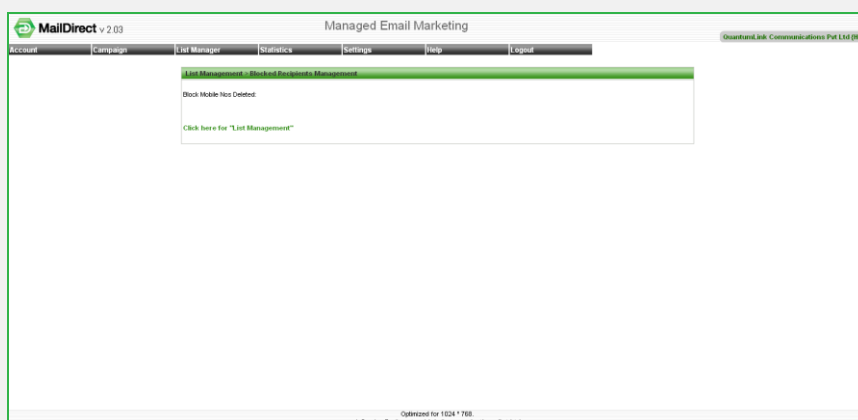


Figure 59: LIST MANAGEMENT>BLOCKED RECIPIENT MANAGEMENT WITH ALL THE BLOCKED MOBILE NUMBERS DELETED

The available link is explained below-

- Click here for “List Management”:

Click this link to perform list management.

MailDirect displays the Contact List Management screen, as

shown in [Figure 14](#).

Instructions for list management are given in section [3.2](#).

◆ [Download Blocked Mobile Nos]:

Click this link to download the blocked mobile numbers.

If the link is clicked, MailDirect displays the Opening Blocked Recipients screen.

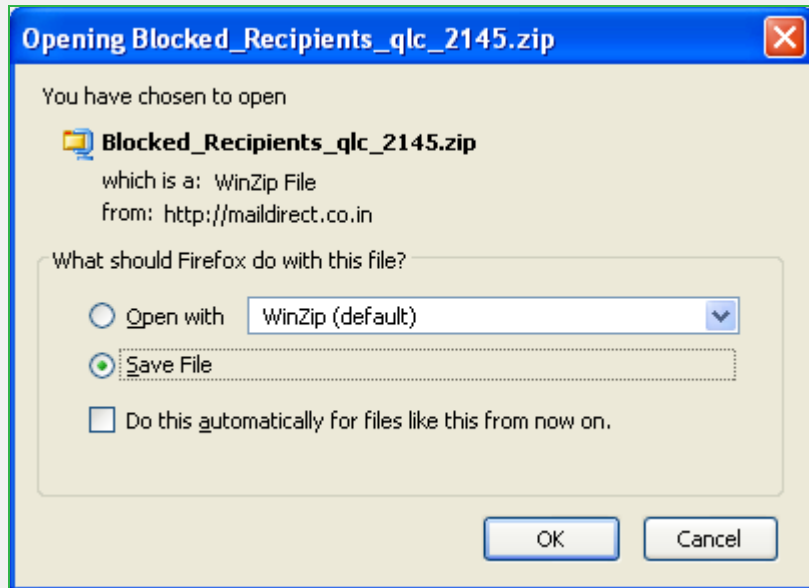


Figure 60: OPENING BLOCKED RECIPIENTS

Select the **Save File** option and click the **OK** button to download the file.

Note: The user can also select the **Open with** option and select the suitable application using which the file can be viewed without saving it.

◆ (What is a blocked Mobile No?):

Click this link to view brief information about blocked numbers.

1. Specifying Recipients

Input Format This section provides the options to define the order to enter the details of blocked recipients to either unblock or delete their email addresses/mobile numbers. The details will be entered in the **Text Area** or in the CSV file.

The available options are explained below-

- **Column 1:**
Select either **Email** or **MobileNo** from the drop-down list to set the corresponding field as first in the order.
- **Column 2:**

Select either **Email** or **MobileNo** from the drop-down list to set the corresponding field as second in the order.

Note: The fields defined in the **Column 1** and **Column 2** drop-down lists should not be the same.

Action Area This section provides the options to define the action for blocked recipients. The available options are explained below-

- **Action for the Specified Email IDs:**
Select either the **Unblock Blocked Email Recipients** option or the **Delete Blocked Email ID** option to unblock or delete the email addresses of the corresponding blocked recipients.
- **Action for the Specified Mobile Nos:**
Select either the **Unblock Blocked Mobile Recipients** option or the **Delete Blocked Mobile Nos** option to unblock or delete the mobile numbers of the corresponding blocked recipients.

2.Upload Recipients

Upload Options This section provides the options to upload the details of the blocked recipients. The available options are explained below-

- **Import CSV/ZIP File:**
Enter the location of the file or click **Browse** to go to the location of the CSV/ZIP (of the CSV file) file and attach an appropriate file.
- **Text Area:**
Type the appropriate details of the recipients in the CSV format according to the order defined in the **Input Format**.

Select/Enter the appropriate details in the required fields.

2. Click the **Submit** button.

MailDirect displays the List Management>Blocked Recipients Management screen.

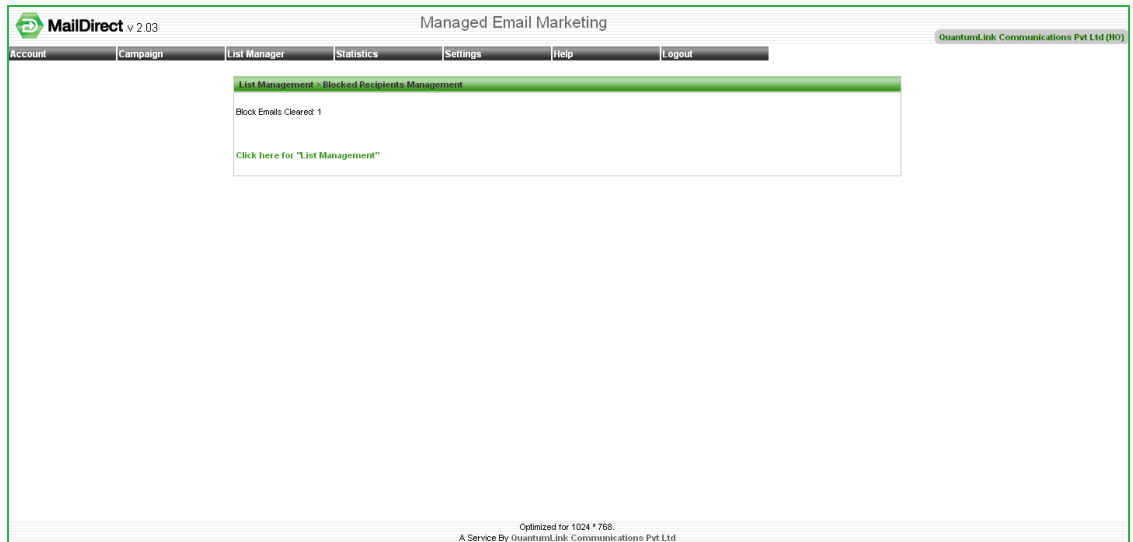


Figure 61: LIST MANAGEMENT>BLOCKED RECIPIENTS MANAGEMENT

Table 17: LIST MANAGEMENT>BLOCKED RECIPIENTS MANAEGMENT

Link	Description
Click here for “List Management”	Click this link to perform list management to navigate to the Contact List Management screen.

3.3.3 Browsing for and Managing Recipients

 **To browse for and manage recipients**

1. On the List Manager menu, click the Browse Recipients option.

MailDirect displays the List Management>Browse Recipient screen.

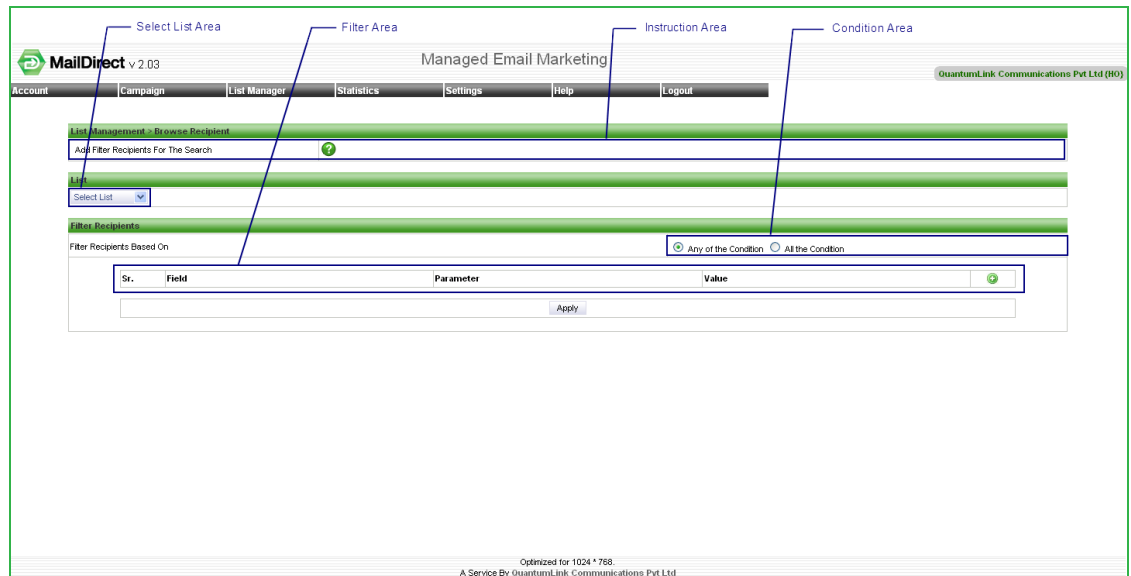



Figure 62: LIST MANAGEMENT>BROWSE RECIPIENT

Table 18: LIST MANAGEMENT>BROWSE RECIPIENT

Field	Description
Browse Recipient	
Instruction Area	<p>This section has an icon that displays instructions about browsing the recipients. The available icon is explained below-</p> <ul style="list-style-type: none">  : Point to this icon to view instructions for browsing for recipients.
List	
Select List Area	Select an appropriate list from which recipients are to be filtered, from the drop-down list.
Filter Recipients	
Condition Area	Select either the Any of the Condition option or the All the Condition option to filter the recipients that match any or all conditions in the Filter Area , if there is more than one condition in the Filter Area .
Filter Area	<p>This section has icons that allow the user to add or remove a filter condition.</p> <p>The available options are explained below-</p>



Click this icon to add a filter condition.

If this icon is clicked, a filter condition is added in the **Filter Area**.

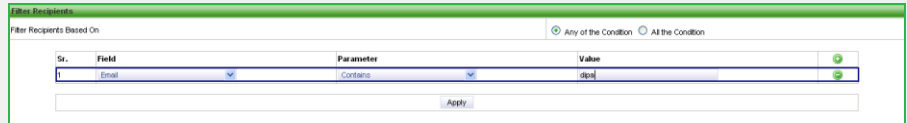


Figure 63: FILTER CONDITION

The available options are explained below-

◆ **Sr.:**

This field displays the serial number of the filter condition.

◆ **Field:**

Select an appropriate option, which is a field in which the filter keyword is to be searched for, from the drop-down list.

Note: The options available in the drop-down list are according to the personalization fields defined in the **Field Manager** in the **Settings** menu.

◆ **Parameter:**

Select an appropriate option for the parameter according to which the keyword will be searched for in the selected field, from the drop-down list.

Note: The parameter options are available according to the field selected.

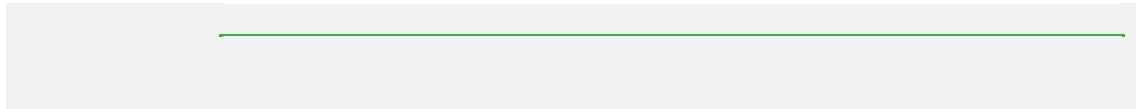
◆ **Value:**

Type an appropriate keyword for which the filter search is to be performed.



Click this icon corresponding to the filter condition to remove that filter condition.

Note: This icon is available only if there is at least one filter condition in the **Filter Area**.



Select/Enter the appropriate details in the required fields.

2. Click the **Apply** button.

MailDirect displays the List Management>Browse Recipient screen with the Filtered Results.

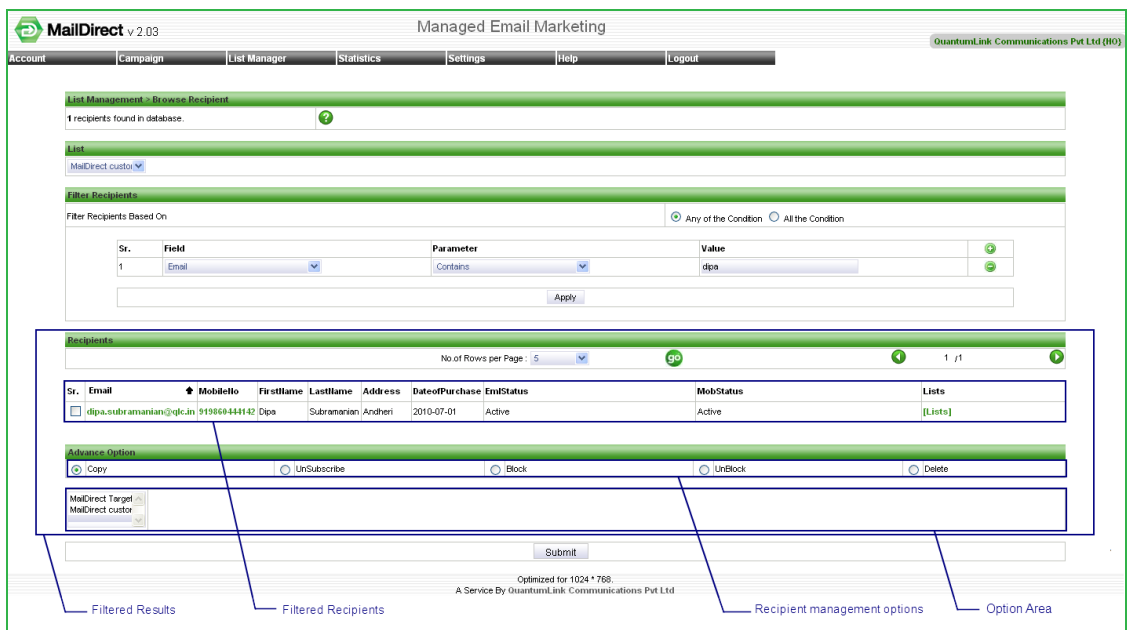




Figure 64: LIST MANAGEMENT>BROWSE FOR RECIPIENT WITH THE FILTERED RESULTS

Table 19: FILTERED RESULTS

Field/Link	Description
Recipients	
No. of Rows per Page	Select an appropriate number of recipients to be displayed in one page, from the drop-down list.
	Click this icon to view the filtered results according to the number defined in the No. of Rows per Page drop-down list.
	Click this icon to view the previous page with the filtered results.
<p>Note: This icon can be clicked only if the filtered results are displayed in more than one page.</p>	



Click this button to view the next page with the filtered results.

Note: This icon can be clicked only if the filtered results are displayed in more than one page.

Filtered Recipients

Sr.	Select/Clear this check box for the corresponding recipient to enable/disable management of the corresponding recipient details.
Email	This field displays the email address of the corresponding recipient.
MobileNo	This field displays the mobile number of the corresponding recipient.
FirstName	This field displays the first name of the corresponding recipient.
LastName	This field displays the last name of the corresponding recipient.
Address	This field displays the address of the corresponding recipient. <hr/> <p>Note: This is a customized field.</p> <hr/>
DateofPurchase	This field displays the date of purchase for the corresponding recipient. <hr/> <p>Note: This is a customized field.</p> <hr/>
EmlStatus	This field displays the status of the email address of the corresponding recipient.
MobStatus	This field displays the status of the mobile number of the corresponding recipient.
Lists	This field provides the link to view the contact lists to which the corresponding recipient is subscribed to. If this link is clicked, MailDirect displays the List Management>Recipients Details screen.

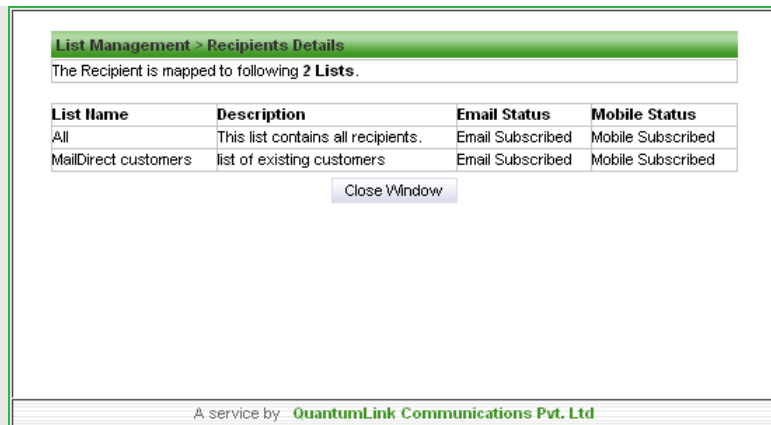


Figure 65: LIST MANAGEMENT>RECIPIENTS DETAILS

Advance Option

Recipient Management Options

This section provides the options to manage the selected recipient.

The available options are explained below-

- Copy:

Select this option to copy/subscribe the selected recipients to the list/s in Option Area.

If this option is selected, the options for copying the selected recipients are displayed in Option Area.

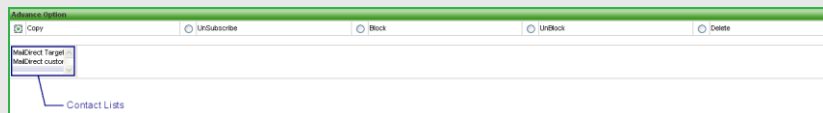


Figure 66: COPY OPTIONS IN OPTION AREA

Note: By default, this option is selected.

The available option is explained below-

- ◆ Contact Lists:

Select the appropriate contact lists to which the selected recipients are to be copied.

- UnSubscribe:

Select this option to unsubscribe either the email address or the mobile number of the selected recipients from the selected contact lists.

If this option is selected, the options for unsubscribing the selected recipients are displayed in the Option Area.

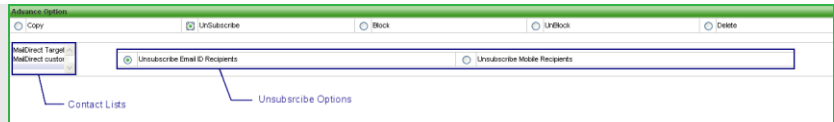


Figure 67: UNSUBSCRIBE OPTIONS IN THE OPTION AREA

The available options are explained below-

- ◆ **Contact Lists:**
Select the appropriate contact lists from which the selected recipients are to be unsubscribed.
- ◆ **Unsubscribe Options:**
Select either the **UnSubscribe Email ID Recipients** option or the **UnSubscribe Mobile Recipients** option to unsubscribe either the email address or the mobile number of the selected recipients from the selected contact lists.
- **Block:**
Select this option to block either the email address or the mobile number of the selected recipients.

If this option is selected, the options for blocking the selected recipients are displayed in **Option Area**.

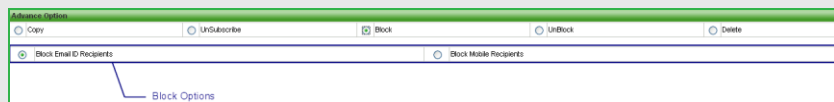


Figure 68: BLOCK OPTIONS IN THE OPTION AREA

The available options are explained below-

- ◆ **Block Options:**
Select either the **Block Email ID Recipients** option or the **Block Mobile Recipients** option to block either the email address or the mobile number of the selected recipients.
- **UnBlock:**
Select this option to unblock either the email address or the mobile number of the selected recipients.

If this option is selected, the options for unblocking the selected recipients are displayed in **Option Area**.



Figure 69: UNBLOCK OPTIONS IN THE OPTION AREA

The available options are explained below-

◆ **Unblock Options:**

Select either the **UnBlock Email ID Recipients** option or the **UnBlock Mobile Recipients** option to unblock either the email address or the mobile number of the selected recipients.

■ **Delete:**

Select this option to delete either the email address or the mobile number of the selected recipients from the database.

If this option is selected, the options for deleting the selected recipients are displayed in **Option Area**.

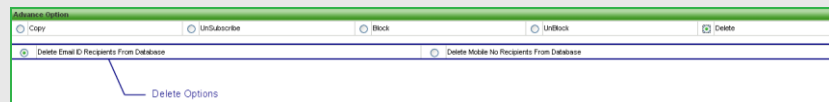


Figure 70: DELETE OPTIONS IN THE OPTION AREA

The available options are explained below-

◆ **Delete Options:**

Select either the **Delete Email ID Recipients From Database** option or the **Delete Mobile No Recipients From Database** option to delete either the email address or the mobile number of the selected recipients from database.

Select the appropriate details in the required fields.

3. Click the **Submit** button.

4 Working with Email Campaigns

In this chapter, users will learn how to:

- Manage email campaigns

4.1 Introduction

Users can create new email campaigns and edit/modify existing ones. The campaigns can be:

- Launched immediately
- Scheduled to start later
- Tested for a real-time view
- Viewed
- Saved to the drafts folder for running later
- Abandoned (if active)

Users have to attach contact list/s before launching a campaign. They can view statistics summary of active or completed campaigns.

4.2 Managing Email Campaign

This section provides instructions on how to create an email campaign and view statistics summary.

4.2.1 Creating Email Campaign

This section provides instructions for creating campaigns using the **MailDirect** wizard and creating online email campaigns.



To create email campaign using wizard

1. On the **Campaign** menu, click the **Email Campaign** option.

MailDirect displays the Create New Campaign screen.

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Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

To create a campaign, prepare your email message and map it to the list of recipients you want to communicate to . :

- [Create Email Campaign](#) - Preparing Email Campaign is now so **Easy** ?
- [Create Email Campaign Online - Create Text Campaign.](#)

Statistics > Active Email Campaigns
No Campaign Found.

Statistics > Scheduled Email Campaigns
No Campaign Found.

Statistics > Draft Email Campaigns

Sr	Name	Status	Repts	Exp DT(MB)	Created On
1	version upgrade in PostMa...	Planned	0	0.00	2010-05-29 16:23:36
2	Campaign for promotion of...	Planned	0	0.00	2010-05-29 16:11:40
3	MailDirect new feature an...	Planned	0	0.00	2010-05-29 12:03:27
4	MailDirect survey module ...	Planned	0	0.00	2010-05-29 10:52:31

Note: Statistics for completed campaigns are available in [Statistics section](#).

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Figure 71: CREATE NEW CAMPAIGN

2. Click the Create Email Campaign link.

MailDirect displays the Campaign Wizard screen.

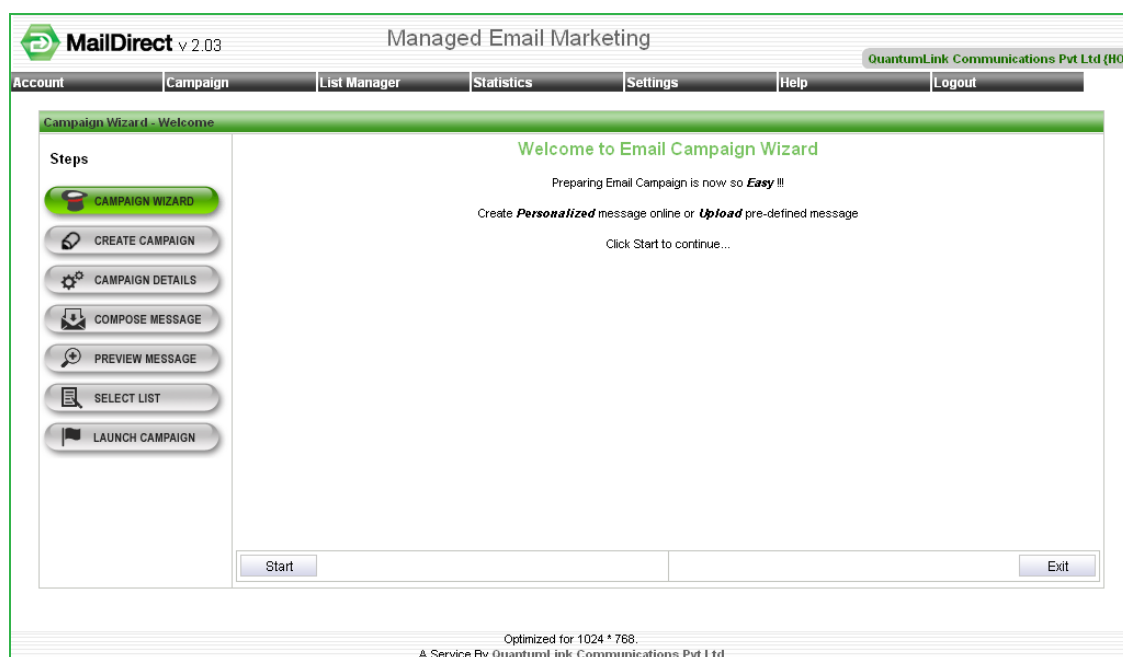


Figure 72: CAMPAIGN WIZARD - WELCOME

Note: Alternately, on the Campaign menu, click the Email Campaign Wizard to open the Campaign Wizard.

3. Click the **Start** button.

MailDirect displays the Create Campaign screen.

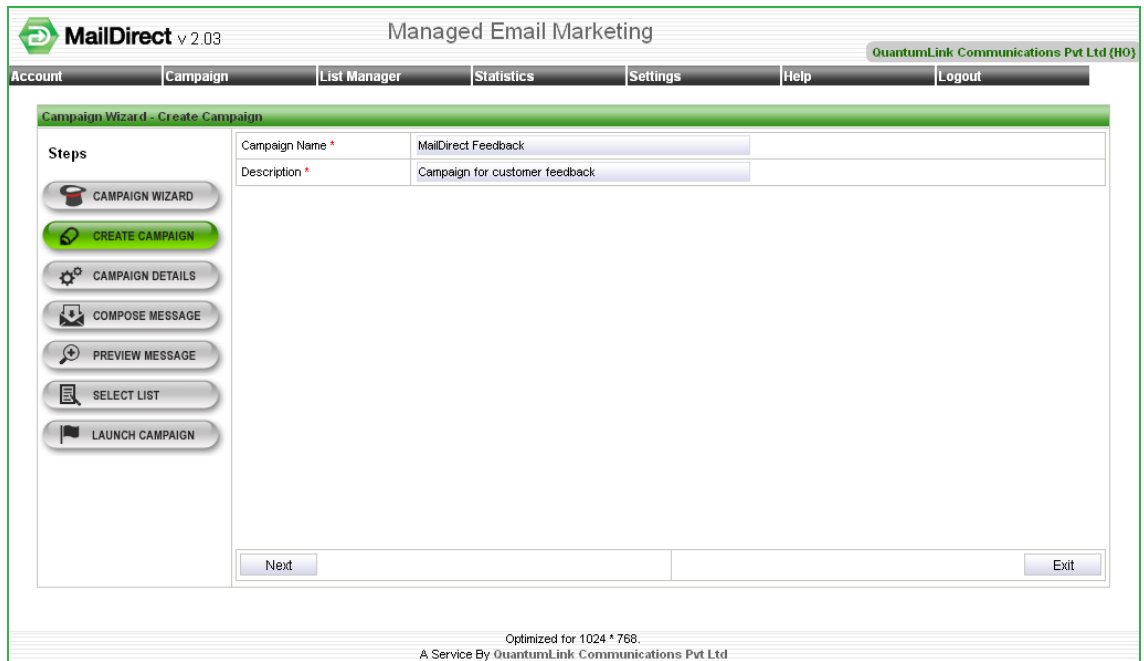


Figure 73: CREATE CAMPAIGN

Table 20: CREATING CAMPAIGN

Field	Description
Campaign Name	Type an appropriate name for the campaign. This field is mandatory.
Description	Type an appropriate description for the campaign. This field is mandatory.

Enter the appropriate details in the required fields.

4. Click the **Next** button.

MailDirect displays the Campaign Send Details screen.

Figure 74: CAMPAIGN SEND DETAILS

Table 21: CAMPAIGN SEND DETAILS

Field	Description
From Email	Type an appropriate email ID from which the campaign will be sent. This field is mandatory.
Reply To	Type an appropriate email ID to which all the replies for the campaign will be received. This field is mandatory.
From Name	Type an appropriate sender name. This field is not mandatory.
Subject	Type an appropriate subject line for the campaign. This field is mandatory.

Enter the appropriate details in the required fields.

- Click the **Next** button.

MailDirect displays the Compose Message screen.

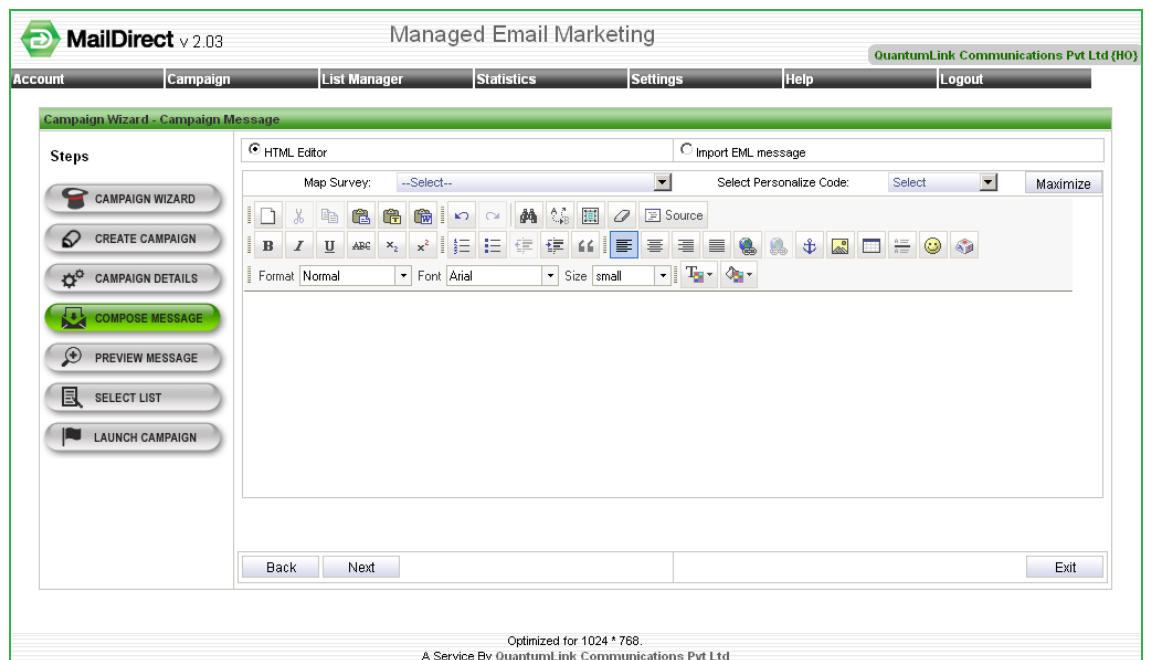


Figure 75: COMPOSE MESSAGE

6. To compose a campaign message:
Users can compose a campaign message by selecting:
 - ◆ HTML Editor option OR
 - ◆ Import EML message option
 - a. To compose a campaign message using HTML Editor
 - i. Select the HTML Editor option to compose a message in HTML format.

MailDirect displays the Compose Message screen with the HTML Editor options.

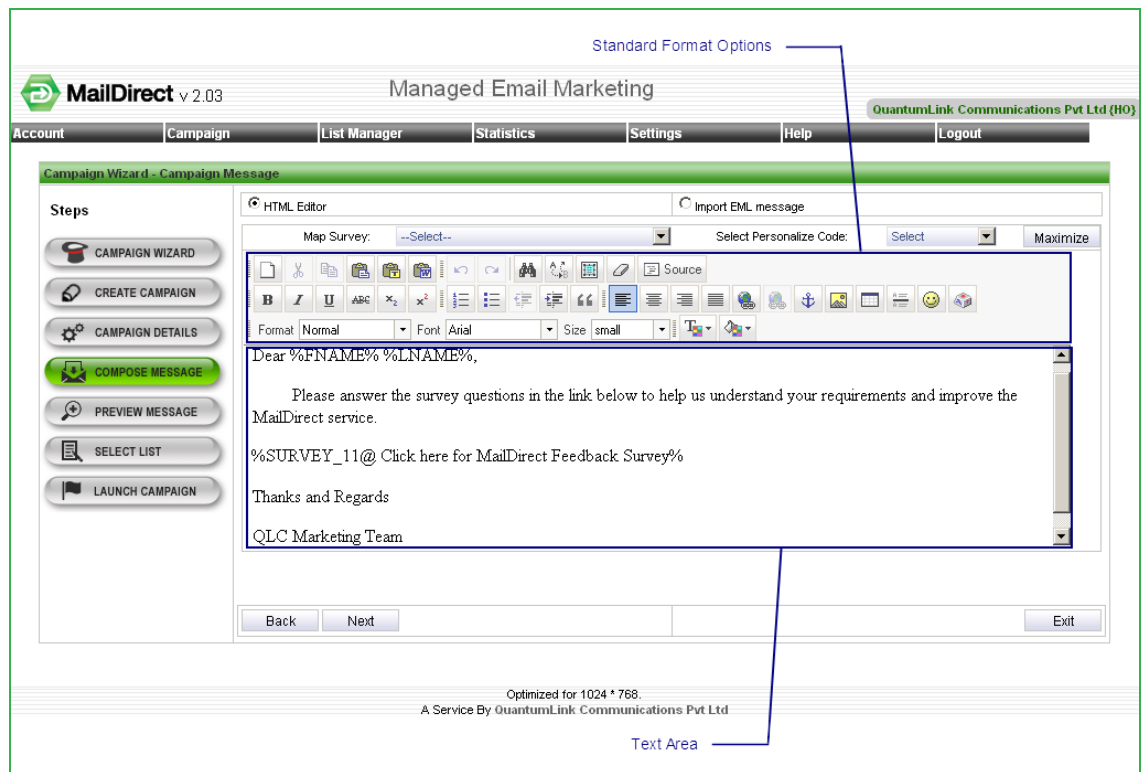


Figure 76: COMPOSE MESSAGE WITH THE HTML EDITOR OPTIONS

Note: By default, HTML Editor is selected.

Table 22: COMPOSE MESSAGE USING THE HTML EDITOR

Field	Description
Map Survey	Select an appropriate survey to be mapped to the campaign. Note: On selecting the survey, a link for the survey is added in the text area.
Select Personalize Code	Select an appropriate personalized code to be sent in the campaign message.
Maximize	Click this button to maximize the Compose Message screen.

Text Area	Type an appropriate campaign message.
Standard Format Options	Select the appropriate format options to apply to the text entered in the Text Area .

Enter/Select the appropriate details in the required fields.

- b. To compose a campaign message by importing an EML message.
 - i. Select the **Import EML message** option to import an EML message.

MailDirect displays the **Compose Message** screen with the **Import EML message** option.

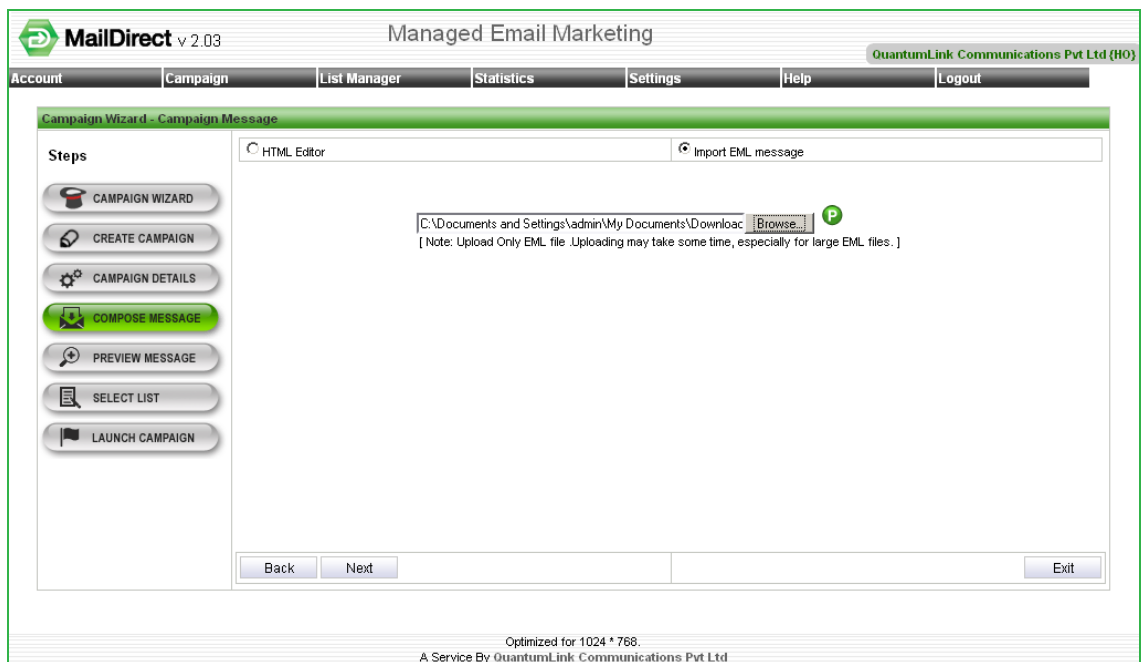


Figure 77: COMPOSE MESSAGE WITH THE IMPORT EML MESSAGE OPTIONS

Table 23: COMPOSE MESSAGE USING THE IMPORT EML MESSAGE

Field	Description
Browse	Enter the location of the file or click Browse to go to the location of the EML file and attach an appropriate EML.

Note: Before importing the EML file, map an appropriate survey in the HTML Editor and copy the survey link at an appropriate position in the EML file to be imported.

Enter the location of the file or browse to the appropriate location.

7. Click the **Next** button.

MailDirect displays the **Preview** screen.

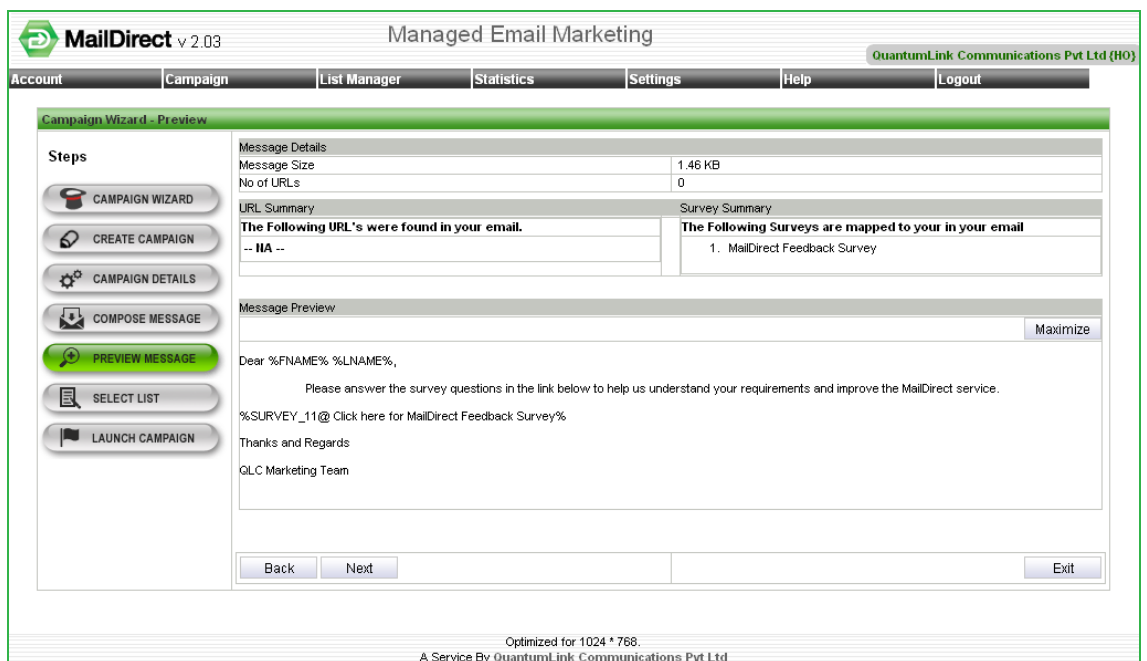


Figure 78: PREVIEW

The user can preview the composed message. To make any changes to the message, click the **Back** button.

Note: Only messages composed by using the **HTML Editor** option can be previewed and not messages composed by using the **Import EML message** option. The user can click the **Maximize** button to maximize the **Preview** screen.

8. Click the **Next** button.
MailDirect displays the **List Map** screen.

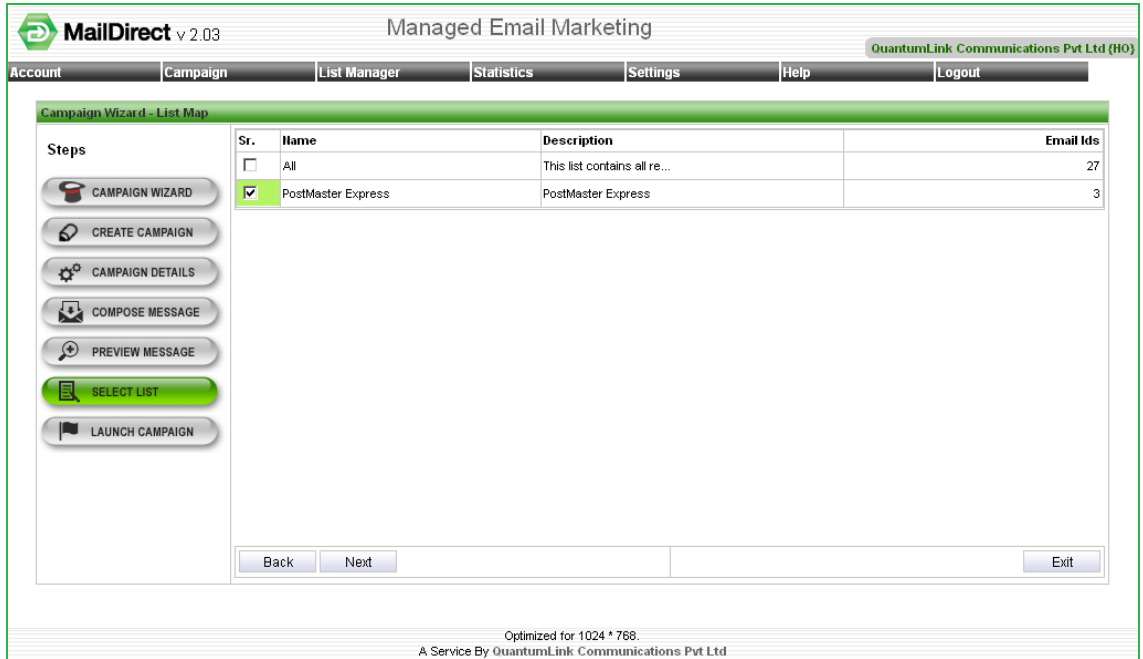


Figure 79: LIST MAP

Table 24: LIST MAP

Field	Description
Sr.	Select the check boxes corresponding to the appropriate contact list/s to be mapped to the campaign. The campaign will be sent to all those who are included in these lists. This field is not mandatory.
Name	This section displays the name of the contact list.
Description	This section displays the description about the contact list.
Email Ids	This section displays the number of recipient email IDs present in the corresponding contact list.

- Select the appropriate check boxes.
9. Click the **Next** button.

MailDirect displays the Action screen.

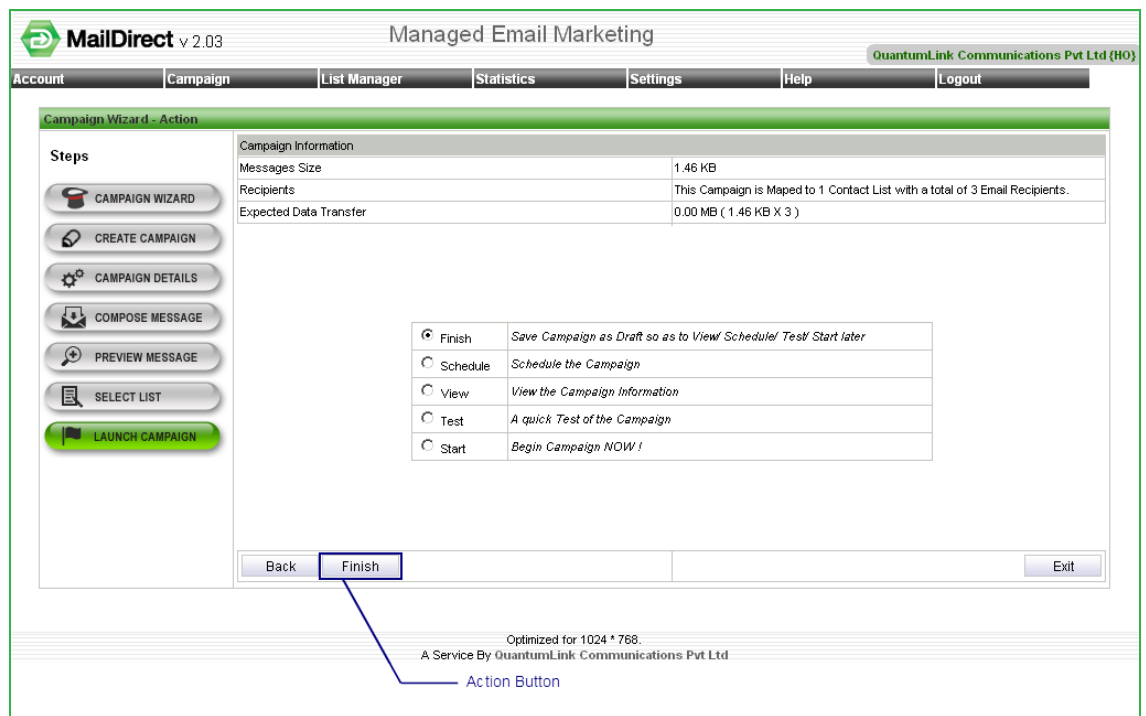


Figure 80: ACTION

10. To launch a campaign:

Users can select any one of the following options:

- ◆ Save a campaign as a draft using the **Finish** option
- ◆ Schedule it for launch on a later date using the **Schedule** option
- ◆ Preview it using the **View** option
- ◆ Test it in real-time using the **Test** option
- ◆ Launch it immediately using the **Start** option.

Note: When the user selects an option, the action button changes to the option selected. The user can select only one option at a time.

a. To save a campaign as a draft using the **Finish** option:

i. Select the **Finish** option.

On selecting the **Finish** option, the **Finish** button will be made available.

Note: By default, the **Finish** option is selected.

- ii. Click the **Finish** button.

MailDirect displays the **Create New Campaign** screen with the campaign added to the **Draft Email Campaigns** section.

Create New Campaign

To create a campaign, prepare your email message and map it to the list of recipients you want to communicate to :

- **Create Email Campaign** - Preparing Email Campaign is now so **Easy** ?
- **Create Email Campaign Online** - **Create Text Campaign**.

Statistics > Active Email Campaigns
No Campaign Found.

Statistics > Scheduled Email Campaigns
No Campaign Found.

Statistics > Draft Email Campaigns

Sr	Name	Status	Rcpts	Exp DT (MB)	Created On
1	MailDirect Feedback	Planned	3	0.00	2010-06-18 12:05:11
2	version upgrade in PostMa...	Planned	0	0.00	2010-05-29 16:18:33
3	Campaign for promotion of...	Planned	0	0.00	2010-05-29 16:11:40
4	MailDirect new feature an...	Planned	0	0.00	2010-05-29 12:03:27
5	MailDirect survey module ...	Planned	0	0.00	2010-05-29 10:52:31

Note: Statistics for completed campaigns are available in **Statistics** section.

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Figure 81: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO DRAFT EMAIL CAMPAIGNS SECTION

- b. To schedule a campaign for launch at a later time using the **Schedule** option:
 - i. Select the **Schedule** option.
On selecting the **Schedule** option, the **Schedule** button will be available.
 - ii. Click the **Schedule** button.

MailDirect displays the Schedule Campaign screen.

Figure 82: SCHEDULE CAMPAIGN

Table 25: SCHEDULE CAMPAIGN

Field	Description
Campaign Schedule Date	Select an appropriate date on which the campaign will be launched, from the calendar. This field is not mandatory.
Campaign Schedule Time	Select an appropriate hour and minute at which the campaign will be the launched, from the drop-down lists. Note: A campaign can only be scheduled to launch every hour or at the 15 th , 30 th and 45 th minute of an hour. This field is not mandatory.

Select the appropriate details in the required fields.

- iii. Click the **Save** button.

MailDirect displays the Create New Campaign screen with the campaign added to the Scheduled Email Campaigns section.

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Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

To create a campaign, prepare your email message and map it to the list of recipients you want to communicate to .

- **Create Email Campaign** - Preparing Email Campaign is now so **Easy** ?
- **Create Email Campaign Online - Create Text Campaign.**

Statistics > Active Email Campaigns

No Campaign Found.

Statistics > Scheduled Email Campaigns

Sr	Name	Status	Repts	Exp DT(MB)	Scheduled On	Created On
1	MailDirect Feedback	Scheduled	3	0.00	2010-07-15 10:00:00	2010-06-18 13:08:25

Statistics > Draft Email Campaigns

Sr	Name	Status	Repts	Exp DT(MB)	Created On
1	version upgrade in PostMa...	Planned	0	0.00	2010-05-29 16:18:33
2	Campaign for promotion of...	Planned	0	0.00	2010-05-29 16:11:40
3	MailDirect new feature an...	Planned	0	0.00	2010-05-29 12:03:27
4	MailDirect survey module ...	Planned	0	0.00	2010-05-29 10:52:31

Note: Statistics for completed campaigns are available in [Statistics section](#).

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Figure 83: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO SCHEDULED EMAIL CAMPAIGNS SECTION

- c. To preview a campaign using the **View** option:
 - i. Select the **View** option.
On selecting the **View** option, the **View** button will be available.
 - ii. Click the **View** button.

MailDirect displays the Details screen.

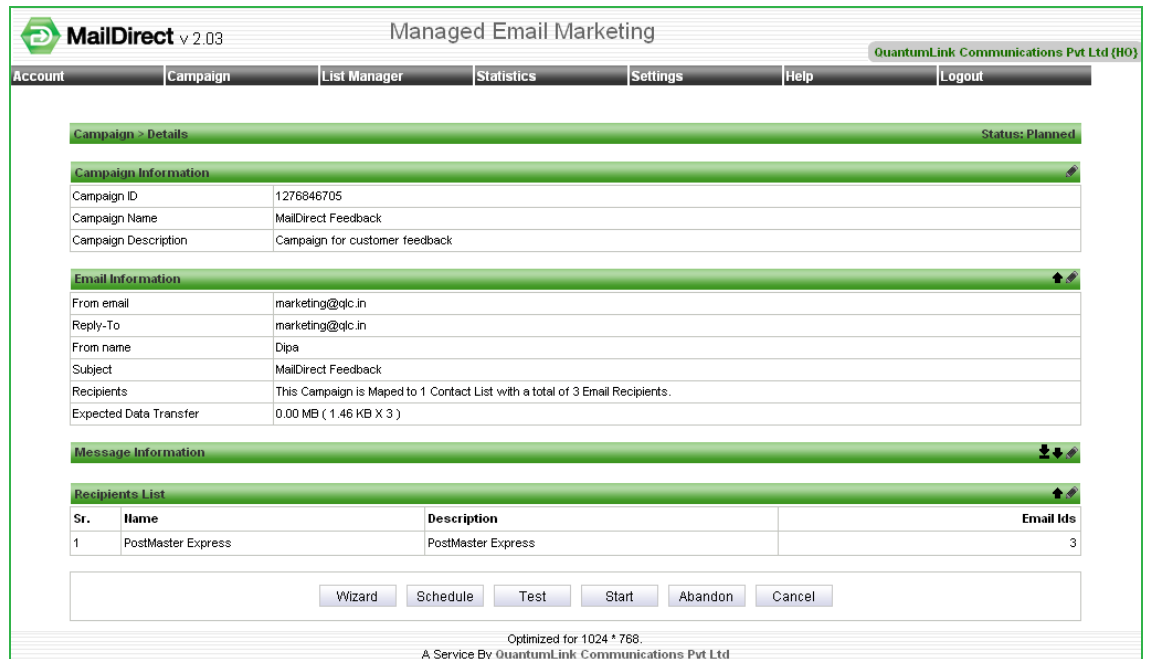






Figure 84: DETAILS

Table 26: CAMPAIGN DETAILS

Field	Description
	Click this icon corresponding to the appropriate section to edit the information displayed in that section.
	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
	Click this icon corresponding to the appropriate section to download the information displayed in that section.
	Click this icon corresponding to the appropriate section to display the details in that section.
Wizard	Click this button to edit the campaign that is currently being viewed. Note: The user can edit the entire campaign.
Schedule	Click this button to schedule the launch of campaign, which is

	<p>currently being viewed, to a later point of time.</p> <hr/> <p>Note: Instructions to schedule the campaign are given in step 10.b.ii and iii.</p> <hr/>
Test	<p>Click this button to test the campaign, which is currently being viewed, in real time.</p> <hr/> <p>Note: Instructions to test the campaign are given in step 10.d.ii and iii.</p> <hr/>
Start	<p>Click this button to immediately launch the campaign that is currently being viewed.</p> <hr/> <p>Note: Instructions to start the campaign are given in step 10.e.ii and iii.</p> <hr/>
Abandon	<p>Click this button to abandon the campaign that is currently being viewed.</p>

Click the appropriate icons/buttons as required.

- d. To test a campaign for a real-time view using the **Test** option:
 - i. Select the **Test** option.
On selecting the **Test** option, the **Test** button will be available.
 - ii. Click the **Test** button.

MailDirect displays the Campaign screen.

The screenshot shows a web form titled "Campaign: 'MailDirect Feedback'". The form has four columns: "Email", "MobileNo", "Firstname", and "Lastname". The first row contains the following values: "info@qic.in", "919324157700", "Dipa", and "Subramanian". Below the form are "Submit" and "Close" buttons. At the bottom, it says "A service by QuantumLink Communications Pvt. Ltd".

Email	MobileNo	Firstname	Lastname
info@qic.in	919324157700	Dipa	Subramanian

Submit Close

A service by QuantumLink Communications Pvt. Ltd

Figure 85: CAMPAIGN

Table 27: TEST CAMPAIGN

Field	Description
Email	Type an appropriate email address to which the campaign will be sent for a test in real-time.
MobileNo	Type an appropriate mobile number of the recipient of the campaign under test.
FirstName	Type an appropriate first name of the recipient of the campaign under test.
LastName	Type an appropriate last name of the recipient of the campaign under test.

Note: The number of fields for entering personal details can differ if the user has customized the fields using the Fields Manager tab in the Settings menu.

Enter the appropriate details in the required fields.

- iii. Click the Submit button.

MailDirect displays the Campaign screen with test status.



Figure 86: CAMPAIGN WITH TEST STATUS

- iv. Click the Close button.
MailDirect displays the Action screen, as shown in [Figure 80](#).
- e. To launch a campaign immediately using the Start option:
 - i. Select the Start option.
On selecting the Start option, the Start button will be available.
 - ii. Click the Start button.
MailDirect displays a message.

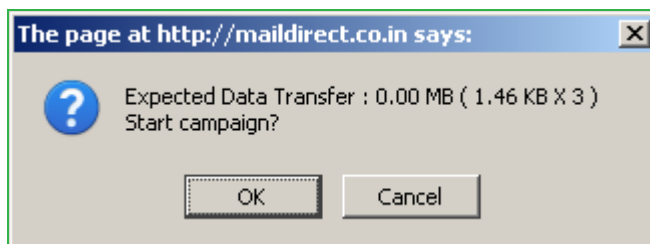


Figure 87: START CAMPAIGN MESSAGE

- iii. Click the OK button.

MailDirect displays the Campaign>Details screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Campaign > Details Status: Completed

Campaign Information

Campaign ID	1276846705
Campaign Name	MailDirect Feedback
Campaign Description	Campaign for customer feedback

Email Information ↑

From email	marketing@qlc.in
Reply-To	marketing@qlc.in
From name	Dipa
Subject	MailDirect Feedback
Recipients	This Campaign is Mapped to 1 Contact List with a total of 3 Email Recipients.
Expected Data Transfer	0.00 MB (1.46 KB X 3)

Message Information ↓ ↓

Recipients List ↑

Sr.	Name	Description	Email Ids
1	PostMaster Express	PostMaster Express	3

This campaign has been completed

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Figure 88: CAMPAIGN>DETAILS

Table 28: CAMPAIGN DETAILS

Field	Description
↑	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
↓ ↓	Click this icon corresponding to the appropriate section to download the information displayed in that section.
↓	Click this icon corresponding to the appropriate section to display the details in that section.

Click the appropriate icons as required.



To create a Quick Email Campaign:

1. On the Campaign menu, click the Email Campaign option.

MailDirect displays the Create New Campaign screen.

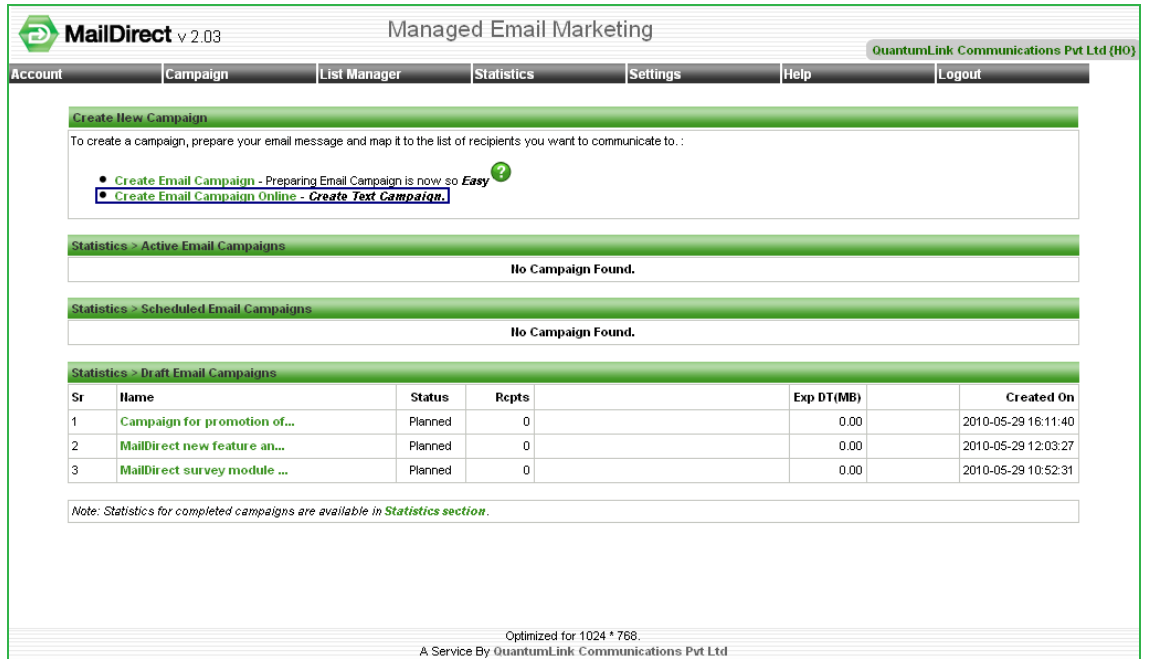


Figure 89: CREATE NEW CAMPAIGN

2. Click the Create Email Campaign Online link.

MailDirect displays the MailDirect>Quick Email Campaign screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (H0)

Account Campaign List Manager Statistics Settings Help Logout

MailDirect > Quick Email Campaign

Campaign Information

Campaign Name * MailDirect Campaign
Description * Campaign for customer feedback

Email Information

From Email * marketing@qlc.in ?
Reply To * marketing@qlc.in ?
From Name Dipa ?
Subject * Customer feedback campaign

Message Information

Text Editor Import EML message

Hi %FNAME% %LNAME%,
Please feel free to get in touch with us if you do have any suggestions on how we can improve our services.
Thanks & Regards,
QLC Marketing Team

Recipients List

Sr.	Name	Description	Email Ids
<input type="checkbox"/>	All	This list contains all re...	25
<input checked="" type="checkbox"/>	PostMaster Express	PostMaster Express	1
<input type="checkbox"/>	test list	test	1

Save Start Campaign Reset

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Text Area

Figure 90: MAILDIRECT>QUICK EMAIL CAMPAIGN WITH THE TEXT EDITOR OPTION

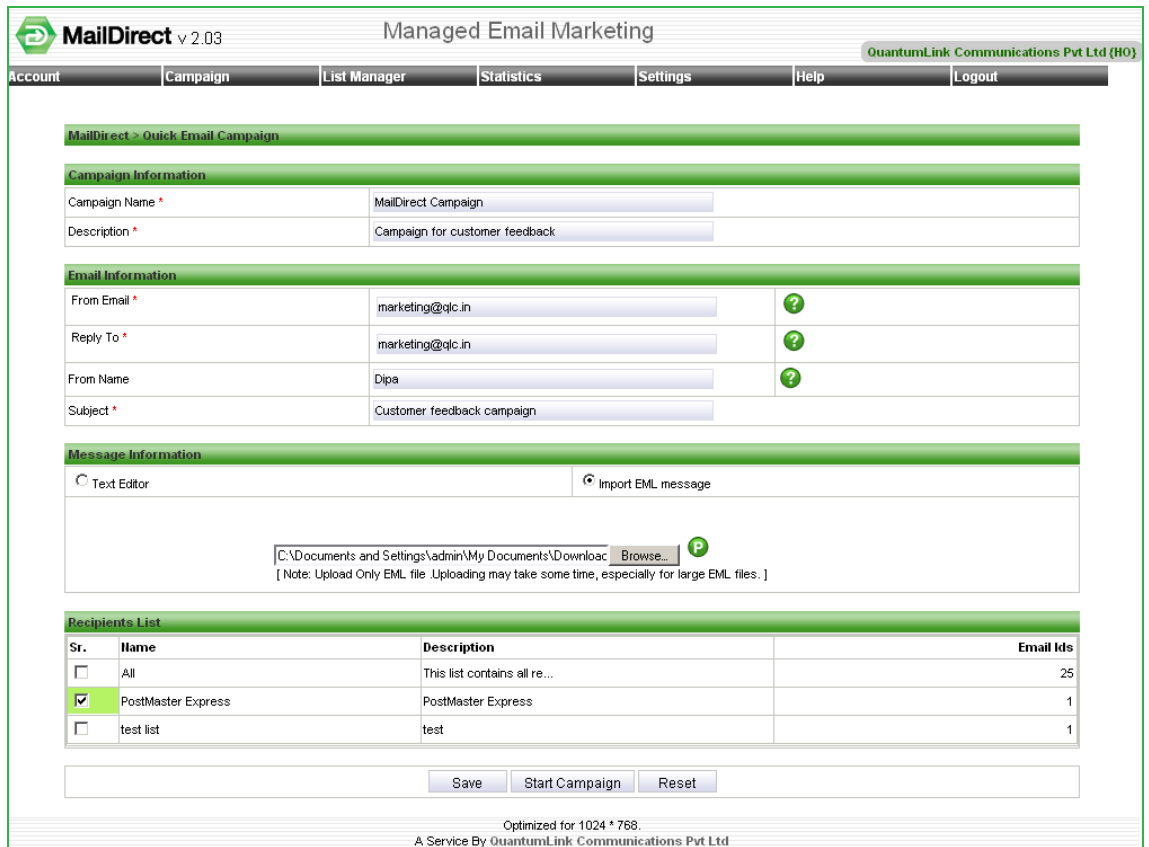


Figure 91: MAILDIRECT>QUICK EMAIL CAMPAIGN WITH THE IMPORT EML MESSAGE OPTION

Note: Alternately, the user can click the Quick Email Campaign option on the Campaign menu.

Table 29: QUCIK EMAIL CAMPAIGN

Field	Description
Campaign Information	Type the appropriate details to be displayed as the campaign information. The available fields are explained below- <ul style="list-style-type: none"> Campaign Name: Type an appropriate name for the campaign. This field is mandatory. Description: Type an appropriate description for the campaign. This field is mandatory.
Email Information	Type the appropriate details to be displayed as the email

information.

The available fields are explained below-

- **From Email:**
Type an appropriate email ID from which the campaign will be sent.
This field is mandatory.
- **Reply To:**
Type an appropriate email ID to which all the replies for the campaign will be received.
This field is mandatory.
- **From Name:**
Type an appropriate sender name.
This field is not mandatory.
- **Subject:**
Type an appropriate subject line for the campaign.
This field is mandatory.

Message Information

Select either the **Text Editor** option or the **Import EML message** option to compose the campaign message.

The available options are explained below-

- **Text Editor:**
Select this option to compose a campaign message in plain text.

Note: By default, the **Text Editor** option is selected.

On selecting the **Text Editor** option, the **Text Area** will be made available, as shown in [Figure 90](#).

Type an appropriate campaign message.

- **Import EML message:**
Select this option to compose a campaign message by importing an EML message.

On selecting the **Import EML message** option, the **Browse** text box and the **Browse** button will be made available, as shown in [Figure 91](#).

Enter the location of the file or click **Browse** to go to the location of the EML file and attach an appropriate EML.

Recipients List

Select the appropriate check boxes to map the campaign to the recipients.

The available options are explained below-

- **Sr.**

Select the check boxes corresponding to the appropriate contact list/s to be mapped to the campaign. The campaign will be sent to all those who are included in these lists.

This field is not mandatory.
- **Name**

This section displays the name of the contact list.
- **Description**

This section displays the description about the contact list.
- **Email Ids**

This section displays the number of recipient email IDs present in the corresponding contact list.

Enter/Select the appropriate details in the required fields.

3. Click the **Save** button.

MailDirect displays the Campaign>Result screen.

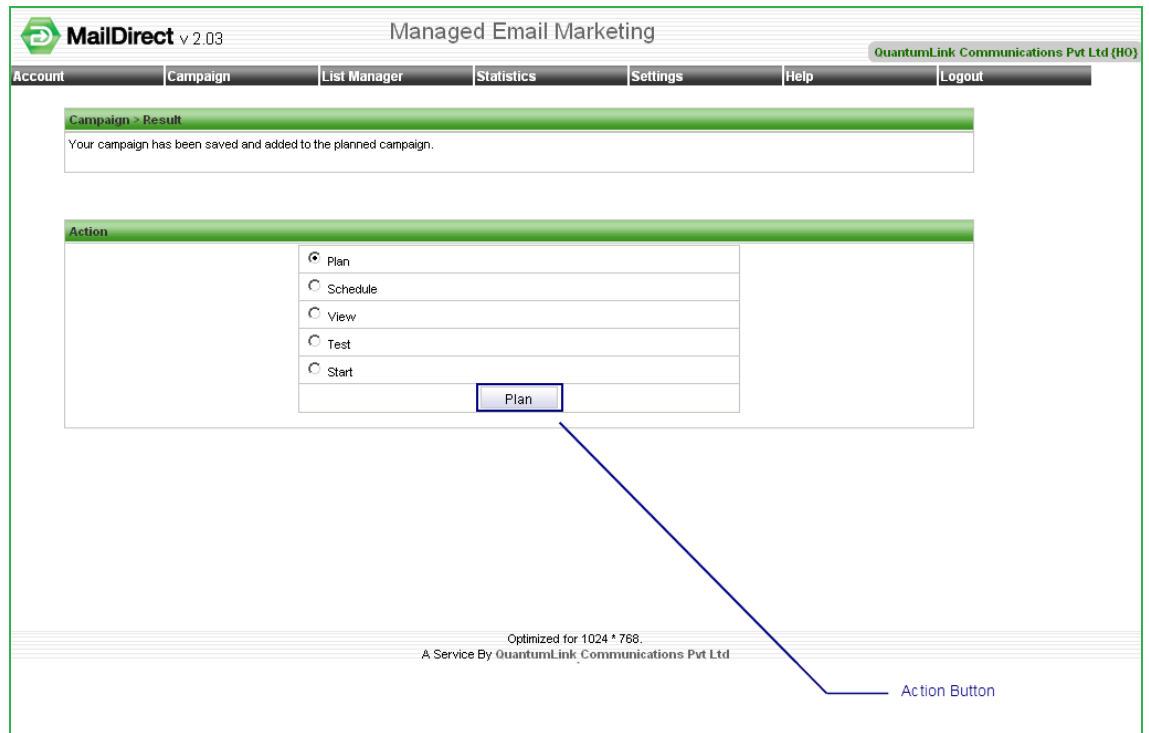


Figure 92: CAMPAIGN>RESULT

Users can select any one of the following options for a saved campaign:

- ◆ Save as a draft using the **Plan** option
- ◆ Schedule for launch on a later date using the **Schedule** option
- ◆ Preview using the **View** option
- ◆ Test in real-time using the **Test** option
- ◆ Launch immediately using the **Start** option.

Note: When the user selects an option, the action button changes to the option selected. The user can select only one option at a time.

- a. To save a campaign as a draft using the **Plan** option:

Note: The campaign has already been saved as a draft and added to planned campaigns. The user should use this option only if needed.

- i. Select the **Plan** option. The **Plan** button will be made available.

Note: By default, the **Plan** option is selected.

- ii. Click the **Plan** button.

MailDirect displays the **Create New Campaign** screen with the campaign added to the **Draft Email Campaigns** section.

MailDirect v2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

To create a campaign, prepare your email message and map it to the list of recipients you want to communicate to . :

- **Create Email Campaign** - Preparing Email Campaign is now so **Easy** ?
- **Create Email Campaign Online** - **Create Text Campaign**.

Statistics > Active Email Campaigns
No Campaign Found.

Statistics > Scheduled Email Campaigns
No Campaign Found.

Statistics > Draft Email Campaigns

Sr	Name	Status	Rcpts	Exp DT(MB)	Created On
1	MailDirect Campaign	Planned	1	0.00	2010-06-21 10:46:48
2	Campaign for promotion of...	Planned	0	0.00	2010-05-29 16:11:40
3	MailDirect new feature an...	Planned	0	0.00	2010-05-29 12:03:27
4	MailDirect survey module ...	Planned	0	0.00	2010-05-29 10:52:31

Note: Statistics for completed campaigns are available in Statistics section.

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Figure 93: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO DRAFT EMAIL CAMPAIGNS SECTION

- b. To schedule a campaign for launch at a later time using the **Schedule** option:
 - i. Select the **Schedule** option. The **Schedule** button will be made available.
 - ii. Click the **Schedule** button.

MailDirect displays the Schedule Campaign screen.

Figure 94: SCHEDULE CAMPAIGN

Table 30: SCHEDULE CAMPAIGN

Field	Description
Campaign Schedule Date	Select an appropriate date on which the campaign will be launched, from the calendar.
Campaign Schedule Time	Select an appropriate hour and minute at which the campaign will be the launched, from the drop-down lists. Note: A campaign can only be scheduled to launch every hour or at the 15th, 30th and 45th minute of an hour.

Select the appropriate details in the required fields.

- iii. Click the **Save** button.

MailDirect displays the Create New Campaign screen with the campaign added to the Scheduled Email Campaigns section.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

To create a campaign, prepare your email message and map it to the list of recipients you want to communicate to .

- Create Email Campaign - Preparing Email Campaign is now so **Easy** ?
- Create Email Campaign Online - **Create Text Campaign**.

Statistics > Active Email Campaigns

No Campaign Found.

Statistics > Scheduled Email Campaigns

Sr	Name	Status	Repts	Exp DT(MB)	Scheduled On	Created On
1	MailDirect Campaign	Scheduled	1	0.00	2010-06-24 11:30:00	2010-06-21 10:46:48

Statistics > Draft Email Campaigns

Sr	Name	Status	Repts	Exp DT(MB)	Created On
1	Campaign for promotion of...	Planned	0	0.00	2010-05-29 16:11:40
2	MailDirect new feature an...	Planned	0	0.00	2010-05-29 12:03:27
3	MailDirect survey module ...	Planned	0	0.00	2010-05-29 10:52:31

Note: Statistics for completed campaigns are available in **Statistics section**.

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Figure 95: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO SCHEDULED EMAIL CAMPAIGNS SECTION

- c. To preview a campaign using the **View** option:
 - i. Select the **View** option. The **View** button will be made available.
 - ii. Click the **View** button.

MailDirect displays the Details screen.

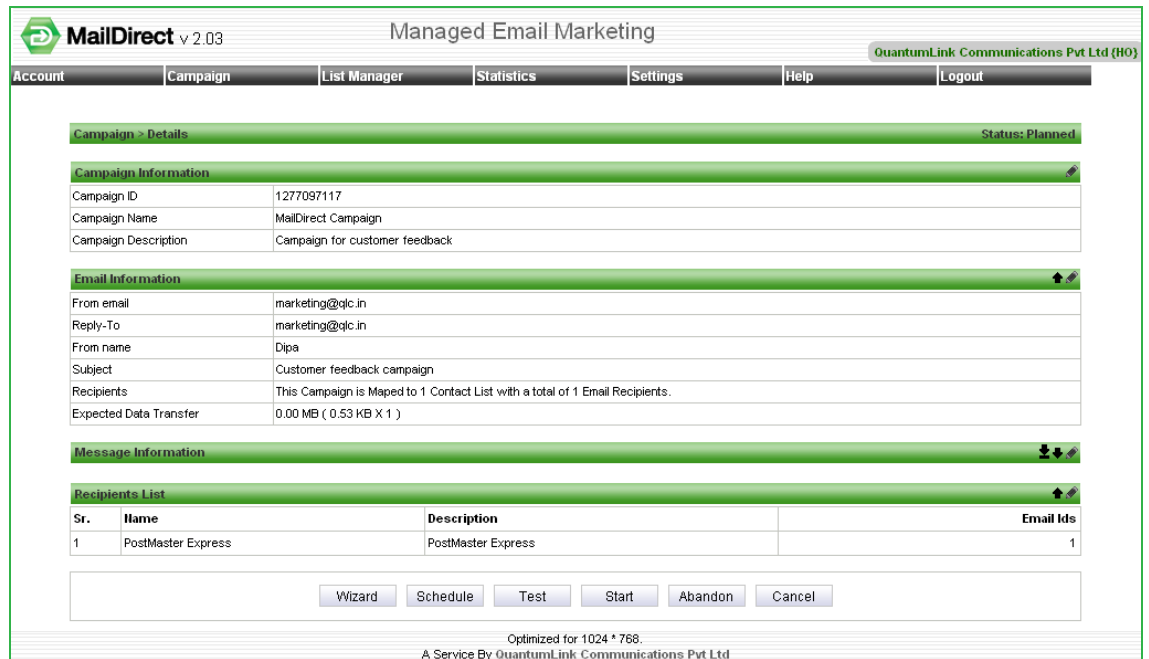


Figure 96: DETAILS

Table 31: CAMPAIGN DETAILS

Field	Description
	Click this icon corresponding to the appropriate section to edit the information displayed in that section.
	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
	Click this icon corresponding to the appropriate section to download the information displayed in that section.
	Click this icon corresponding to the appropriate section to display the details in that section.
Wizard	Click this button to edit the campaign that is currently being viewed. Note: The user can edit the entire campaign.
Schedule	Click this button to schedule the launch of the campaign, which

	<p>is currently being viewed, to a later point of time.</p> <hr/> <p>Note: Instructions to schedule the campaign are given in step 3.b.ii and iii.</p> <hr/>
Test	<p>Click this button to test the campaign, which is currently being viewed, in real time.</p> <hr/> <p>Note: Instructions to test the campaign are given in step 3.d.ii and iii.</p> <hr/>
Start	<p>Click this button to immediately launch the campaign that is currently being viewed.</p> <hr/> <p>Note: Instructions to start the campaign are given in step 3.e.ii and iii.</p> <hr/>
Abandon	<p>Click this button to abandon the campaign that is currently being viewed.</p>

Click the appropriate icons/buttons as required.

- d. To test a campaign for a real-time view using the **Test** option:
 - i. Select the **Test** option. The **Test** button will be made available.
 - ii. Click the **Test** button.

MailDirect displays the **Campaign** screen.

Campaign: "MailDirect Campaign"			
Email	MobileNo	Firstname	Lastname
info@gic.in	919324157700	Dipa	Subramanian
Submit		Close	
A service by QuantumLink Communications Pvt. Ltd			

Figure 97: CAMPAIGN

Table 32: TEST CAMPAIGN

Field	Description
EMAIL	Type an appropriate email address to which the campaign will be sent for a test in real time.
MobileNo	Type an appropriate mobile number of the recipient of the campaign under test.
FirstName	Type an appropriate first name of the recipient of the campaign under test.
LastName	Type an appropriate last name of the recipient of the campaign under test.

Note: The number of fields for entering personal details can differ if the user has customized the fields using the Fields Manager tab in the Settings menu.

Enter the appropriate details in the required fields.

- iii. Click the **Submit** button.

MailDirect displays the **Campaign** screen with test status.



Figure 98: CAMPAIGN WITH TEST STATUS

- iv. Click the **Close** button.

MailDirect displays the **Campaign>Result** screen, as shown in [Figure 92](#).

- e. To launch a campaign immediately using the **Start** option:
 - i. Select the **Start** option. The **Start** button will be made available.
 - ii. Click the **Start** button.

MailDirect displays a message.

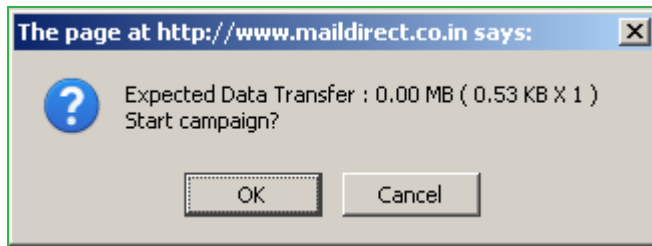


Figure 99: START CAMPAIGN MESSAGE

iii. Click the OK button.

MailDirect displays the Campaign>Details screen.

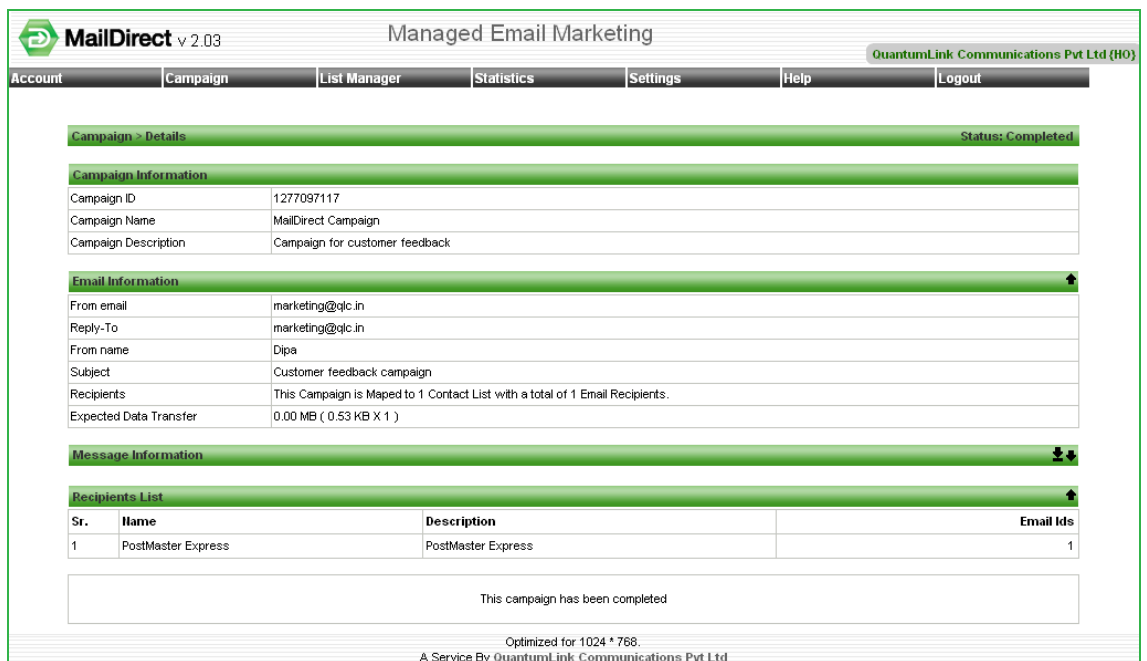


Figure 100: CAMPAIGN>DETAILS

Table 33: CAMPAIGN DETAILS

Field	Description
↑	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
↓	Click this icon corresponding to the appropriate section to

download the information displayed in that section.



Click this icon corresponding to the appropriate section to display the details in that section.

Click the appropriate icons as required.

OR

Click the **Start Campaign** button.

Note: Instructions to start a campaign are given in steps [3.e.ii](#) and [iii](#).

4.2.2 Viewing Email Campaign Statistics Summary



To view email campaign statistics summary

1. On the Campaign menu, click the Email Campaign option.

MailDirect displays the Create New Campaign screen.

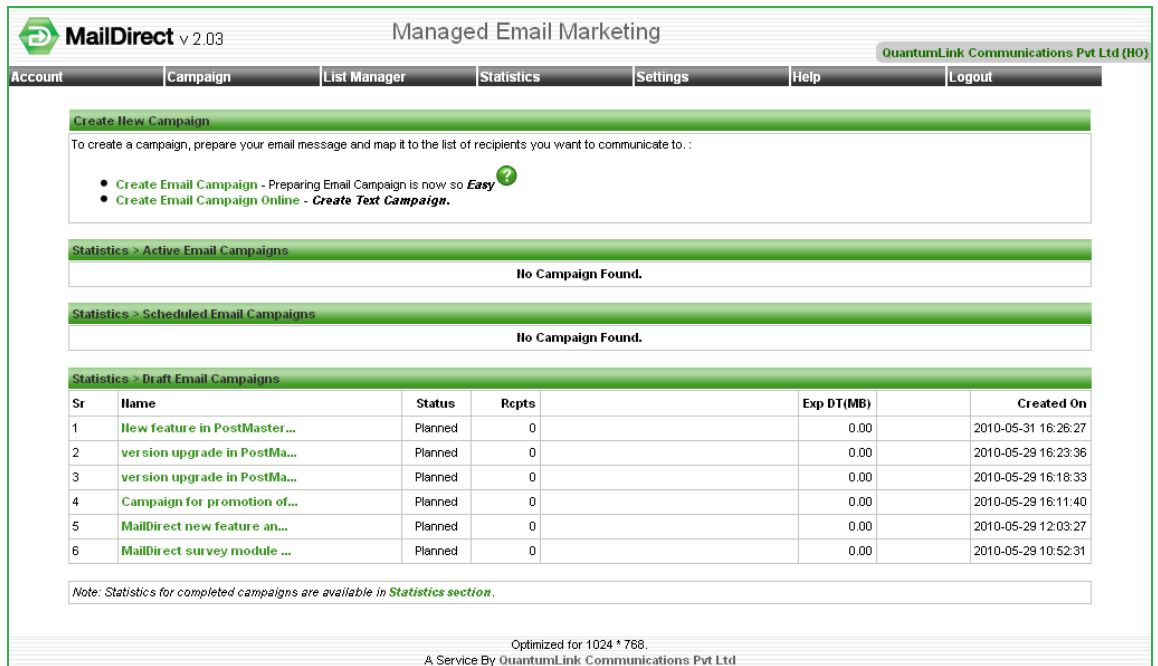


Figure 101: CREATE NEW CAMPAIGN

Table 34: STATISTICS

Field	Description
Statistics > Active/Scheduled/Draft Email Campaigns	
Name	This section displays the name of the campaign. Click the name, which is a link, to view the details about the corresponding email campaign.
Status	This section displays the status of the email campaign. The campaign status can either be Active , or Scheduled or Planned .
Rcpts	This section displays the number of recipients of the email campaign.
Exp DT (MB)	This section displays the data transferred for the corresponding campaign, in MB.
Start On (Active)/Created On (Planned and Scheduled)	This section displays the date on which the corresponding campaign was started/created.

Note: The user can also click on the **Statistics section** link available below the **Statistics>Draft Email Campaigns** sections to view the detailed statistics for the email campaigns.

5 Working with SMS Campaigns

In this chapter, users will learn how to:

- Manage a SMS campaign

5.1 Introduction

Users can create new SMS campaigns and edit/modify existing ones to send campaign messages to any GSM or CDMA number within India. They can:

- Start a campaign immediately
- Schedule it to start later
- Test it for a real-time view
- View it
- Save it to the drafts folder for running later
- Abandon it (if active)

Users must attach contact list/s before launching the campaign. They can view statistics summary of active or completed campaigns.

5.2 Managing SMS Campaign

This section provides instructions on how to create a SMS campaign and view statistics summary.

5.2.1 Creating SMS Campaign

This section provides instructions on how to create quick SMS campaigns and create campaigns using the wizard.



To create a SMS Campaign using Wizard:

1. On the Campaign menu, click the SMS Campaign option.

MailDirect displays the Create New Campaign screen.

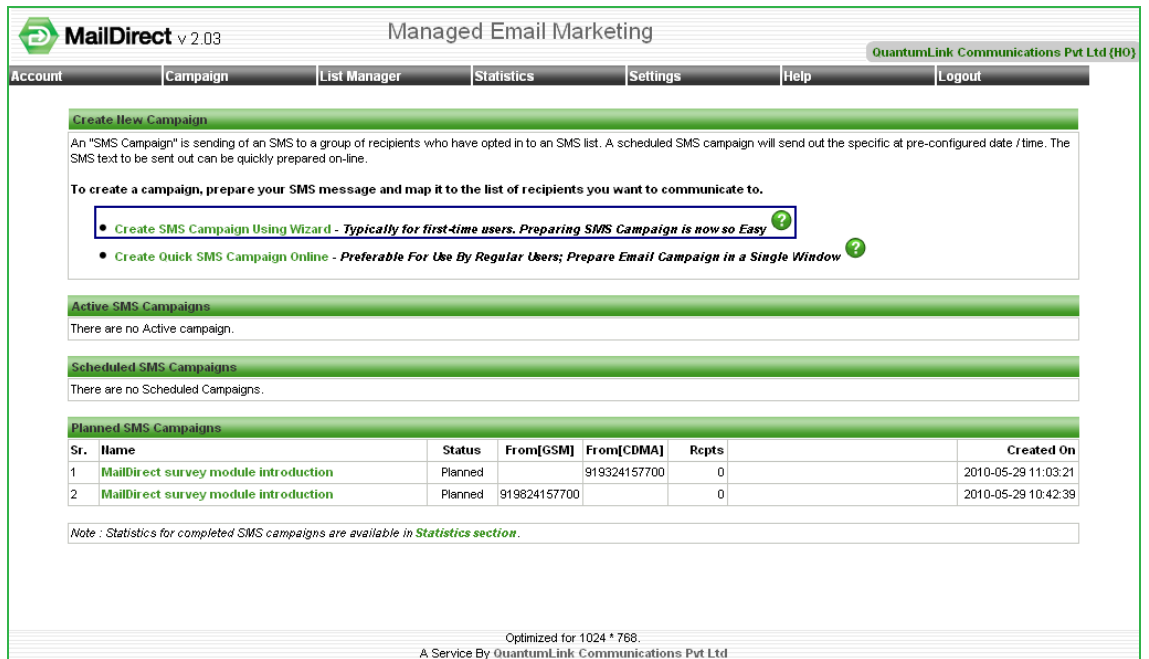


Figure 102: CREATE NEW CAMPAIGN

- Click the Create SMS Campaign Using Wizard link.

MailDirect displays the SMS Campaign Wizard - Welcome screen.

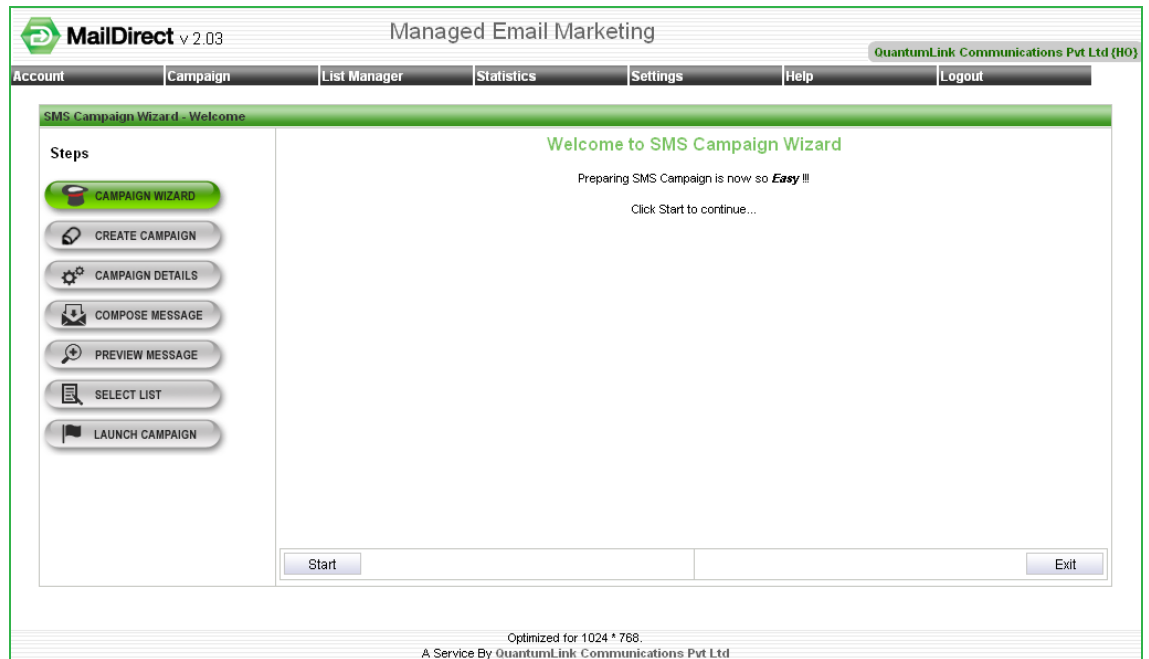


Figure 103: SMS CAMPAIGN WIZARD - WELCOME

Note: Alternately, the user can click the SMS Campaign Wizard option on the Campaign menu.

3. Click the **Start** button.

MailDirect displays the SMS Campaign Wizard – Create Campaign screen.

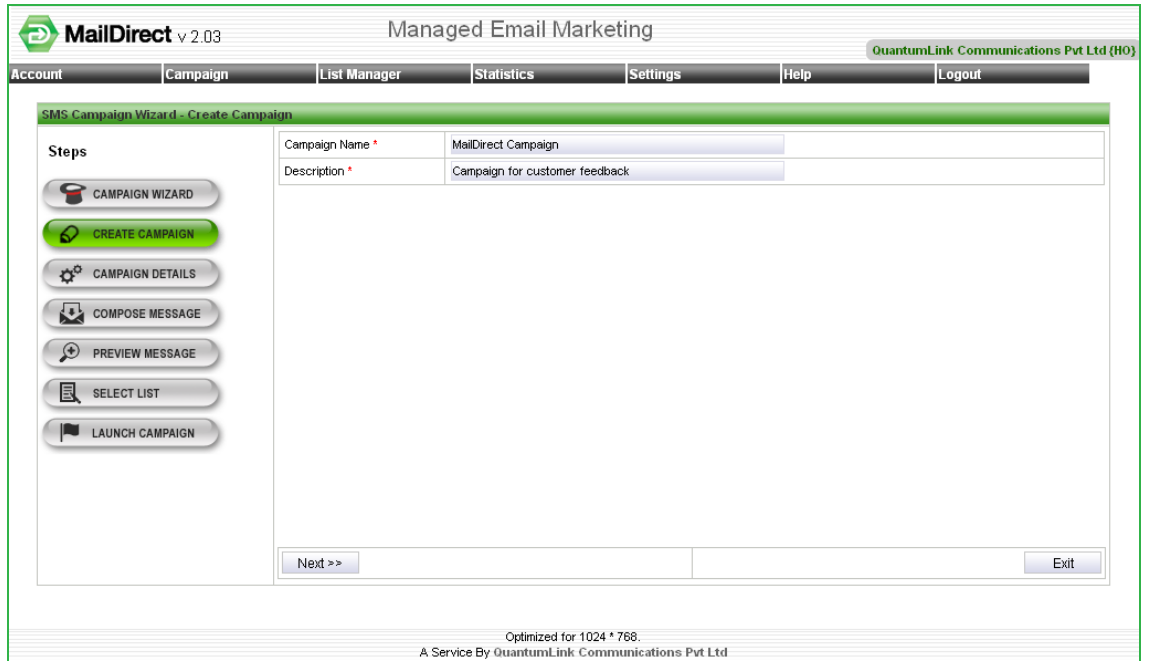


Figure 104: SMS CAMPAIGN WIZARD – CREATE CAMPAIGN

Table 35: CREATING CAMPAIGN

Field	Description
Campaign Name	Type an appropriate name for the campaign. This field is mandatory.
Description	Type an appropriate description for the campaign. This field is mandatory.

Enter the appropriate details in the required fields.

4. Click the **Next** button.

MailDirect displays the SMS Campaign Wizard – Campaign Send Details screen.

Figure 105: SMS CAMPAIGN WIZARD – CAMPAIGN SEND DETAILS

Table 36: CAMPAIGN SEND DETAILS

Field	Description
From	<p>Type the appropriate information to be displayed as the campaign details.</p> <p>The available fields are explained below-</p> <ul style="list-style-type: none"> ▪ [GSM]: Type an appropriate GSM number prefixed with 91 (country code) from which the campaign will be sent. ▪ [CDMA]: Type an appropriate CDMA number prefixed with 91 (country code) from which the campaign will be sent. <p>This field is mandatory.</p>

Enter the appropriate details in the required fields.

Note: For technical reasons, the user is advised to enter both GSM and CDMA numbers.

5. Click the Next button

MailDirect displays the SMS Campaign Wizard – Campaign Message screen.

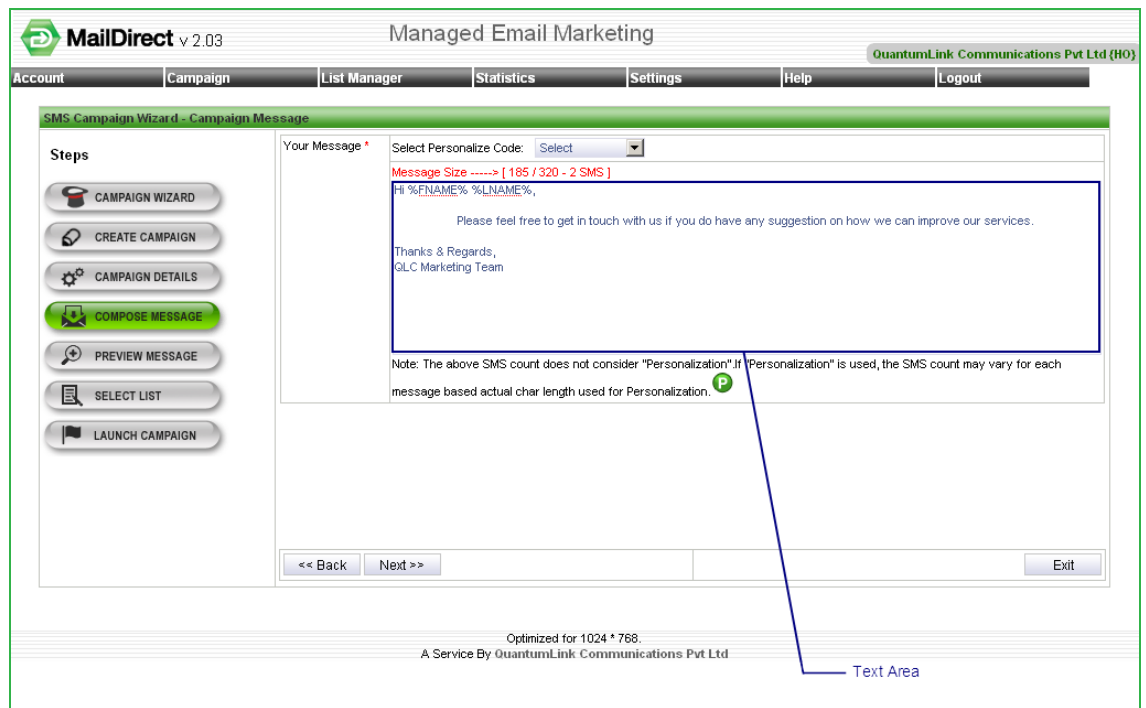


Figure 106: SMS CAMPAIGN WIZARD – CAMPAIGN MESSAGE

Note: If the user has entered an invalid GSM or CDMA number, an error message is displayed, which prevents the user from proceeding to the next step in the campaign creation. If the user has entered only a CDMA number, a warning message is displayed before the user can proceed to the next step in the campaign creation.

Table 37: CAMPAIGN MESSAGE

Field	Description
Your Message	<p>Type/Select the appropriate details to be displayed as the campaign message.</p> <p>The available fields are explained below-</p> <ul style="list-style-type: none"> Select Personalize Code: Select an appropriate personalized code to be sent in the campaign message. Text Area: Type an appropriate campaign message.

Note: The user can enter any number of characters for a campaign message. The campaign message will be divided over multiple SMS with each SMS containing 160 characters. The number of characters utilized in real-time (when a message is sent to a recipient or tested by substitution of personalized fields as appropriate) may differ from that at the time of creating a message due to varying length of personal details.

This field is mandatory.

Enter/Select the appropriate details in required fields.

6. Click the **Next** button.

MailDirect displays the SMS Campaign Wizard – Preview screen.

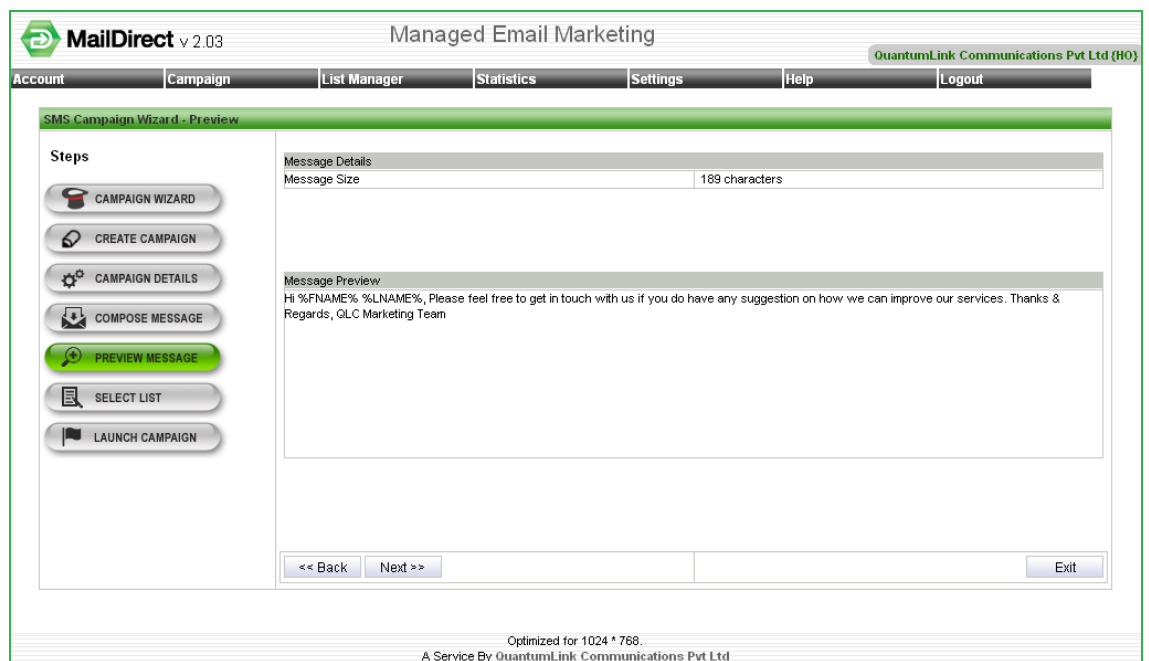


Figure 107: SMS CAMPAIGN WIZARD – PREVIEW

7. Click the **Next** button.

MailDirect displays the SMS Campaign Wizard – List Map screen.

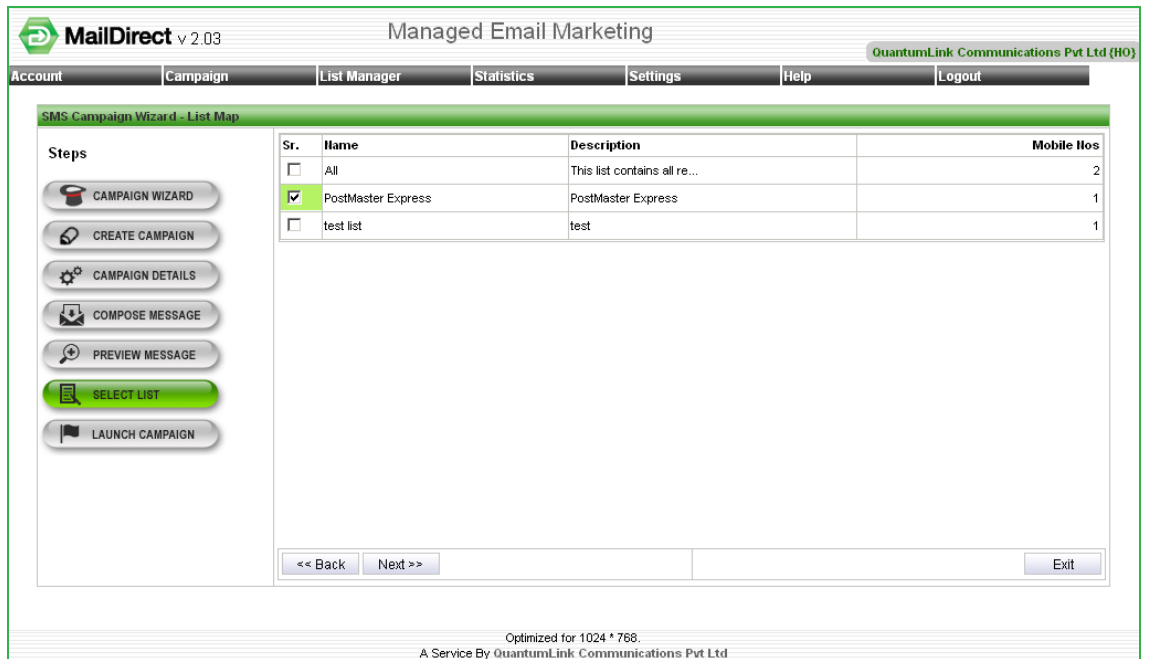


Figure 108: SMS CAMPAIGN WIZARD – LIST MAP

Table 38: LIST MAP

Field	Description
Sr.	Select the check boxes corresponding to the appropriate contact list/s to be mapped to the campaign. The campaign will be sent to all those who are included in these lists. This field is not mandatory.
Name	This section displays the name of the contact list.
Description	This section displays the description about the contact list.
Mobile Nos	This section displays the number of recipient mobile numbers present in the corresponding contact list.

Select the appropriate check boxes.

- Click the Next button.

MailDirect displays the SMS Campaign Wizard – Action screen.

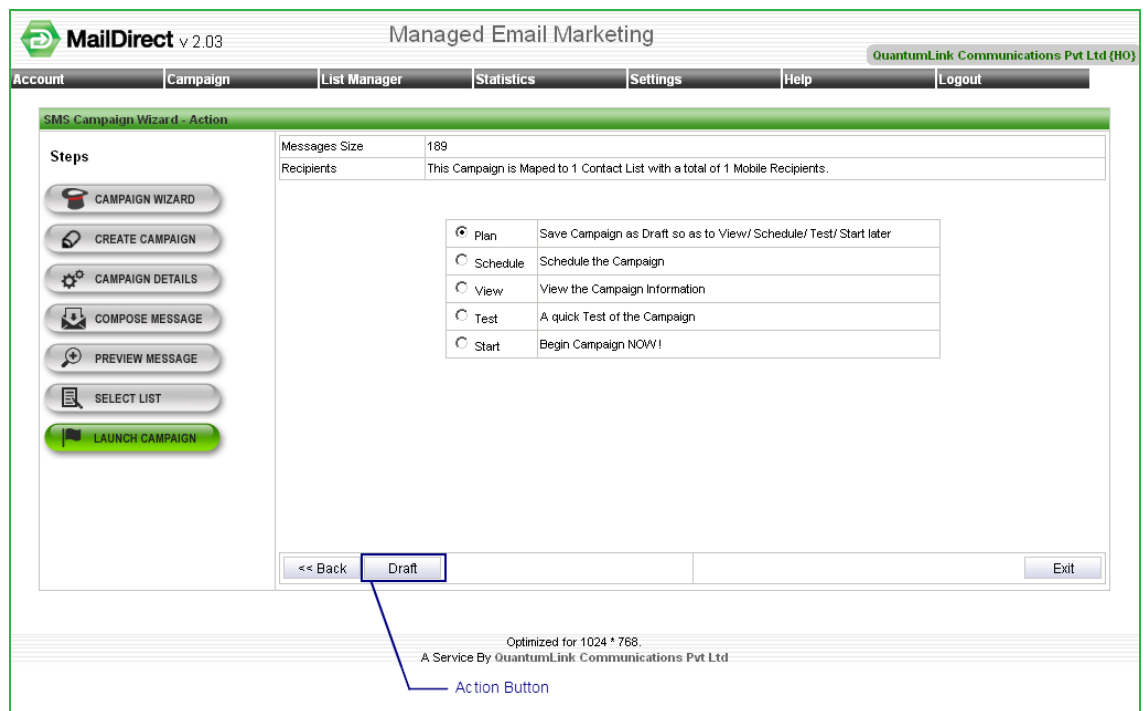


Figure 109: SMS CAMPAIGN WIZARD – ACTION

9. To launch a campaign:

Users can select any one of the following options:

- Save a campaign as a draft using the **Plan** option
- Schedule it for launch on a later date using the **Schedule** option
- Preview it using the **View** option
- Test it in real-time using the **Test** option
- Launch it immediately using the **Start** option.

Note: When the user selects an option, the action button changes to the option selected. The user can select only one option at a time.

a. To save a campaign as a draft using the **Plan** option:

- i. Select the **Plan** option. The **Plan** button will be made available.

Note: By default, the **Plan** option is selected.

- ii. Click the **Draft** button.

MailDirect displays the **Create New Campaign** screen with the campaign added to the **Planned SMS Campaigns** section.

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Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

An "SMS Campaign" is sending of an SMS to a group of recipients who have opted in to an SMS list. A scheduled SMS campaign will send out the specific at pre-configured date / time. The SMS text to be sent out can be quickly prepared on-line.

To create a campaign, prepare your SMS message and map it to the list of recipients you want to communicate to.

- Create SMS Campaign Using Wizard - Typically for first-time users. Preparing SMS Campaign is now so Easy ?
- Create Quick SMS Campaign Online - Preferable For Use By Regular Users; Prepare Email Campaign in a Single Window ?

Active SMS Campaigns
There are no Active campaign.

Scheduled SMS Campaigns
There are no Scheduled Campaigns.

Planned SMS Campaigns

Sr.	Name	Status	From[GSM]	From[CDMA]	Repts	Created On
1	MailDirect Campaign	Planned	919824157700	919324157700	1	2010-06-21 13:56:56
2	MailDirect survey module introduction	Planned		919324157700	0	2010-05-29 11:03:21
3	MailDirect survey module introduction	Planned	919824157700		0	2010-05-29 10:42:39

Note : Statistics for completed SMS campaigns are available in Statistics section.

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Figure 110: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO THE PLANNED SMS CAMPAIGNS SECTION

- b. To schedule a campaign for launch at a later time using the **Schedule** option:
 - i. Select the **Schedule** option. The **Schedule** button will be made available.
 - ii. Click the **Schedule** button.

MailDirect displays the SMS Campaign>Schedule SMS Campaign screen.

Figure 111: SMS CAMPAIGN>SCHEDULE SMS CAMPAIGN

Table 39: SCHEDULE SMS CAMPAIGN

Field	Description
SMS Campaign Schedule Date	Select an appropriate date on which the campaign will be launched, from the calendar.
SMS Campaign Schedule Time	Select an appropriate hour and minute at which the campaign will be the launched, from the drop-down lists.

Note: A campaign can only be scheduled to launch every hour or at the 15th, 30th and 45th minute of an hour.

Select the appropriate details in the required fields.

- iii. Click the **Save** button.

MailDirect displays the Create New Campaign screen with the campaign added to the Scheduled SMS Campaigns section.

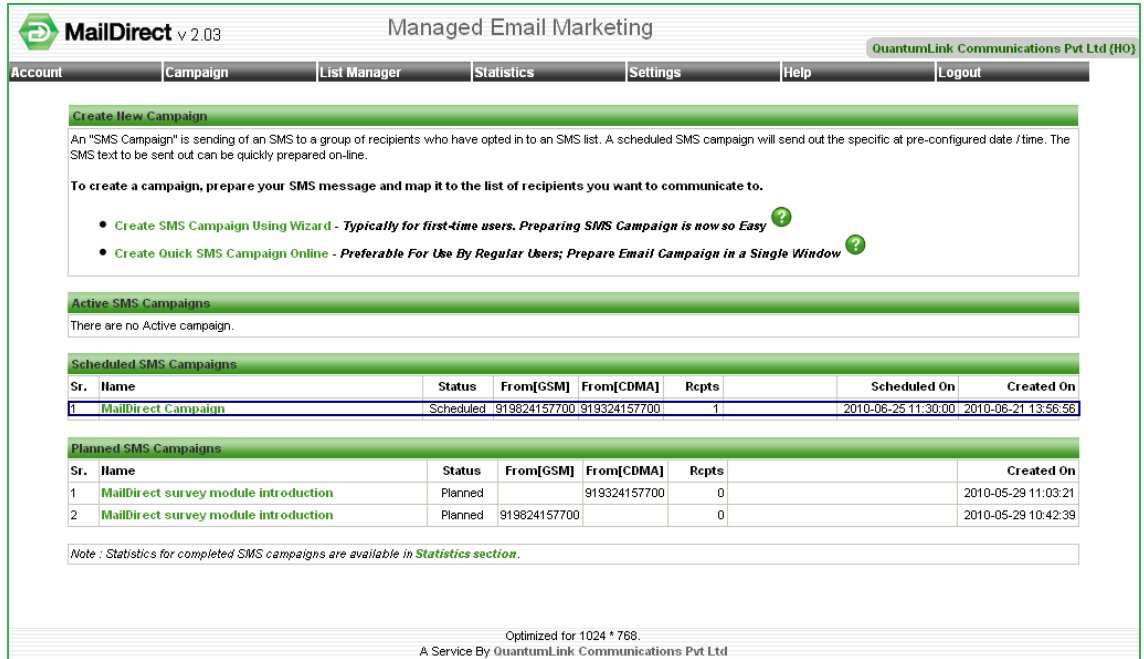


Figure 112: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO SCHEDULED SMS CAMPAIGNS SECTION

- c. To preview a campaign using the **View** option:
 - i. Select the **View** option. The **View** button will be made available.
 - ii. Click the **View** button.

MailDirect displays the Details screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

SMS Campaign > Details Status: Planned

SMS Campaign Information

SMS Campaign Name	MailDirect Campaign
Description	Campaign for customer feedback

SMS Information

From	[GSM]	919824157700
	[CDMA]	919324157700

Message Information

Recipients List

Sr.	Name	Description	Mobile Nos
1	PostMaster Express	PostMaster Express	1

Wizard Schedule Test Start Abandon Cancel

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Figure 113: DETAILS

Table 40: CAMPAIGN DETAILS

Field	Description
	Click this icon corresponding to the appropriate section to edit the information displayed in that section.
	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
	Click this icon corresponding to the appropriate section to display the details in that section.
Wizard	Click this button to edit the campaign that is currently being viewed. <hr/> Note: The user can edit the entire campaign. <hr/>
Schedule	Click this button to schedule the launch of the campaign, which is currently being viewed, to a later point of time.

	<p>Note: Instructions to schedule the campaign are given in step 9.b.ii and iii.</p>
Test	<p>Click this button to test the campaign, which is currently being viewed, in real time.</p> <p>Note: Instructions to test the campaign are given in step 9.d.ii and iii.</p>
Start	<p>Click this button to immediately launch the campaign that is currently being viewed.</p> <p>Note: Instructions to start the campaign are given in step 9.e.i and ii.</p>
Abandon	<p>Click this button to abandon the campaign that is currently being viewed.</p>

Click the appropriate icons/buttons as required.

- d. To test a campaign for a real-time view using the **Test** option:
 - i. Select the **Test** option. The **Test** button will be made available.
 - ii. Click the **Test** button.

MailDirect displays the **Campaign** screen.

SMS Campaign: "MailDirect Campaign"			
Email	MobileNo	Firstname	Lastname
info@qtc.in	919324157700	Dipa	Subramanian
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Submit"/>		<input type="button" value="Close"/>	
A service by QuantumLink Communications Pvt. Ltd			

Figure 114: CAMPAIGN

Table 41: TEST CAMPAIGN

Field	Description
Email	Type an appropriate email address of the recipient of the campaign under test.
MobileNo	Type an appropriate mobile number to which the campaign will be sent for a test in real-time.
FirstName	Type an appropriate first name of the recipient of the campaign under test.
LastName	Type an appropriate last name of the recipient of the campaign under test.

Note: The number of fields for entering personal details can differ if the user has customized the fields using the Fields Manager tab in the Settings menu.

Enter the appropriate details in the required fields.

- iii. Click the **Submit** button.

MailDirect displays the **SMS Campaign** screen with test status.

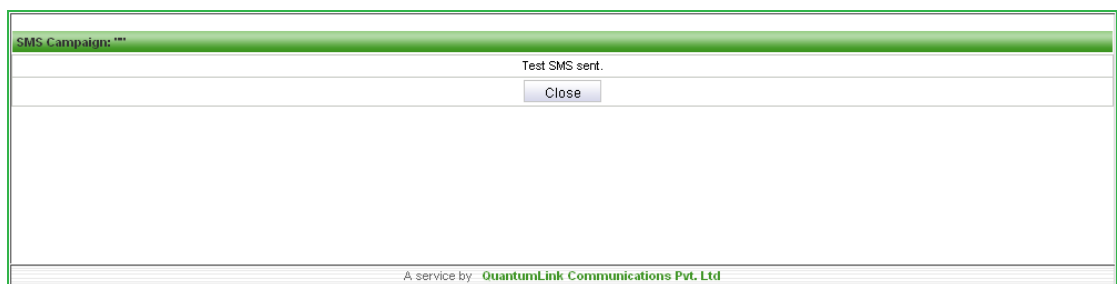


Figure 115: SMS CAMPAIGN WITH TEST STATUS

- iv. Click the **Close** button.

MailDirect displays the **SMS CAMPAIGN WIZARD – ACTION** screen, as shown in [Figure 109](#).

- e. To launch a campaign immediately using the **Start** option:
 - i. Select the **Start** option. The **Start** button will be made available.
 - ii. Click the **Start** button.

MailDirect displays a message.



Figure 116: START CAMPAIGN MESSAGE

- iii. Click the OK button.

MailDirect displays the SMS Campaign>Details screen.

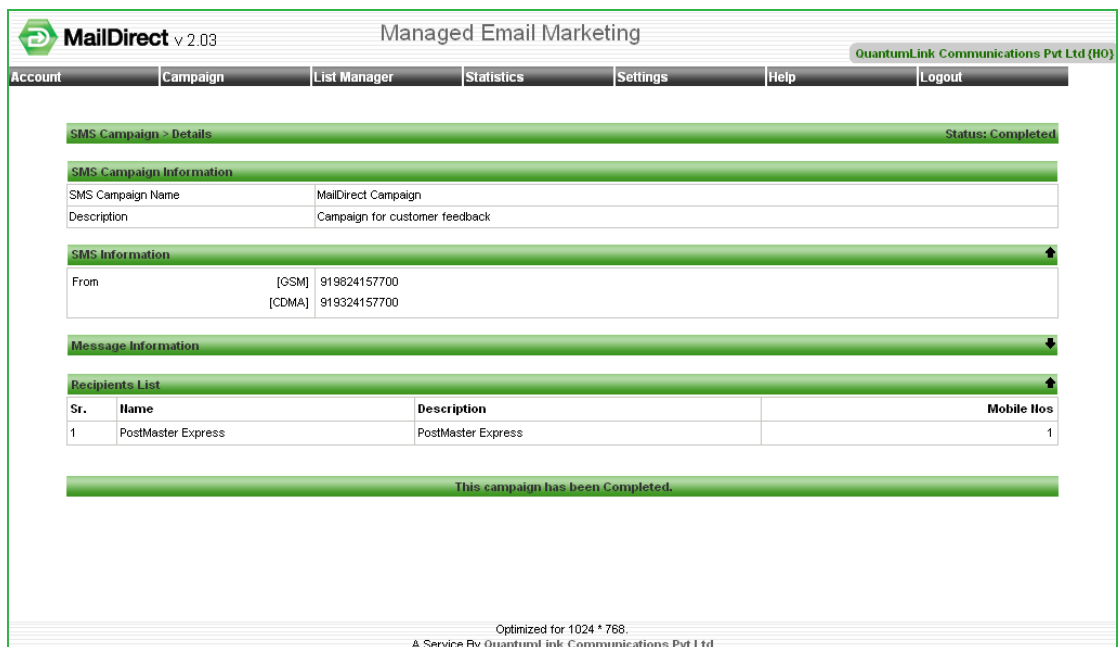


Figure 117: SMS CAMPAIGN>DETAILS

Table 42: SMS CAMPAIGN DETAILS

Field	Description
↑	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
↓	Click this icon corresponding to the appropriate section to

display the details in that section.

Click the appropriate icons as required.



To create a Quick SMS Campaign:

1. On the Campaign menu, click the SMS Campaign option. MailDirect displays the Create New Campaign screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

An "SMS Campaign" is sending of an SMS to a group of recipients who have opted in to an SMS list. A scheduled SMS campaign will send out the specific at pre-configured date / time. The SMS text to be sent out can be quickly prepared on-line.

To create a campaign, prepare your SMS message and map it to the list of recipients you want to communicate to.

- Create SMS Campaign Using Wizard - Typically for first-time users. Preparing SMS Campaign is now so Easy ?
- **Create Quick SMS Campaign Online - Preferable For Use By Regular Users; Prepare Email Campaign in a Single Window ?**

Active SMS Campaigns
There are no Active campaign.

Scheduled SMS Campaigns
There are no Scheduled Campaigns.

Planned SMS Campaigns

Sr.	Name	Status	From[GSM]	From[CDMA]	Repts	Created On
1	MailDirect survey module introduction	Planned	919824157700	919324157700	0	2010-05-29 11:03:21
2	MailDirect survey module introduction	Planned	919824157700		0	2010-05-29 10:42:39

Note : Statistics for completed SMS campaigns are available in Statistics section.

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Figure 118: CREATE NEW CAMPAIGN

2. Click the Create Quick SMS Campaign Online link.

MailDirect displays the SMS Direct>Quick SMS Campaign screen.

SmsDirect > Quick SMS Campaign

SMS Campaign Information

Campaign Name * MailDirect Campaign
 Description * Campaign for customer feedback

SMS Information

From* [GSM] 919824157700
 [CDMA] 919324157700

Message Information

Your Message *
 Select Personalize Code: Select
 Message Size -----> [181 / 320 - 2 SMS]
 Hi %FNAME% %LNAME%,
 Please feel free to get in touch with us if you have any suggestion on how we can improve our services.
 Thanks & Regards,
 GLC Marketing Team
 Note: The above SMS count does not consider "Personalization". If "Personalization" is used, the SMS count may vary for each message based actual char length used for Personalization.

Recipients List

Sr.	Name	Description	Mobile Nos
<input type="checkbox"/>	All	This list contains all re...	2
<input checked="" type="checkbox"/>	PostMaster Express	PostMaster Express	1
<input type="checkbox"/>	test list	test	1

Submit Reset

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Text Area

Figure 119: SMS DIRECT>QUICK SMS CAMPAIGN

Note: Alternately, the user can click the Quick SMS Campaign option on the Campaign menu.

Table 43: QUICK SMS CAMPAIGN

Field	Description
SMS Campaign Information	Type the appropriate details to be displayed as the campaign information. The available fields are explained below- <ul style="list-style-type: none"> Campaign Name: Type an appropriate name for the campaign. This field is mandatory.

	<ul style="list-style-type: none"> ▪ Description: Type an appropriate description for the campaign. This field is mandatory.
<p>SMS Information</p>	<p>Type the appropriate details in the From fields to be displayed as the SMS Information.</p> <p>The available fields are explained below-</p> <ul style="list-style-type: none"> ▪ [GSM]: Type an appropriate GSM number prefixed with 91 (country code) from which the campaign will be sent. ▪ [CDMA]: Type an appropriate CDMA number prefixed with 91 (country code) from which the campaign will be sent. <p>This field is mandatory.</p>
<p>Your Message</p>	<p>Type/Select the appropriate details to be displayed as the campaign message.</p> <p>The available fields are explained below-</p> <ul style="list-style-type: none"> ▪ Select Personalize Code: Select an appropriate personalized code to be sent in the campaign message. ▪ Text Area: Type an appropriate campaign message. <hr/> <p>Note: The user can enter any number of characters for a campaign message. The campaign message will be divided over multiple SMS with each SMS containing 160 characters. The number of characters utilized in real-time (when a message is sent to a recipient or tested by substitution of personalized fields as appropriate) may differ from that used at the time of creating a message due to varying length of personal details.</p> <hr/> <p>This field is mandatory.</p>
<p>Recipients List</p>	<p>Select the appropriate check boxes to map the campaign to the recipients.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Sr. Select the check boxes corresponding to the appropriate contact list/s to be mapped to the campaign. The campaign will be sent to all those who are included in these lists. This field is not mandatory. ▪ Name

- This section displays the name of the contact list.
- **Description**
This section displays the description about the contact list.
- **Mobile Nos**
This section displays the number of recipient mobile numbers present in the corresponding contact list.

Enter/Select the appropriate details in the required fields.

Note: For technical reasons, the user is advised to enter both GSM and CDMA numbers.

3. Click the **Submit** button

MailDirect displays the SMS Campaign>Result screen.

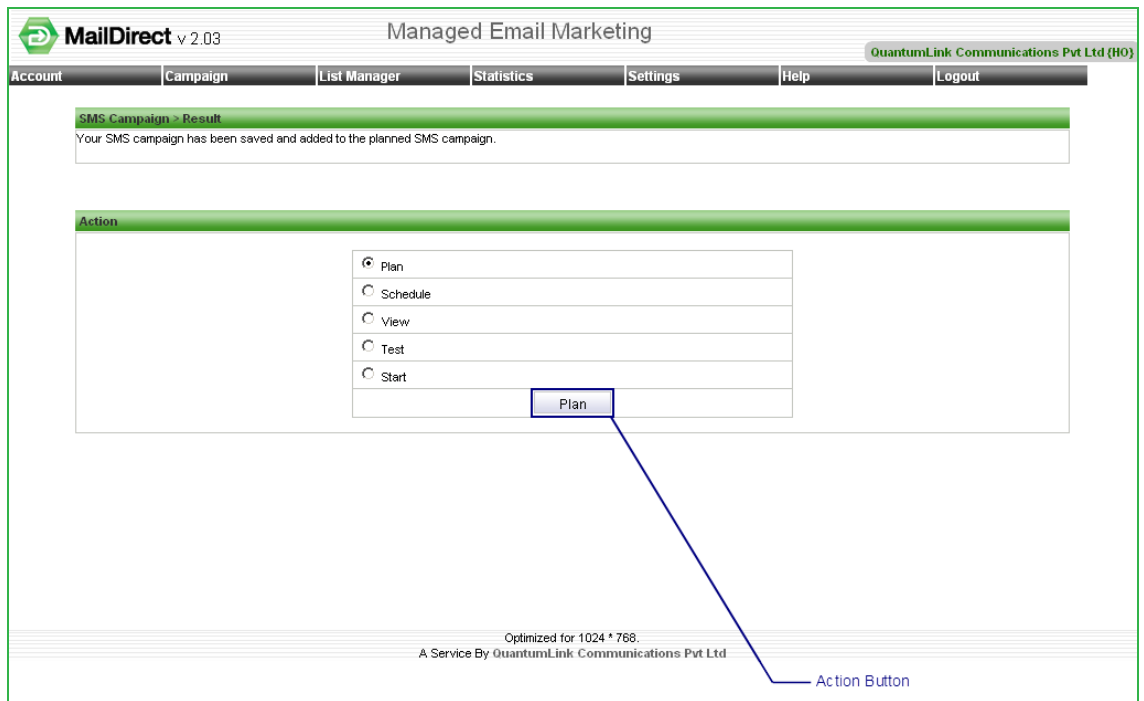


Figure 120: SMS CAMPAIGN>RESULT

4. To launch a campaign:

Users can select any one of the following options:

- Save a campaign as a draft using the **Plan** option
- Schedule it for launch on a later date using the **Schedule** option
- Preview it using the **View** option
- Test it in real-time using the **Test** option
- Launch it immediately using the **Start** option.

Note: When the user selects an option, the action button changes to the option selected. The user can select only one option at a time.

a. To save a campaign as a draft using the **Plan** option:

Note: The campaign has already been saved to the drafts and added to the planned campaigns. The user should use this option only if needed.

i. Select the **Plan** option. The **Plan** button will be made available.

Note: By default, the **Plan** option is selected.

ii. Click the **Plan** button.

MailDirect displays the Create New Campaign screen with the campaign added to the Planned SMS Campaigns section.

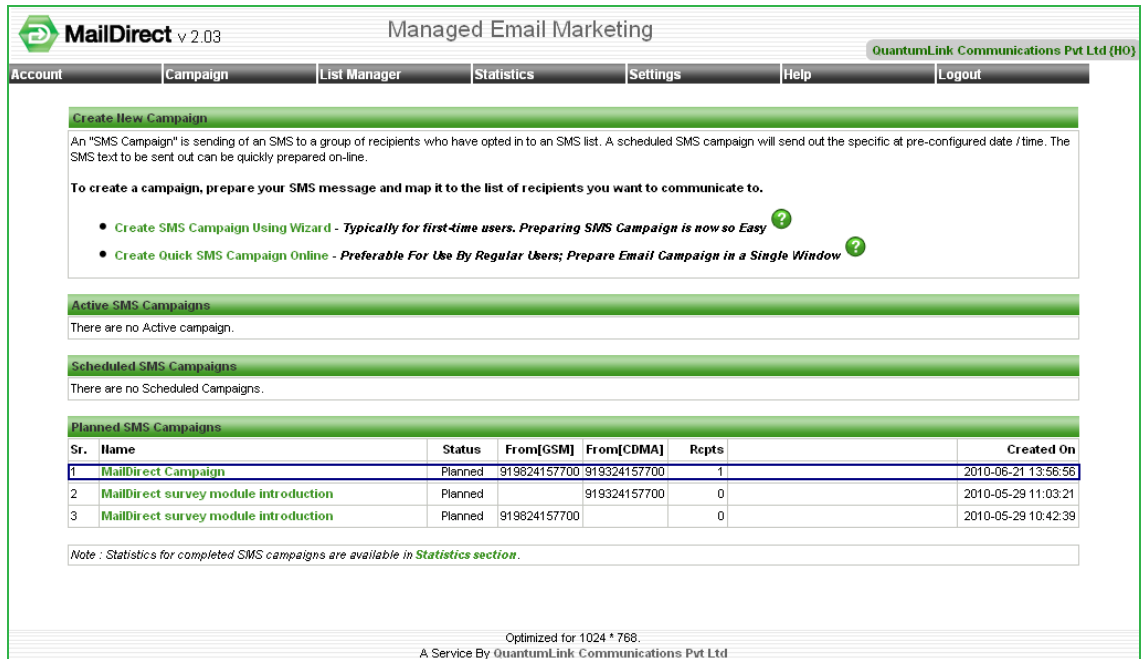


Figure 121: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO THE PLANNED SMS CAMPAIGNS SECTION

- b. To schedule a campaign for launch at a later time using the Schedule option:
 - i. Select the Schedule option. The Schedule button will be made available.
 - ii. Click the Schedule button.

MailDirect displays the SMS Campaign>Schedule SMS Campaign screen.

Figure 122: SMS CAMPAIGN>SCHEDULE SMS CAMPAIGN

Table 44: SCHEDULE SMS CAMPAIGN

Field	Description
SMS Campaign Schedule Date	Select an appropriate date on which the campaign will be launched, from the calendar.
SMS Campaign Schedule Time	Select an appropriate hour and minute at which the campaign will be the launched, from the drop-down lists.

Note: A campaign can only be scheduled to launch every hour or at the 15th, 30th and 45th minute of an hour.

Select the appropriate details in the required fields.

- iii. Click the **Save** button.

MailDirect displays the Create New Campaign screen with the campaign added to the Scheduled SMS Campaigns section.

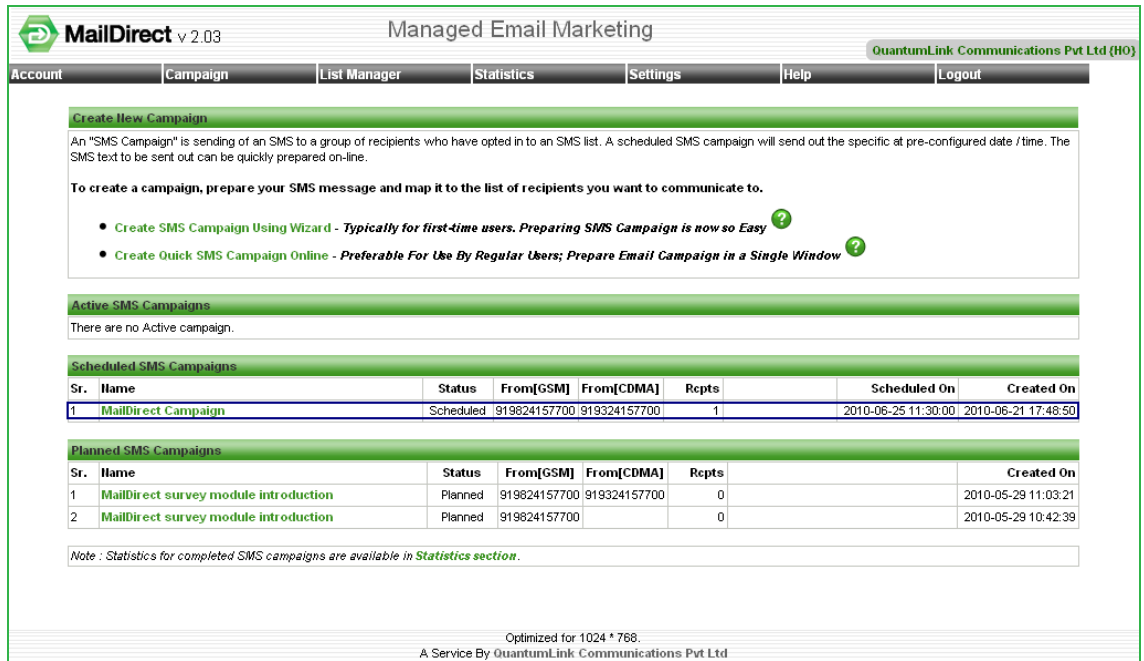


Figure 123: CREATE NEW CAMPAIGN WITH THE CAMPAIGN ADDED TO SCHEDULED SMS CAMPAIGNS SECTION

- c. To preview a campaign using the **View** option:
 - i. Select the **View** option. The **View** button will be made available.
 - ii. Click the **View** button.

MailDirect displays the Details screen.




The screenshot displays the 'SMS Campaign > Details' screen in the MailDirect v 2.03 interface. The page title is 'Managed Email Marketing' and the user is logged in as 'QuantumLink Communications Pvt Ltd (HO)'. The navigation menu includes Account, Campaign, List Manager, Statistics, Settings, Help, and Logout. The main content area is divided into several sections:

- SMS Campaign > Details** (Status: Planned)
- SMS Campaign Information**: Includes fields for SMS Campaign Name (MailDirect Campaign) and Description (Campaign for customer feedback).
- SMS Information**: Shows phone numbers for GSM (919824157700) and CDMA (919324157700).
- Message Information**
- Recipients List**: A table with columns for Sr., Name, Description, and Mobile Nos. It contains one entry: Sr. 1, Name PostMaster Express, Description PostMaster Express, Mobile Nos 1.

At the bottom of the screen, there are buttons for Wizard, Schedule, Test, Start, Abandon, and Cancel. The footer text reads: 'Optimized for 1024 * 768. A Service By QuantumLink Communications Pvt Ltd'.

Figure 124: DETAILS

Table 45: CAMPAIGN DETAILS

Field	Description
	Click this icon corresponding to the appropriate section to edit the information displayed in that section.
	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
	Click this icon corresponding to the appropriate section to display the details in that section.
Wizard	Click this button to edit the campaign that is currently being viewed. Note: The user can edit the entire campaign.
Schedule	Click this button to schedule the launch of the campaign, which is currently being viewed, to a later point of time.

	<p>Note: Instructions to schedule the campaign are given in step 4.b.ii and iii.</p>
Test	<p>Click this button to test the campaign, which is currently being viewed, in real time.</p> <p>Note: Instructions to test the campaign are given in step 4.d.ii and iii.</p>
Start	<p>Click this button to immediately launch the campaign that is currently being viewed.</p> <p>Note: Instructions to start the campaign are given in step 4.e.ii and iii.</p>
Abandon	<p>Click this button to abandon the campaign that is currently being viewed.</p>

Click the appropriate icons/buttons as required.

- d. To test a campaign for a real-time view using the Test option:
 - i. Select the Test option. The Test button will be made available.
 - ii. Click the Test button.

MailDirect displays the Campaign screen.

SMS Campaign: "MailDirect Campaign"			
Email	MobileNo	Firstname	Lastname
info@qtc.in	919324157700	Dipa	Subramanian
Submit		Close	
A service by QuantumLink Communications Pvt. Ltd			

Figure 125: CAMPAIGN

Table 46: TEST CAMPAIGN

Field	Description
EMAIL	Type an appropriate email address of the recipient of the campaign under test.
MobileNo	Type an appropriate mobile number to which the campaign will be sent for a test in real-time.
FirstName	Type an appropriate first name of the recipient of the campaign under test.
LastName	Type an appropriate last name of the recipient of the campaign under test.

Note: The number of fields for entering personal details can differ if the user has customized the fields using the Fields Manager tab in the Settings menu.

Enter the appropriate details in the required fields.

- iii. Click the **Submit** button.

MailDirect displays the **SMS Campaign** screen with test status.

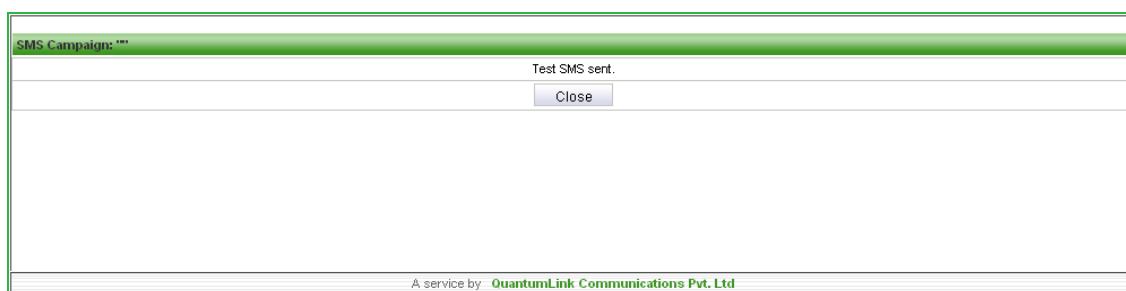


Figure 126: SMS CAMPAIGN WITH TEST STATUS

- iv. Click the **Close** button.

MailDirect displays the **SMS Campaign>Result** screen, as shown in [Figure 120](#).

- e. To launch a campaign immediately using the **Start** option:
 - i. Select the **Start** option. The **Start** button will be made available.
 - ii. Click the **Start** button.

MailDirect displays a message.



Figure 127: START CAMPAIGN MESSAGE

- iii. Click the OK button.

MailDirect displays the SMS Campaign>Details screen.

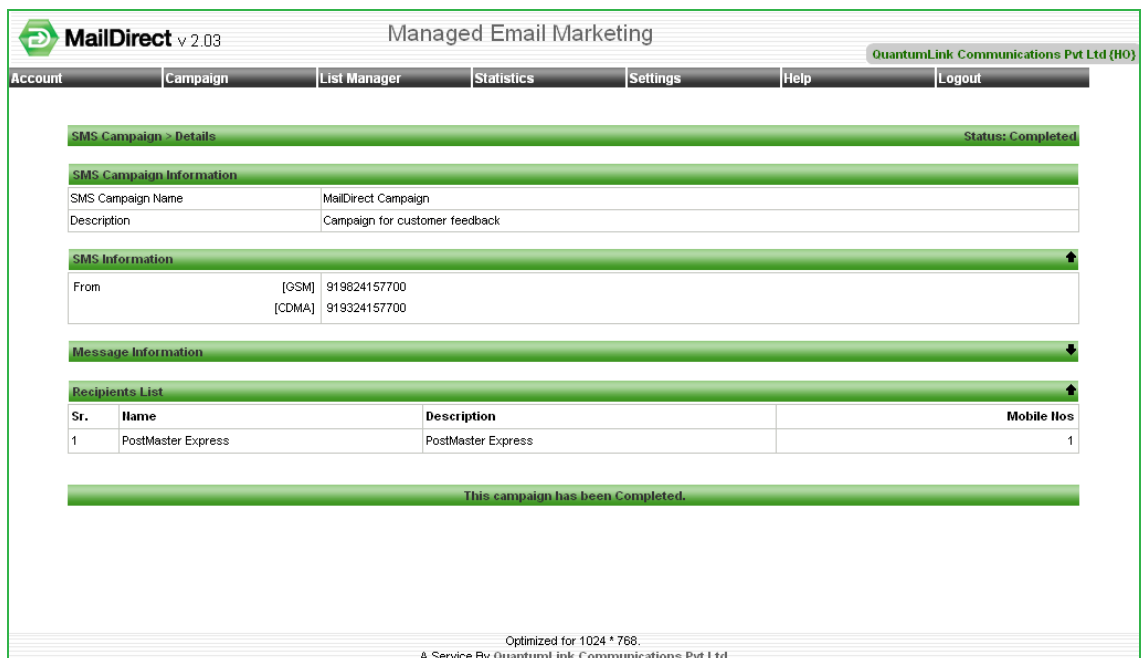


Figure 128: SMS CAMPAIGN>DETAILS

Table 47: SMS CAMPAIGN DETAILS

Field	Description
↑	Click this icon corresponding to the appropriate section to hide the details displayed in that section.
↓	Click this icon corresponding to the appropriate section to

display the details in that section.

Click the appropriate icons as required.

5.2.2 Viewing SMS Campaign Statistics summary



To view SMS campaign statistics summary:

1. On the Campaign menu, click the SMS Campaign option.
MailDirect displays the Create New Campaign screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (H0)

Account Campaign List Manager Statistics Settings Help Logout

Create New Campaign

An "SMS Campaign" is sending of an SMS to a group of recipients who have opted in to an SMS list. A scheduled SMS campaign will send out the specific at pre-configured date /time. The SMS text to be sent out can be quickly prepared on-line.

To create a campaign, prepare your SMS message and map it to the list of recipients you want to communicate to.

- Create SMS Campaign Using Wizard - Typically for first-time users. Preparing SMS Campaign is now so Easy ?
- Create Quick SMS Campaign Online - Preferable For Use By Regular Users; Prepare Email Campaign in a Single Window ?

Active SMS Campaigns

There are no Active campaign.

Scheduled SMS Campaigns

There are no Scheduled Campaigns.

Planned SMS Campaigns

Sr.	Name	Status	From[GSM]	From[CDMA]	Repts	Created On
1	MailDirect survey module introduction	Planned	919824157700	919324157700	0	2010-05-29 11:03:21
2	MailDirect survey module introduction	Planned	919824157700		0	2010-05-29 10:42:39

Note : Statistics for completed SMS campaigns are available in Statistics section.

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Figure 129: CREATE NEW CAMPAIGN

Table 48: STATISTICS

Field	Description
Statistics > Active/Scheduled/Draft SMS Campaigns	
Name	This section displays the name of the campaign. Click the name, which is a link, to view the details about the corresponding SMS campaign.

Status	This section displays the status of the SMS campaign. The campaign status can either be Active , or Scheduled or Planned .
From[GSM]	This field displays the GSM number from which the campaign messages were/are being (depending on whether the campaign is active or has been completed) sent.
From[CDMA]	This field displays the CDMA number from which the campaign messages were/are being (depending on whether the campaign is active or has been completed) sent.
Rcpts	This section displays the number of recipients of the SMS campaign.
Start On (Active)/Created On (Planned and Scheduled)	This section displays the date on which the corresponding campaign was started/created.

Note: The user can also click on the **Statistics section** link available below the **Statistics>Draft SMS Campaigns** sections to view the detailed statistics for the SMS campaigns.

6 Working with Surveys

In this chapter, users will learn how to:

- Manage a survey

6.1 Introduction

Users can create new surveys to gauge customer response to a product or service. Survey questions can have a text based or an option based response facility. They can also view the statistics summary. Users can choose one of the following options:

- Send the link to the survey questions via emails
- Put the link on a website
- Run a combined survey.

6.2 Managing Survey

This section provides instructions on how to create a Survey and view statistics summary.

6.2.1 Creating Survey

This section provides instructions on how to create email based, website based and combined (both email and website based) surveys.



To create an Email based Survey Campaign:

1. On the Campaign menu, click the Survey option.

MailDirect displays the Introduction To Surveys screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- [Create New Survey](#) - *This is a quick & fast method of creating your Survey.* ?

Active Surveys

There are no Active Survey.

Planned Surveys

Sr.	Name	Status	Link/Email	Questions	Repts	Start Date	Expiry Date
1	MailDirect survey	Planned	Invite Via Email	1	0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

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Figure 130: INTRODUCTION TO SURVEYS

2. Click the Create New Survey link.

MailDirect displays the Survey Details screen.

The screenshot shows the 'Survey Details' screen in the MailDirect interface. The page header includes 'MailDirect v 2.03' and 'Managed Email Marketing'. The user is logged in as 'QuantumLink Communications Pvt Ltd (HO)'. The navigation menu includes 'Account', 'Campaign', 'List Manager', 'Statistics', 'Settings', 'Help', and 'Logout'. The main content area is titled 'Survey Details' and contains a form with the following fields:

Field	Value	Help Icon
Name of Survey *	MailDirect Customer Survey	
Survey Type *	Invite Via Email [Restricted]	?
Survey Expiry Date *	15/06/2010	
Receive Response by Email*	<input type="radio"/> Yes <input checked="" type="radio"/> No	?
Enable Captcha *	<input checked="" type="radio"/> Yes <input type="radio"/> No	?

On the left side, there is a 'Steps' sidebar with the following buttons: EDIT SURVEY (highlighted), SURVEY QUESTIONS, PAGE DESIGN, PAGE PREVIEW, CREATE CAMPAIGN, and EXIT. A 'Next>>' button is located at the bottom right of the form area. The footer of the page indicates 'Optimized for 1024 * 768. A Service By QuantumLink Communications Pvt Ltd'.

Figure 131: SURVEY DETAILS

Table 49: SURVEY DETAILS

Field	Description
Name of Survey	Type an appropriate name for the survey. This field is mandatory.
Survey Type	Select an appropriate option to define the type of survey to be created, from the drop-down list. The available options are explained below- <ul style="list-style-type: none"> ■ Invite Via Email [Restricted]: Select this option to create a survey that will be conducted via emails. This type of survey facilitates the user to send an invitation to the survey, via email. ■ Public Link On Website [Public]: Select this option to create a survey that will be conducted by using public links on the user's Website. This type of survey can be answered by anybody who visits the user's website. ■ Combined [Restricted & Public]: Select this option to create a survey that will be conducted via emails as

well as by using public links on the user's Website.

This field is mandatory.

Survey Expiry Date

Select an appropriate date, month and year till when this survey will be conducted.

This field is mandatory.

Receive Response by Email

Select either **Yes** or **No** to enable or disable receipt of survey responses by email.

If **Yes** is selected, the **Email Id To Receive Response** text box will be made available to the user.

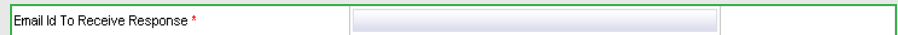


Figure 132: EMAIL ID TO RECEIVE RESPONSE FIELD

Type an appropriate email ID to which survey responses are to be sent by the recipients.

Note: By default, **No** is selected.

This field is mandatory.

Enable Captcha

Select either **Yes** or **No** to enable or disable **Captcha** (Completely Automated Public Turing Test to tell Computers and Humans Apart). Selecting **Yes** ensures that survey responses are not generated by computers.

Note: By default, **Yes** is selected.

This field is mandatory.

Enter/Select the appropriate details in the required fields.

3. Click the **Next** button.

Note: To create an email based survey, select the **Invite Via Email [Restricted]** option from the **Survey Type** drop-down list.
The following steps are applicable only if the **Invite Via Email [Restricted]** option is selected.

MailDirect displays the Survey Questions screen.

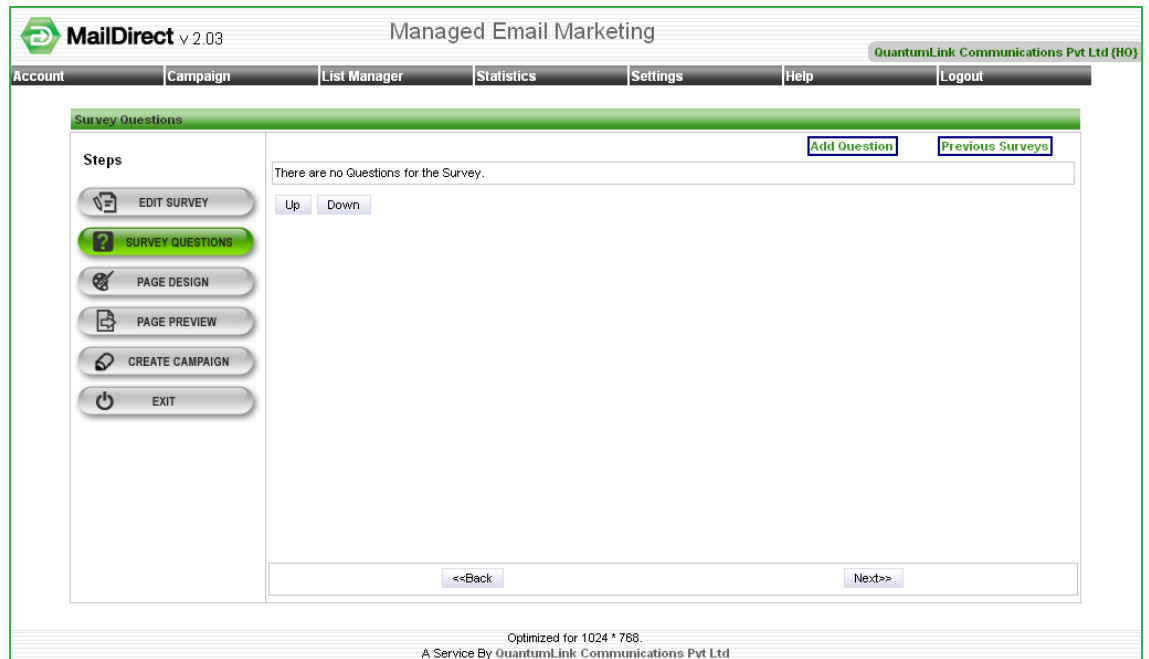


Figure 133: SURVEY QUESTIONS

4. To add questions:

Users can add questions by using:

- ◆ Add Question link (to add new questions)
- ◆ Previous Surveys link (to add questions from existing surveys)
- a. To add questions using the Add Question link:
 - i. Click the Add Question link.

MailDirect displays the Add/Edit Question screen.

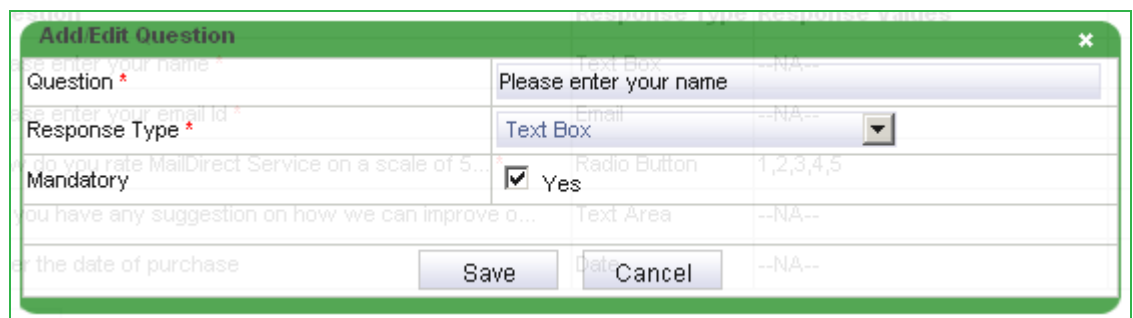


Figure 134: ADD/EDIT QUESTION

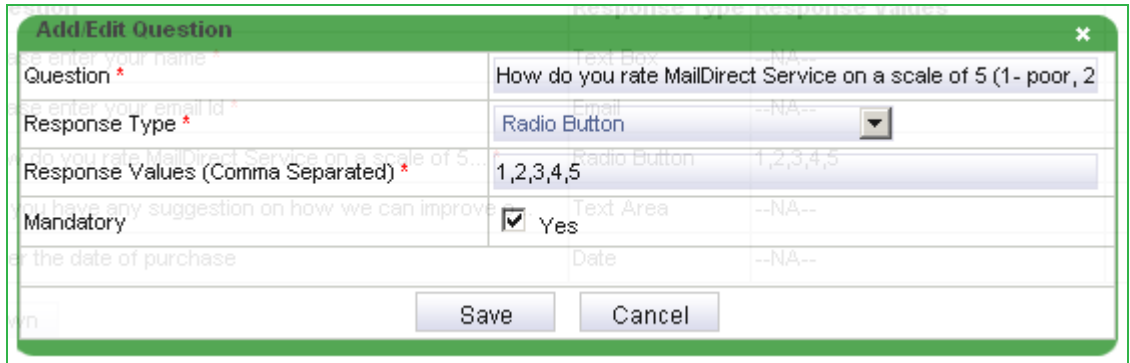


Figure 135: ADD/EDIT QUESTION [WITH RESPONSE VALUES FIELD]

Table 50: ADD/EDIT QUESTION

Field	Description
Question	Type an appropriate question. This field is mandatory.
Response Type	<p>Select an appropriate option from the drop-down list, to define the type of response for this question.</p> <p>The available options are explained below -</p> <ul style="list-style-type: none"> Text Box: If this option is selected, a text box will be made available to survey recipients for entering responses to the survey. Text Area: If this option is selected, a text area will be made available to survey recipients for entering responses to the survey. Drop Down Box: If this option is selected, a drop-down box will be made available to survey recipients for selecting a response to the survey. On selecting this option, a Response Values text box will be made available to the user for defining responses to the survey, as shown in Figure 135. Type the appropriate values separated by a comma. This field is mandatory. Radio Button: If this option is selected, radio buttons will be made available to survey recipients for selecting a response to the survey. On selecting this option, a Response Values text box will be made available to the user for defining responses to the

survey, as shown in [Figure 135](#).

Type the appropriate values separated by a comma.

The number of radio buttons that will be available to survey recipients depends on the number of values entered by the user in the **Response Values** text box.

This field is mandatory.

- **Check Box:**

If this option is selected, check boxes will be made available to survey recipients for selecting a response to the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown as in [Figure 135](#).

Type the appropriate values separated by a comma.

The number of check boxes that will be available to survey recipients depends on the number of values entered by the user in the **Response Values** text box.

This field is mandatory.

- **Email:**

If this option is selected, a text box will be made available to survey recipients for entering responses to the survey.

- **Date:**

If this option is selected, a calendar will be made available to survey recipients for selecting responses to the survey.

This field is mandatory.

Mandatory

Select this check box to make it mandatory for survey recipients to respond to the question.

This field is not mandatory.

Enter/select the appropriate details in the required fields.

- ii. Click the **Save** button to save the entered/selected information.

MailDirect displays the **Survey Questions** screen with added/modified questions.

Note: Only one question can be added at a time; the user can click either of the following:

- **Add Questions** link to add more new questions
- **Previous Surveys** link to add questions from a previous survey
- **Next** button to go to the **Page Design** screen

To edit a question added on the **Survey Questions** screen, the user can click the **Edit** link for the corresponding question. MailDirect displays the **Add/Edit Question** screen with the details for the corresponding question. Edit the details in the required fields.

To delete a question added on the **Survey Questions** screen, the user can click the **Delete** link for the corresponding question. The **Delete** link is only available if there are two or more questions on the **Survey Questions** screen.

b. To add questions using the **Previous Surveys** link.

i. Click the **Previous Surveys** link.

MailDirect displays the **Get Questions from Previous Survey** screen.

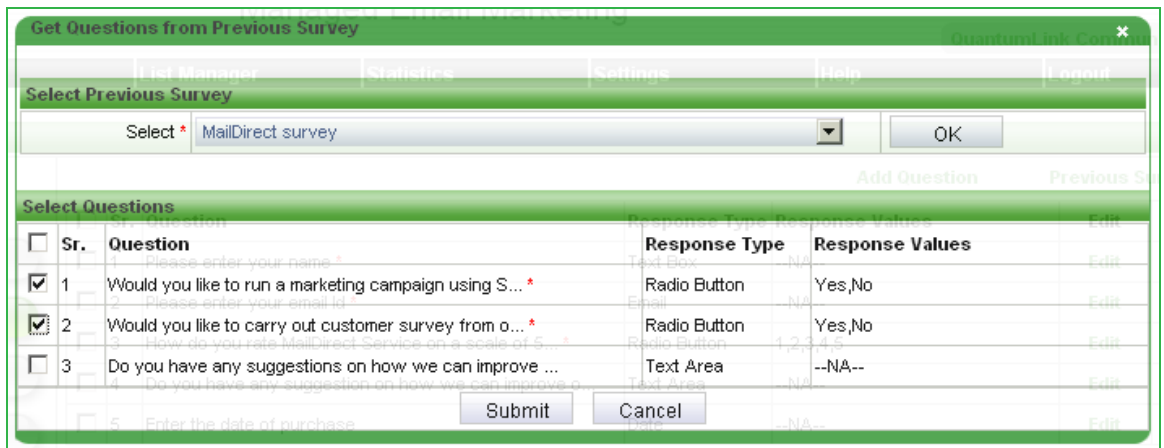


Figure 136: GET QUESTIONS FROM PREVIOUS SURVEY

Table 51: GET QUESTIONS FROM PREVIOUS SURVEY

Field	Description
Select	Select an appropriate survey from the drop-down list. This field is mandatory.
OK	Click this button to display all the questions in the selected survey.
Select Questions	Select the check boxes corresponding to the appropriate question/s to be added to the survey. This field is not mandatory.

Select the appropriate details in the required fields.

ii. Click the **Submit** button to add the selected question/s from the previous survey.

MailDirect displays the **Survey Questions** screen with the question/s added from the previous survey.

5. Click the **Next** button.
MailDirect displays the **Page Design** screen.



Figure 137: PAGE DESIGN

6. To customize page design:
Users can customize the page design by using:
 - ◆ Available customization tabs to create new designs
 - ◆ **Previous Survey** link to import designs from previous surveys
 - a. To create new designs using the customization tabs:
 - i. Select the **Header** tab.

Note: By default, the **Header** tab is selected.

MailDirect displays the **Page Design** screen with the **Header** options.

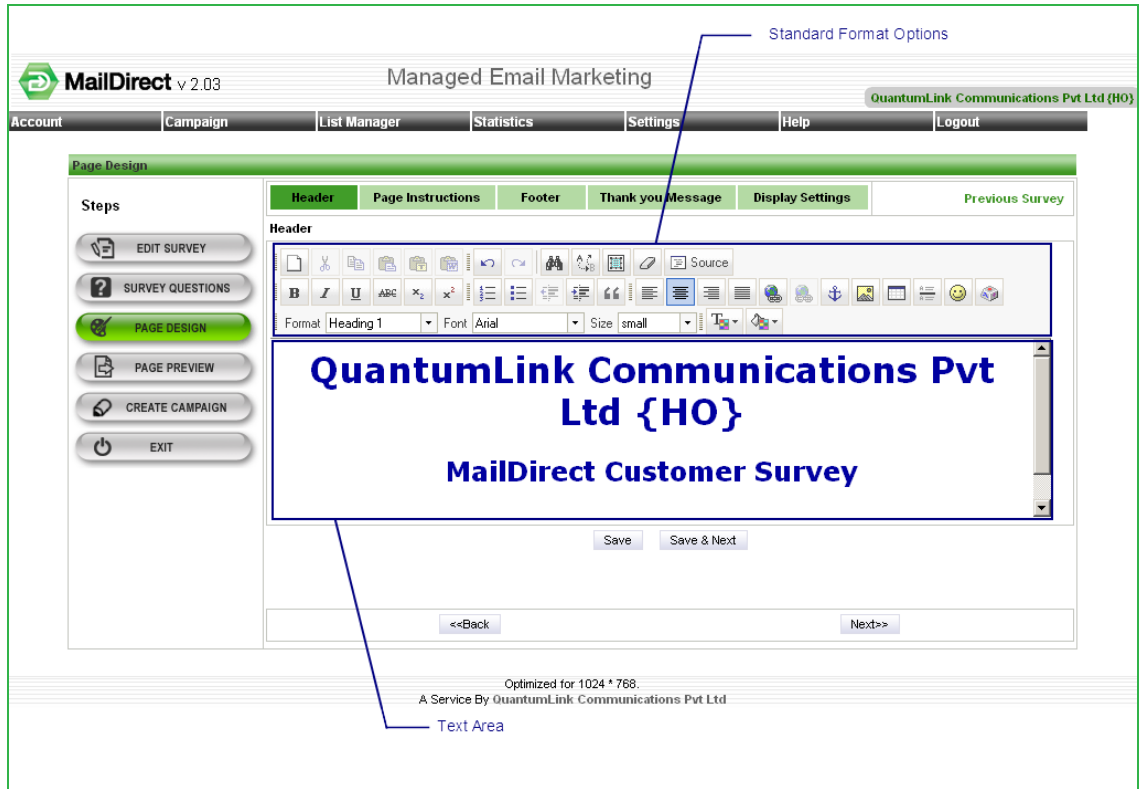


Figure 138: PAGE DESIGN WITH HEADER OPTIONS

Table 52: HEADER OPTIONS

Field	Description
Text Area	<p>Type an appropriate header to be displayed in the header section of the survey.</p> <hr/> <p>Note: By default, an appropriate header is displayed in the Text Area. The user can make use of the default header. The user can edit and use the default header. The user can replace the default header with an appropriate header.</p> <hr/> <p>This field is not mandatory.</p>
Standard Format Options	<p>Select the appropriate format options to apply to the text entered in the Text Area.</p>

Enter/Select the appropriate details in the required fields.

- ii. Click the **Save & Next** button.

MailDirect displays the Page Design screen with the Page Instructions options.

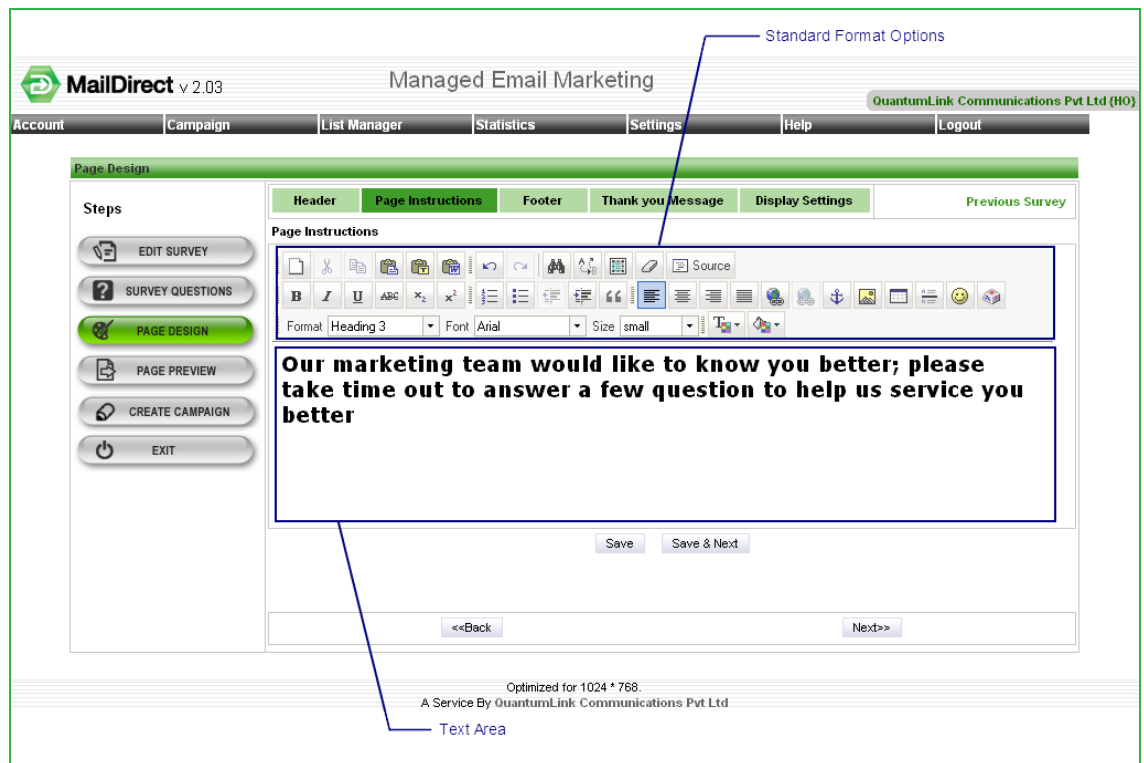


Figure 139: PAGE DESIGN WITH PAGE INSTRUCTION OPTIONS

Note: The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can also click the **Page Instructions** tab to customize the page instruction of the survey. If the user clicks the **Page Instructions** tab without saving the changes on the **Page Design** screen, the changes will be discarded.

Table 53: PAGE INSTRUCTION OPTIONS

Field	Description
Text Area	Type an appropriate message to be displayed as a page instruction in the survey.
	Note: By default, an appropriate message is displayed as page instruction in the Text Area . The user can make use of the default message. The user can edit and use the default page instruction. The user can replace the default message with an appropriate message.

This field is not mandatory.

Standard Format Options Select the appropriate format options to apply to the text entered in the Text Area.

Enter/Select the appropriate details in the required fields.

- iii. Click the Save & Next button.

MailDirect displays the Page Design screen with the Footer options.

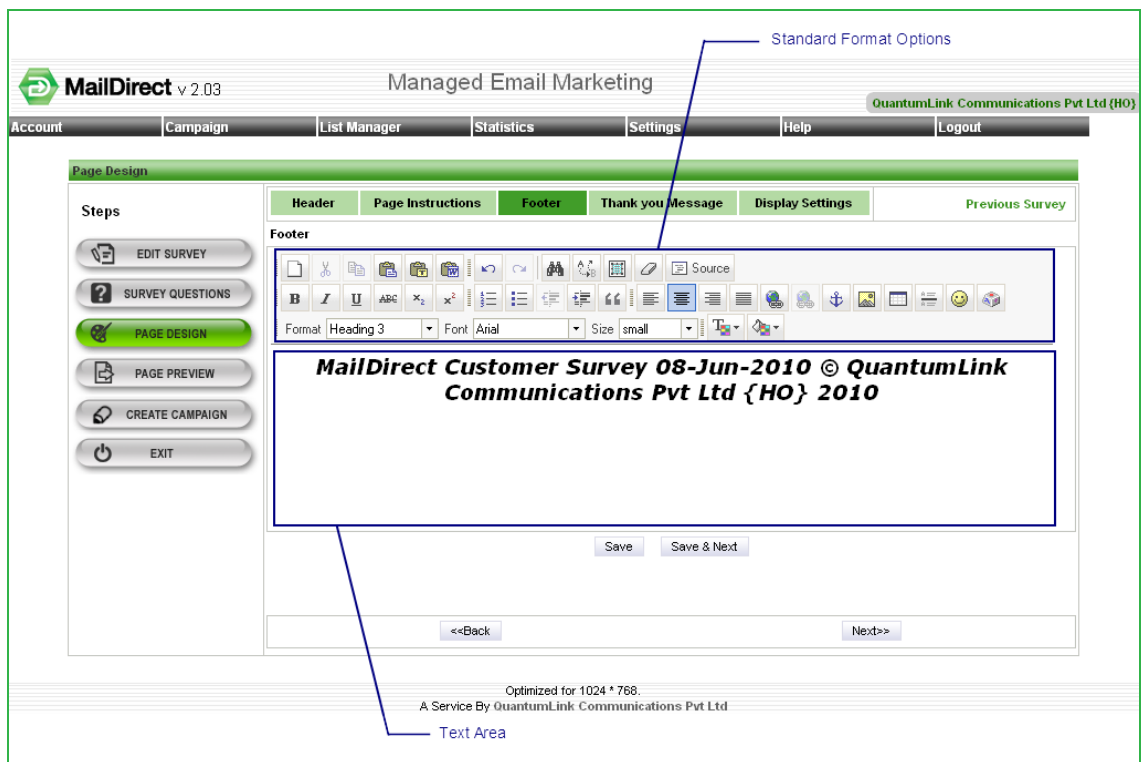


Figure 140: PAGE DESIGN WITH FOOTER OPTIONS

Note: The user can also click the Save button on the Page Design screen to save changes in the Page Design screen.

The user can also click the Footer tab to customize footer of the survey. If the user clicks the Page Instructions tab without saving the changes on the Page Design screen, the changes will be discarded.

Table 54: FOOTER OPTIONS

Field	Description
-------	-------------

Text Area

Type an appropriate footer to be displayed in the footer section of the survey.

Note: By default, an appropriate footer is displayed in the **Text Area**. The user can make use of the default footer. The user can edit and use the default footer. The user can replace the default footer with an appropriate footer.

This field is not mandatory.

Standard Format Options

Select the appropriate format options to apply to the text entered in the **Text Area**.

Enter/select the appropriate details in the required fields.

- iv. Click the **Save & Next** button.

MailDirect displays the **Page Design** screen with the **Thank you Message** options.

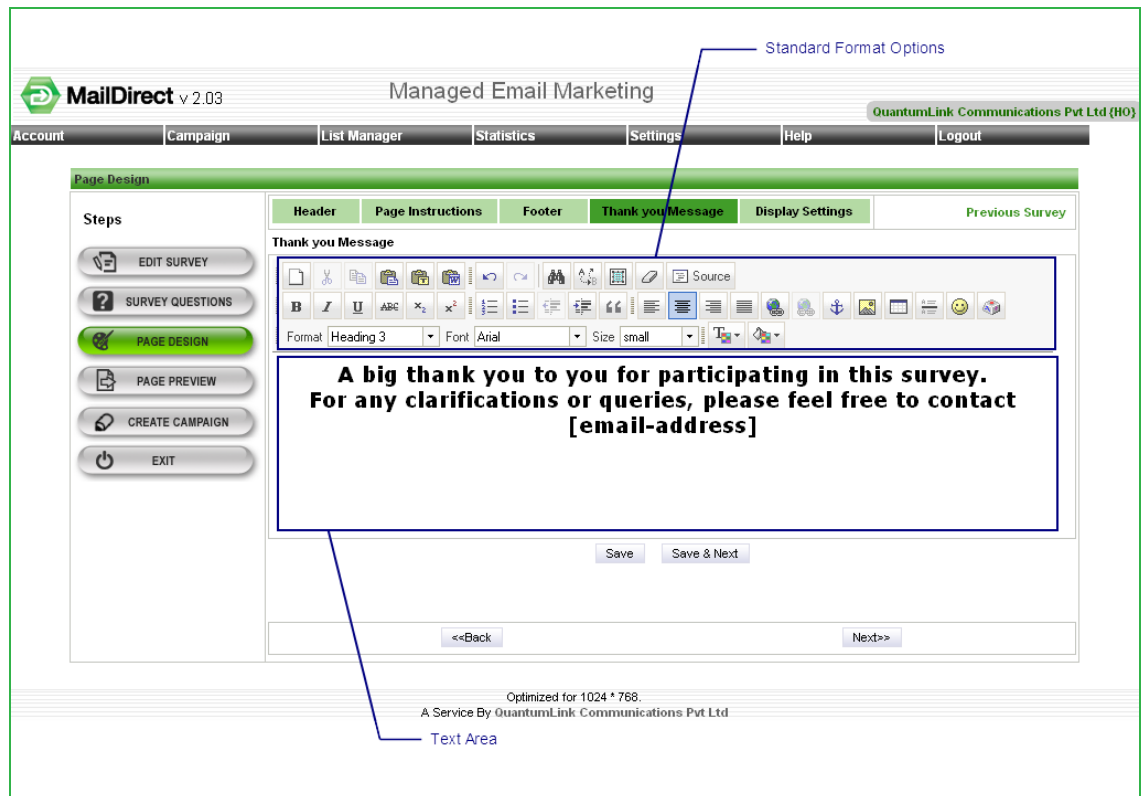


Figure 141: PAGE DESIGN WITH THE THANK YOU MESSAGE OPTIONS

Note: The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can also click the **Thank you Message** tab to customize the thank you message of the survey. If the user clicks the **Page Instructions** tab without saving the changes on the **Page Design** screen, the changes will be discarded.

Table 55: THANK YOU MESSAGE OPTIONS

Field	Description
<p>Text Area</p>	<p>Type an appropriate message to be displayed as a thank you message in the survey.</p> <hr/> <p>Note: By default, an appropriate message is displayed as thank you message in the Text Area. The user can make use of the default message. The user can edit and use the default thank you message. The user can replace the default message with an appropriate message.</p> <hr/> <p>This field is not mandatory.</p>
<p>Standard Format Options</p>	<p>Select the appropriate format options to apply to the text entered in the Text Area.</p>

Enter/Select the appropriate details in the required fields.

- v. Click the **Save & Next** button.

MailDirect displays the Page Design screen with the Display Settings options.

The screenshot shows the MailDirect interface for 'Managed Email Marketing'. The user is logged in as 'QuantumLink Communications Pvt Ltd (HO)'. The navigation menu includes Account, Campaign, List Manager, Statistics, Settings, Help, and Logout. The 'Page Design' screen is active, with tabs for Header, Page Instructions, Footer, Thank you Message, Display Settings (selected), and Previous Survey. On the left, a 'Steps' sidebar contains buttons for EDIT SURVEY, SURVEY QUESTIONS, PAGE DESIGN (highlighted), PAGE PREVIEW, CREATE CAMPAIGN, and EXIT. The 'Display Settings' section is divided into several categories:

- Page:** Page Background Color (#FFFFFF), Page Border Color (#000000), Page Border Size (3px), and Page Border Style (solid).
- Font:** Font Name (Verdana, Geneva, sans-serif), Font Type (Normal), Font Color (#000000), and Font Size (10px).
- Table:** Table Width (100%), Table Border Color (#000000), and Table Border Size (2px).
- Input:** Input Width (200px) and Input Border Color (#000000).

 At the bottom, there are 'Save' and 'Save & Next' buttons, and navigation arrows for '<<Back' and 'Next>>'. The footer indicates the page is optimized for 1024 * 768 and is a service by QuantumLink Communications Pvt Ltd.

Figure 142: PAGE DESIGN WITH THE DISPLAY SETTINGS

Note: The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can also click the **Display Settings** tab to customize the display settings of the survey. If the user clicks the **Page Instructions** tab without saving the changes on the **Page Design** screen, the changes will be discarded.

Table 56: HEADER OPTIONS

Field	Description
Page	<p>Select the appropriate options to apply to the survey page. The available options are explained below-</p> <ul style="list-style-type: none"> Page Background Color: Select an appropriate page background color from the color palette. Page Border Color: Select an appropriate page border color from the color palette. Page Border Size: Select an appropriate page border size from the drop-

	<p>down list.</p> <ul style="list-style-type: none"> ■ Page Border Style: Select an appropriate page border style from the drop-down list. <p>This field is not mandatory.</p>
Font	<p>Select the appropriate font options to apply to the text in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ■ Font Name: Select an appropriate font name from the drop-down list. ■ Font Color: Select an appropriate font color from the color palette. ■ Font Type: Select an appropriate font type from the drop-down list. ■ Font Size: Select an appropriate font size from the drop-down list. <p>This field is not mandatory.</p>
Table	<p>Select the appropriate table options to apply to the table in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ■ Table Width: Select an appropriate table width from the drop-down list. ■ Table Border Size: Select an appropriate table border size from the drop-down list. ■ Table Border Color: Select an appropriate table border color from the color palette. <p>This field is not mandatory.</p>
Input	<p>Select the appropriate input options to apply to the Input fields in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ■ Input Width: Select an appropriate width for the input fields from the drop-down list. ■ Input Border Size: Select an appropriate border size for the input fields from the drop-down list. ■ Input Border Color: Select an appropriate border color for the input fields from

the color palette.
This field is not mandatory.

Select the appropriate details in the required fields.

vi. Click the Save & Next button.

MailDirect displays the Page Preview screen.

The screenshot shows the MailDirect interface for a survey page preview. The header includes the MailDirect logo, version 2.03, and the title 'Managed Email Marketing'. The user is logged in as 'QuantumLink Communications Pvt Ltd {HO}'. The navigation menu includes Account, Campaign, List Manager, Statistics, Settings, Help, and Logout. The main content area is titled 'Page Preview' and displays a survey form for 'QuantumLink Communications Pvt Ltd {HO} MailDirect Customer Survey'. The survey text reads: 'Our marketing team would like to know you better; please take time out to answer a few question to help us service you better'. The form contains five questions:

- 1 Please enter your name *
- 2 Please enter your email Id *
- 3 How do you rate MailDirect Service on a scale of 5 (1- poor, 2 - Below average, 3 - Average, 4 - Good, 5 - Excellent) *
- 4 Do you have any suggestion on how we can improve our service?
- 5 Enter the validation code displayed in the image. *

The validation code image shows 'M 0 4 K D'. Below the form are 'Submit' and 'Reset' buttons. The footer of the survey page reads 'MailDirect Customer Survey 08-Jun-2010 © QuantumLink Communications Pvt Ltd {HO} 2010'. Navigation buttons '<<Back' and 'Next>>' are at the bottom. The page is optimized for 1024 * 768 and is a service by QuantumLink Communications Pvt Ltd.

Figure 143: PAGE PREVIEW

Note: Alternatively, the user can click the **Next** button on the **Page Design** screen, which also displays the **Page Preview** screen without saving the latest changes in the **Page Design** screen. The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen. The user can click the tabs in any order to customize the survey page design as needed.

- b. To import designs from previous surveys using the Previous Survey link.
 - i. Click the Previous Survey link on the Page Design screen.

MailDirect displays the Get Page Design from Previous Survey screen.



Figure 144: GET PAGE DESIGN FROM PREVIOUS SURVEY

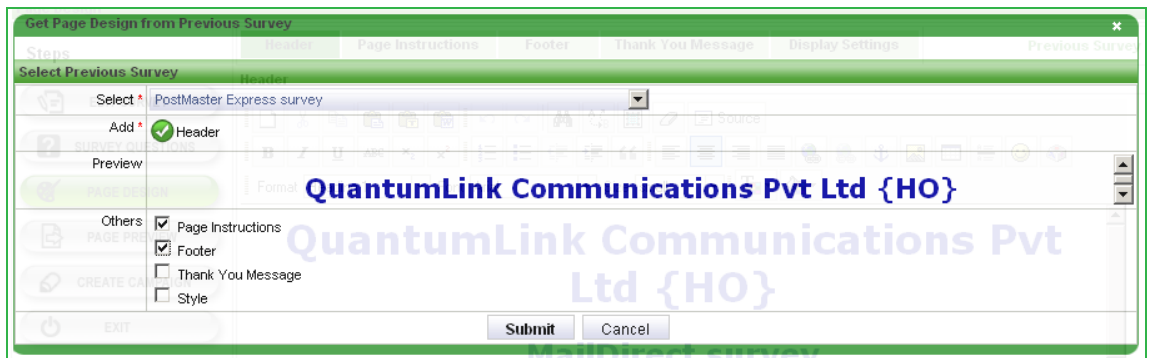


Figure 145: GET PAGE DESIGN FROM PREVIOUS SURVEY [WITH OPTIONS TO IMPORT PAGE DESIGN]

Table 57: GET PAGE DESIGN FROM PREVIOUS SURVEY

Field	Description
Select	<p>Select an appropriate previous survey from which the page design is to be imported, from the drop-down list.</p> <p>On selecting the appropriate survey, other page design options will be made available, as shown in Figure 145.</p> <p>This field is mandatory.</p>
Add	<p>Displays the header.</p> <hr/> <p>Note: The Header of the previous survey will always be added.</p> <hr/>
Preview	<p>Provides a preview of the selected survey header.</p>
Others	<p>Select the appropriate check boxes to import the page design for the corresponding sections from the selected survey.</p> <p>The available options are explained below-</p>

- **Page Instructions**
Select this check box to import the page instructions from the selected survey.
- **Footer**
Select this check box to import the footer from the selected survey.
- **Thank You Message**
Select this check box to import the thank you message from the selected survey.
- **Style**
Select this check box to import the style from the selected survey.

Select the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the **Page Design** screen (with the design selected above), as shown in [Figure 137](#).

The user can customize the imported page design as needed.

Note: Instructions to customize the page design are given in [step 6](#).

7. Click the **Next** button on the **Page Preview** screen.

Note: MailDirect displays the **Create Campaign** screen. Refer to the [create campaign](#) section for more details.



To create a Website based Survey Campaign:

1. On the **Campaign** menu, click the **Survey** option.

MailDirect displays the Introduction To Surveys screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- [Create New Survey - This is a quick & fast method of creating your Survey.](#) ?

Active Surveys

There are no Active Survey.

Planned Surveys

Sr.	Name	Status	Link/Email	Questions	Repts	Start Date	Expiry Date
1	MailDirect survey	Planned	Invite Via Email	1	0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

Optimized for 1024 * 768.
A Service By QuantumLink Communications Pvt Ltd

Figure 146: INTRODUCTION TO SURVEYS

2. Click the Create New Survey link.

MailDirect displays the Survey Details screen.

Figure 147: SURVEY DETAILS

Table 58: SURVEY DETAILS

Field	Description
Name of Survey	Type an appropriate name for the survey. This field is mandatory.
Survey Type	Select an appropriate option to define the type of survey to be created, from the drop-down list. The available options are explained below- <ul style="list-style-type: none"> ■ Invite Via Email [Restricted]: Select this option to create a survey that will be conducted via emails. This type of survey facilitates the user to send an invitation to the survey, via email. ■ Public Link On Website [Public]: Select this option to create a survey that will be conducted by using public links on the user's Website. This type of survey can be answered by anybody who visits the user's website. ■ Combined [Restricted & Public]: Select this option to create a survey that will be conducted via emails as well

as by using public links on the user's Website.

This field is mandatory.

Survey Expiry Date

Select the appropriate date, month and year till when this survey will be conducted.

This field is mandatory.

Receive Response by Email

Select either **Yes** or **No** to enable or disable receipt of survey responses by email.

If **Yes** is selected, the **Email Id To Receive Response** text box will be made available to the user.

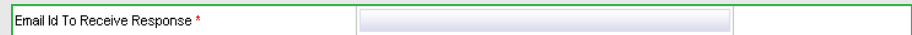


Figure 148: EMAIL ID TO RECEIVE RESPONSE FIELD

Type an appropriate email ID to which survey responses are to be sent by the recipients.

Note: By default, **No** is selected.

This field is mandatory.

Enable Captcha

Select either **Yes** or **No** to enable or disable **Captcha** (Completely Automated Public Turing Test to tell Computers and Humans Apart). Selecting **Yes** ensures that survey responses are not generated by computers.

Note: By default, **Yes** is selected.

This field is mandatory.

Track Respondent Email Address

Select or clear the **Yes** check box to enable or disable tracking of the respondent's email address.

If the check box is selected, the **Survey Query for Track Respondent Email Address** text box will be made available to the user.

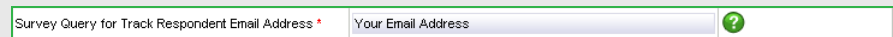


Figure 149: SURVEY QUERY FOR TRACK RESPONDENT EMAIL ADDRESS FIELD

Type an appropriate survey query that will be displayed to the survey respondents.

Note: By default, Your Email Address is displayed in the text box.

This field is mandatory.

Enter/Select the appropriate details in the required fields.

3. Click the **Next** button.

Note: To create a Website based survey, select the **Public Link On Website [Public]** option from the **Survey Type** drop-down list.
The following steps are applicable only if the **Public Link On Website [Public]** option is selected.

MailDirect displays the Survey Questions screen.

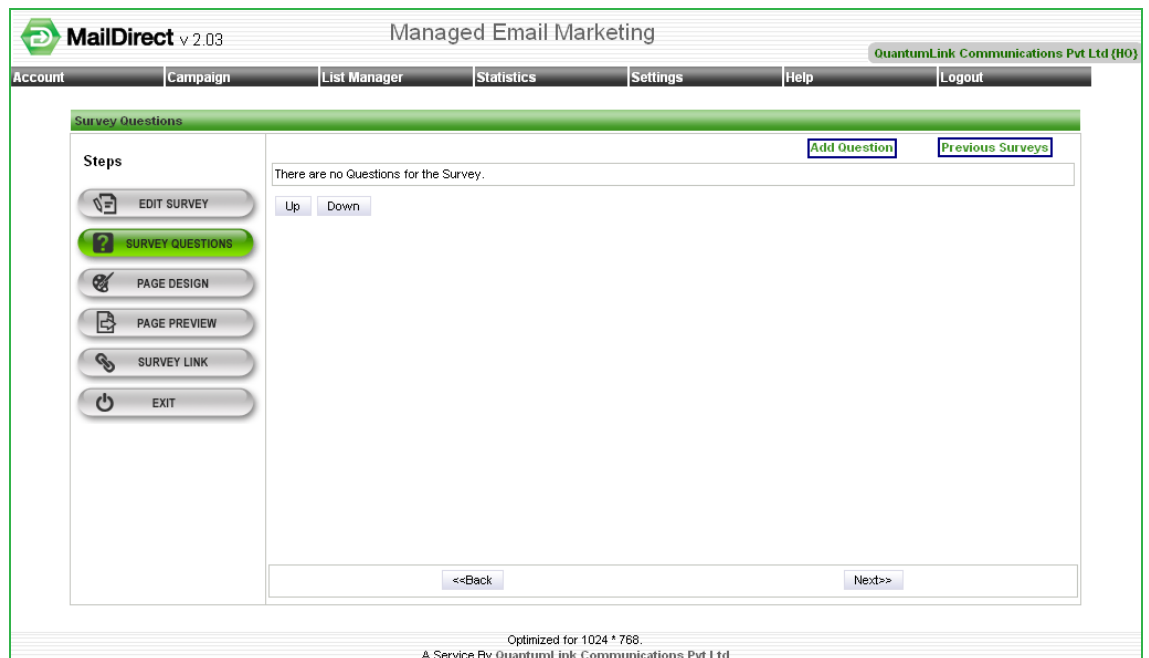


Figure 150: SURVEY QUESTIONS

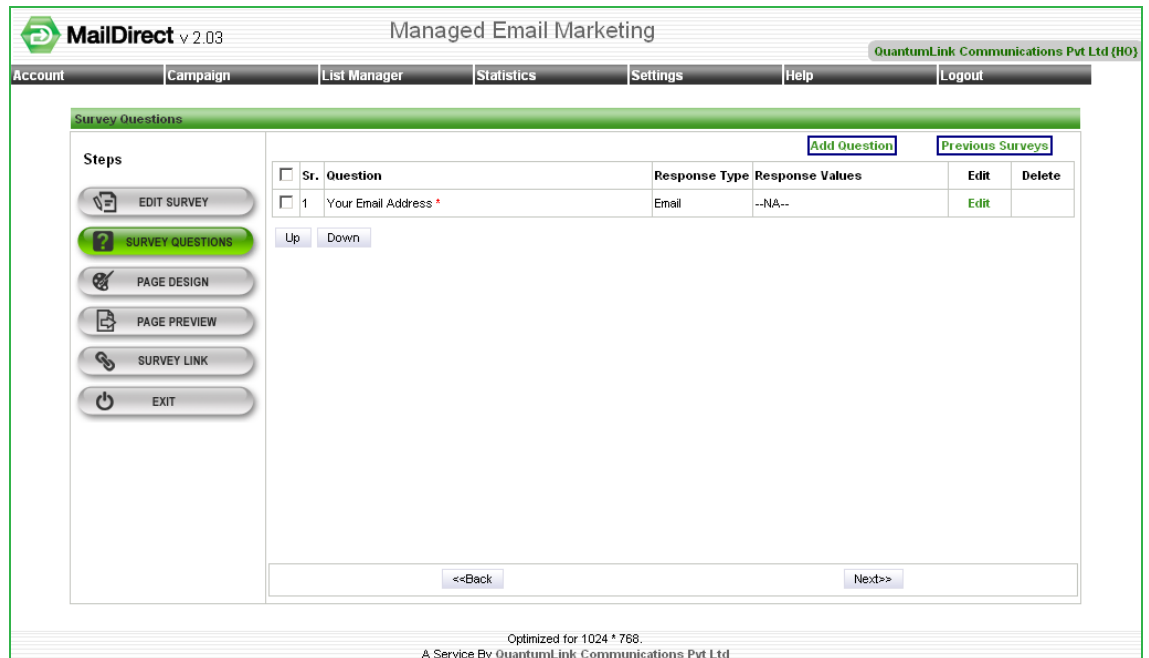


Figure 151: SURVEY QUESTIONS [IF THE TRACK RESPONDENT EMAIL ADDRESS FIELD IS SELECTED]

Note: [Figure 151](#) is displayed only if the Track Respondent Email Address field is selected in the Survey Details screen.

4. To add questions:

Users can add questions by using:

- ◆ Add Question link (to add new questions)
- ◆ Previous Surveys link (to add questions from existing surveys)
- a. To add questions using the Add Question link:
 - i. Click the Add Question link.

MailDirect displays the Add/Edit Question screen.

Figure 152: ADD/EDIT QUESTION

Figure 153: ADD/EDIT QUESTION [WITH RESPONSE VALUES FIELD]

Table 59: ADD/EDIT QUESTION

Field	Description
Question	Type an appropriate question. This field is mandatory.
Response Type	Select an appropriate option from the drop-down list, to define the type of response for this question. The available options are explained below - <ul style="list-style-type: none"> ■ Text Box: If this option is selected, a text box will be made available to survey recipients for entering responses to the survey. ■ Text Area: If this option is selected, a text area will be made available to survey recipients for entering responses to the survey. ■ Drop Down Box: If this option is selected, a drop-down box will be made available to survey recipients for selecting a response to

the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown in [Figure 153](#).

Type the appropriate values separated by a comma.

This field is mandatory.

- **Radio Button:**

If this option is selected, radio buttons will be made available to survey recipients for selecting a response to the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown in [Figure 153](#).

Type the appropriate values separated by a comma.

The number of radio buttons that will be available to survey recipients depends on the number of values entered by the user in the **Response Values** text box.

This field is mandatory.

- **Check Box:**

If this option is selected, check boxes will be made available to survey recipients for selecting a response to the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown as in [Figure 153](#).

Type the appropriate values separated by a comma.

The number of check boxes that will be available to survey recipients depends on the number of values entered by the user in the **Response Values** text box.

This field is mandatory.

- **Email:**

If this option is selected, a text box will be made available to survey recipients for entering responses to the survey.

- **Date:**

If this option is selected, a calendar will be made available to survey recipients for selecting responses to the survey.

This field is mandatory.

Mandatory

Select this check box to make it mandatory for survey recipients to respond to the question.

This field is not mandatory.

Enter/Select the appropriate details in the required fields.

- ii. Click the **Save** button to save the entered/selected information.

MailDirect displays the **Survey Questions** screen with the new question added.

Note: Only one question can be added at a time; the user can click either of the following:

- **Add Questions** link to add more new questions
- **Previous Surveys** link to add questions from a previous survey
- **Next** button to go to the **Page Design** screen

To edit a question added on the **Survey Questions** screen, the user can click the **Edit** link for the corresponding question. MailDirect displays the **Add/Edit Question** screen with the details for the corresponding question. Edit the details in the required fields.

To delete a question added on the **Survey Questions** screen, the user can click the **Delete** link for the corresponding question. The **Delete** link is available only if there are two or more questions on the **Survey Questions** screen.

If the **Track Respondent Email Address** field is selected, the **Delete** link is available only if there are more than two questions on the **Survey Questions** screen.

- b. To add questions using the **Previous Surveys** link.
 - i. Click the **Previous Surveys** link.

MailDirect displays the Get Questions from Previous Survey screen.

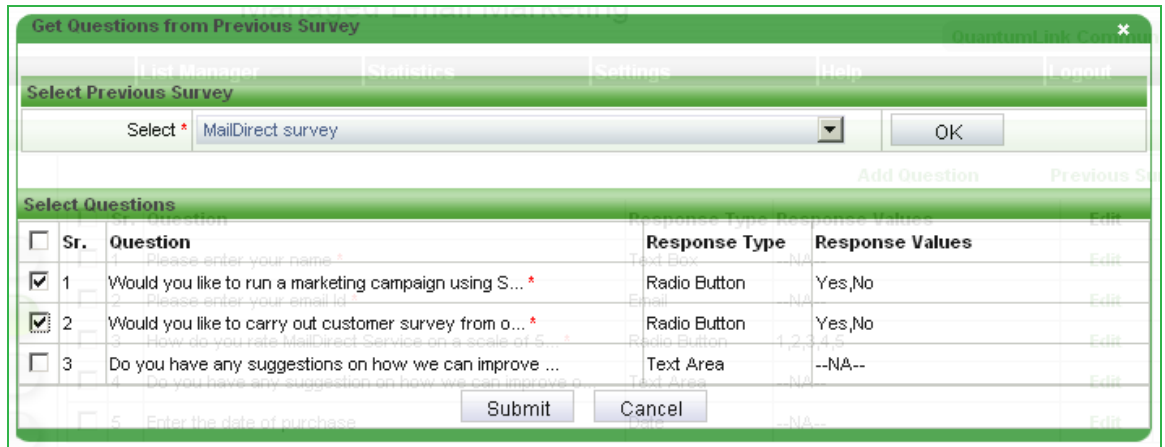


Figure 154: GET QUESTIONS FROM PREVIOUS SURVEY

Table 60: GET QUESTIONS FROM PREVIOUS SURVEY

Field	Description
Select	Select an appropriate survey from the drop-down list. This field is mandatory.
OK	Click this button to display all the questions in the selected survey.
Select Questions	Select the check boxes corresponding to the appropriate question/s to be added to the survey.

Select the appropriate details in the required fields.

- ii. Click the **Submit** button to add the selected question/s from the previous survey.

MailDirect displays the Survey Questions screen with the question/s added from the previous survey.

- 5. Click the **Next** button.

MailDirect displays the Page Design screen.

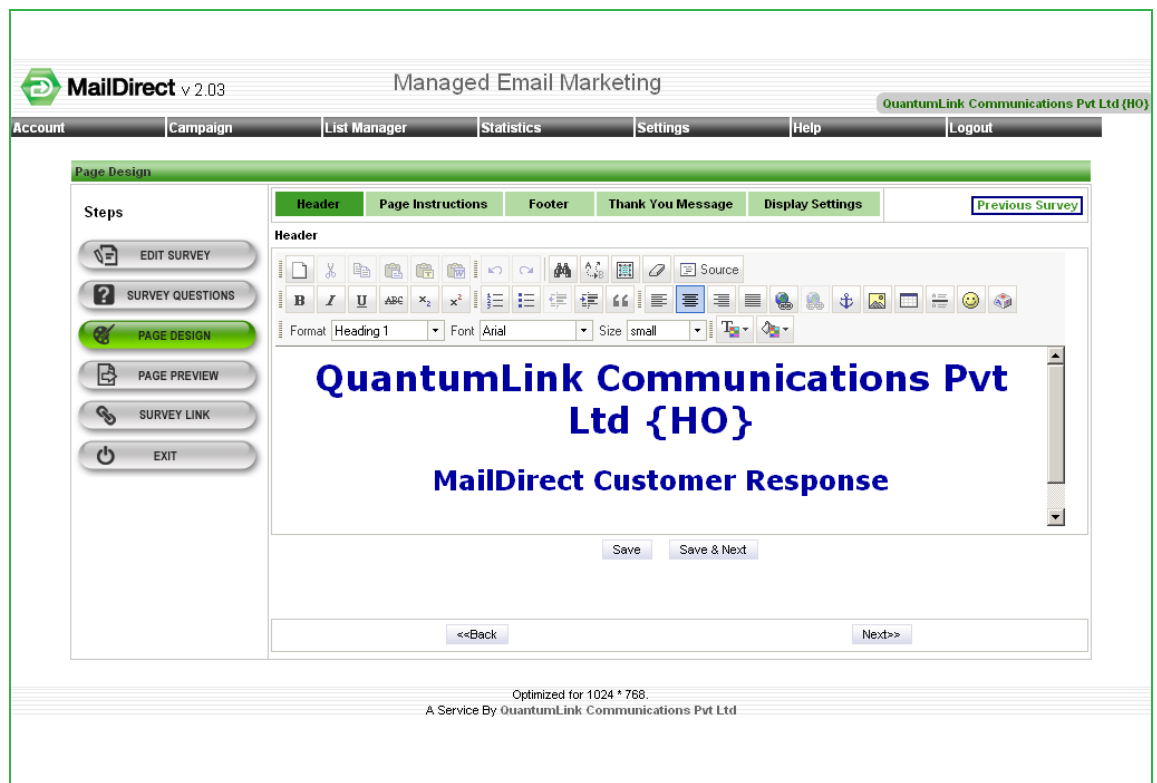


Figure 155: PAGE DESIGN

6. To customize page design:
 - Users can customize the page design by using:
 - ◆ Available customization tabs to create new designs
 - ◆ Previous Survey link to import designs from previous surveys
 - a. To create new designs using the customization tabs:
 - i. Select the Header tab.

Note: By default, the **Header** tab is selected.

MailDirect displays the Page Design screen with the Header options.

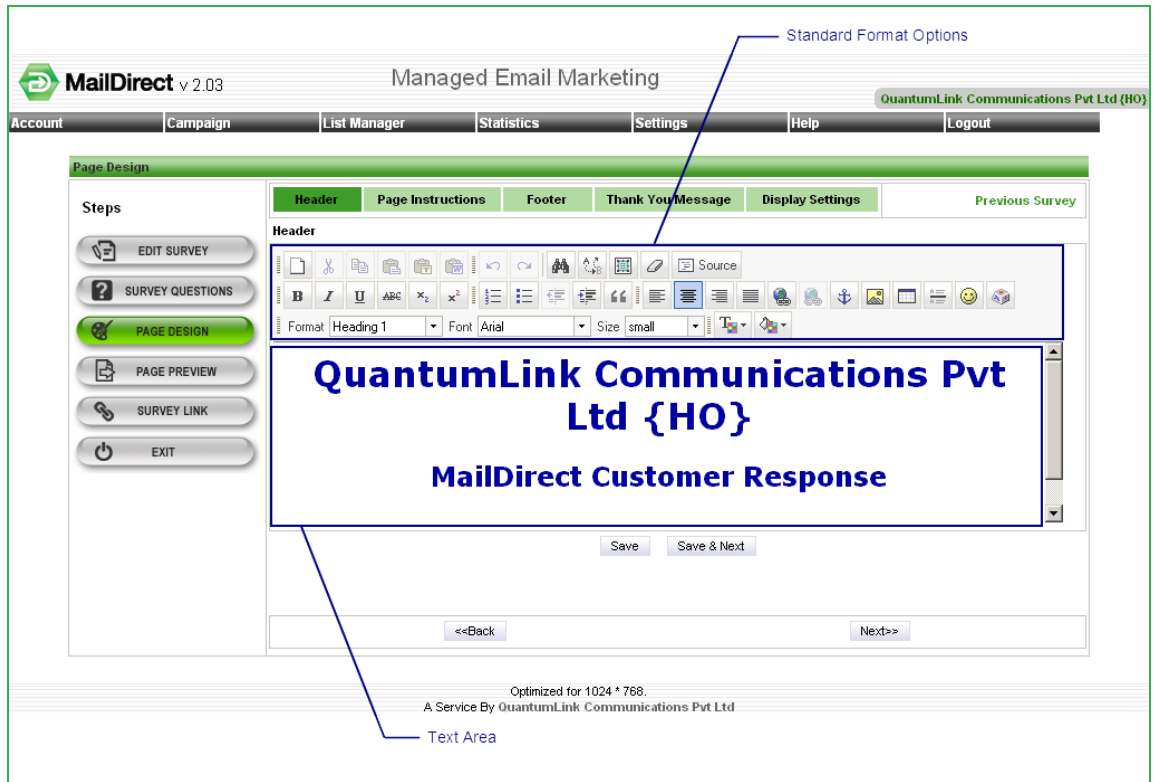


Figure 156: PAGE DESIGN WITH HEADER OPTIONS

Table 61: HEADER OPTIONS

Field	Description
Text Area	Type an appropriate header to be displayed in the header section of the survey. Note: By default, an appropriate header is displayed in the Text Area . The user can make use of the default header. The user can edit and use the default header. The user can replace the default header with an appropriate header. This field is not mandatory.
Standard Format Options	Select the appropriate format options to apply to the text entered in the Text Area .

Enter/Select the appropriate details in the required fields.

- ii. Click the Save & Next button.

MailDirect displays the Page Design screen with the Page Instructions options.

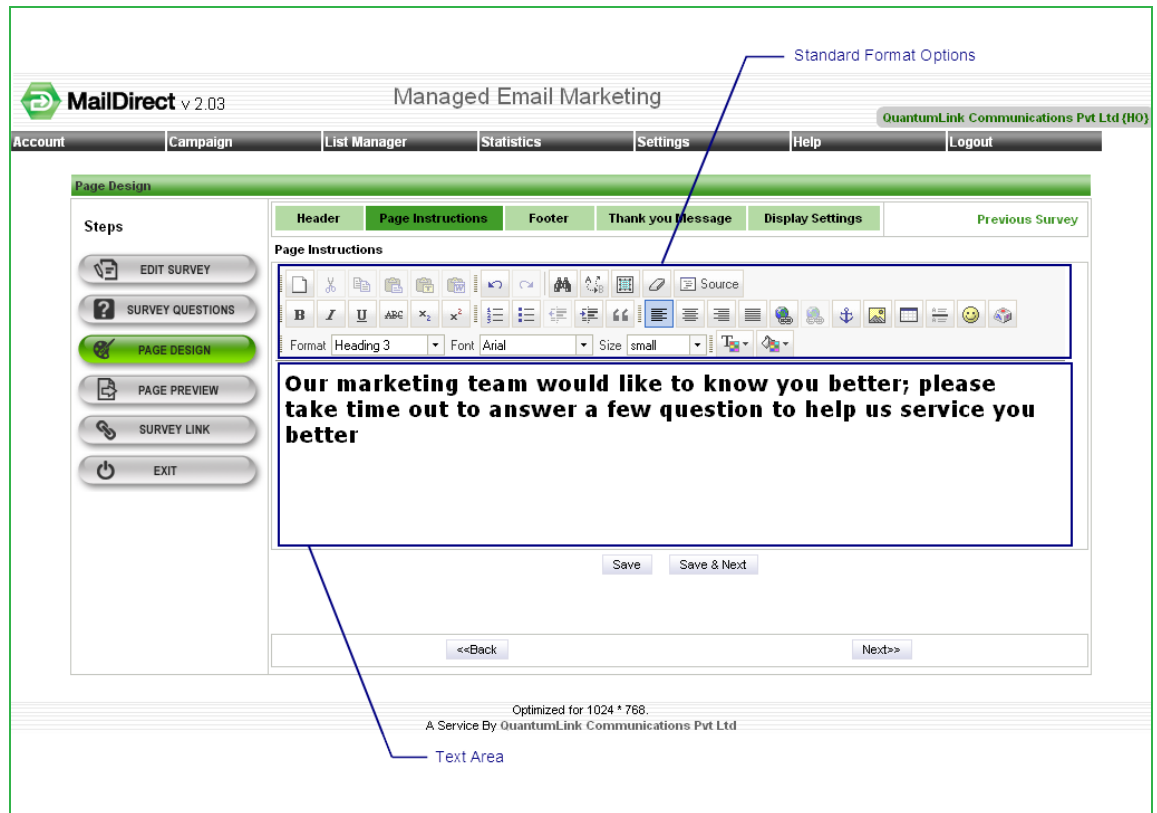


Figure 157: PAGE DESIGN WITH PAGE INSTRUCTION OPTIONS

Note: The user can also click the Save button on the Page Design screen to save changes in the Page Design screen.

The user can also click the Page Instructions tab to customize the page instruction of the survey. If the user clicks the Page Instructions tab without saving the changes on the Page Design screen, the changes will be discarded.

Table 62: PAGE INSTRUCTION OPTIONS

Field	Description
Text Area	Type an appropriate message to be displayed as page instruction in the survey.

Note: By default, an appropriate message is displayed as page instruction in the Text Area. The user can make use of the default

message. The user can edit and use the default page instruction. The user can replace the default message with an appropriate message.

This field is not mandatory.

Standard Format Options

Select the appropriate format options to apply to the text entered in the **Text Area**.

Enter/Select the appropriate details in the required fields.

- iii. Click the **Save & Next** button.

MailDirect displays the **Page Design** screen with the **Footer** options.

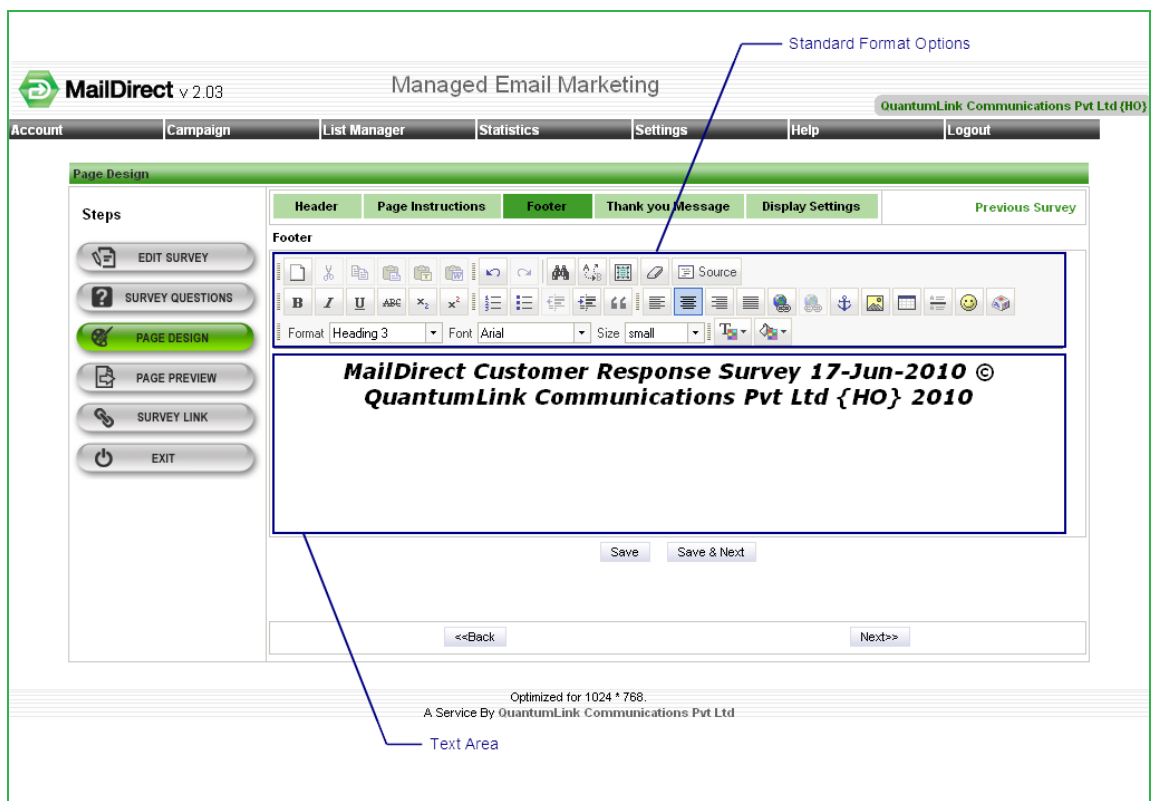


Figure 158: PAGE DESIGN WITH FOOTER OPTIONS

Note: The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can also click the **Footer** tab to customize footer of the survey. If the user clicks the **Page Instructions** tab without saving the changes on the **Page Design** screen, the changes will be discarded.

Table 63: FOOTER OPTIONS

Field	Description
Text Area	<p>Type an appropriate footer to be displayed in the footer section of the survey.</p> <hr/> <p>Note: By default, an appropriate footer is displayed in the Text Area. The user can make use of the default footer. The user can edit and use the default footer. The user can replace the default footer with an appropriate footer.</p> <hr/> <p>This field is not mandatory.</p>
Standard Format Options	Select the appropriate format options to apply to the text entered in the Text Area .

Enter/select the appropriate details in the required fields.

- iv. Click the **Save & Next** button.

MailDirect displays the Page Design screen with the Thank you Message options.

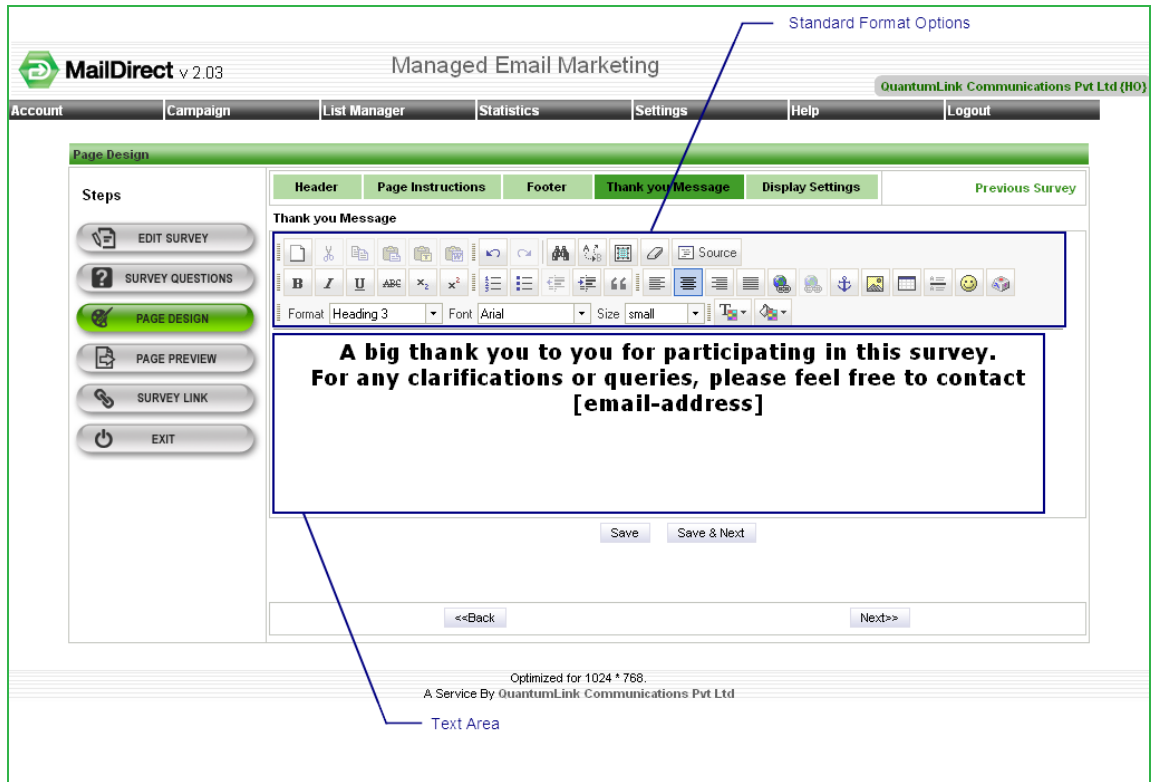


Figure 159: PAGE DESIGN WITH THE THANK YOU MESSAGE OPTIONS

Note: The user can also click the Save button on the Page Design screen to save changes in the Page Design screen.

The user can also click the Thank you Message tab to customize the thank you message of the survey. If the user clicks the Page Instructions tab without saving the changes on the Page Design screen, the changes will be discarded.

Table 64: THANK YOU MESSAGE OPTIONS

Field	Description
Text Area	Type an appropriate message to be displayed as a thank you message in the survey. Note: By default, an appropriate message is displayed as thank you message in the Text Area . The user can make use of the default message. The user can edit and use the default thank you message. The user can replace the default message with an appropriate message.

This field is not mandatory.

Standard Format Options

Select the appropriate format options to apply to the text entered in the Text Area.

Enter/Select the appropriate details in the required fields.

- v. Click the Save & Next button.

MailDirect displays the Page Design screen with the Display Settings options.

The screenshot shows the MailDirect interface for 'Managed Email Marketing'. The user is logged in as 'QuantumLink Communications Pvt Ltd (H0)'. The navigation menu includes Account, Campaign, List Manager, Statistics, Settings, Help, and Logout. The 'Page Design' screen is active, with the 'Display Settings' tab selected. The interface is divided into a 'Steps' sidebar and a main configuration area.

Steps:

- EDIT SURVEY
- SURVEY QUESTIONS
- PAGE DESIGN**
- PAGE PREVIEW
- SURVEY LINK
- EXIT

Display Settings Tab:

Header	Page Instructions	Footer	Thank you Message	Display Settings	Previous Survey
Display Settings					
Page					
Page Background Color	#FFFFFF		Page Border Size	3px	
Page Border Color	#000000		Page Border Style	solid	
Font					
Font Name	Verdana, Geneva, sans-serif		Font Type	Normal	
Font Color	#000000		Font Size	10px	
Table					
Table Width	100%		Table Border Color	#000000	
Table Border Size	2px				
Input					
Input Width	200px		Input Border Color	#000000	
Input Border Size	1px				

Buttons: Save, Save & Next, <<Back, Next>>

Footer: Optimized for 1024 * 768. A Service By QuantumLink Communications Pvt Ltd

Figure 160: PAGE DESIGN WITH THE DISPLAY SETTINGS

Note: The user can also click the Save button on the Page Design screen to save changes in the Page Design screen.

The user can also click the Display Settings tab to customize the display settings of the survey. If the user clicks the Page Instructions tab without saving the changes on the Page Design screen, the changes will be discarded.

Table 65: HEADER OPTIONS

Field	Description
Page	<p>Select the appropriate options to apply to the survey page.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Page Background Color: Select an appropriate page background color from the color palette. ▪ Page Border Color: Select an appropriate page border color from the color palette. ▪ Page Border Size: Select an appropriate page border size from the drop-down list. ▪ Page Border Style: Select an appropriate page border style from the drop-down list. <p>This field is not mandatory.</p>
Font	<p>Select the appropriate font options to apply to the text in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Font Name: Select an appropriate font name from the drop-down list. ▪ Font Color: Select an appropriate font color from the color palette. ▪ Font Type: Select an appropriate font type from the drop-down list. ▪ Font Size: Select an appropriate font size from the drop-down list. <p>This field is not mandatory.</p>
Table	<p>Select the appropriate table options to apply to the table in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Table Width: Select an appropriate table width from the drop-down list. ▪ Table Border Size: Select an appropriate table border size from the drop-down list. ▪ Table Border Color: Select an appropriate table border color from the color

	palette. This field is not mandatory.
Input	<p>Select the appropriate input options to apply to the Input fields in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none">■ Input Width: Select an appropriate width for the input fields from the drop-down list.■ Input Border Size: Select an appropriate border size for the input fields from the drop-down list.■ Input Border Color: Select an appropriate border color for the input fields from the color palette. <p>This field is not mandatory.</p>

Select the appropriate details in the required fields.

- vi. Click the **Save & Next** button.

MailDirect displays the Page Preview screen.

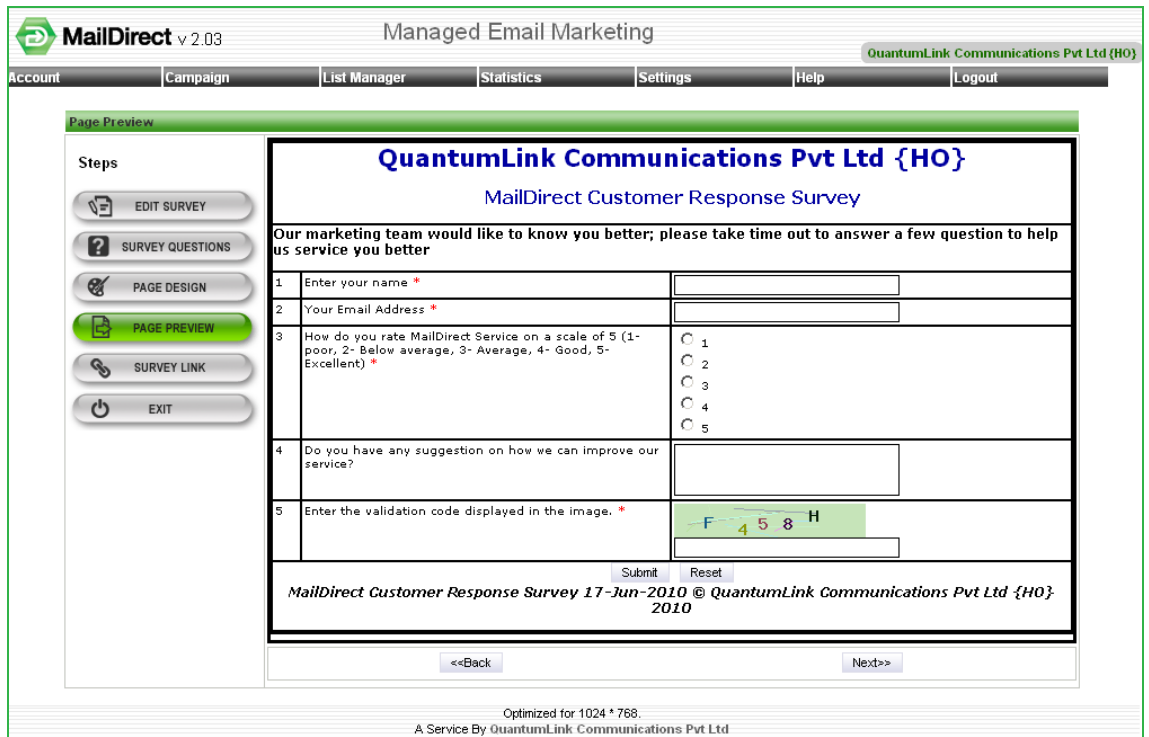


Figure 161: PAGE PREVIEW

Note: Alternatively, the user can click the **Next** button on the **Page Design** screen, which also displays the **Page Preview** screen without saving the latest changes in the **Page Design** screen. The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen. The user can click the tabs in any order to customize the survey page design as needed.

- b. To import designs from previous surveys using the Previous Survey link.
 - i. Click the Previous Survey link on the Page Design screen. MailDirect displays the Get Page Design from Previous Survey screen.

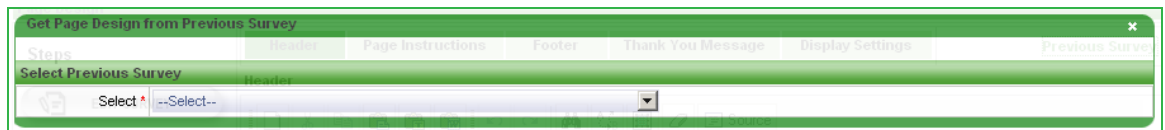


Figure 162: GET PAGE DESIGN FROM PREVIOUS SURVEY

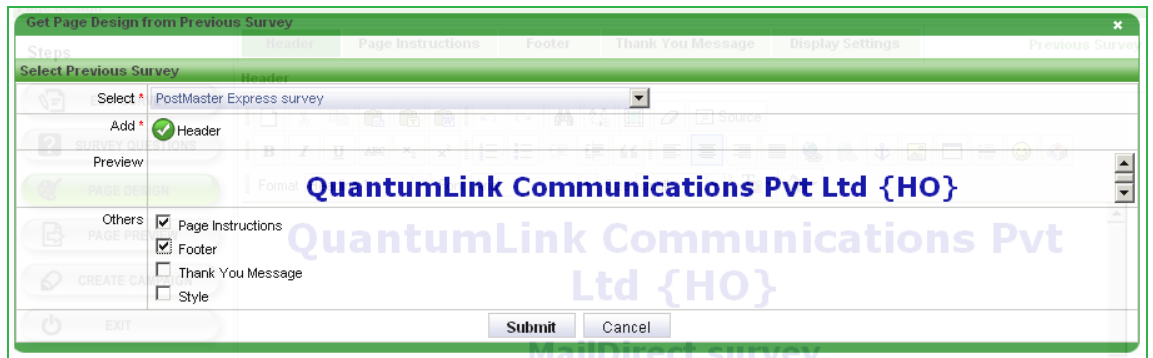


Figure 163: GET PAGE DESIGN FROM PREVIOUS SURVEY [WITH OPTIONS TO IMPORT PAGE DESIGN]

Table 66: GET PAGE DESIGN FROM PREVIOUS SURVEY

Field	Description
Select	<p>Select an appropriate previous survey from which the page design is to be imported, from the drop-down list.</p> <p>On selecting the appropriate survey, other page design options will be made available, as shown in Figure 163.</p> <p>This field is mandatory.</p>
Add	<p>Displays the header.</p> <hr/> <p>Note: The Header of the previous survey will always be added.</p> <hr/>
Preview	<p>Provides a preview of the selected survey header.</p>
Others	<p>Select the appropriate check boxes to import the page design for the corresponding sections from the selected survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> <p>■ Page Instructions</p> <p>Select this check box to import the page instructions from the selected survey.</p> <p>■ Footer</p> <p>Select this check box to import the footer from the selected survey.</p> <p>■ Thank You Message</p> <p>Select this check box to import the thank you message from the selected survey.</p> <p>■ Style</p>

Select this check box to import the style from the selected survey.

Select the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the **Page Design** screen (with the design selected above), as shown in [Figure 155](#).

Note: Instructions to customize the page design are given in step [6](#).

7. Click the **Next** button on the **Page Preview** screen.

MailDirect displays the **Survey Link** screen.

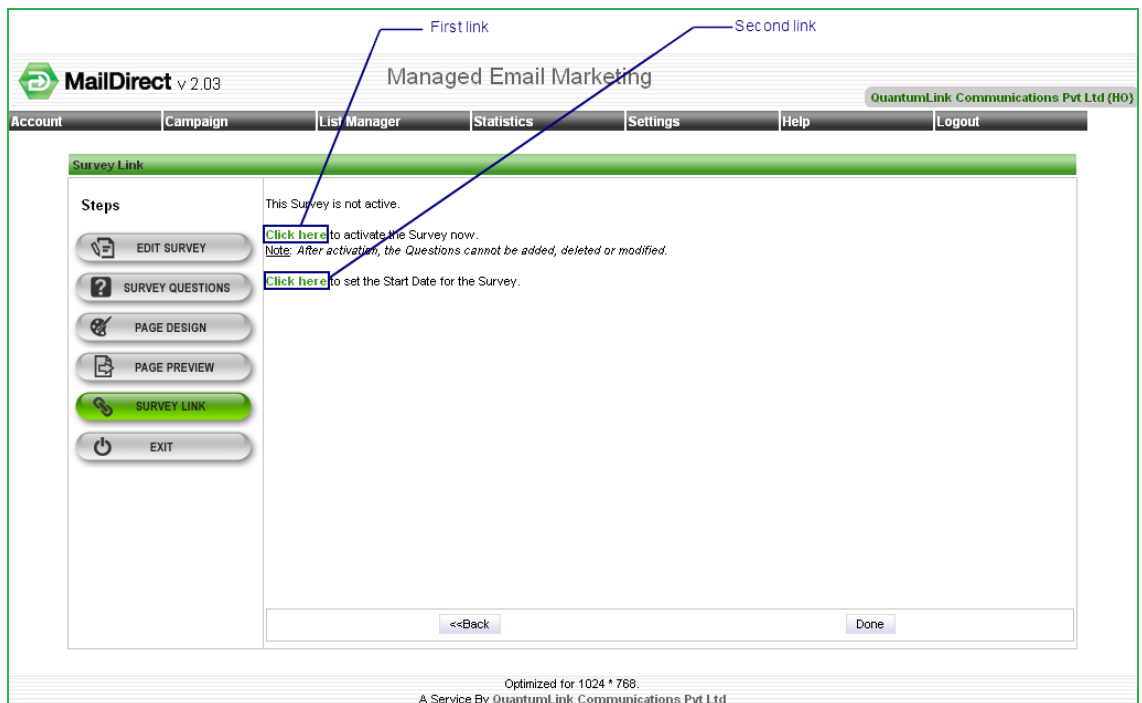


Figure 164: SURVEY LINK

8. To activate a survey:

Users can activate a survey by using:

- ◆ **Click here** to activate the Survey now link (the First Link) to activate the survey immediately

- ◆ Click [here](#) to set the Start Date for the Survey link (the Second Link) to activate the survey on a later date
- a. To activate a survey immediately:
 - i. Click the first [Click here](#) link.
MailDirect displays a message.

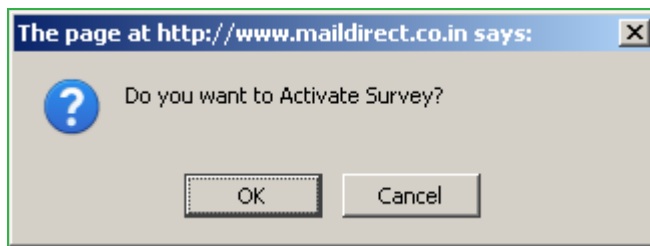


Figure 165: ACTIVATE SURVEY MESSAGE

- ii. Click the OK button.
MailDirect displays the Survey Link screen with the link for the survey.

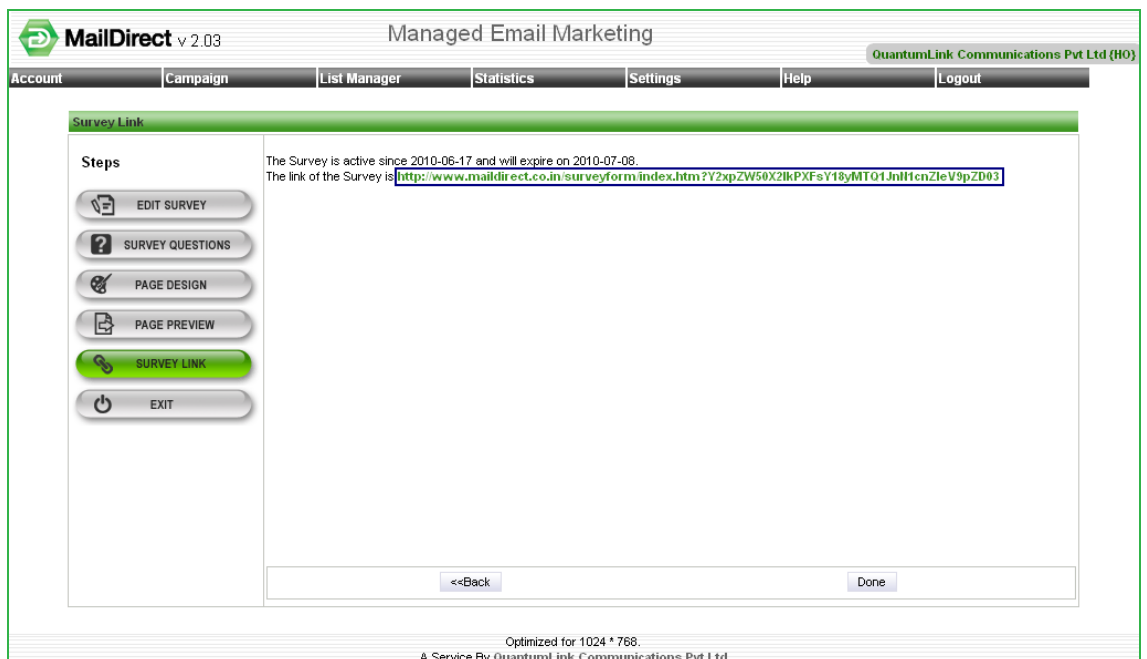


Figure 166: SURVEY LINK WITH THE LINK FOR THE SURVEY

Note: The user has to copy the survey link to the appropriate website on which the survey will be conducted.

- iii. Click the Done button.

MailDirect displays the Introduction To Surveys screen with the survey added to the Active Surveys section.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- **Create New Survey - This is a quick & fast method of creating your Survey.** ?

Active Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	MailDirect Customer Respo...	Active	Public Link On Web Site	4	0	--NA--	2010-06-17	2010-07-08
2	BackTrack Survey Campaign	Active	Invite Via Email	4	1	3	2010-06-11	2010-06-30
3	PostMaster Express survey	Active	Invite Via Email	1	1	3	2010-06-11	2010-06-21

Planned Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	PostMaster Express Respon...	Planned	Public Link On Web Site	2		--NA--		2010-06-17
2	PostMaster Enterprise Res...	Planned	Public Link On Web Site	1		--NA--		2010-06-17
3	tytyty	Planned	Public Link On Web Site	1		--NA--		2010-06-30
4	PostMaster Enterprise Sur...	Planned	Invite Via Email	0		0		2010-06-18
5	MailServe Survey	Planned	Invite Via Email	1		0		2010-06-15
6	MailDirect survey	Planned	Invite Via Email	4		0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section.](#)

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Figure 167: INTRODUCTION TO SURVEYS WITH THE SURVEY ADDED TO THE ACTIVE SURVEYS SECTION

- b. To activate a survey on a later date:
 - i. Click the second Click here link.

MailDirect displays the Set Start Date screen.



Set Start Date

Survey Start Date * 18/06/2010

Submit Reset Cancel

A service by **QuantumLink Communications Pvt. Ltd**

Figure 168: SET START DATE

Table 67: SET START DATE

Field	Description
Survey Start Date	Select an appropriate start date from the calendar. This field is mandatory.

- ii. After selecting the date, click the Submit button.

MailDirect displays the Survey Link screen with the survey link and the links to edit the survey start date.

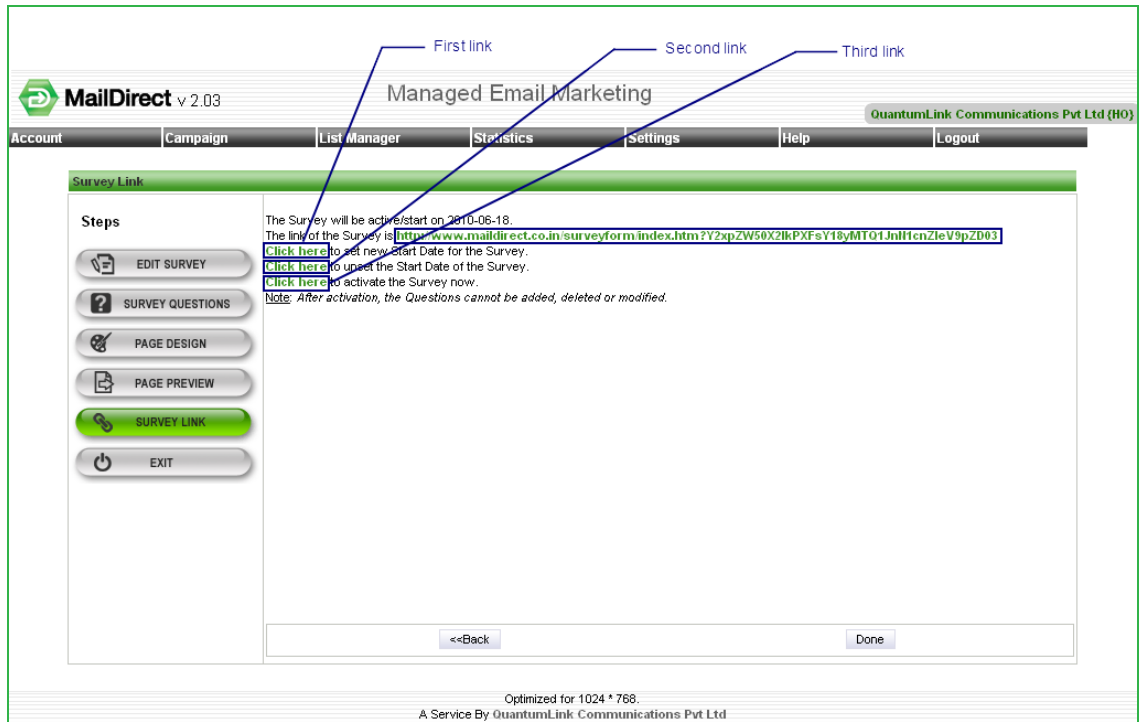


Figure 169: SURVEY LINK [WITH THE SURVEY LINK AND THE LINKS TO EDIT SURVEY START DATE]

- iii. If the scheduled Start Date is to remain unchanged, click the Done button.

MailDirect displays the Introduction To Surveys screen with the survey added to the Planned Surveys section.

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- **Create New Survey - This is a quick & fast method of creating your Survey.**

Active Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	PostMaster Express Respon...	Active	Public Link On Web Site	4	0	--NA--	2010-06-17	2010-06-19
2	BackTrack Survey Campaign	Active	Invite Via Email	4	1	3	2010-06-11	2010-06-30
3	PostMaster Express survey	Active	Invite Via Email	1	1	3	2010-06-11	2010-06-21

Planned Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	MailDirect Customer Respo...	Planned	Public Link On Web Site	4		--NA--	2010-06-19	2010-07-08
2	PostMaster Enterprise Res...	Planned	Public Link On Web Site	1		--NA--		2010-06-17
3	tytyty	Planned	Public Link On Web Site	1		--NA--		2010-06-30
4	PostMaster Enterprise Sur...	Planned	Invite Via Email	0		0		2010-06-18
5	MailServe Survey	Planned	Invite Via Email	1		0		2010-06-15
6	MailDirect survey	Planned	Invite Via Email	4		0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

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Figure 170: INTRODUCTION TO SURVEYS WITH THE SURVEY ADDED TO THE PLANNED SURVEYS

OR

If the survey is to be activated on a new date:

Click the first [Click here](#) link.

MailDirect displays the Set Start Date screen, as shown in [Figure 168](#).

Note: Instructions to set start date are given in step [8.b.i](#) and [ii](#).

OR

If the date of activation is to be cancelled:

Click the second [Click here](#) link.

MailDirect displays a message.

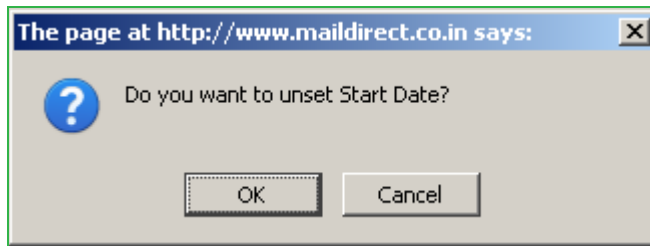


Figure 171: UNSET START DATE MESSAGE

Click the OK button.

MailDirect displays the Survey Link screen, as shown in [Figure 164](#).

OR

If the survey is to be activated immediately:

Click the third [Click here](#) link.

Note: Instructions to activate survey immediately are given in step [8.a](#).

 **To create a Combined (Email and Website based) Survey Campaign:**

1. On the Campaign menu, click the Survey option.

MailDirect displays the Introduction To Surveys screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- [Create New Survey - This is a quick & fast method of creating your Survey.](#) ?

Active Surveys

There are no Active Survey.

Planned Surveys

Sr.	Name	Status	Link/Email	Questions	Repts	Start Date	Expiry Date
1	MailDirect survey	Planned	Invite Via Email	1	0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

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Figure 172: INTRODUCTION TO SURVEYS

2. Click the Create New Survey link.

MailDirect displays the Survey Details screen.

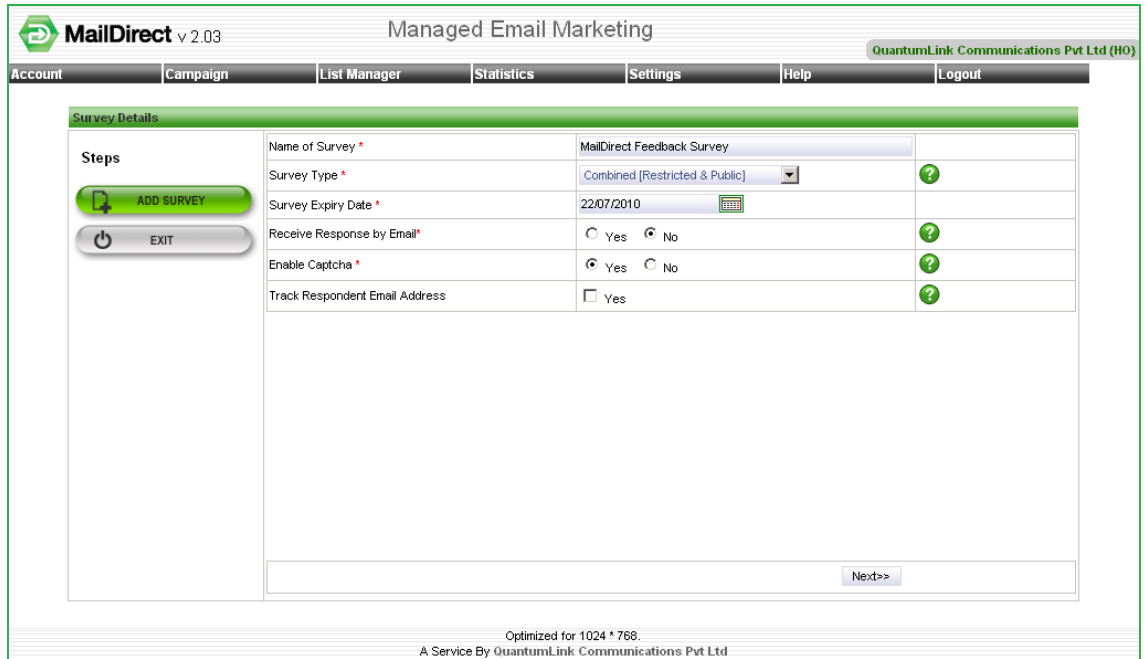


Figure 173: SURVEY DETAILS

Table 68: SURVEY DETAILS

Field	Description
Name of Survey	Type an appropriate name for the survey. This field is mandatory.
Survey Type	Select an appropriate option to define the type of survey to be created, from the drop-down list. The available options are explained below- <ul style="list-style-type: none"> ■ Invite Via Email [Restricted]: Select this option to create a survey that will be conducted via emails. This type of survey facilitates the user to send an invitation to the survey, via email. ■ Public Link On Website [Public]: Select this option to create a survey that will be conducted by using public links on the user's Website. This type of survey can be answered by anybody who visits the user's website. ■ Combined [Restricted & Public]: Select this option to create a survey that will be conducted via emails as

well as by using public links on the user's Website.

This field is mandatory.

Survey Expiry Date

Select an appropriate date, month and year till when this survey will be conducted.

This field is mandatory.

Receive Response by Email

Select either **Yes** or **No** to enable or disable receipt of survey responses by email.

If **Yes** is selected, the **Email Id To Receive Response** text box will be made available to the user.

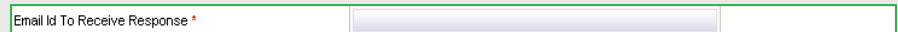


Figure 174: EMAIL ID TO RECEIVE RESPONSE FIELD

Type an appropriate email ID to which survey responses are to be sent by the recipients.

Note: By default, **No** is selected.

This field is mandatory.

Enable Captcha

Select either **Yes** or **No** to enable or disable **Captcha** (Completely Automated Public Turing Test to tell Computers and Humans Apart). Selecting **Yes** ensures that survey responses are not generated by computers.

Note: By default, **Yes** is selected.

This field is mandatory.

Track Respondent Email Address

Select or clear the **Yes** check box to enable or disable tracking of the respondent's email address.

If the check box is selected, the **Survey Query for Track Respondent Email Address** text box will be made available to the user.

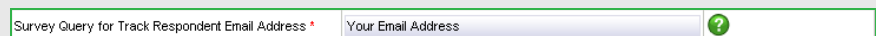


Figure 175: SURVEY QUERY FOR TRACK RESPONDENT EMAIL ADDRESS FIELD

Type an appropriate survey query that will be displayed to the survey respondents.

Note: By default, Your Email Address is displayed in the text box.

This field is mandatory.

Enter/Select the appropriate details in the required fields.

3. Click the **Next** button.

Note: To create a combined survey, select the **Combined [Restricted & Public]** option from the **Survey Type** drop-down list.
The following steps are applicable only if the **Combined [Restricted & Public]** option is selected.

MailDirect displays the Survey Questions screen.

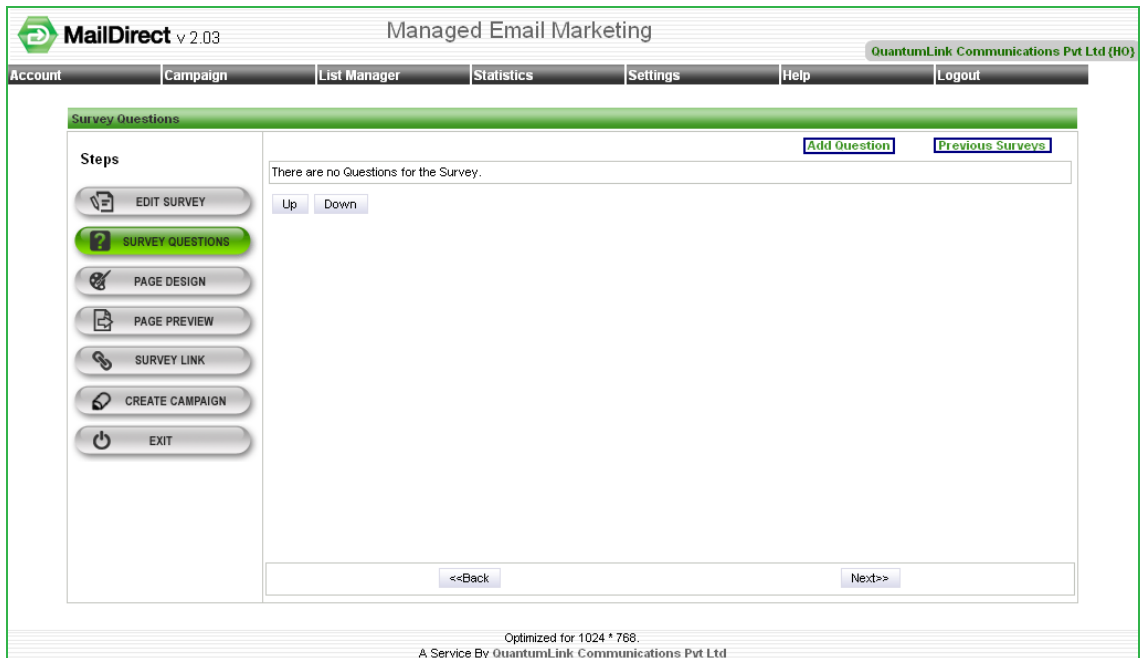


Figure 176: SURVEY QUESTIONS

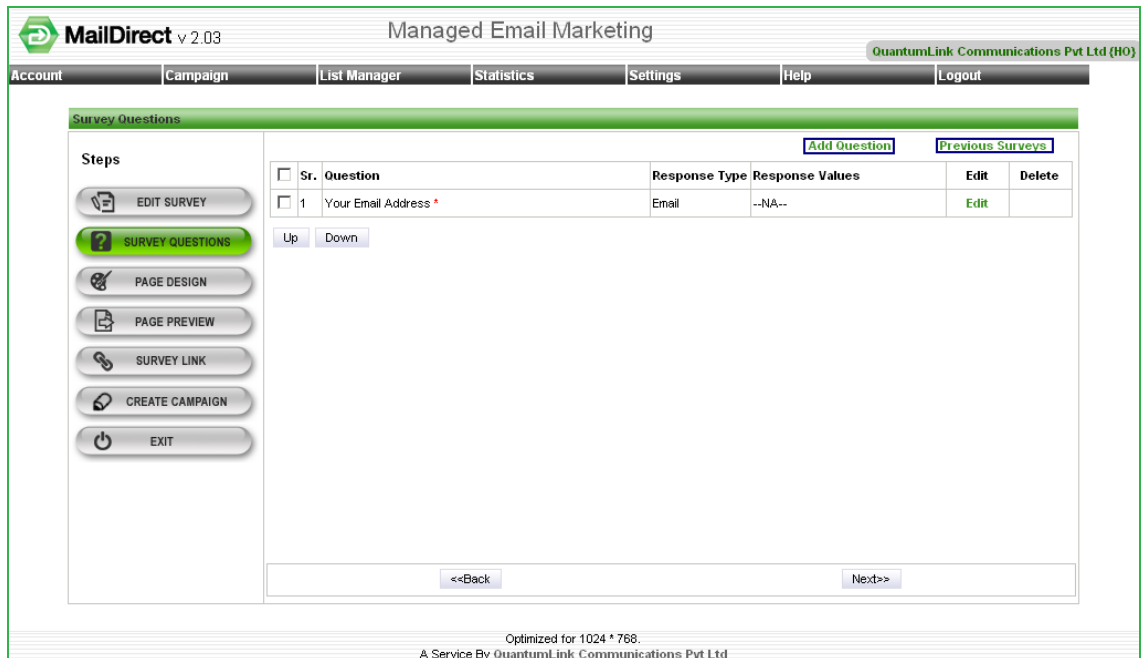


Figure 177: SURVEY QUESTIONS [IF THE TRACK RESPONDENT EMAIL ADDRESS FIELD IS SELECTED]

Note: [Figure 177](#) is displayed only if the Track Respondent Email Address field is selected in the Survey Details screen.

4. To add questions:

Users can add questions by using:

- ◆ Add Question link (to add new questions)
- ◆ Previous Surveys link (to add questions from existing surveys)
- a. To add questions using the Add Question link:
 - i. Click the Add Question link.

MailDirect displays the Add/Edit Question screen.



Figure 178: ADD/EDIT QUESTION

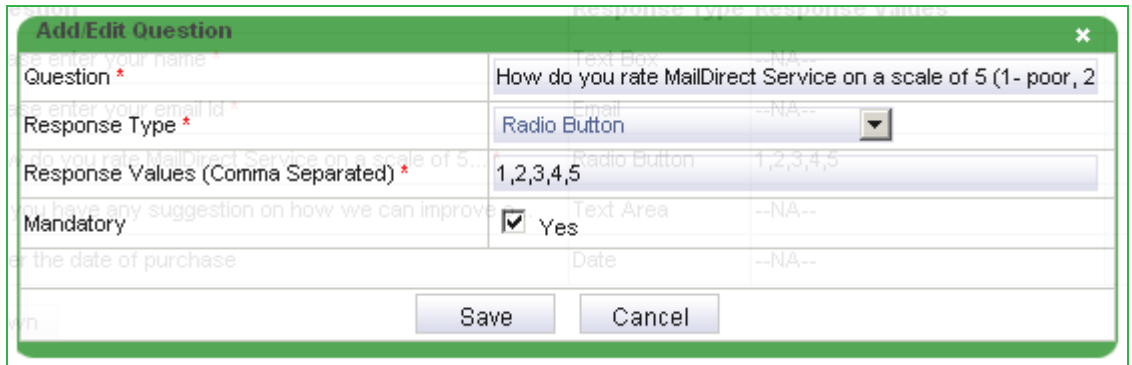


Figure 179: ADD/EDIT QUESTION [WITH RESPONSE VALUES FIELD]

Table 69: ADD/EDIT QUESTION

Field	Description
Question	Type an appropriate question. This field is mandatory.
Response Type	Select an appropriate option from the drop-down list, to define the type of response for this question. The available options are explained below - <ul style="list-style-type: none"> ■ Text Box: If this option is selected, a text box will be made available to survey recipients for entering responses to the survey. ■ Text Area: If this option is selected, a text area will be made available to survey recipients for entering responses to the survey.

- **Drop Down Box:**

If this option is selected, a drop-down box will be made available to survey recipients for selecting a response to the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown in [Figure 179](#).

Type the appropriate values separated by a comma.

This field is mandatory.

- **Radio Button:**

If this option is selected, radio buttons will be made available to survey recipients for selecting a response to the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown in [Figure 179](#).

Type the appropriate values separated by a comma.

The number of radio buttons that will be available to survey recipients depends on the number of values entered by the user in the **Response Values** text box.

This field is mandatory.

- **Check Box:**

If this option is selected, check boxes will be made available to survey recipients for selecting a response to the survey.

On selecting this option, a **Response Values** text box will be made available to the user for defining responses to the survey, as shown as in [Figure 179](#).

Type the appropriate values separated by a comma.

The number of check boxes that will be available to survey recipients depends on the number of values entered by the user in the **Response Values** text box.

This field is mandatory.

- **Email:**

If this option is selected, a text box will be made available to survey recipients for entering responses to the survey.

- **Date:**

If this option is selected, a calendar will be made available to survey recipients for selecting responses to the survey.

This field is mandatory.

Mandatory

Select this check box to make it mandatory for survey recipients to respond to the question.

This field is not mandatory.

Enter/Select the appropriate details in the required fields.

- ii. Click the **Save** button to save the entered/selected information.

MailDirect displays the **Survey Questions** screen with the new question added.

Note: Only one question can be added at a time; the user can click either of the following:

- **Add Questions** link to add more new questions
- **Previous Surveys** link to add questions from a previous survey
- **Next** button to go to the **Page Design** screen

To edit a question added on the **Survey Questions** screen, the user can click the **Edit** link for the corresponding question. **MailDirect** displays the **Add/Edit Question** screen with the details for the corresponding question. Edit the details in the required fields.

To delete a question added on the **Survey Questions** screen, the user can click the **Delete** link for the corresponding question. The **Delete** link is available only if there are two or more questions on the **Survey Questions** screen.

If the **Track Respondent Email Address** field is selected, the **Delete** link is available only if there are more than two questions on the **Survey Questions** screen.

- b. To add questions using the **Previous Surveys** link.
 - i. Click the **Previous Surveys** link.

MailDirect displays the Get Questions from Previous Survey screen.

Sr.	Question	Response Type	Response Values	Edit
<input checked="" type="checkbox"/>	1 Would you like to run a marketing campaign using S... *	Radio Button	Yes,No	Edit
<input checked="" type="checkbox"/>	2 Would you like to carry out customer survey from o... *	Radio Button	Yes,No	Edit
<input type="checkbox"/>	3 Do you have any suggestions on how we can improve ...	Text Area	--NA--	Edit

Figure 180: GET QUESTIONS FROM PREVIOUS SURVEY

Table 70: GET QUESTIONS FROM PREVIOUS SURVEY

Field	Description
Select	Select an appropriate survey from the drop-down list. This field is mandatory.
OK	Click this button to display all the questions in the selected survey.
Select Questions	Select the check boxes corresponding to the appropriate question/s to be added to the survey.

Select the appropriate details in the required fields.

- ii. Click the **Submit** button to add the selected question/s from the previous survey.

MailDirect displays the **Survey Questions** screen with the question/s added from the previous survey.

5. Click the **Next** button.

MailDirect displays the Page Design screen.



Figure 181: PAGE DESIGN

6. To customize page design:
 - Users can customize the page design by using:
 - ◆ Available customization tabs to create new designs
 - ◆ Previous Survey link to import designs from the previous surveys
 - a. To create new designs using the customization tabs:
 - i. Select the **Header** tab.

Note: By default, the **Header** tab is selected.

MailDirect displays the Page Design screen with the Header options.

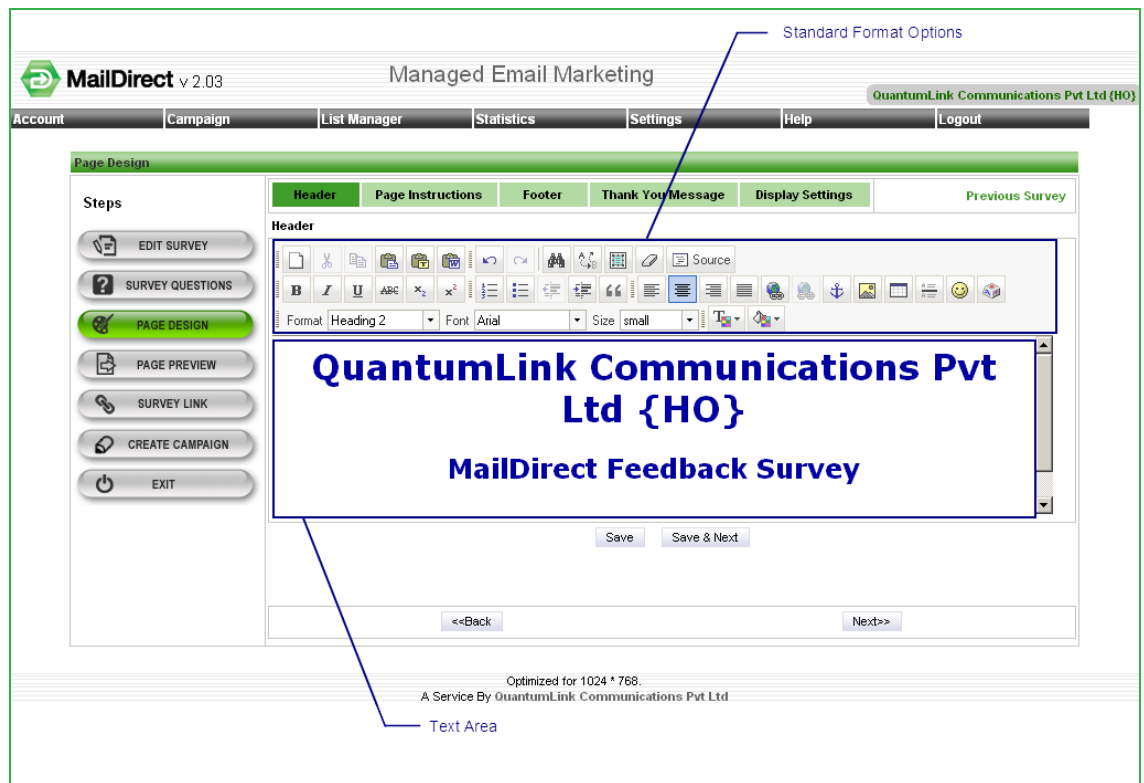


Figure 182: PAGE DESIGN WITH HEADER OPTIONS

Table 71: HEADER OPTIONS

Field	Description
Text Area	<p>Type an appropriate header to be displayed in the header section of the survey.</p> <p>Note: By default, an appropriate header is displayed in the Text Area. The user can make use of the default header. The user can edit and use the default header. The user can replace the default header with an appropriate header.</p> <p>This field is not mandatory.</p>
Standard Format Options	<p>Select the appropriate format options to apply to the text entered in the Text Area.</p>

Enter/Select the appropriate details in the required fields.

- ii. Click the Save & Next button.

MailDirect displays the Page Design screen with the Page Instructions options.

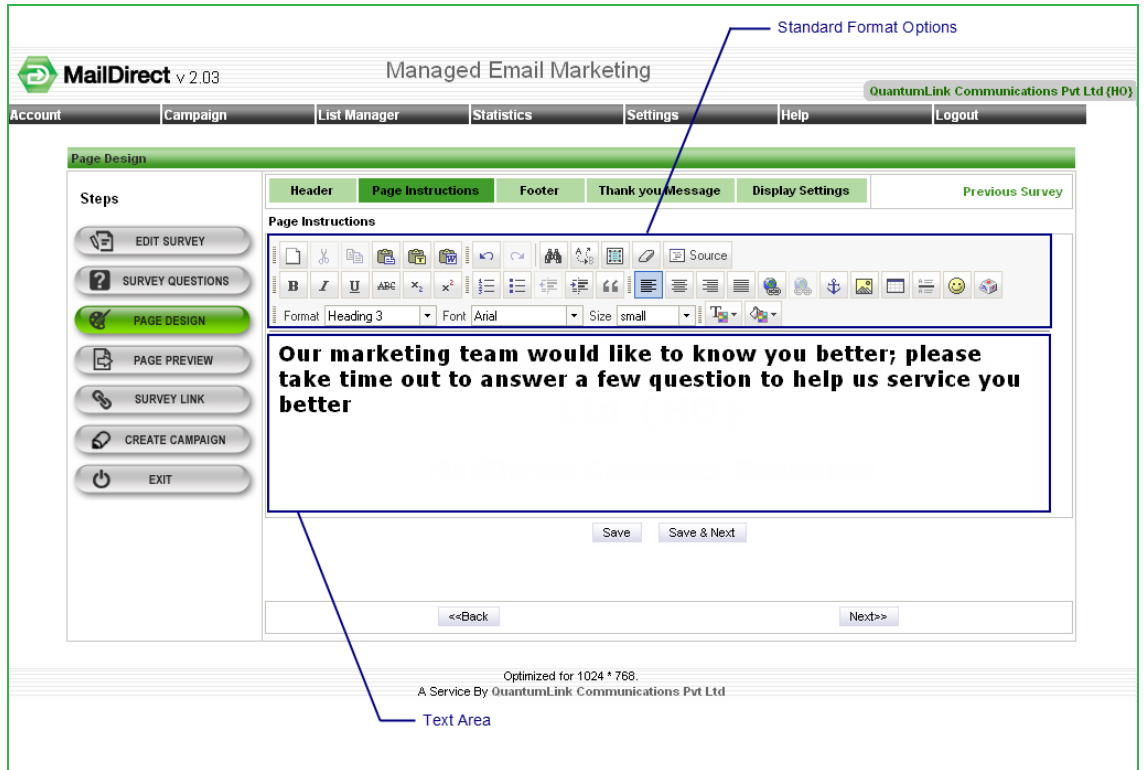


Figure 183: PAGE DESIGN WITH PAGE INSTRUCTION OPTIONS

Note: The user can also click the Save button on the Page Design screen to save changes in the Page Design screen.

The user can also click the Page Instructions tab to customize the page instruction of the survey. If the user clicks the Page Instructions tab without saving the changes on the Page Design screen, the changes will be discarded.

Table 72: PAGE INSTRUCTION OPTIONS

Field	Description
Text Area	Type an appropriate message to be displayed as page instruction in the survey.
	Note: By default, an appropriate message is displayed as page instruction in the Text Area. The user can make use of the default message. The user can edit and use the default page instruction.

The user can replace the default message with an appropriate message.

This field is not mandatory.

Standard Format Options

Select the appropriate format options to apply to the text entered in the **Text Area**.

Enter/Select the appropriate details in the required fields.

- iii. Click the **Save & Next** button.

MailDirect displays the **Page Design** screen with the **Footer** options.

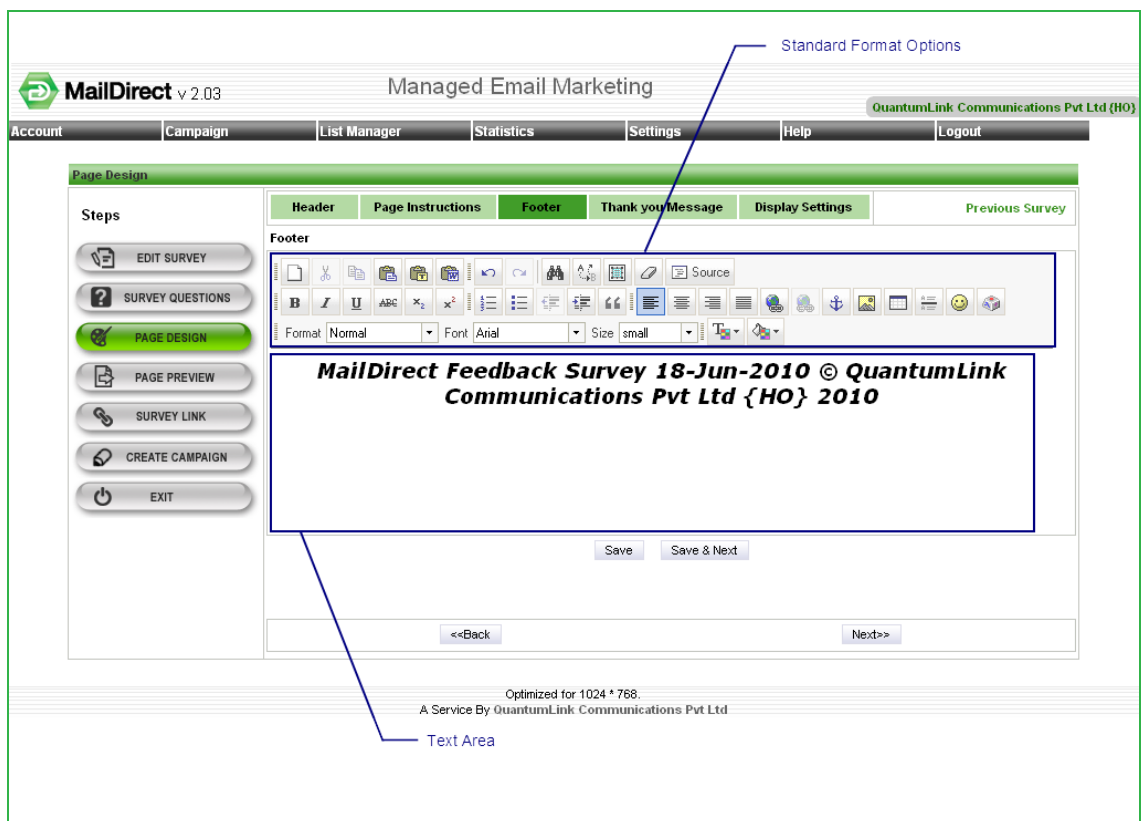


Figure 184: PAGE DESIGN WITH FOOTER OPTIONS

Note: The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can also click the **Footer** tab to customize footer of the survey.

If the user clicks the **Page Instructions** tab without saving the changes on the **Page Design** screen, the changes will be discarded.

Table 73: FOOTER OPTIONS

Field	Description
Text Area	<p>Type an appropriate footer to be displayed in the footer section of the survey.</p> <hr/> <p>Note: By default, an appropriate footer is displayed in the Text Area. The user can make use of the default footer. The user can edit and use the default footer. The user can replace the default footer with an appropriate footer.</p> <hr/> <p>This field is not mandatory.</p>
Standard Format Options	Select the appropriate format options to apply to the text entered in the Text Area .

Enter/Select the appropriate details in the required fields.

- iv. Click the **Save & Next** button.

MailDirect displays the Page Design screen with the Thank you Message options.

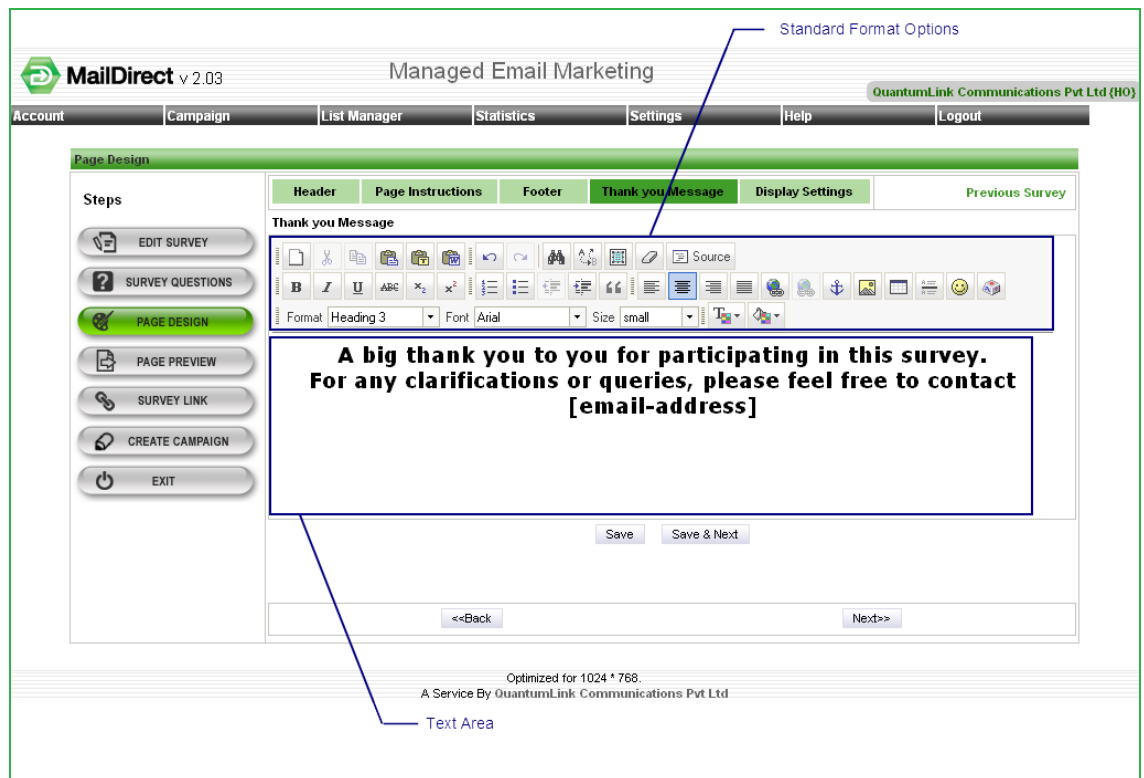


Figure 185: PAGE DESIGN WITH THE THANK YOU MESSAGE OPTIONS

Note: The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can also click the **Thank you Message** tab to customize the thank you message of the survey. If the user clicks the **Page Instructions** tab without saving the changes on the **Page Design** screen, the changes will be discarded.

Table 74: THANK YOU MESSAGE OPTIONS

Field	Description
Text Area	Type an appropriate message to be displayed as a thank you message in the survey.
	Note: By default, an appropriate message is displayed as thank you message in the Text Area . The user can make use of the default message. The user can edit and use the default thank you message. The user can replace the default message with an appropriate message.

This field is not mandatory.

Standard Format Options

Select the appropriate format options to apply to the text entered in the Text Area.

Enter/Select the appropriate details in the required fields.

- v. Click the Save & Next button.

MailDirect displays the Page Design screen with the Display Settings options.

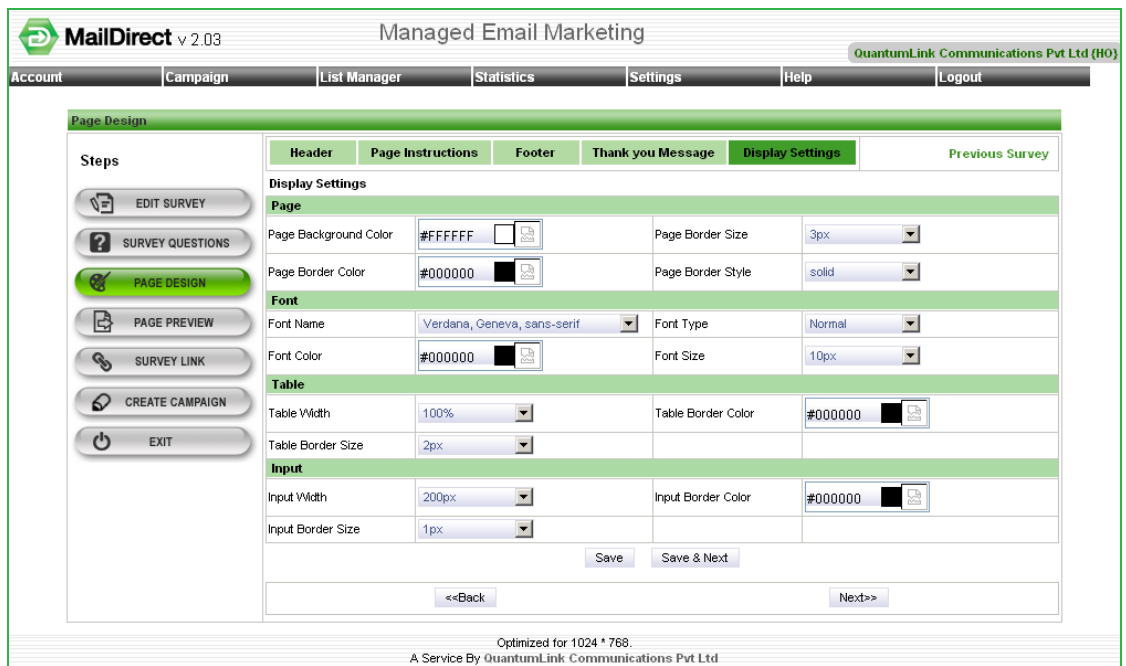


Figure 186: PAGE DESIGN WITH THE DISPLAY SETTINGS

Note: The user can also click the Save button on the Page Design screen to save changes in the Page Design screen.

The user can also click the Display Settings tab to customize the display settings of the survey. If the user clicks the Page Instructions tab without saving the changes on the Page Design screen, the changes will be discarded.

Table 75: HEADER OPTIONS

Field	Description
Page	<p>Select the appropriate options to apply to the survey page.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Page Background Color: Select an appropriate page background color from the color palette. ▪ Page Border Color: Select an appropriate page border color from the color palette. ▪ Page Border Size: Select an appropriate page border size from the drop-down list. ▪ Page Border Style: Select an appropriate page border style from the drop-down list. <p>This field is not mandatory.</p>
Font	<p>Select the appropriate font options to apply to the text in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Font Name: Select an appropriate font name from the drop-down list. ▪ Font Color: Select an appropriate font color from the color palette. ▪ Font Type: Select an appropriate font type from the drop-down list. ▪ Font Size: Select an appropriate font size from the drop-down list. <p>This field is not mandatory.</p>
Table	<p>Select the appropriate table options to apply to the table in the survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Table Width: Select an appropriate table width from the drop-down list. ▪ Table Border Size: Select an appropriate table border size from the drop-down list. ▪ Table Border Color: Select an appropriate table border color from the color

palette.
This field is not mandatory.

Input

Select the appropriate input options to apply to the Input fields in the survey.
The available options are explained below-

- **Input Width:**
Select an appropriate width for the input fields from the drop-down list.
- **Input Border Size:**
Select an appropriate border size for the input fields from the drop-down list.
- **Input Border Color:**
Select an appropriate border color for the input fields from the color palette.

This field is not mandatory.

Select the appropriate details in the required fields.

- vi. Click the **Save & Next** button.

MailDirect displays the Page Preview screen.

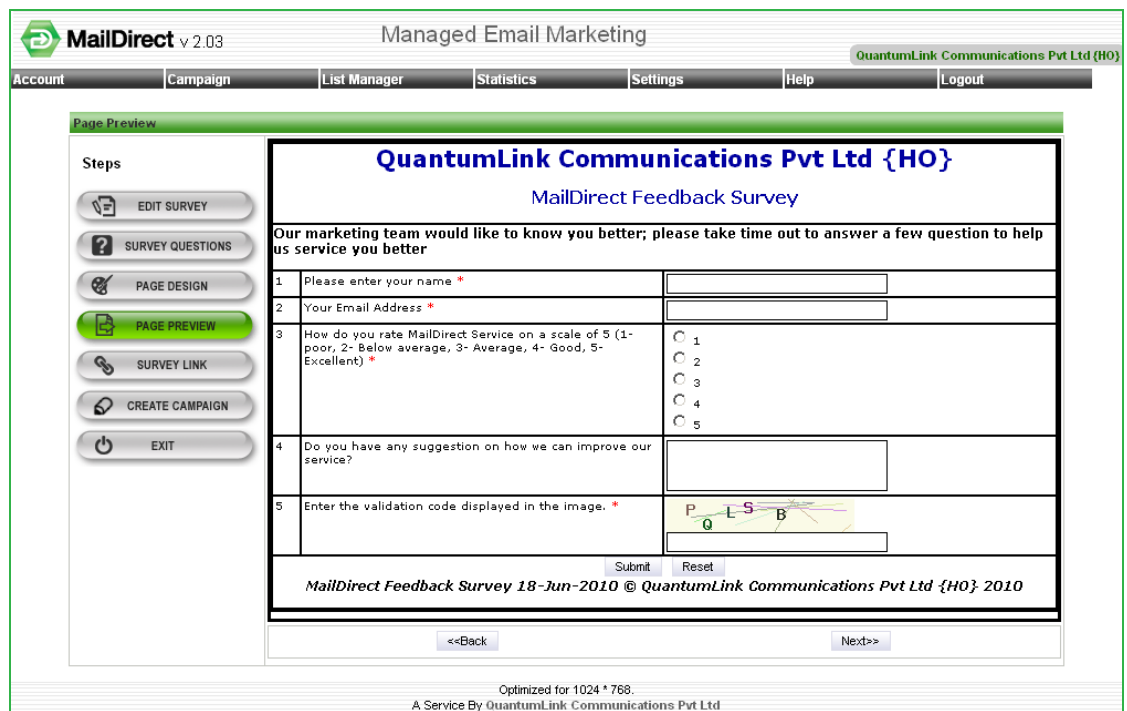


Figure 187: PAGE PREVIEW

Note: Alternatively, the user can click the **Next** button on the **Page Design** screen, which also displays the **Page Preview** screen without saving the latest changes in the **Page Design** screen.

The user can also click the **Save** button on the **Page Design** screen to save changes in the **Page Design** screen.

The user can click the tabs in any order to customize the survey page design as needed.

- b. To import designs from previous surveys using the Previous Survey link.
 - i. Click the Previous Survey link on the Page Design screen.
MailDirect displays the Get Page Design from Previous Survey screen.

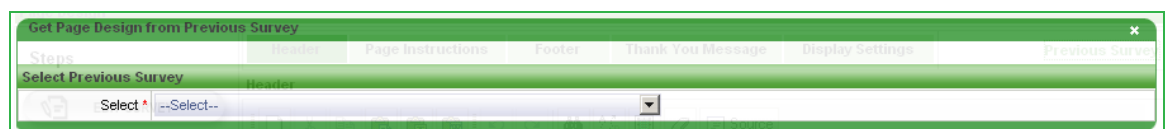


Figure 188: GET PAGE DESIGN FROM PREVIOUS SURVEY

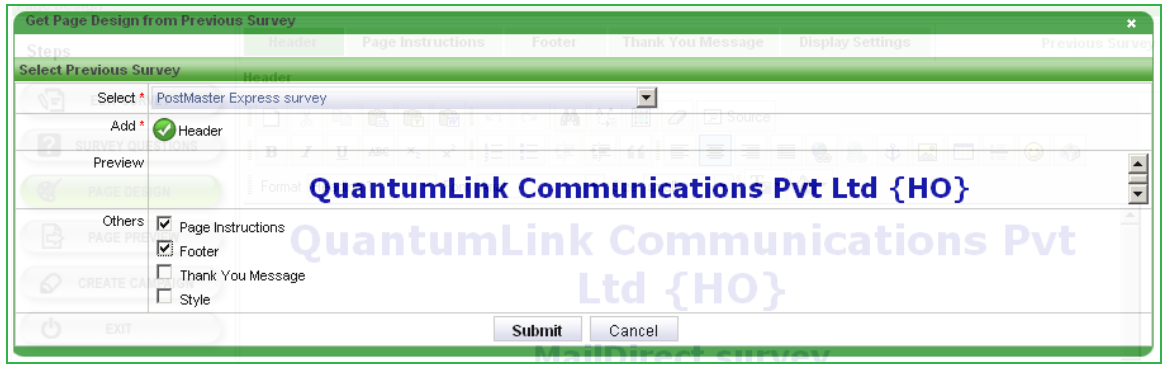


Figure 189: GET PAGE DESIGN FROM PREVIOUS SURVEY [WITH OPTIONS TO IMPORT PAGE DESIGN]

Table 76: GET PAGE DESIGN FROM PREVIOUS SURVEY

Field	Description
Select	<p>Select an appropriate previous survey from which the page design is to be imported, from the drop-down list.</p> <p>On selecting the appropriate survey, other page design options will be made available, as shown in Figure 189.</p> <p>This field is mandatory.</p>
Add	<p>Displays the header.</p> <hr/> <p>Note: The Header of the previous survey will always be added.</p> <hr/>
Preview	<p>Provides a preview of the selected survey header.</p>
Others	<p>Select the appropriate check boxes to import the page design for the corresponding sections from the selected survey.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> <p>■ Page Instructions</p> <p>Select this check box to import the page instructions from the selected survey.</p> <p>■ Footer</p> <p>Select this check box to import the footer from the selected survey.</p> <p>■ Thank You Message</p> <p>Select this check box to import the thank you message from the selected survey.</p> <p>■ Style</p>

Select this check box to import the style from the selected survey.

Select the appropriate details in the required fields.

- ii. Click the **Submit** button.

MailDirect displays the **Page Design** screen (with the design selected above), as shown in [Figure 181](#).

Note: Instructions to customize the page design are given in step [6](#).

7. Click the **Next** button on the **Page Preview** screen.

MailDirect displays the **Survey Link** screen.

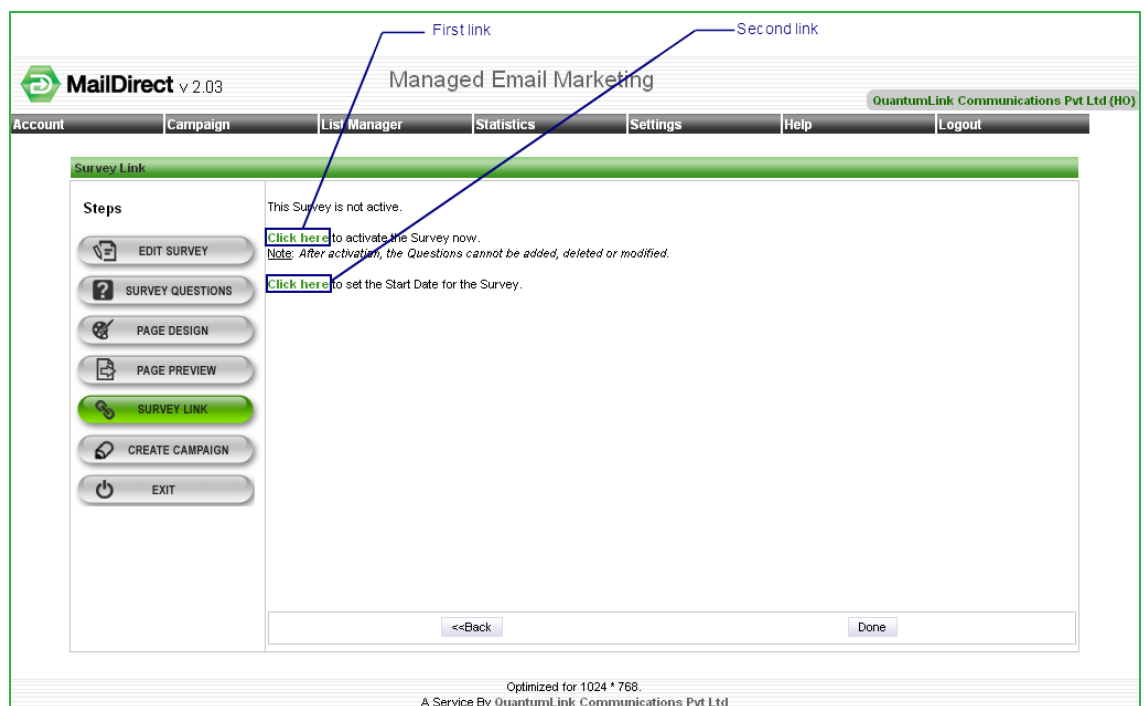


Figure 190: SURVEY LINK

8. To activate a survey:

Users can activate a survey by using:

- ◆ **Click here to activate the Survey now link** (the First Link) to activate the survey immediately

- ◆ Click [here](#) to set the Start Date for the Survey link (the Second Link) to activate the survey on a later date

Note: The user can click the **Done** button to create an email campaign without activating immediately or setting a date for the activation of the survey.

- a. To activate a survey immediately:
 - i. Click the first [Click here](#) link.
MailDirect displays a message.



Figure 191: ACTIVATE SURVEY MESSAGE

- ii. Click the OK button.

MailDirect displays the Survey Link screen with the link for the survey.

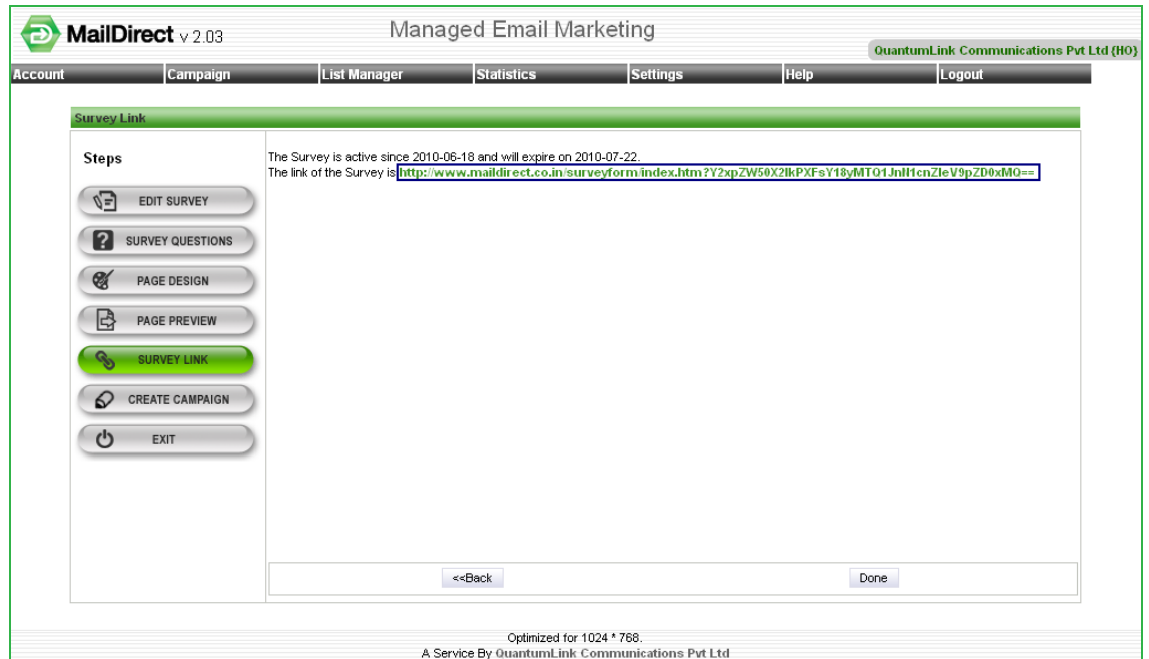


Figure 192: SURVEY LINK WITH THE LINK FOR THE SURVEY

Note: The user has to copy the survey link to the appropriate website on which the survey will be conducted.

- iii. Click the Done button.

MailDirect displays the Introduction To Surveys screen with the survey added to the Active Surveys section.

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- **Create New Survey - This is a quick & fast method of creating your Survey.**

Active Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	MailDirect Feedback Surve...	Active	Combined	4	0	--NA--	2010-06-18	2010-07-22
2	BackTrack Survey Campaign	Active	Invite Via Email	4	1	3	2010-06-11	2010-06-30
3	PostMaster Express survey	Active	Invite Via Email	1	1	3	2010-06-11	2010-06-21

Planned Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	PostMaster Express Respon...	Planned	Public Link On Web Site	2		--NA--		2010-06-17
2	PostMaster Enterprise Res...	Planned	Public Link On Web Site	1		--NA--		2010-06-17
3	tytytu	Planned	Public Link On Web Site	1		--NA--		2010-06-30
4	PostMaster Enterprise Sur...	Planned	Invite Via Email	0		0		2010-06-18
5	MailServe Survey	Planned	Invite Via Email	1		0		2010-06-15
6	MailDirect survey	Planned	Invite Via Email	4		0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

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Figure 193: INTRODUCTION TO SURVEYS WITH THE SURVEY ADDED TO THE ACTIVE SURVEYS SECTION

Note: The user should click the Done button in [Figure 192](#) only if an email campaign is not to be created for the survey.

Alternately, the user can create an email campaign for an active survey by editing the survey.

- b. To activate a survey on a later date:
 - i. Click the second Click here link.

MailDirect displays the Set Start Date screen.



Set Start Date

Survey Start Date * 18/06/2010

Submit Reset Cancel

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Figure 194: SET START DATE

Table 77: SET START DATE

Field	Description
Survey Start Date	Select an appropriate start date from the calendar. This field is mandatory.

- ii. After selecting the date, click the **Submit** button.

MailDirect displays the Survey Link screen with the survey link and the links to edit the survey start date.

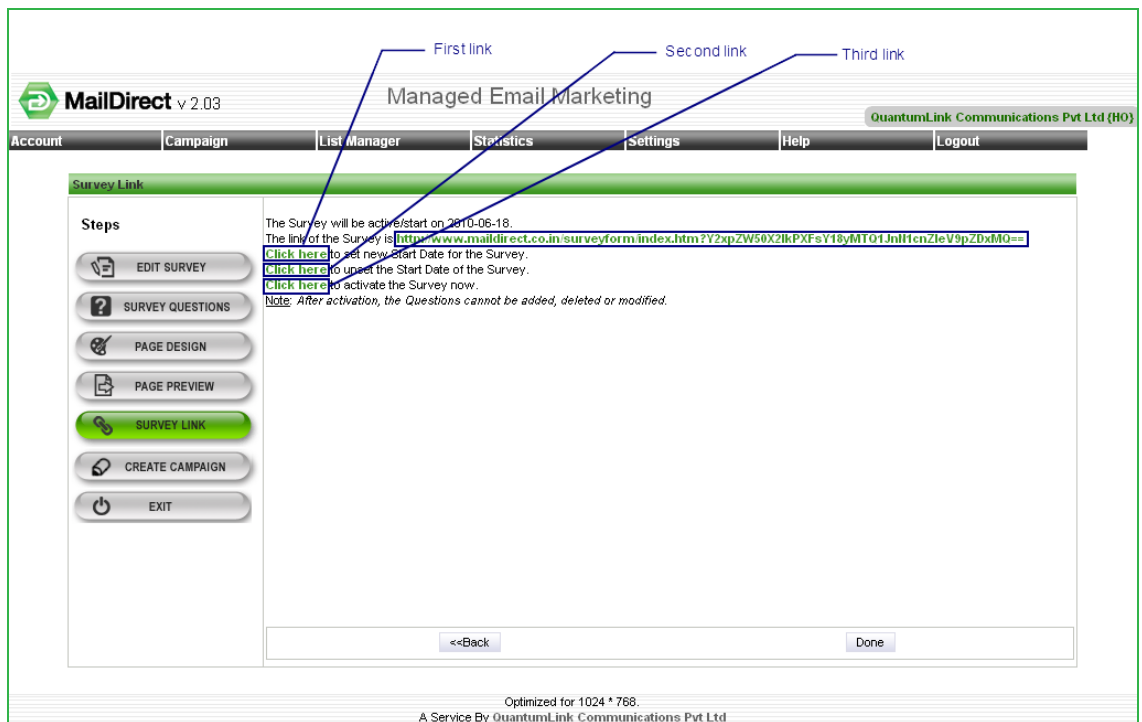


Figure 195: SURVEY LINK [WITH THE SURVEY LINK AND THE LINKS TO EDIT SURVEY START DATE]

- iii. If the scheduled Start Date is to remain unchanged, click the Done button.

MailDirect displays the Introduction To Surveys screen with the survey added to the Planned Surveys section.

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- **Create New Survey - This is a quick & fast method of creating your Survey.** ?

Active Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	PostMaster Express Respon...	Active	Public Link On Web Site	4	0	--NA--	2010-06-17	2010-06-19
2	BackTrack Survey Campaign	Active	Invite Via Email	4	1	3	2010-06-11	2010-06-30
3	PostMaster Express survey	Active	Invite Via Email	1	1	3	2010-06-11	2010-06-21

Planned Surveys

Sr.	Name	Status	Link Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	MailDirect Feedback Surve...	Planned	Combined	4		--NA--	2010-06-18	2010-07-22
2	PostMaster Enterprise Res...	Planned	Public Link On Web Site	1		--NA--		2010-06-17
3	tytyty	Planned	Public Link On Web Site	1		--NA--		2010-06-30
4	PostMaster Enterprise Sur...	Planned	Invite Via Email	0		0		2010-06-18
5	MailServe Survey	Planned	Invite Via Email	1		0		2010-06-15
6	MailDirect survey	Planned	Invite Via Email	4		0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

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Figure 196: INTRODUCTION TO SURVEYS WITH THE SURVEY ADDED TO THE PLANNED SURVEYS

Note: The user should click the Done button in [Figure 195](#) only if an email campaign is not to be created for the survey.

Alternately, the user can create an email campaign for a planned survey by editing the survey.

OR

If the survey is to be activated on a new date:

Click the first [Click here](#) link.

MailDirect displays the Set Start Date screen, as shown in [Figure 194](#).

Note: Instructions to set start a date are given in steps [8.b.i](#) and [ii](#).

OR

If the date of activation is to be cancelled:

Click the second [Click here](#) link.

MailDirect displays a message.

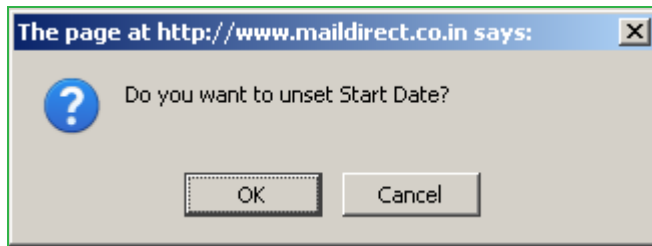


Figure 197: UNSET START DATE MESSAGE

Click the OK button.

MailDirect displays the Survey Link screen, as shown in [Figure 190](#).

OR

If the survey is to be activated immediately:

Click the third [Click here](#) link.

Note: Instructions to activate a survey are given in step [8.a](#).

9. Click the **CREATE CAMPAIGN** button on the left panel if the survey has been activated or has been set for activation on a later date.

OR

Click the **Done** button.

Note: MailDirect displays the Create Campaign screen.

The user should click the **Done** button only if the survey is not activated or scheduled. Refer to [create campaign](#) section for more details.

6.2.2 Viewing Survey Statistics summary



To view survey statistics summary

1. On the Campaign menu, click the Survey option.

MailDirect displays the Introduction To Surveys screen.

Introduction To Surveys

Create New Survey

Surveys are used to collect quantitative information about in political polling and government, health, social science and marketing research. A survey may focus on opinions or factual information depending on its purpose, and many surveys involve administering questions to individuals. Surveys offer an easy method of carrying out online surveys. To create an online survey, prepare questions for your respondents, and map surveys to the list of recipients you want to communicate to:

- **Create New Survey - This is a quick & fast method of creating your Survey.**

Active Surveys								
Sr.	Name	Status	Link/Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	MailDirect Feedback Surve...	Active	Combined	4	1	3	2010-06-18	2010-07-22
2	MailDirect Customer Respo...	Active	Public Link On Web Site	4	0	--NA--	2010-06-17	2010-07-08
3	BackTrack Survey Campaign	Active	Invite Via Email	4	1	3	2010-06-11	2010-06-30

Planned Surveys								
Sr.	Name	Status	Link/Email	Questions	Responses	Rcpts	Start Date	Expiry Date
1	PostMaster Enterprise Res...	Planned	Combined	1		0		2010-06-19
2	tytytu	Planned	Public Link On Web Site	1		--NA--		2010-06-30
3	PostMaster Enterprise Sur...	Planned	Combined	0		0		2010-06-19
4	MailServe Survey	Planned	Invite Via Email	1		0		2010-06-15
5	MailDirect survey	Planned	Invite Via Email	4		0		2010-05-31

Note : Statistics for Surveys past the expiry date are available in Statistics section [Statistics section](#).

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Figure 198: INTRODUCTION TO SURVEYS

Table 78: STATISTICS

Field	Description
Statistics > Active/Planned Surveys	
Name	This section displays the name of the survey. Click the name, which is a link, to view the details about the corresponding survey.
Status	This section displays the status of the survey. The survey status can either be Active or Planned .
Link/Email	This section displays the type of the survey. The survey can either be Email , or Website or Combined .
Questions	This section displays the number of questions present in the survey.
Responses	This section displays the number of responses received for the survey.
Rcpts	This section displays the number of recipients who have received the invitation

	for the survey.
	<hr/> Note: This field will have values other than zero only if the survey type is Email or Combined . <hr/>
Start Date	This section displays the date on which the corresponding survey was started.
Expiry Date	This section displays the date on which the corresponding survey has expired (for an Expired survey)/will expire (for an Active survey).

Note: The user can also click on the **Statistics section** link available below the **Statistics>Planned Surveys** sections to view the detailed statistics for the surveys.

7 Searching for Campaigns/Surveys

In this chapter, users will learn how to:

- Search for a campaign/survey

7.1 Introduction

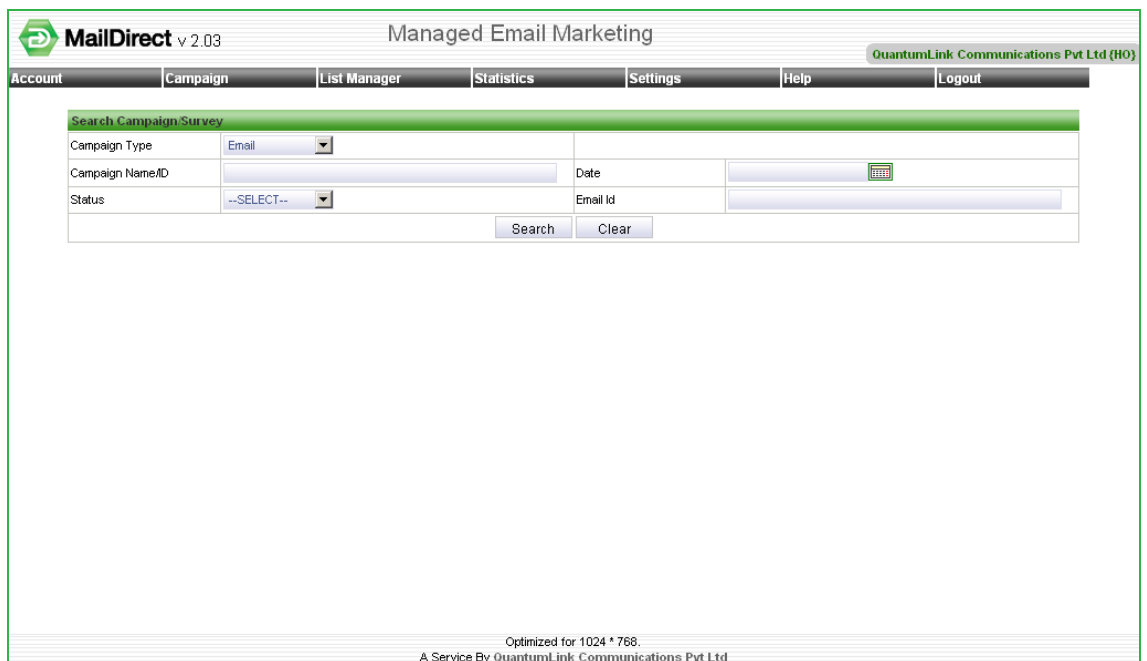
Users can select criteria and enter keywords to search for a campaign/survey. They can view and edit a campaign/survey (only if the campaign/survey is not active/completed/abandoned).

7.2 Searching for Campaign/Survey

This section provides instructions on how to search for campaigns (Email and SMS) or surveys.

To Search for a Campaign/Survey:

1. On the Campaign menu, click the Search Campaign/Survey option.
MailDirect displays the Search Campaign/Survey screen.



The screenshot displays the 'Search Campaign/Survey' interface within the MailDirect v 2.03 application. The page title is 'Managed Email Marketing' and the user is logged in as 'QuantumLink Communications Pvt Ltd (HO)'. The navigation menu includes 'Account', 'Campaign', 'List Manager', 'Statistics', 'Settings', 'Help', and 'Logout'. The search form contains the following fields and controls:

- Campaign Type:** A dropdown menu currently set to 'Email'.
- Campaign Name/ID:** A text input field.
- Status:** A dropdown menu currently set to '--SELECT--'.
- Date:** A date selection field with a calendar icon.
- Email Id:** A text input field.
- Buttons:** 'Search' and 'Clear' buttons.

At the bottom of the page, it states 'Optimized for 1024 * 768. A Service By QuantumLink Communications Pvt Ltd'.

Figure 199: SEARCH CAMPAIGN/SURVEY

2. To search for a campaign/survey:
Users can select the appropriate option in the Campaign Type drop-down list and search for:
 - ◆ Email campaigns

- ◆ SMS campaigns
- ◆ Surveys
- a. To search for an Email campaign
 - i. Select the **Email** option from the **Campaign Type** drop-down list.

Note: By default, the **Email** option is selected.

MailDirect displays the Search Campaign/Survey screen with the email campaign details.

Figure 200: SEARCH CAMPAIGN/SURVEY WITH THE EMAIL CAMPAIGN DETAILS

Table 79: SEARCH FOR EMAIL CAMPAIGN

Field	Description
Campaign Name/ID	Type an appropriate name/ID of the email campaign for which the search is to be conducted.
Status	Select an appropriate status of the email campaign for which the search is to be conducted, from the drop-down list. The available options are explained below- <ul style="list-style-type: none"> ▪ Planned:

	<p>Select this option to search for a campaign that is being planned (and which has been saved to the drafts).</p> <ul style="list-style-type: none">▪ Active: Select this option to search for a campaign that is active (which is currently running).▪ Completed: Select this option to search for a campaign that has been completed.▪ Abandoned: Select this option to search for a campaign that has been abandoned.▪ Scheduled: Select this option to search for a campaign that is scheduled to be launched on a certain date.
Date	Select an appropriate date of the campaign from the calendar.
Email Id	Type an appropriate email ID of the sender of the email campaign.

Enter/Select the appropriate details in the required fields.

- ii. Click the **Search** button.

MailDirect displays the Search Campaign/Survey screen with the search results.

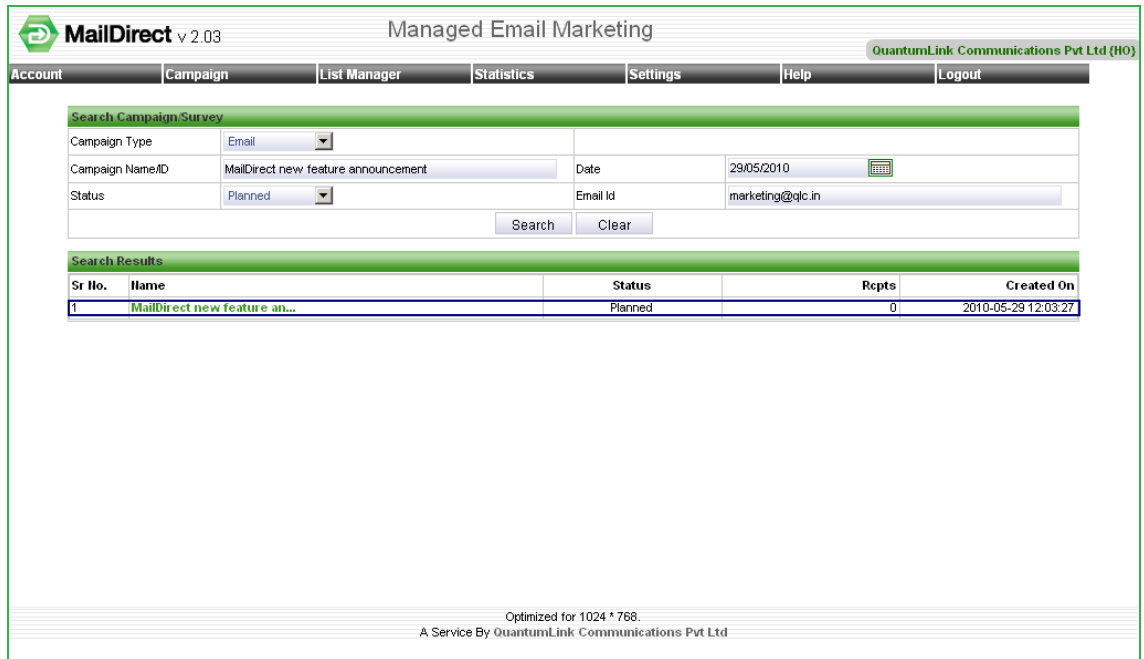


Figure 201: SEARCH CAMPAIGN/SURVEY WITH THE SEARCH RESULTS FOR EMAIL CAMPAIGN

Table 80: EMAIL CAMPAIGN SEARCH RESULTS

Field/Link	Description
Name	<p>This section displays the name of the email campaign.</p> <p>Click the name, which is a link to view the details about the corresponding email campaign.</p> <hr/> <p>Note: On clicking the name, MailDirect displays the screen with the detailed information for the corresponding email campaign. Refer to the email campaign info section for more details. If the status of the email campaign is Planned, MailDirect displays the screen with the options to edit the email campaign.</p>
Status	This section displays the status of the email campaign.
Rcpts	This section displays the number of recipients of the email campaign (if any).
	Note: The number of recipients for planned or scheduled email

campaigns will always be zero.

Created On

This section displays the date on which the email campaign was created.

Click the appropriate name link to view the corresponding details.

- b. To search for a SMS campaign
 - i. Select the SMS option from the Campaign Type drop-down list.

MailDirect displays the Search Campaign/Survey screen with the SMS campaign details.

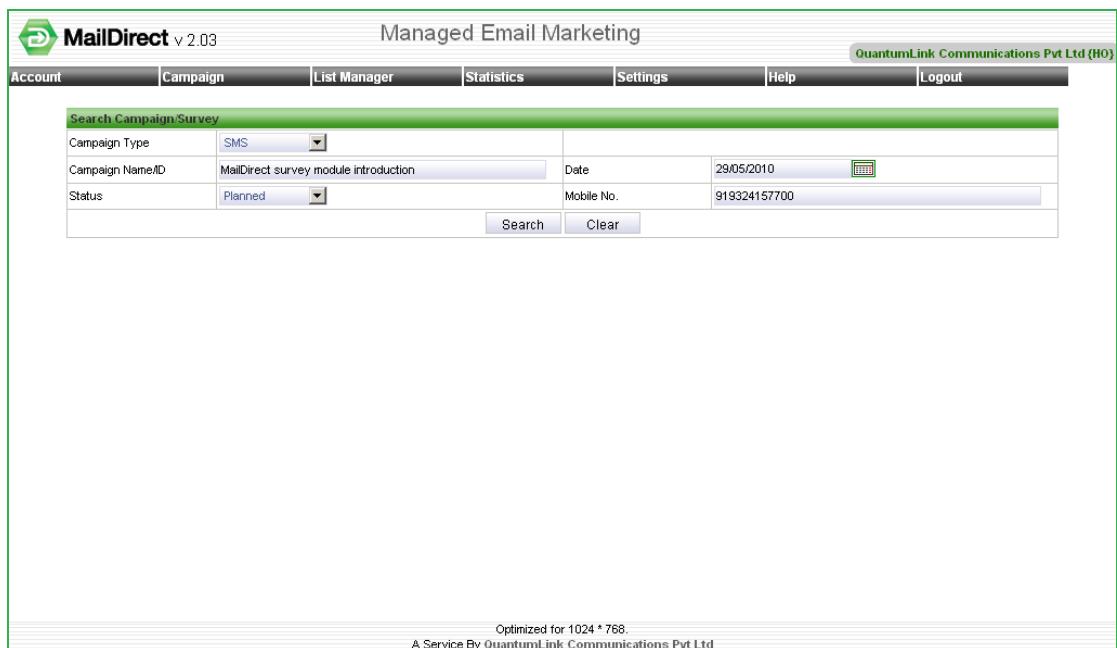


Figure 202: SEARCH CAMPAIGN/SURVEY WITH THE SMS CAMPAIGN FIELDS

Table 81: SEARCH FOR SMS CAMPAIGN

Field	Description
Campaign Name/ID	Type an appropriate name/ID of the SMS campaign for which the search is to be conducted.
Status	Select the appropriate status of the SMS campaign for which the search is to be conducted, from the drop-down list. The available options are explained below-

	<ul style="list-style-type: none">■ Planned: Select this option to search for a campaign that is being planned (and which has been saved to the drafts).■ Active: Select this option to search for a campaign that is active (which is currently running).■ Completed: Select this option to search a campaign that has been completed.■ Abandoned: Select this option to search for a campaign that has been abandoned.■ Scheduled: Select this option to search for a campaign that is scheduled to be launched on a certain date.
Date	Select an appropriate date of the campaign from the calendar.
Mobile No.	Type an appropriate mobile number of the sender of the SMS campaign.

Enter/Select the appropriate details in the required fields.

- ii. Click the **Search** button.

MailDirect displays the Search Campaign/Survey screen with the search results.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HO)

Account Campaign List Manager Statistics Settings Help Logout

Search Campaign/Survey

Campaign Type: SMS

Campaign Name/ID: MailDirect survey module introduction Date: 29/05/2010

Status: Planned Mobile No.: 919324157700

Search Clear

Search Results

Sr No.	Name	Status	Rcpts	Created On
1	MailDirect survey module introduction	Planned	0	2010-05-29 11:03:21

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Figure 203: SEARCH CAMPAIGN/SURVEY WITH THE SEARCH RESULTS FOR SMS CAMPAIGN

Table 82: SMS CAMPAIGN SEARCH RESULTS

Field/Link	Description
Name	<p>This section displays the name of the SMS campaigns.</p> <p>Click the name, which is a link to view the details about the corresponding SMS campaign.</p> <hr/> <p>Note: On clicking the name, MailDirect displays the screen with the detailed information for the corresponding SMS campaign. Refer to the SMS campaign info section for more details.</p> <p>If the status of the SMS campaign is Planned, MailDirect displays the screen with the options to edit the SMS campaign.</p> <hr/>
Status	This section displays the status of the SMS campaign.
Rcpts	This section displays the number of recipients of the SMS campaign (if any).
	<hr/> Note: The number of recipients for planned or scheduled SMS

campaigns will always be zero.

Created On

This section displays the date on which the SMS campaign was created.

Click the appropriate name link to view the corresponding details.

- c. To search for a Survey:
 - i. Select the **Survey** option from the **Campaign Type** drop-down list.
- MailDirect displays the **Search Campaign/Survey** screen with the Survey details.

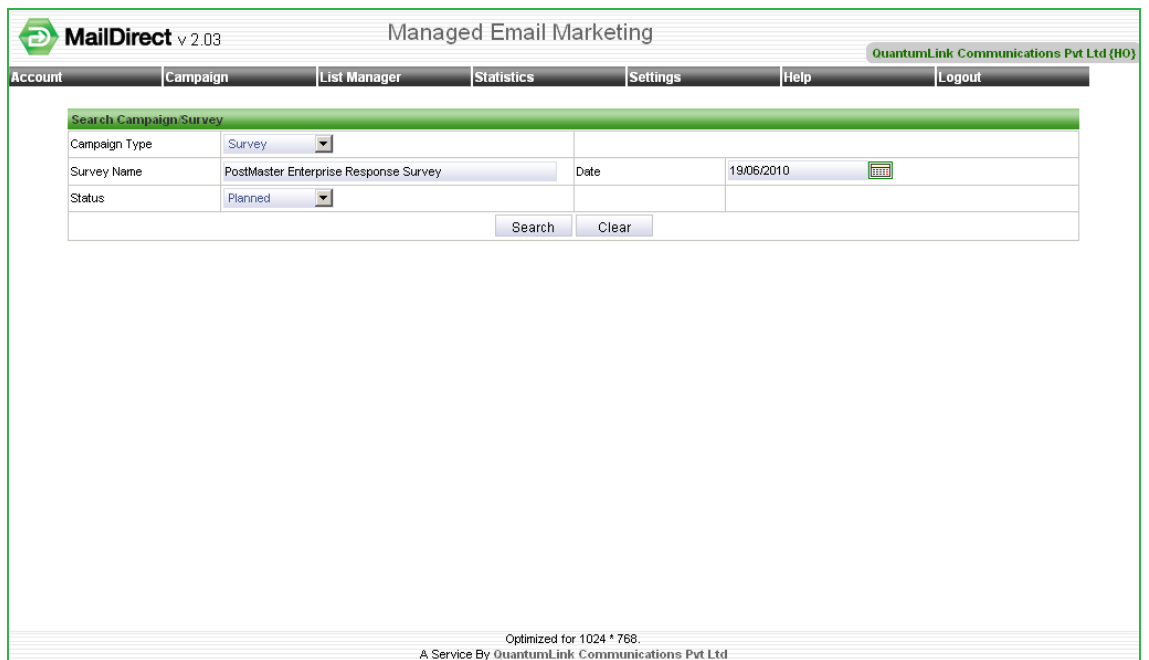


Figure 204: SEARCH CAMPAIGN/SURVEY WITH THE SURVEY FIELDS

Table 83: SEARCH SURVEY

Field	Description
Survey Name	Type an appropriate name of the survey for which a search is to be conducted.
Status	Select the appropriate status of the survey for which the search is to be conducted, from the drop-down list. The available options are explained below-

<ul style="list-style-type: none">■ Planned: Select this option to search for a survey that is being planned (and which has been saved to the drafts).■ Active: Select this option to search for a survey that is active (which is currently running).■ Completed: Select this option to search for a survey that has been completed.■ Abandoned: Select this option to search for a survey that has been abandoned.■ Scheduled: Select this option to search for a survey that is scheduled to be launched on a certain date.	
Date	Select the appropriate date of the campaign from the calendar.

Enter/select the appropriate details in the required fields.

- ii. Click the **Search** button.

MailDirect displays the Search Campaign/Survey screen with the search results.

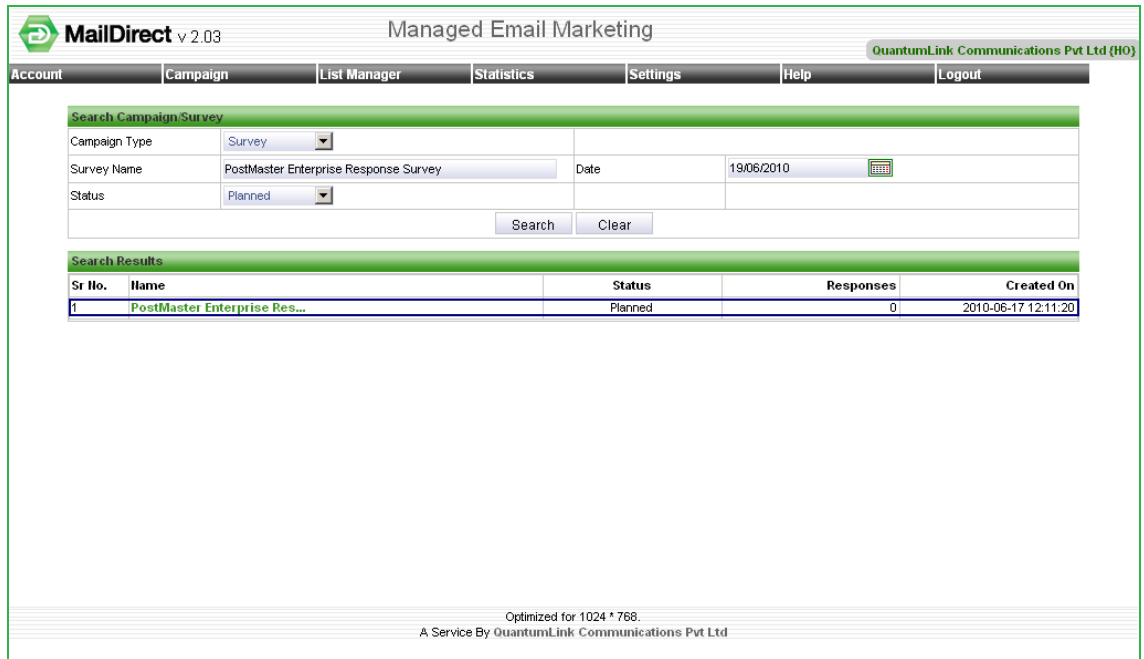


Figure 205: SEARCH CAMPAIGN/SURVEY WITH THE SEARCH RESULTS FOR THE SURVEY

Table 84: SURVEY SEARCH RESULTS

Field/Link	Description
Sr No.	This section displays the serial number of the surveys.
Name	<p>This section displays the name of the surveys.</p> <p>Click the name, which is a link to view the details about the corresponding survey.</p> <hr/> <p>Note: On clicking the name, MailDirect displays a screen with detailed information for the corresponding Survey. Refer to survey info section for more details.</p> <p>If the status of the Survey campaign is Planned, MailDirect displays a screen with the options to edit the Survey.</p> <hr/>
Status	This section displays the status of the corresponding survey.
Responses	This section displays the number of responses for the corresponding survey (if any).

Note: Survey responses for planned or scheduled surveys will always be zero.

Created On

This section displays the date on which the corresponding survey was created.

Click the appropriate name link to view the corresponding details.

8 Viewing Campaign/Survey Statistics

In this chapter, users will learn how to:

- View email campaign statistics
- View SMS campaign statistics
- View Survey campaign statistics

8.1 Introduction

The **Statistics** menu enables users to view the detailed reports for:

- ◆ Email Campaigns
- ◆ SMS campaigns
- ◆ Surveys

They can view statistics for active, completed, auto & abandoned campaigns, and for active & expired surveys.

The email campaign reports include the number of recipients of the email campaign, number of emails viewed by the recipients, number of email address from where the campaign email has bounced, number of click through for the link (if any) sent in the campaign email and location wise analysis.

The SMS campaigns reports include the number of recipients of the SMS campaign, number of messages sent successfully and the number of campaign messages not sent.

The Surveys reports include the number of recipients of the survey (if email based), number of responses for the survey, question wise responses, response reports and graphical reports for responses on questions with response type as non-textual.

Additionally, users can download reports on a desktop/laptop.

8.2 Viewing Email Campaign Statistics

This section provides instructions on how to view email campaign statistics.



To view Email Campaign Statistics:

1. On the **Statistics** menu, click the **Email Campaign Status** option.

MailDirect displays the Statistics screen.

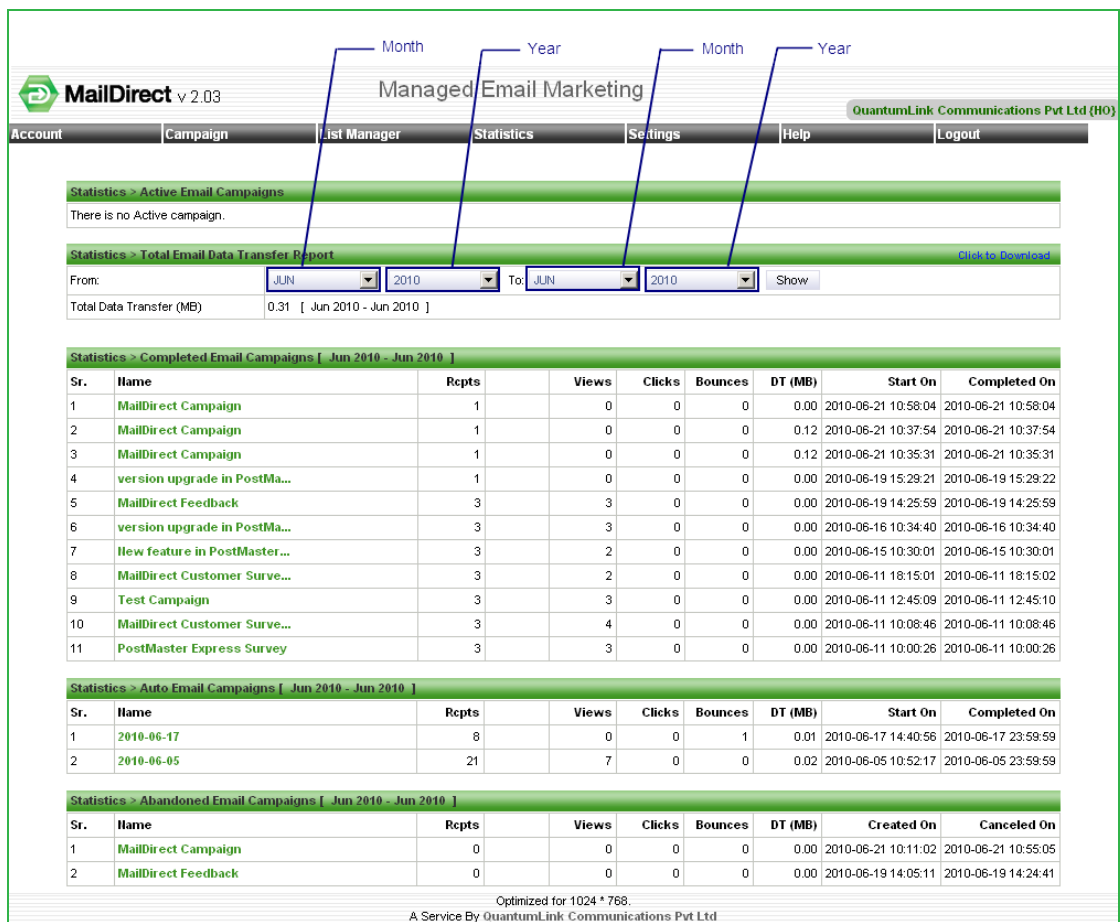


Figure 206: STATISTICS

Table 85: STATISTICS

Field	Description
Statistics > Total Email Data Transfer Report	
From	<p>Select the appropriate options to specify the month and year from when the email campaign statistics are needed.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> Month: Select an appropriate month from the drop-down list. Year: Select an appropriate year from the drop-down list.

To	<p>Select the appropriate options to specify the month and year till when the email campaign statistics are needed.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Month: Select an appropriate month from the drop-down list. ▪ Year: Select an appropriate year from the drop-down list.
Show	<p>Click this button to view the email campaign statistics for the specified time-period.</p> <hr/> <p>Note: By default, the email campaign statistics for the current month are displayed.</p> <hr/>
Statistics > Completed/Auto/Active/Abandoned Email Campaigns	
Name	<p>This section displays the name of the campaign.</p> <p>Click the name, which is a link, to view the details about the corresponding email campaign.</p>
Rcpts	<p>This section displays the number of recipients of the email campaign.</p>
Views	<p>This section displays the number of recipients who have viewed the email campaign.</p>
Clicks	<p>This section displays the number of recipients who have clicked the links in the email campaign (if any link has been sent).</p>
Bounces	<p>This section displays the number of email addresses from which the campaign has bounced.</p>
DT (MB)	<p>This section displays the data transferred for the corresponding campaign, in MB.</p>
Start On (Completed, Auto and Active)/Created On (Abandoned)	<p>This section displays the date on which the corresponding campaign was started/created.</p>
Completed On (Completed and Auto)/Updated On (Active)/Cancelled On (Abandoned)	<p>This section displays the date on which the corresponding campaign was completed/updated/cancelled.</p>

Select the appropriate details in the required fields.

2. Click the name of the campaign to view details for the corresponding campaign.

MailDirect displays the Campaign Info screen.

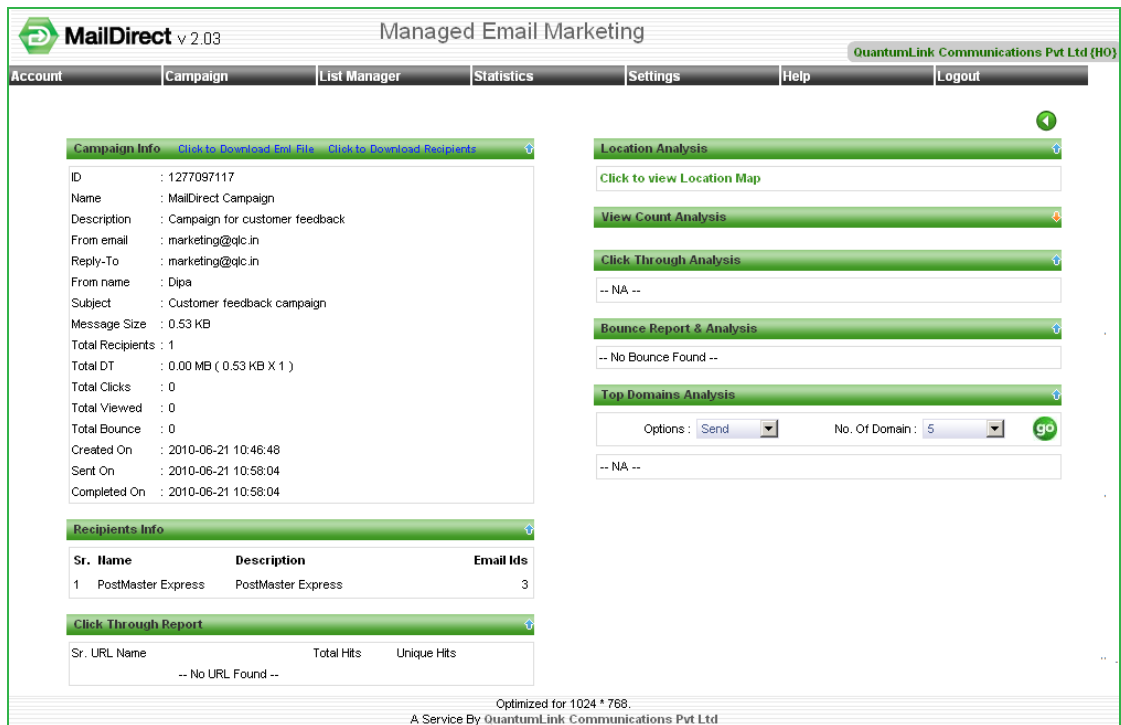


Figure 207: CAMPAIGN INFO

Table 86: CAMPAIGN INFO

Field	Description
Campaign Info	<p>This section displays the basic email campaign information. For detailed information, click appropriate links available to download the required files.</p> <p>The available links are explained below-</p> <ul style="list-style-type: none"> Click to Download Eml File: <p>Click this link to download the EML file for the campaign message. If the link is clicked, MailDirect displays the Opening Campaign screen.</p>

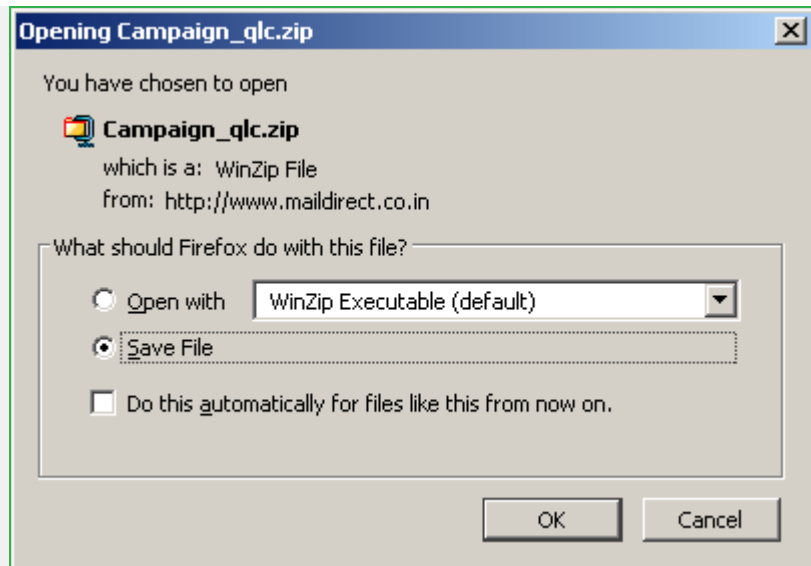


Figure 208: OPENING CAMPAIGN

Select the Save File option and click the OK button to download the file.

Note: By default, the Save File option is selected. The user can also select the Open with option and select the suitable application using which the file can be viewed without saving it.

- **Click to Download Recipients:**
Click this link to download the list of recipients for the campaign.

If the link is clicked, MailDirect displays the Opening Recipient screen.

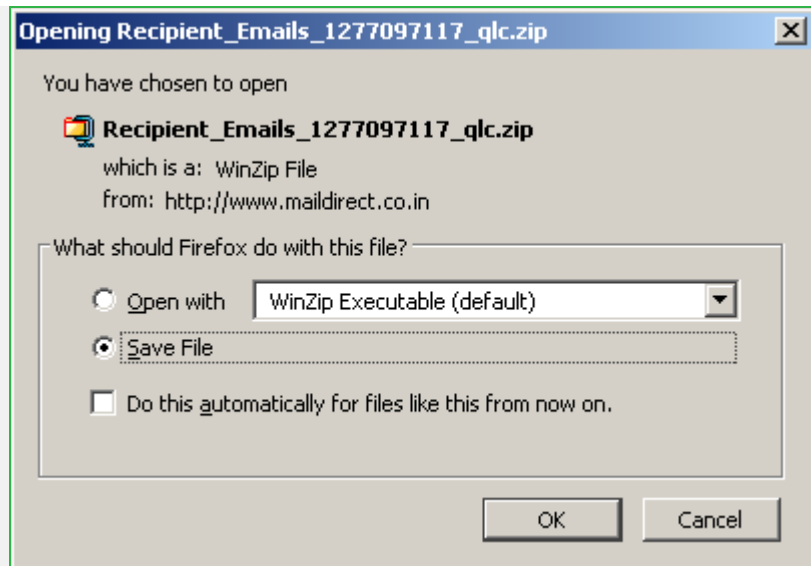


Figure 209: OPENING RECIPIENT

Select the Save File option and click the OK button to download the file.

Note: By default, the Save File option is selected. The user can also select the Open with option and select the suitable application using which the file can be viewed without saving it.

The available fields are explained below-

- **ID:**
This field displays the campaign ID.
- **Name:**
This field displays the campaign name.
- **Description:**
This field displays the description about the campaign.
- **From email:**
This field displays the email address from which the campaign emails were/are being (depending on whether the campaign is active or completed) sent.
- **Reply-To:**
This field displays the email address on which the reply to the campaign emails will be sent (if any).
- **From Name:**
This field displays the name of the sender of the email campaign.
- **Subject:**
This field displays the subject of the email campaign.

- **Message Size:**
This field displays the size of the campaign message.
- **Total Recipients:**
This field displays the total number of recipients of the email campaign.
- **Total DT:**
This field displays the total data transfer (in MB) for the email campaign.
- **Total Clicks:**
This field displays the total number of recipients who have clicked the links in the email campaign (if any link has been sent).
- **Total Viewed:**
This field displays the total number of recipients who have viewed the email campaign.
- **Total Bounce:**
This field displays the number of email addresses from which the campaign has bounced.
- **Created On:**
This field displays the date on which the corresponding campaign was created.
- **Sent On:**
This field displays the date on which the corresponding campaign was sent.
- **Completed On:**
This section displays the date on which the corresponding campaign was completed.

Recipients Info

This section displays information about the recipients of the email campaign. The available fields are explained below-

- **Name:**
This field displays the name of the contact list that was/is mapped to the campaign.
- **Description:**
This field displays the description of the contact list that was/is mapped to the campaign.
- **Email IDs:**
This field displays the number of email addresses present in the contact list that was/is mapped to the campaign.

Click Through Report

This section displays the click through report for the links sent in the email campaign (if any link has been sent).

Location Analysis

Click the link to view the location wise analysis.

The available link is explained below-

- **Click to view Location Map:**

Click this link to view the location wise analysis on a map.
If the link is clicked, MailDirect displays the Location Map screen.

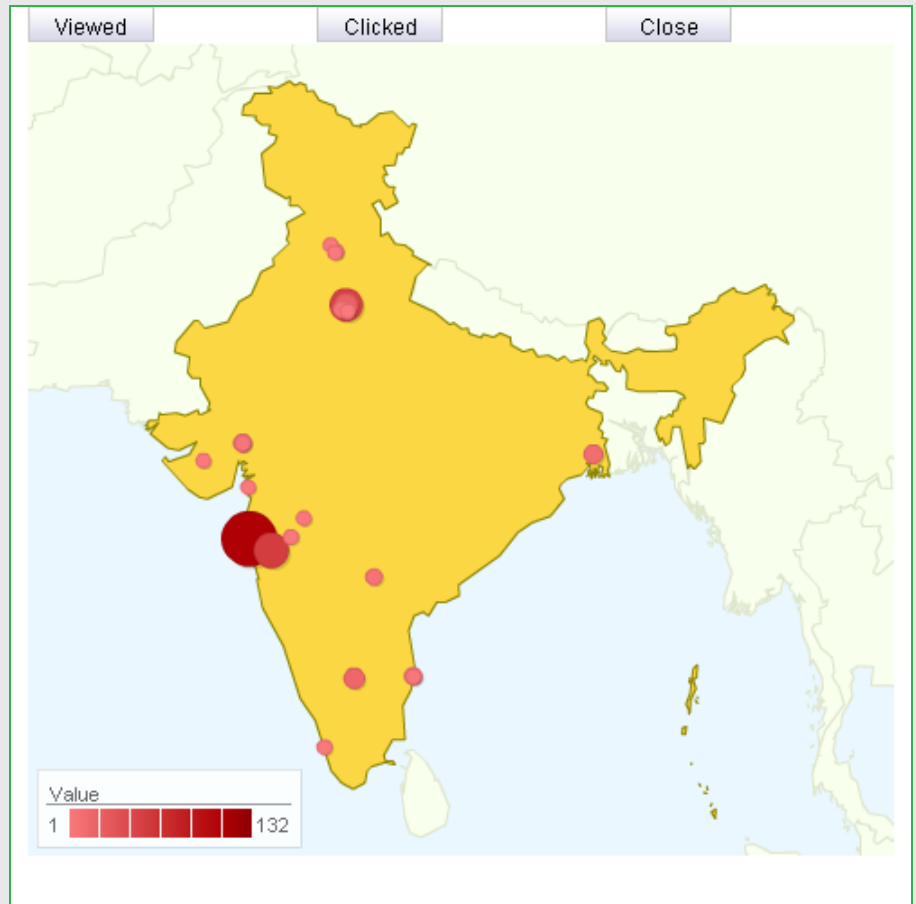


Figure 210: LOCATION MAP

The options available are explained below-

◆ **Viewed:**

Click this button to view the location wise analysis of the viewed emails.

◆ **Clicked:**

Click this button to view the location wise analysis for the number of click through for links sent (if any links have been sent).

View Count Analysis

This section displays the count analysis graph for the number of emails viewed. Click the link to download the graph.

The available link is explained below-

■ **Click to Download:**

Click this link to download the graph for the count analysis for the email campaign.

If the link is clicked, MailDirect displays the Opening Statistics screen.

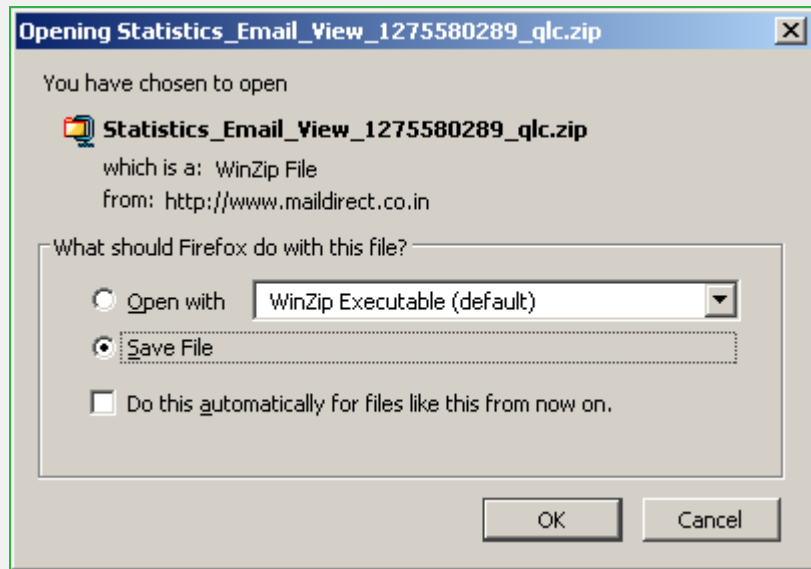


Figure 211: OPENING STATISTICS

Select the Save File option and click the OK button to download the file.

Note: By default, the Save File option is selected. The user can also select the Open with option and select the suitable application using which the file can be viewed without saving it.

Click Through Analysis

This section displays the click through analysis graph and chart for the links sent in the email campaign (if any link has been sent).

Bounce Reports & Analysis

This section displays the chart for the number of emails delivered and number of emails bounced.

Top Domain Analysis

Select an appropriate option to view the analysis for the top domains.

The available options are explained below-

- Options:

Select the appropriate options from the drop-down list.

The available options are explained below-

- ◆ Send:

Select this option to view the analysis for the domains to which the maximum campaign emails were sent.

- ◆ Bounce:

Select this option to view the analysis for the domains from where the maximum campaign emails were bounced.

◆ **View:**

Select this option to view the analysis for the domains on which the campaign emails were viewed the most.

◆ **Click:**

Select this option to view the analysis for the domains on which the links in the campaign emails were clicked the most.

■ **Number of Domain:**

Select the appropriate number of domains from the drop-down list to view the analysis chart categorized for the selected number of domains.

■ **Go:**

Click this button to view the top domain analysis chart categorized according to the options selected in the drop-down lists.

If the button is clicked, a **Domain Analysis Chart** will be displayed.

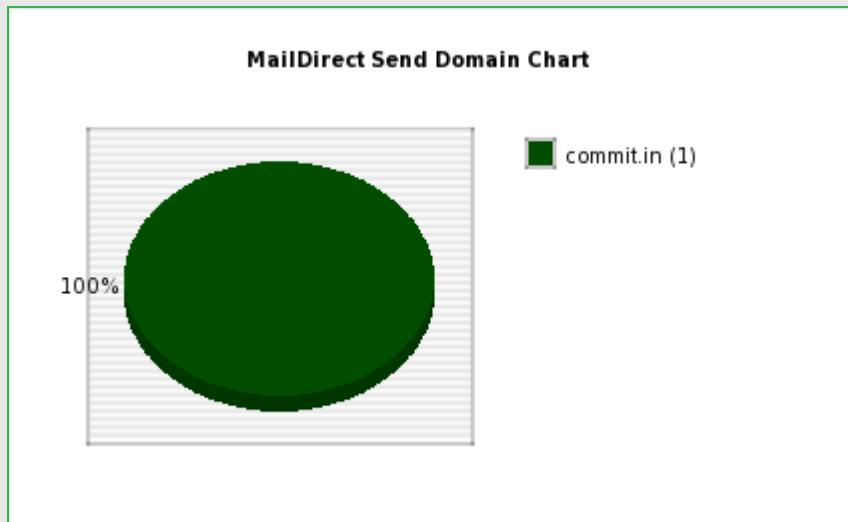


Figure 212: DOMAIN ANALYSIS CHART

If the analysis chart is displayed, a link will be available to the user to download the analysis chart.

The available link is explained below-

◆ **Click to Download [Send/Bounce/View/Click]:**

Click this link to download the displayed chart.

If the link is clicked, **MailDirect** displays the **Opening Statistics_Domain** screen.

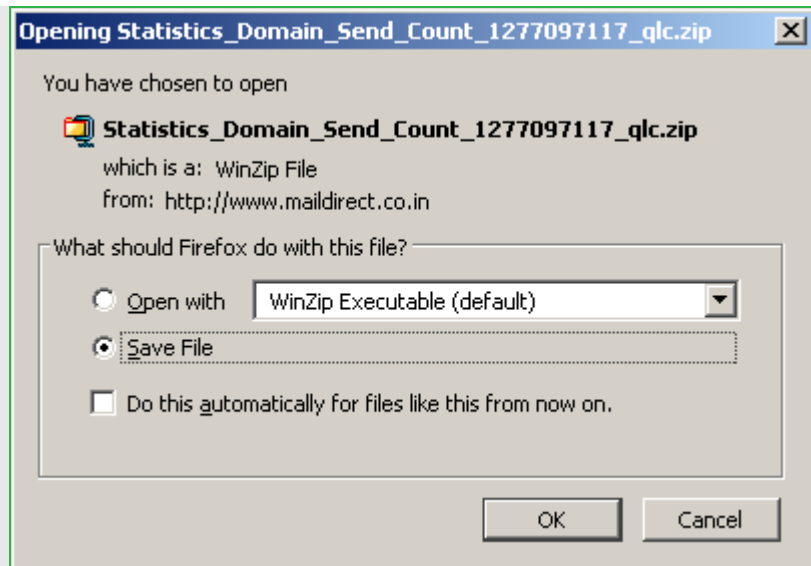


Figure 213: OPENING STATISTICS_DOMAIN

Select the Save File option and click the OK button to download the file.

Note: By default, the Save File option is selected. The user can also select the Open with option and select the suitable application using which the file can be viewed without saving it.



Click this button to navigate to the previous screen.

8.3 Viewing SMS Statistics

This section provides instructions on how to view SMS campaign statistics.

 **To view SMS Campaign Statistics:**

1. On the Statistics menu, click the SMS Campaign Status option.
MailDirect displays the Statistics screen.

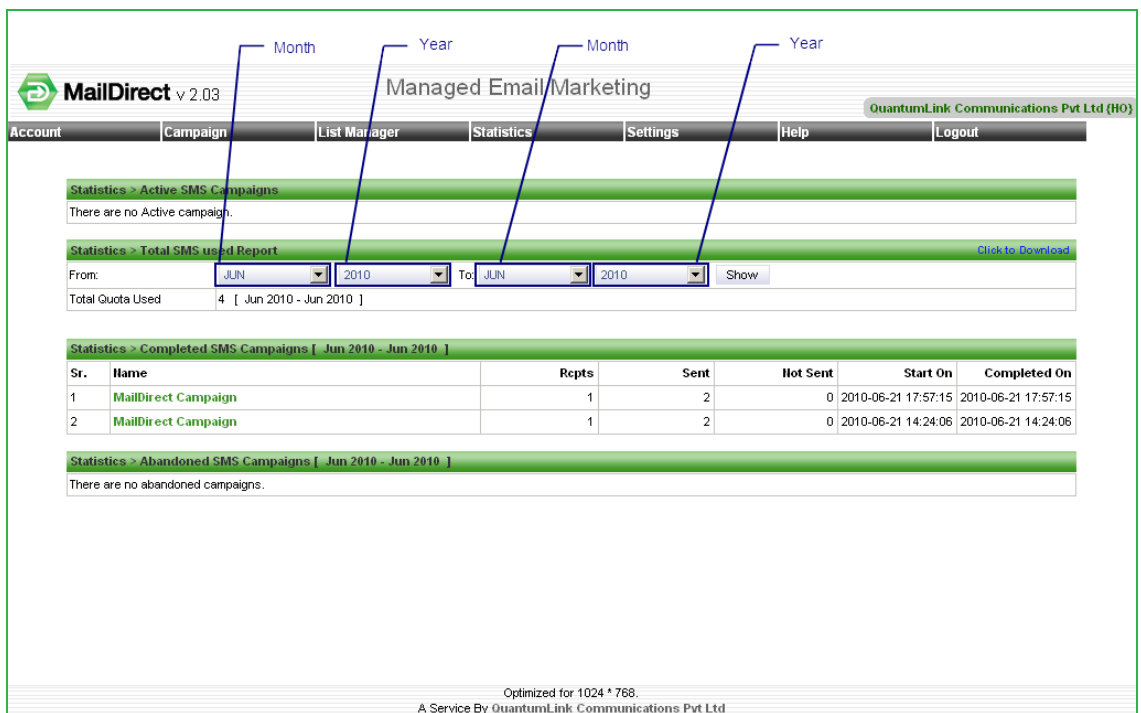


Figure 214: STATISTICS

Table 87: STATISTICS

Field	Description
Statistics > Total SMS used Report	
From	Select the appropriate options to specify the month and year from when the SMS campaign statistics are needed. The available options are explained below- <ul style="list-style-type: none"> Month: <ul style="list-style-type: none"> Select an appropriate month from the

	<p>drop-down list.</p> <ul style="list-style-type: none"> ▪ Year: Select an appropriate year from the drop-down list.
To	<p>Select the appropriate options to specify the month and year till when the SMS campaign statistics are needed.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ Month: Select an appropriate month from the drop-down list. ▪ Year: Select an appropriate year from the drop-down list.
Show	<p>Click this button to view the SMS campaign statistics for the specified time-period.</p> <hr/> <p>Note: By default, the SMS campaign statistics for the current month are displayed.</p> <hr/>
Statistics > Completed/Auto/Active/Abandoned SMS Campaigns	
Name	<p>This section displays the name of the campaign.</p> <p>Click the name, which is a link, to view the details about the corresponding SMS campaign.</p>
Rcpts	<p>This section displays the number of recipients of the SMS campaign.</p>
Sent	<p>This section displays the number of recipients to whom the campaign message has been sent.</p>
Not Sent	<p>This section displays the number of recipients to whom the message was not sent.</p>
Start On (Completed, Auto and Active)/Created On (Abandoned)	<p>This section displays the date on which the corresponding campaign was started/created.</p>
Completed On (Completed and Auto)/Updated On (Active)/Cancelled On (Abandoned)	<p>This section displays the date on which the corresponding campaign was completed/updated/cancelled.</p>

Select the appropriate details in the required fields.

2. Click the name of the campaign to view details for the corresponding campaign.

MailDirect displays the Campaign Info screen.

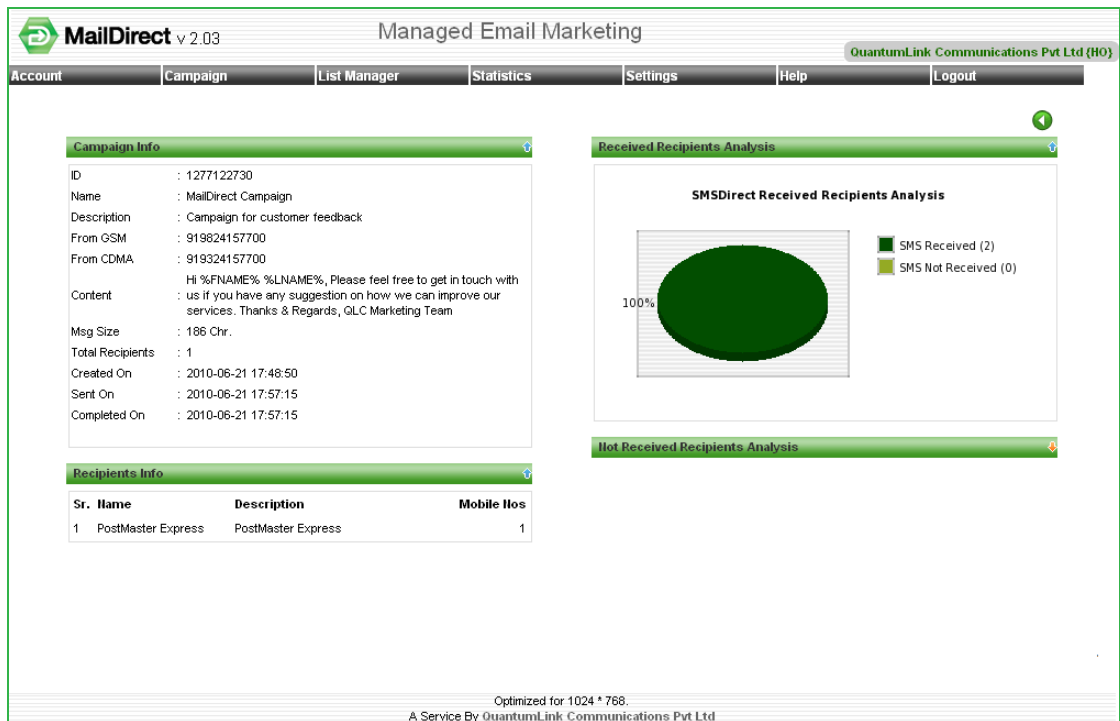


Figure 215: CAMPAIGN INFO

Table 88: CAMPAIGN INFO

Field	Description
Campaign Info	<p>This section displays the basic email campaign information. The available fields are explained below-</p> <ul style="list-style-type: none"> ▪ ID: This field displays the campaign ID. ▪ Name: This field displays the campaign name. ▪ Description: This field displays the description about the campaign. ▪ From GSM: This field displays the GSM number from which the campaign messages were/are being (depending on whether the campaign is

active or completed) sent.

- **From CDMA:**

This field displays the CDMA number from which the campaign messages were/are being (depending on whether the campaign is active or completed) sent.

- **Content:**

This field displays the campaign message.

- **Message Size:**

This field displays the size of the campaign message (number of characters).

- **Total Recipients:**

This field displays the total number of recipients of the SMS campaign.

- **Created On:**

This field displays the date on which the corresponding campaign was created.

- **Sent On:**

This field displays the date on which the corresponding campaign was sent.

- **Completed On:**

This section displays the date on which the corresponding campaign was completed.

Recipients Info

This section displays information about the recipients of the email campaign.

The available fields are explained below-

- **Name:**

This field displays the name of the contact list that was/is mapped to the campaign.

- **Description:**

This field displays the description of the contact list that was/is mapped to the campaign.

- **Mobile Nos:**

This field displays the number of mobile numbers present in the contact list that was/is mapped to the campaign.

Received Recipients Analysis

This section displays the analysis chart for the number of recipients who have received the SMS campaign.

Not Received Analysis

This section displays the link to download the file with the recipient numbers that have not received the SMS campaign.

Note: This link is available only if there are recipients to whom the campaign message was not sent.

The available link is explained below-

- **Click here to Download:**

Click this link to download the CSV file with the recipient numbers who have not received the SMS campaign.

If the link is clicked, MailDirect displays the Opening Statistics screen.

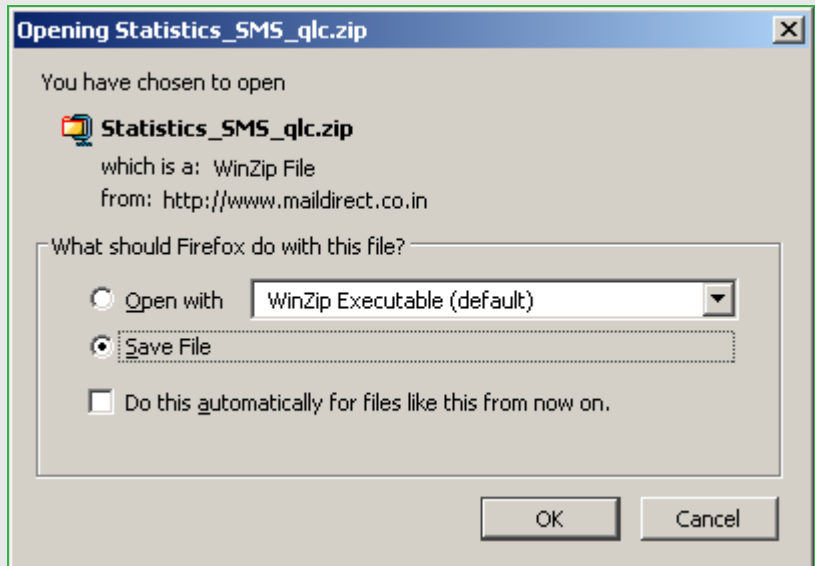


Figure 216: OPENING STATISTICS

Select the **Save File** option and click the OK button to download the file.

Note: By default, the **Save File** option is selected. The user can also select the **Open with** option and select the suitable application using which the file can be viewed without saving it.

8.4 Viewing Survey Statistics

This section provides instructions on how to view the survey statistics.



To view Survey Statistics:

1. On the Statistics menu, click the Survey Status option.
MailDirect displays the Active Survey screen.

The screenshot shows the MailDirect v 2.03 interface for QuantumLink Communications Pvt Ltd (HQ). The navigation menu includes Account, Campaign, List Manager, Statistics, Settings, Help, and Logout. The main content area displays two tables: 'Active Survey' and 'Expired Survey'.

Active Survey									
Sr.	Name	Status	Link/Email	Questions	Responses	Repts	Start Date	Expiry Date	
1	MailDirect Feedback Surve...	Active	Combined	4	1	3	2010-06-18	2010-07-22	
2	MailDirect Customer Respo...	Active	Public Link On Web Site	4	0	--NA--	2010-06-17	2010-07-08	
3	BackTrack Survey Campaign	Active	Invite Via Email	4	1	3	2010-06-11	2010-06-30	

Expired Survey									
Sr.	Name	Status	Link/Email	Questions	Responses	Repts	Start Date	Expiry Date	
1	PostMaster Feedback Surve...	Expired	Combined	4	0	0	2010-06-18	2010-06-19	
2	PostMaster Express Respon...	Expired	Combined	2	0	0	2010-06-18	2010-06-18	
3	PostMaster Express survey	Expired	Invite Via Email	1	1	3	2010-06-11	2010-06-21	
4	MailDirect Customer Surve...	Expired	Invite Via Email	5	1	3	2010-06-11	2010-06-15	

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Figure 217: ACTIVE SURVEY

Table 89: STATISTICS

Field	Description
Statistics > Active/Expired Survey	
Name	This section displays the name of the survey. Click the name, which is a link, to view the details about the corresponding survey.
Status	This section displays the status of the survey. The survey status can either be Expired or Active.

Link/Email	This section displays the type of the survey. The survey can either be Email , or Website or Combined .
Questions	This section displays the number of questions present in the survey.
Responses	This section displays the number of responses received for the survey.
Rcpts	<p>This section displays the number of recipients who have received the invitation for the survey.</p> <hr/> <p>Note: This field will have values other than zero only if the survey type is Email or Combined.</p> <hr/>
Start Date	This section displays the date on which the corresponding survey was started.
Expiry Date	This section displays the date on which the corresponding survey has expired (for an Expired survey)/will expire (for an Active survey).

Select the appropriate details in the required fields.

2. Click the name of the survey to view details for the corresponding survey.

MailDirect displays the Survey Info screen.

Survey Info

ID : 2 Responses : 1
 Name : MailDirect Customer Survey Email Recipients : 3
 Type : Invite Via Email (Restricted) Start Date : 11/06/2010
 Status : Expired Expiry Date : 15/06/2010

[Click here to Download Survey Response](#)

Sr.	Questions	No. of Response	Response Details	Download	Graphs
1	Please enter your name *	1	--NA--	Download	--NA--
2	Please enter your email Id *	1	--NA--	Download	--NA--
3	How do you rate MailDirect Service on a scale of 5 (1- poor, 2 - Below average, ... *	1	1-0, 2 - 0, 3 - 0, 4 - 0, 5 - 1	Download	Graph
4	Do you have any suggestion on how we can improve our service?	1	--NA--	Download	--NA--
5	Enter the date of purchase	1	--NA--	Download	--NA--

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Figure 218: SURVEY INFO

Table 90: SURVEY INFO

Field	Description
Survey Info	<p>This section displays the basic survey information. Click the link to download the survey response.</p> <p>The available fields are explained below-</p> <ul style="list-style-type: none"> ■ ID: This field displays the survey ID. ■ Name: This field displays the survey name. ■ Type: This field displays the type of the survey. ■ Status: This field displays the status of the survey. ■ Responses: This field displays the number of responses received for the survey.

- **Email Recipients:**
This field displays the total number of recipients of the Survey.

Note: This field is displayed only if the survey type is **Email** or **Combined**.

- **Start Date:**
This field displays the date on which the corresponding survey was started.
- **Expiry Date:**
This field displays the date on which the corresponding survey has expired (for an Expired survey)/will expire (for an Active survey).

The available link is explained below-

- **Click here to download Survey Response:**
Click this link to download the survey response for the corresponding survey. If the link is clicked, MailDirect displays the **Opening SurveyReport** screen.

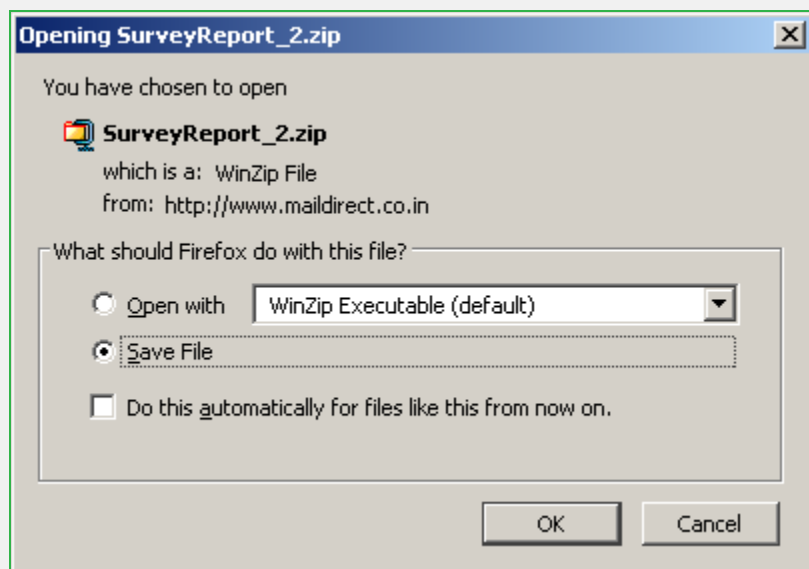


Figure 219: OPENING SURVEYREPORT

Select the Save File option and click the OK button to download the file.

Note: By default, the Save File option is selected. The user can also select the Open with option and select the suitable application using which the file can be viewed without saving it.

Responses This section displays information about the responses for the survey questions. Click the available link to view the survey response.

The available link is explained below-

- **View/Print:**

Click this link to view/print the survey response.

If the link is clicked, MailDirect displays the Response screen.

QuantumLink Communications Pvt Ltd {HO}		
MailDirect Customer Survey		
Our marketing team would like to know you better; please take time out to answer a few question to help us service you better.		
Sr.	Questions	Response Details
1	Please enter your name *	--NA--
2	Please enter your email id *	--NA--
3	How do you rate MailDirect Service on a scale of 5 (1- poor, 2 - Below average, 3 - Average, 4 - Good, 5 - Excellent) *	1-0, 2 - 0, 3 - 0, 4 - 0, 5 - 1
4	Do you have any suggestion on how we can improve our service?	--NA--
5	Enter the date of purchase	--NA--
MailDirect Customer Survey 08-Jun-2010 © QuantumLink Communications Pvt Ltd {HO} 2010		

Figure 220: RESPONSE

The available fields are explained below-

- **Questions:**

This field displays the displays the survey questions.

- **No. of Response:**

This field displays the number of responses received for the corresponding question.

- **Response Details:**

This field displays the response details for the corresponding question.

Note: Response details will only be displayed for the questions with **non textual** as the response type is.

- **Download:**

This field displays the link to download the response for the corresponding question.

Note: The link to download the response will only be available if there are any responses.

The available link is explained as below-

- ◆ **Download:**

Click this link to download the file with the response for the corresponding question.

If the link is clicked, MailDirect displays the Opening SurveyReport screen.

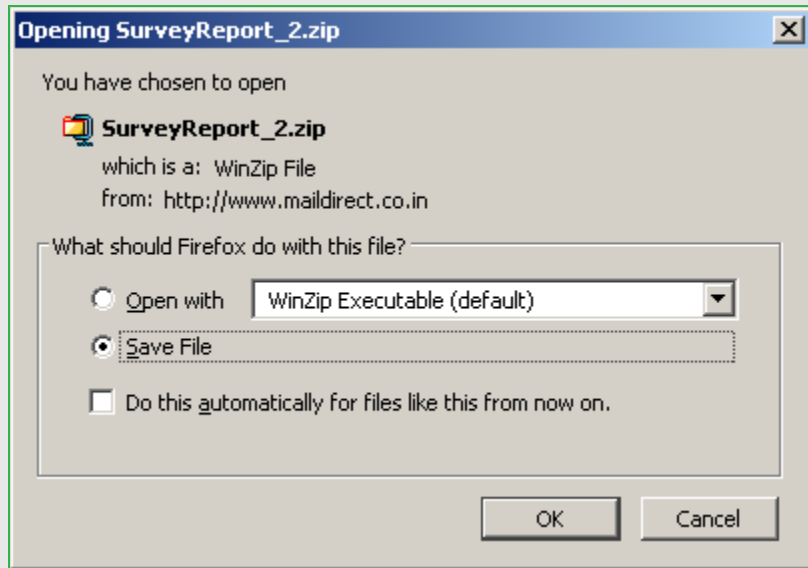


Figure 221: OPENING SURVEYREPORT

Select the Save File option and click the OK button to download the file.

Note: By default, the Save File option is selected. The user can also select the Open with option and select the suitable application using which the file can be viewed without saving it.

- **Graphs:**

This field displays the link to view the graph for the response for the corresponding question.

Note: The link to view the graph will only be available if there are any responses and if the response type for the corresponding question is non textual (option based).

The available link is explained as below-

- ◆ **Graph:**

Click this link to view the graph for the response for the corresponding question.

If the link is clicked, MailDirect displays the **Graphs** screen.

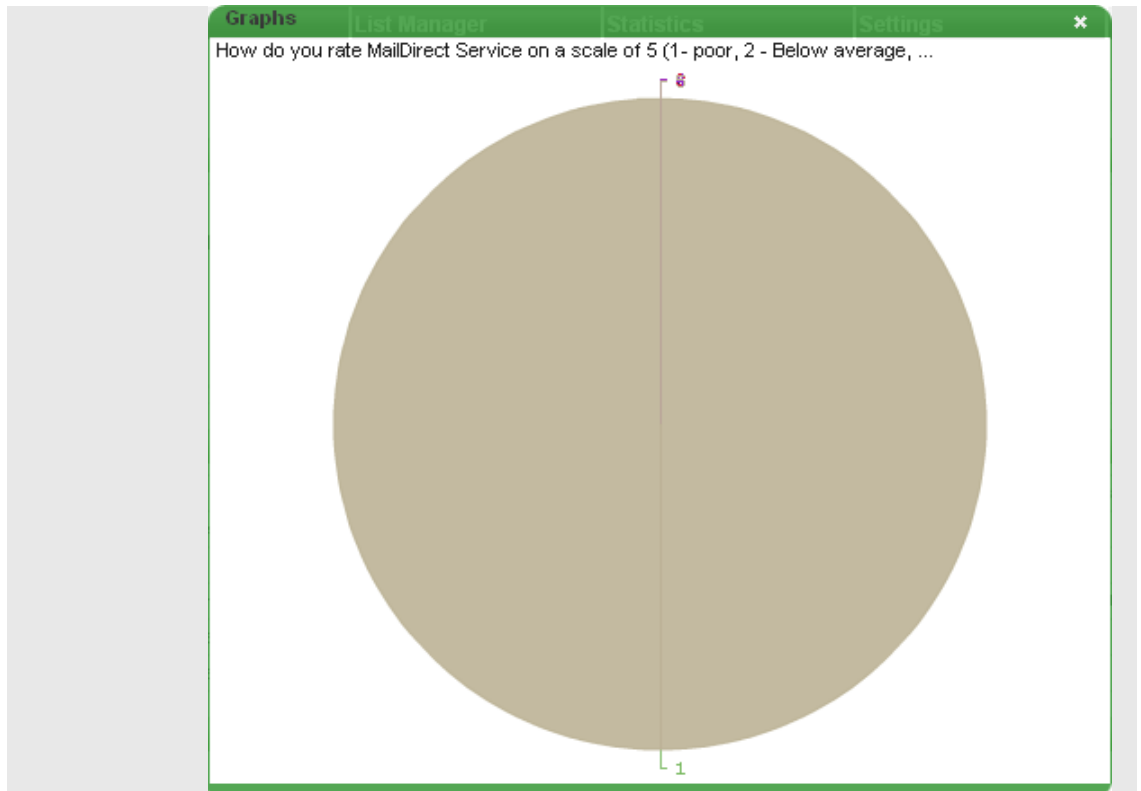


Figure 222: GRAPHS

Search

Select the appropriate options to search for the required information.

The available options are explained below-

- **Lookup for:**

Type an appropriate keyword for which the search will be conducted.

- **In:**

Select an appropriate option on which the search is to be conducted, from the drop-down list. The options are the survey questions and email IDs of the respondents (if the **Track respondent** check box has been selected).

- **Search:**

Click this button to search for the keyword entered in the option selected.

Select Campaign

Select an appropriate campaign from the drop-down list.

Click the **View** button to view the campaign details for the corresponding campaign.

Note: Only the campaigns which are mapped to the corresponding survey are available in the drop-down list.

The **Select Campaign** drop-down list and the **View** button are available only if the survey type is **Email** or **Combined**.

9 Configuring Settings

In this chapter, users will learn how to:

- Manage personalization fields
- Change Password

9.1 Introduction

The **Settings** menu enables users to manage personalization fields and change passwords. They can create new custom personalization fields and modify these as needed. These fields enable users to run personalized campaigns, which gives campaign recipients a feeling that the user knows them and is aware of their business needs. This, in turn, helps to generate more responses for the campaign. The user can add up to 19 personalization fields (4 – default fields and 15 user-created custom fields) in a campaign message.

9.2 Managing Personalization Fields

This section provides instructions on how to manage personalization fields.



To manage personalization fields:

1. On the **Settings** menu, click the **Fields Manager** option.
MailDirect displays the Custom Field Management screen.

MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (HQ)

Account Campaign List Manager Statistics Settings Help Logout

Custom Field Management

Currently there are **5** fields & you can add **14** more Fields. Create New Field(s)

Sr.	Name	Type	Size	Personalization Code	Option
1	Email	String	100	%EMAIL%	
2	MobileNo	String	12	%MobileNo%	
3	FirstName	String	40	%FNAME%	
4	LastName	String	40	%LNAME%	
5	Address	String	50	%Address%	<input type="button" value="Edit"/>


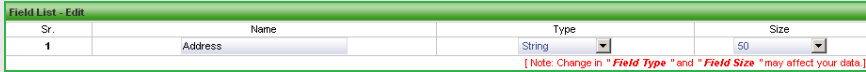
Field List - Add

Select	Name	Type	Size
<input checked="" type="checkbox"/>	DateofPurchase	Number	10

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Figure 223: CUSTOM FIELD MANAGEMENT

Table 91: FIELD MANAGEMENT

Field	Description
Custom Field Management	
Name	This section displays the name of the field.
Type	This section displays the input type for the corresponding field.
Size	This section displays the permissible number of characters for the corresponding field.
Personalization Code	This section displays the personalization code for the corresponding field. Click the name, which is a link to view the details about the corresponding email campaign.
Option	<p>This section displays the option to modify the corresponding field. Click the available link to modify the corresponding field.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ■  : This icon indicates that the corresponding field is a default field and cannot be modified. ■ Edit: Click this link to modify the corresponding custom field. If the link is clicked then the Field List – Edit for the corresponding field will be available.
	
Figure 224: FIELD LIST – EDIT	
	<p>The available options to edit the field are explained below-</p> <ul style="list-style-type: none"> ◆ Name: Edit the name of the field as needed. ◆ Type: Select an appropriate option to edit the input type for the corresponding field, from the drop-down list. ◆ Size: Select an appropriate option to edit the input size for the corresponding field, from the drop-down list.
Create New Fields	<p>Select the appropriate number of fields to be added from the drop-down list. On selecting the required fields click the Go button.</p> <p>If the button is clicked, MailDirect displays the Custom Field Management screen with the respective number of fields added in the Field List – Add</p>

section.

Note: There can only be 19 personalization fields, of which 4 are default fields. The user can add only 15 custom personalization fields. The drop-down list always displays the number of remaining custom personalization fields.

Field List - Add

Select	Select this check box to select the corresponding field to be added.
Name	Type an appropriate name for the field.
Type	<p>Select the appropriate option to define the input type for the field, from the drop-down list.</p> <p>The available options are explained below-</p> <ul style="list-style-type: none"> ▪ String: Select this option to set string as the input type. ▪ Number: Select this option to set number as the input type. ▪ Phone No / Fax: Select this option to set phone number or fax number as the input type. ▪ Amount: Select this option to set amount as the input type. ▪ Currency: Select this option to set currency as the input type. ▪ Date(YYYY-MM-DD): Select this option to set date as the input type.
Size	Select the appropriate option to define the input size for field, from the drop-down list.

Enter/Select the appropriate details in the required fields.

- Click the **Submit** button to add the new custom fields or to save changes to the existing one (if the **Edit** link was clicked for the corresponding field).

MailDirect displays the Custom Field Management screen.

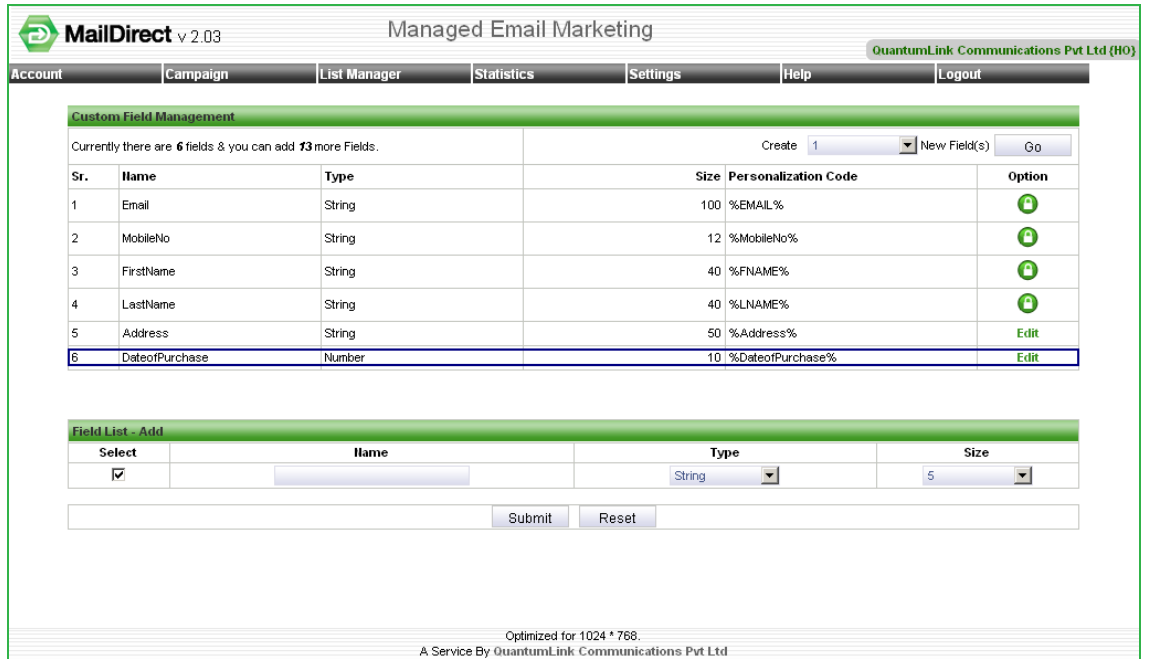


Figure 225: CUSTOM FIELD MANAGEMENT WITH THE NEW FIELD ADDED

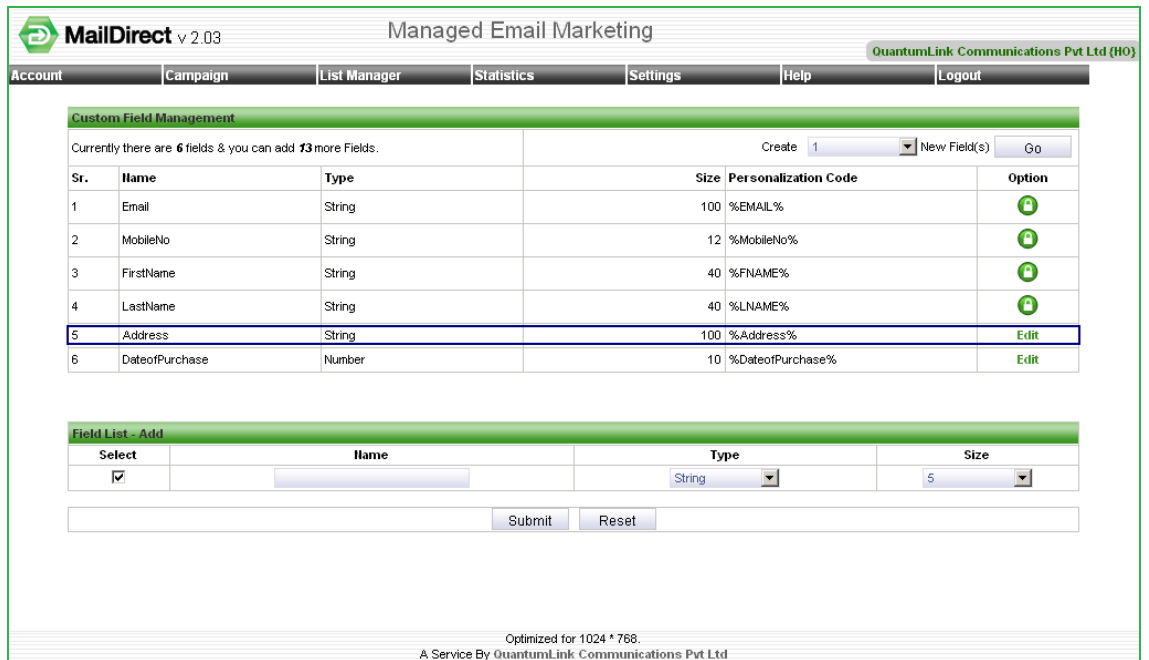


Figure 226: CUSTOM FIELD MANAGEMENT WITH THE EXISTING FIELD MODIFIED

9.3 Changing Password



To change user password:

1. On the Settings menu, click the Change Password option.
MailDirect displays the Change Password screen.

Field	Description
Current Password	Type the current password.
New Password	Type an appropriate password to be set as the new password.
Confirm Password	Retype the new password in confirmation.

Password String Validate	
String Length	3 to 15
string Characters	All char
Special Characters	@ # & * _ -

Figure 227: CHANGE PASSWORD

Table 92: CHANGE PASSWORD

Field	Description
Current Password	Type the current password.
New Password	Type an appropriate password to be set as the new password.
Confirm Password	Retype the new password in confirmation.

2. Click the Submit button.

MailDirect displays the Change Password screen indicating that the password has been changed.



Figure 228: PASSWORD CHANGED

10 Account Information

In this chapter, users will learn how to:

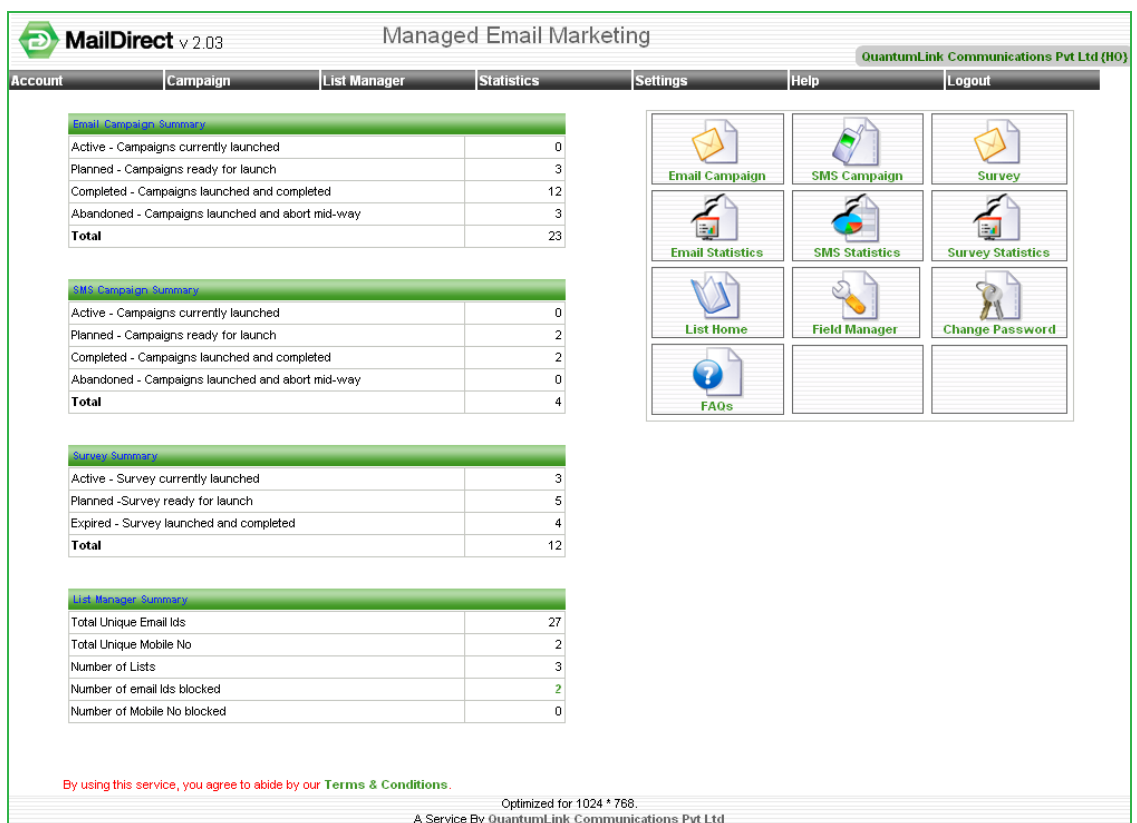
- Navigate to Home Page
- View account details

10.1 Navigating to Home Page

This section provides instructions on how to navigate to the Home Page.

 **To navigate to the Home Page:**

1. On the Account menu, click the Home option.
MailDirect displays the Home Page screen.



MailDirect v 2.03 Managed Email Marketing QuantumLink Communications Pvt Ltd (H0)

Account Campaign List Manager Statistics Settings Help Logout

Email Campaign Summary	
Active - Campaigns currently launched	0
Planned - Campaigns ready for launch	3
Completed - Campaigns launched and completed	12
Abandoned - Campaigns launched and abort mid-way	3
Total	23

SMS Campaign Summary	
Active - Campaigns currently launched	0
Planned - Campaigns ready for launch	2
Completed - Campaigns launched and completed	2
Abandoned - Campaigns launched and abort mid-way	0
Total	4

Survey Summary	
Active - Survey currently launched	3
Planned - Survey ready for launch	5
Expired - Survey launched and completed	4
Total	12

List Manager Summary	
Total Unique Email Ids	27
Total Unique Mobile No	2
Number of Lists	3
Number of email ids blocked	2
Number of Mobile No blocked	0

By using this service, you agree to abide by our [Terms & Conditions](#).

Optimized for 1024 * 768.
A Service By QuantumLink Communications Pvt Ltd

Figure 229: HOME PAGE

10.2 Viewing Account Details

This section provides instructions on how to view account details.



To view account details:

1. On the Account menu, click the User Profile option.
MailDirect displays the Account Details screen.

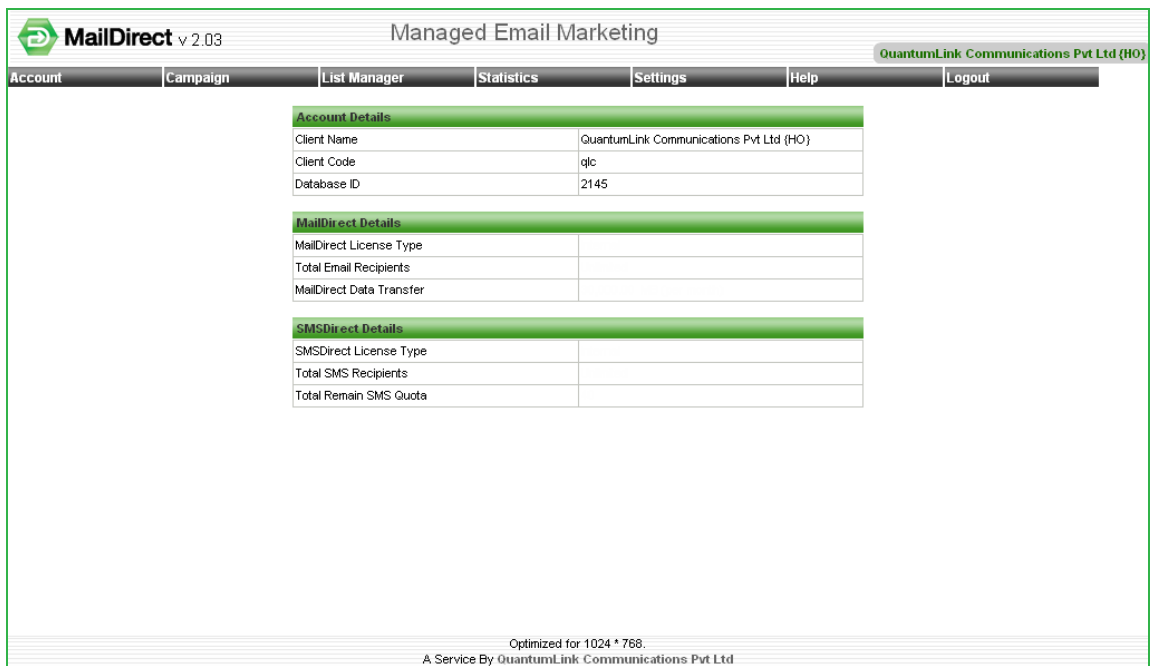


Figure 230: ACCOUNT DETAILS

Table 93: ACCOUNT DETAILS

Field	Description
Account Details	<p>This section displays the basic account details. The available fields are explained below-</p> <ul style="list-style-type: none"> ▪ Client Name: This field displays the client name. ▪ Client Code: This field displays the client code. ▪ Database ID:

This field displays the client Database ID.

MailDirect Details

This section displays the **MailDirect** details for the respective user.

The available fields are explained below-

- **MailDirect License Type:**

This field displays the type of license issued for **MailDirect** to the respective user (for running email campaigns).

- **Total Email Recipients:**

This field displays the total number of recipients to whom the respective user can send email campaigns.

- **MailDirect Data Transfer:**

This field displays the permissible data transfer for the respective user (in MB per month).

SMS Direct Details

This section displays the **SMSDirect** details for the user.

The available fields are explained below-

- **SMSDirect License Type:**

This field displays the type of license issued for **SMSDirect** to the respective user (for running SMS campaigns).

- **Total SMS Recipients:**

This field displays the total number of recipients to whom the respective user can send SMS campaigns.

- **Total Remain SMS Quota:**

This field displays the remaining SMS quota.

11 Using Online Help

In this chapter, users will learn how to:

- Use Online Help

11.1 Using Online Help

This section provides instructions on how to use online help.



To use online help

1. On the **Help** menu, click the **Home** option to view detailed information about MailDirect.

MailDirect displays the Home Page of www.maidirect.in.

OR

On the **Help** menu, click the **Features & Benefits** option to view MailDirect features and benefits.

MailDirect displays the Features & Benefits page of www.maidirect.in.

OR

On the **Help** menu, click the **Frequently Asked Questions** option to view the frequently asked questions about MailDirect.

MailDirect displays the Frequently Asked Questions page of www.maidirect.in.

OR

On the **Help** menu, click the **Terms & Conditions** option to view the Terms & Conditions for using MailDirect.

MailDirect displays the Terms & Conditions page of www.maidirect.in.

OR

On the **Help** menu, click the **Contact Us** option to view the QLC contact details in order to get in touch with us.

MailDirect displays the Contact Us page of www.maidirect.in.

OR

On the **Help** menu, click the **About** option to view details about the current version of MailDirect.

MailDirect displays the About page of www.maidirect.in.

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C

Glossary

Terms	Description
Activate Survey	A feature that allows users of MailDirect to activate and generate a link to the survey using which recipients can participate in this survey.
Block Recipients	A feature that allows users to block campaigns from being directed to a recipient.
Campaign	Email & SMS promotions and surveys sent out to recipients.
CDMA	Code Division Multiple Access - a standard used by mobile service providers.
Contact List	A list in which contact and personal details of recipients are stored
CSV	A Comma Separated Value file using which recipient details can be uploaded on MailDirect .
EML	Email messages created or saved using Microsoft Outlook Express or other programs.
GSM	Global System For Mobile Communications - a standard used by mobile service providers.
HTML	HyperText Markup Language - used to embed images & objects and create interactive content.
Keyword	One or more words used to search for records.
Personalized	Use of recipient's personal information.
Public Lists	Lists with public name, which will be visible to recipient in the Unsubscribe area of the campaign messages.
Real-time	A view of the progress of promotions and surveys as and when it takes place.
Recipient	Target audience for the email & SMS promotions and surveys.
Record	Contact & personal detail of a single recipient.
Response/Feedback	Replies of recipients
SMS Quota	Total number of SMS availed by the user's organization.
Software-as-a-Service	A service deployed on the servers of service provider, which can be accessed over the Internet. The service is designed on a pay-as-you-go model and can be used without any investment on hardware.
Statistics	Basic information about email & SMS promotions and surveys using which users can analyze the success of a campaign.

Subscribe	A feature that allows users to add a recipient to a list, so that he/she starts receiving all campaigns addressed to the corresponding list.
URL	Uniform Resource Locator - a Uniform Resource Identifier that specifies where an identified resource is available and the mechanism for retrieving it. Used to specify location of a website.
UnBlock	A feature that allows users of MailDirect to unblock the blocked recipients so that campaigns can be directed to them.
Unsubscribe	A feature that allows users to remove a recipient from a list, so that he/she stops receiving all campaigns addressed to the corresponding list.
User Credentials	Includes unique user ID and password using which a user can access MailDirect. User credentials are available only if MailDirect services are availed.
Web Browser	A software application for retrieving, presenting, and traversing information resources on the World Wide Web.
Website Based Survey Campaign	Use of survey links on website that facilitate visitors to answer survey questions.
QLC Administrator	The person in-charge at QLC who creates accounts for users availing MailDirect services and manages the service.



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