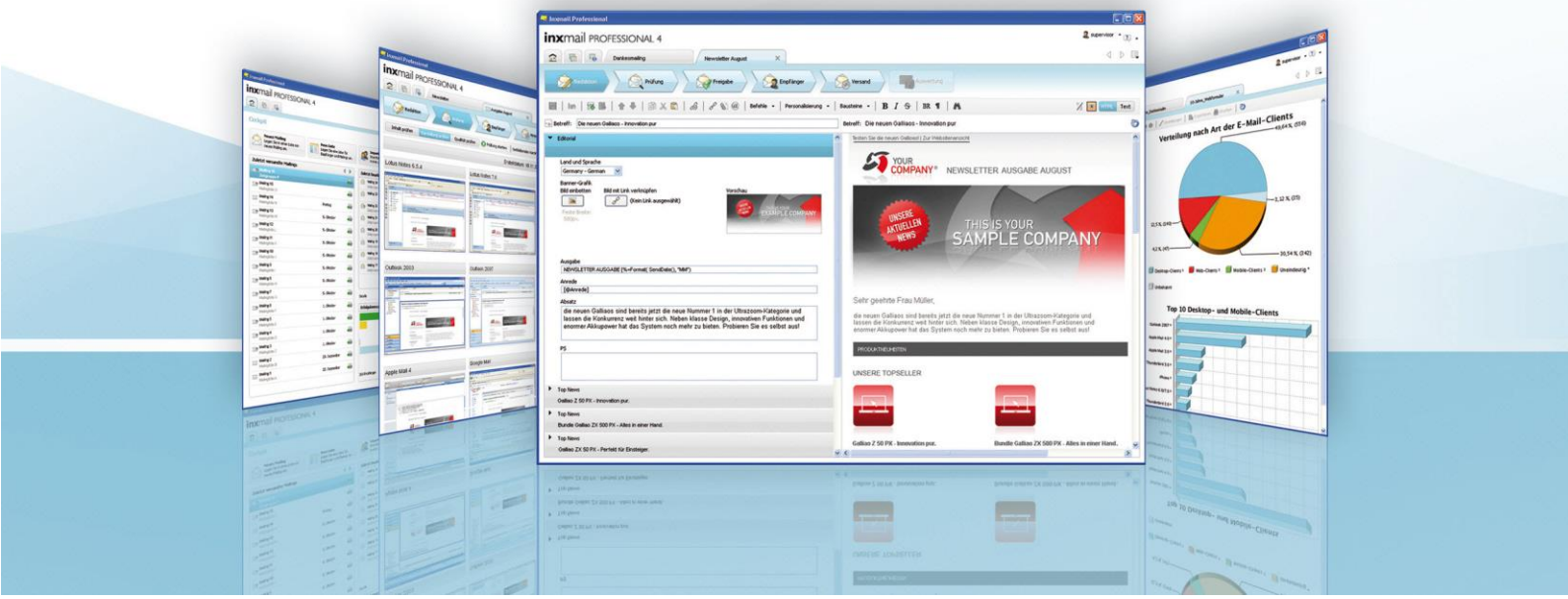
inxmail
professional email marketing



User manual

Inxmail Professional 4.4

Version: XPRO-A-EN-14-4.4.0-1.3

Tel.: (+49-761) 296979-0 | Fax: (+49-761) 296979-9
info@inxmail.de | www.inxmail.de

Contents

1 About this document

Release

This document relates to the following releases/versions:

- Inxmail Professional 4.4

Target group

This document is intended for users who use *Inxmail Professional*. The individual chapters of the documentation can be grouped as follows:

Introduction to Inxmail Professional

The chapters *Quickstart* page 6 to *Reports* page 344 are intended for all beginning users of Inxmail Professional. In addition to providing an introduction to the user interface of Inxmail Professional, this section is intended to familiarise you with the basic functions required to create and send mailings (newsletters). In addition, you will learn to use reports to evaluate the mailing dispatch or recognise which emails cannot be sent.

Advanced Functions to Inxmail Professional

The chapters *Mailings (advanced editing)* page 364 to *Operator, command and function reference* page 515 are intended for Inxmail Professional users that have some experience working with Inxmail Professional. Here, you will learn to use more complex functions in Inxmail Professional, for example, how to integrate the content from external websites into your mailings, how to send email sequences and how to manage files in a webspace.

Inxmail Professional Administration

The chapters *Installation* page 554 to *Further tasks (license customers)* page 613 are intended for all Inxmail Professional administrators. In this section, you will learn how to install and configure Inxmail Professional. In addition, this section of the user guide will teach you how to complete tasks, for example, resetting passwords, while using the software.

Special information

The following terms are used to draw your attention to special information.

Term	Explanation
Important	Care should be taken here. You should make every effort to observe the information in this section.
Note	Here you will find tips that can make life easier for you.
Example	This section provides example procedures or example data to help guide you.

Structure of individual chapters

The individual chapters typically consist of the following sections:

Section	Content
Prerequisites	This section sets out the conditions that must be met for a particular task to be performed.
Step by step	This section guides you through the application step by step until you have completed your task.
Additional information	Here you can find further information that is relevant for the task that you have to perform.
Related topics	Here you will find a table listing topics that are related in terms of content to the task to be completed.

Typographic conventions

The formatting options listed below draw your attention to the following:

Formatting	Use
User interface	*Words that appear in this style relate to elements of the Inxmail Professional user interface.*
`Code`	`Text that appears in this style represents program code.`
Entries Selections	Words that appear in this style are to be entered in input fields. In the case of selections, you must select the value that appears in this style.

User interface

This document describes the application based on the Microsoft Windows user interface.

Additional information and documents

For a detailed description of the functionality of *Inxmail Professional*, see the Inxmail Professional User Manual and online help. The user manual can be downloaded or displayed via the Help menu (Downloading the user manual page 44). It is also available for download from the Inxmail Community at http://community.inxmail.de.

The Inxmail Community also offers a range of other documents for *Inxmail Professional* users including How-tos and documents for administrators (for example, installation manuals).

2 Support

Contact Inxmail Professional support if problems occur when using Inxmail Professional in a live environment. Detailed information on the version of the Inxmail Professional Client in use will be required to identify the problem.

1. To access this information, click the (*Help*) button in the header and the select the entry About Inxmail Professional.

   The *About Inxmail Professional* information dialog appears. Here, you can find information on:

   - The version of the Inxmail Professional Client in use
   - Licence details
   - Operating system details
   - Memory usage information
   - Data on the Java versions on the client and server
   - Information on the Inxmail Professional server in use
   - Information on the database in use
   - Information on SSL encryption
   - Information on the currently logged in user
2. Click the *Copy to clipboard* button to copy the displayed information to the clipboard for further use.
3. Paste it into an email and send it, together with a description of your problem, to support@inxmail.de.

3 New in Inxmail Professional 4.4

Here you can find an overview of the most important new features and changes implemented in *Inxmail Professional 4.4*.

Split test

Up to now the *A/B Split* plug-in was available for Inxmail Professional. With Inxmail Professional 4.4 the *A/B Split* plug-in is replaced by the *Split test* agent. The *Split test* agent is an integral part of Inxmail Professional 4.4.

With the *Split test* agent you can optimise your mailings. You can test different subject lines and sender addresses in order to obtain higher opening rates. In addition you can execute multi-variable tests, which allows you to test different content for your mailing. Or you can use the sending time test to find out when your mailings capture the full attention of your readers.

You will gain a long-term understanding of the interests of your recipients by regularly testing the individual characteristics of your mailings. You can carry out the tests using different key figures, and decide for yourself what the decisive criterion for the winning version is.

The winning version can be sent automatically or manually. In addition, a new report is available that provides a quick overview of the split test results.

A detailed description of the split test function can be found in *Split tests* page 273.

Import Automation

The new Import Automation allows you to import your recipient data to Inxmail Professional automatically at regular intervals. You can import the data either to a defined list or to the 'Global settings' (from where the data can be used for all lists). The data is configured in Inxmail Professional.

Import conflicts are taken into account using the familiar import rules at the data import planning stage. Just as for a manual import, you can use special settings for imports. The Import Automation log holds all the important details for the imports. The available filters help you to keep an overview when several imports are taking place.

Once the import has ended, you can send a notification to one or more recipients informing them whether or not the import was successful.

A detailed description of the Import Automation can be found in *Import Automation* page 468.

Wizard for creating salutation modules

The wizard for creating salutation modules in the Modules agent allows you in a very easy way to personalise the way you address your recipients (*Creating a new salutation module* page 157).

Reduced advertising pressure

The Target groups agent within Inxmail Professional 4.4 offers new functionality for defining target groups, which you can use to manage the advertising pressure faced by your recipients. It is possible to define, for example, that a recipient who has already received a user-defined number of emails in a particular time period should not receive any further mailings (*Selecting recipients according to a particular number of received mailings* page 168).

Download and display of user manual

From Inxmail Professional 4.4 onwards the user manual is not delivered as an integral part of the Inxmail Professional client any more. Instead of that the user manual can be downloaded via the menu item Manual in the help menu. You can save the manual in a folder of your choice. After the download you can display the user manual by clicking (again) the menu item Manual in the help menu (*Downloading the user manual* page 44 bzw. *Displaying the user manual* page 45).

Defining the start page in the cockpit

You can define the start page of Inxmail Professional respectively the Cockpit (*Defining the start page in the cockpit* page 43).

Chinese

Now Chinese is available as a further language (*Available languages* page 10).

4 Quickstart

As an Inxmail Professional beginner, you will learn how to create and send your first mailing (newsletter) as swiftly as possible in this chapter. In Inxmail Professional, the term 'mailing' is used to refer to a 'newsletter'.

Work through the following steps in the order shown:

(For more information on each step, see the specified chapter in the manual.)

1. Log in

   Start Inxmail Professional. In the login section, set up your clients and, if required, your proxy server. Then log in with your user details (*Login* page 7).

2. Create a mailing list

   Mailing lists are used in Inxmail Professional to create mailings. Therefore, start by creating a mailing list of type "standard" (*Creating standard mailing lists* page 77).

3. Import your recipient data

   You must integrate your recipient data into Inxmail Professional to be able to subsequently send your mailing to your recipients. To do this, import your existing recipient records into the mailing list (*Importing recipients (from an import source)* page 95).

4. Create a mailing

   Create your first mailing in the mailing list. Choose a mailing template for your mailing (*Creating a new mailing* page 184).

5. Create your mailing content

   The layout of your mailing is determined by the mailing template you selected. Fill your new mailing with content such as text, images and links (*Mailings (editing)* page 189).

6. Check mailing

   Before you send your mailing, check its contents, for example by using the various preview functions provided such as the quality test and optional display test or by sending test emails (*Mailings (check)* page 228).

7. Approve mailing

   Before you can send the mailing, it has to be approved. Depending on the setting of the system, this is done using 'immediate release' or via the release process (*Mailings (approval)* page 253).

8. Assign recipients

   Assign the recipients to whom the mailing should be sent (*Mailings (recipient)* page 264).

9. Send mailing

   Send the mailing either immediately or at the specified time of your choice (Versand von Mailings).

10. Analyse the success of the mailing

    After your mailing has been dispatched, view the analysis for the mailing to see how successfully your mailing was received by your recipients (*Mailing (dispatch analysis)* page 271).

5 Carry out login

5.1 Login

You will get to know the Inxmail Professional login dialog box in this chapter and find out:

- which data you require for logging in
- how you can change the language of Inxmail Professional
- which settings you need to make in the login dialog box (for example, you must save the clients you use in a drop-down list and, if required, configure a proxy server)
- how you can run an update again

5.1.1 Overview: Login dialog box and login

The login dialog box is displayed when you start Inxmail Professional.

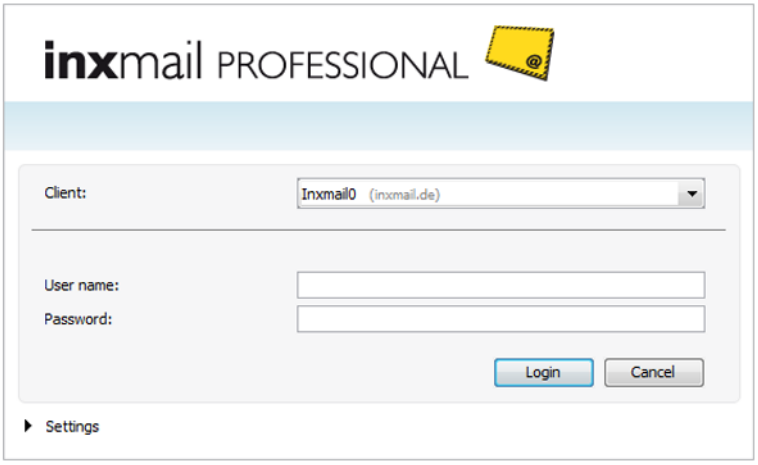


Figure 1: Login section

Note ASP customers receive their login data from Inxmail GmbH. Licensed customers receive the login data from their Inxmail Professional administrator.

You require the following login data to log in:

- Client (or login URL)

  To be able to log in to the Inxmail Professional Server, you must add a client in the login dialog box and assign to it the server's login URL (HTTP address) (*Adding a client* page 8). This client is saved and can then be selected in the login dialog box during subsequent logins.
- Proxy server data (optional)

  If you access Inxmail Professional via a proxy server (for example, because you work with your notebook over a wi-fi network), you must also specify the address and port for the proxy server and, if necessary, your user name and password (*Configuring a proxy server* page 11).

  These proxy server settings are also saved and are preset in the login dialog box during subsequent logins (irrespective of which client has been selected).
- User

You require a user name.

- Password

  You require a password for this user name. If required, you can change this password after logging in (*Changing your password* page 40).

If you are unable to log in, check the following:

1. Make sure your login data is spelled correctly (be aware of case sensitivity).
2. Check the client that has been selected.
3. Ask your Inxmail Professional administrator whether your user has been set up in Inxmail Professional (with the required rights).

Note Inxmail Professional does not allow several people to log in at the same time as the same user. A message will appear if you try to log in with the same user name that is being used by an existing, active session. You will be given the option to cancel your own login or cancel the other user's session. Any unsaved data from the cancelled session will be lost.

You can also open Inxmail Professional in another language (*Available languages* page 10).

5.1.2 Adding a client

You must select a client in the login dialog box to log in to Inxmail Professional. If the client you require does not yet exist in the *Client* drop-down list in the login dialog box, add the client as follows:

Step-by-step

1. To open the login dialog box, start Inxmail Professional.
2. In the *Client* drop-down list in the login dialog box, select *Add client*.

   The *Login URL* field is also displayed in the login dialog box.

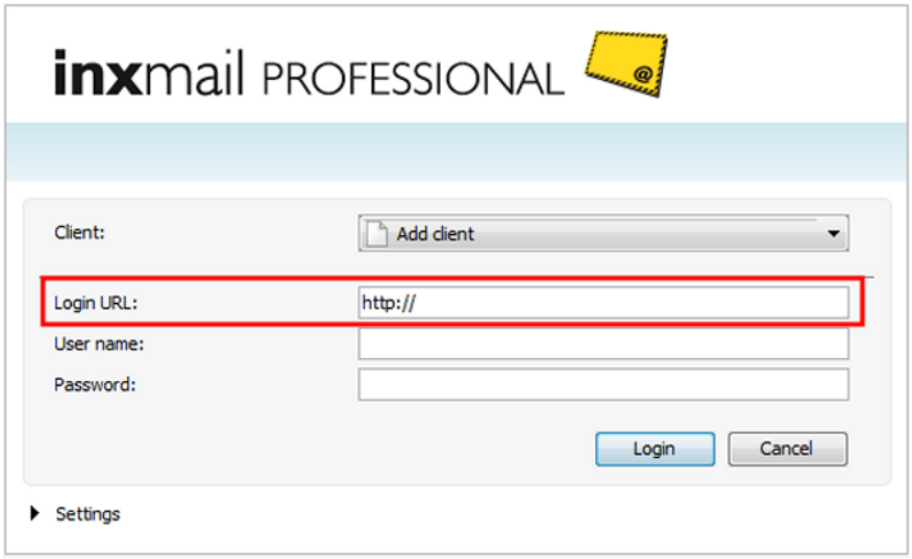


Figure 2: Login section with "Login URL" field

3. Enter the login URL (HTTP address) of the server in the *Login URL* field.

The server login URLs (HTTP address) of ASP customers include an alias name for the company name at the end of the URL, for example: http://login.inxmail.com/sample_company

Enter the full login URL (HTTP address) in the *Login URL* field.

Secure Sockets Layer (SSL) allows the server and software to communicate with one another over a secure connection. To start Inxmail Professional with SSL encryption, enter https:// instead of http:// at the beginning of the server login URL. SSL encryption must have been activated on the server by your administrator.

4. Enter your user name and password.
5. Click *Login*.

Special information for Windows users

After your login, Inxmail Professional will attempt to contact the specified server. If this is successful, you will be logged in.

If the server cannot be reached, the system will search for the Windows proxy server in the registry. Inxmail Professional will then try to log you in using this proxy server. If this is successful, Inxmail Professional will transfer the Windows proxy server data to the login dialog box (that is, the data will be entered in the corresponding fields under *Settings*) and will use it by default for subsequent logins. If this login is also unsuccessful, an error message will be displayed. You should then enter a suitable proxy server manually (*Configuring a proxy server* page 11).

✓ The Inxmail Professional user interface is displayed.

Inxmail Professional saves the entry for the client that has been added on your computer. You can now select this client from the *Client* drop-down list in the login dialog box during subsequent logins (from this computer). Inxmail Professional will automatically display the user who last logged in with this client in the *User* field. The password is not saved.

5.1.3 Removing a client

Proceed as follows to remove a client:

Step-by-step

1. Start Inxmail Professional.

   The login dialog box is displayed.
2. In the *Client* drop-down list, select *Remove client*.

   A dialog box appears.
3. Select the clients to be removed in the dialog box.
4. Confirm the dialog box by clicking *OK*.

5.2 Specifying settings

You can specify additional settings in the login dialog box. Click *Settings* and the options will open.

5.2.1 Available languages

Inxmail Professional is available in the following languages:

- German
- English
- Spanish
- French
- Italian
- Polish
- Turkish
- Czech
- Chinese

The configured language also determines the format in which date values, weekdays or calendar weeks, for instance, are displayed in Inxmail Professional. As this can vary depending on the country, in the login section you can select the language according to your country, if applicable.

Example

You can select *English (United States)*, *English (Australia)* or *English (Sweden)* in addition to English. The software program is then always displayed in English (British English). All date and calendar entries are displayed in the country-specific format and, if applicable, in the language of the country (for example, in Swedish).

After installation, the language configured for your operating system is automatically preset for Inxmail Professional.

If your operating system is configured to use a language other than those listed above, English is preset for Inxmail Professional.

The online help, user manual and all templates (for example, JSP templates for web pages) are available in English and German.

Online help: If you start Inxmail Professional in German, the online help opens in German. If you start Inxmail Professional in another language, the online help is in English.

Templates: If you have installed a German version of Inxmail Professional, the templates installed as standard are in German (even if you subsequently change the language in the login dialog box). If you have installed Inxmail Professional in another language, the templates installed as standard are in the corresponding language (if available) or in English.

5.2.2 Changing the language

When you log in, you can change the language as follows:

Step-by-step

1. To open the login dialog box, start Inxmail Professional.
2. Select a client in the login dialog box and enter your user name and password.
3. Select the language you require in the *Language* field under *Settings*.
4. Click *Login*.

✓ Inxmail Professional now opens in the language you have set.

Inxmail Professional saves the language setting on your computer and opens the login dialog box in this language during subsequent logins (from your computer). You can change the language again at any time.

5.2.3 Configuring a proxy server

If you log in via a proxy server, you must proceed as follows:

Step-by-step

1. To open the login dialog box, start Inxmail Professional.
2. Select a client in the login dialog box and enter your user name and password.
3. To open the settings section, click *Settings*.

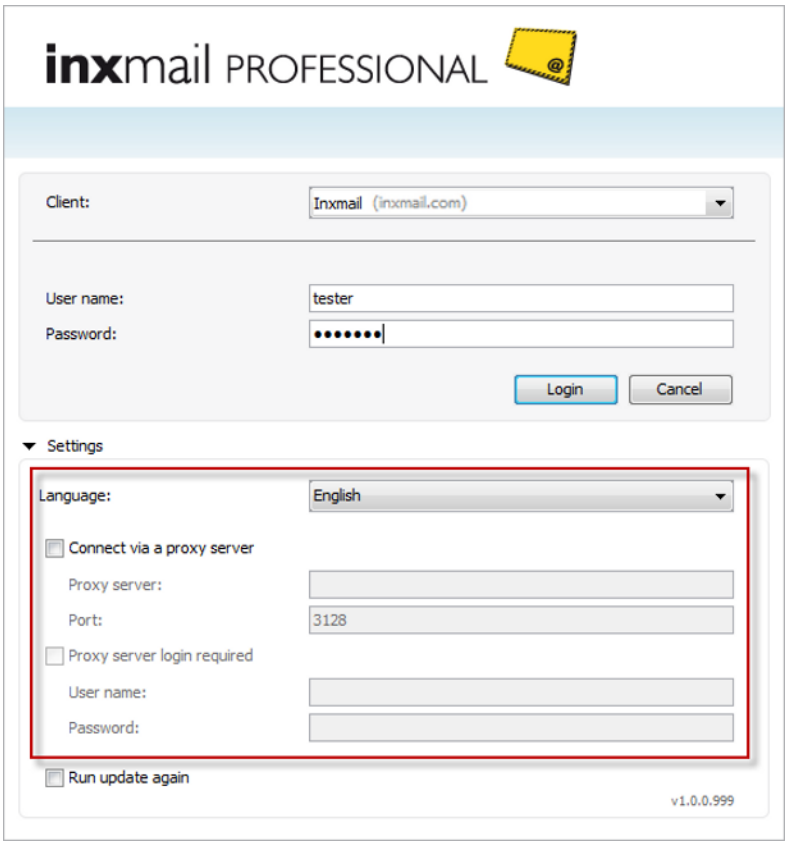


Figure 3: Login section with settings section

4. In the *Settings* section, select the *Connect via a proxy server* check box and enter the HTTP address and port number of the proxy server in the fields below.
5. If you are required to complete an extra login to access the proxy server, select the *Proxy server login required* check box and enter the user name and password for the proxy server in the fields below.
6. Click *Login*.

✓ The Inxmail Professional user interface is displayed.

Inxmail Professional saves the proxy server settings on your computer and displays these (irrespective of which client has been selected) in the login dialog box during subsequent logins (from your computer).

5.2.4 Running an update again

In some cases, an update cannot be run correctly, for example because of a premature termination. You should then contact the support team at Inxmail GmbH. You will be given appropriate instructions by the support team and may be advised to select the *Run update again* check box.

Related Topics

» *Running an update again* page 555

6 User interface

This chapter introduces you to the Inxmail Professional user interface. You get to know the key elements of the user interface (for example, tabs, user menu and agents). The user interface home page, that is, the cockpit (*Overview – Cockpit* page 26), is also presented.

6.1 Introduction

After you have logged into Inxmail Professional, the (*Cockpit*) tab opens. This tab is the application's home page. The following entries are available in the Navigation area of the tab:

- *Quick start*
- *Sending overview*
- *Editorial overview*
- *List overview*

After Inxmail Professional starts, the *Quick start* entry is active. Clicking the respective entries allows you to switch between overviews. The Inxmail Professional rights assigned to your user account determine which functions you are able to carry out on the (*Cockpit*) tab (and in Inxmail Professional in general).

You can find a detailed description of the Cockpit in *Cockpit – the application's home page* page 26.

Note Please note that based on the Inxmail Professional user rights concept, not every user can view all the elements or use all the functions.

ASP customers receive users that are already set up from Inxmail GmbH or their partners.

In the case of licence customers, Inxmail Professional administrators can create users individually and assign the required user rights (*Users, roles, rights and security* page 557).

In addition to the (*Cockpit*) tab, the user interface also contains the following basic elements:

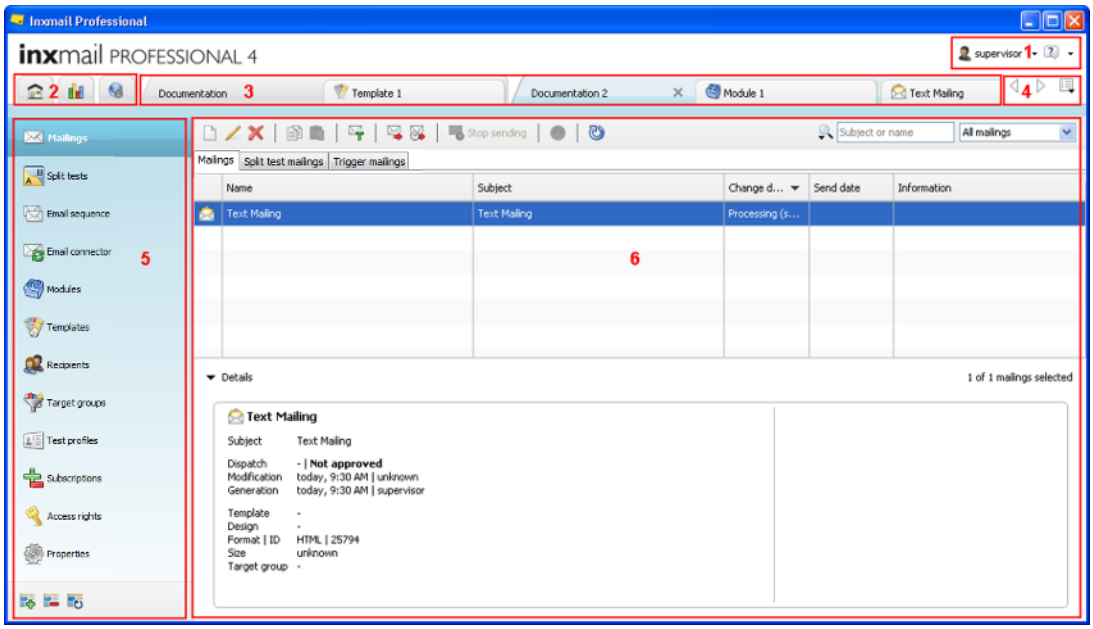


Figure 4: User interface

- User menu (*User menu* page 40)
- Three (main) tabs (*Main tabs* page 15)
- Further tabs for opened mailing lists and opened objects (*Further tabs for opened mailing lists and child objects* page 16)
- Agents (*Agents and workspace* page 18)
- Agent workspace (*Agents and workspace* page 18)

6.2 Overview: Elements of the user interface

6.2.1 User menu

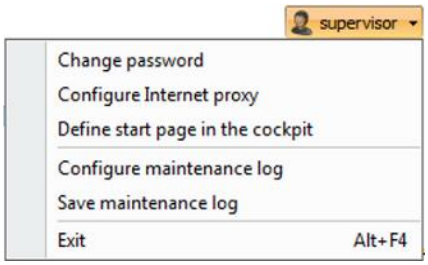


Figure 5: User menu

You can specify the following via the user menu:

- You can change the password that you use to log into Inxmail Professional (*Changing your password* page 40).
- You can configure a proxy server for connecting to the Internet (*Configuring an Internet proxy* page 41).

- You can define an overview as the start page in the Cockpit (*Defining the start page in the cockpit* page 43).
- You can configure and save the maintenance log. (These entries are generally only relevant if you contact Inxmail GmbH support. The maintenance log contains a *.zip file of log files detailing system activities.)
- You can click <User name> > Exit to close Inxmail Professional.
- You can click (Help) > General help to open the online help. Alternatively, you can click (Help) > Direct help to open the online help page that contains context-sensitive information on the item currently opened in Inxmail Professional.
- You can click (Help) > About Inxmail Professional to display information about Inxmail Professional and copy the information, if required.

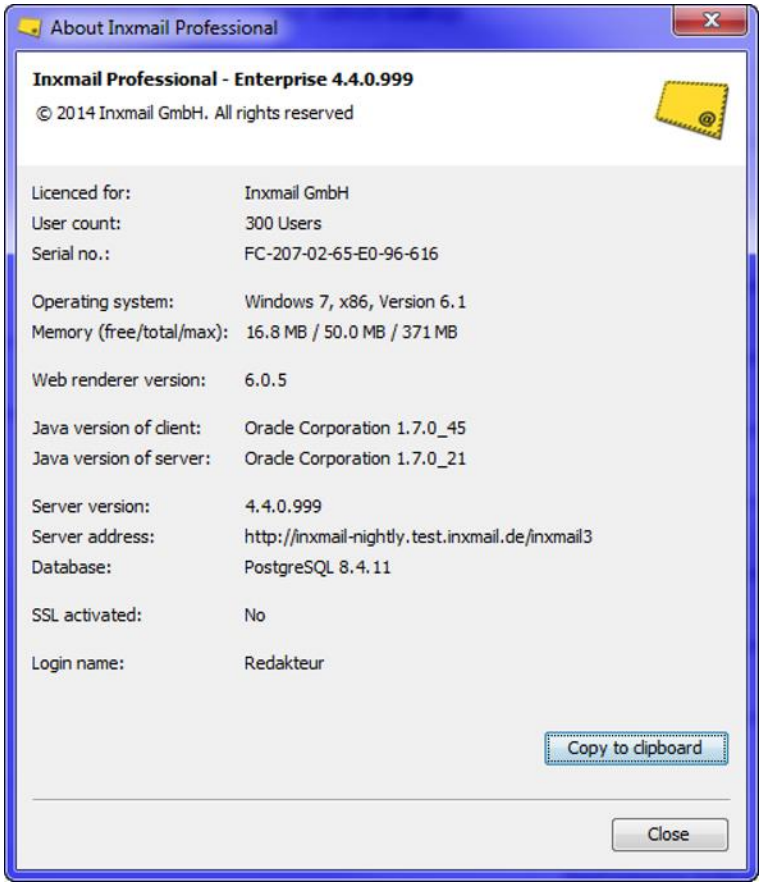


Figure 6: "About Inxmail Professional" dialog box

6.2.2 Main tabs

Inxmail Professional has the following (main) tabs that you can neither remove nor close:

Figure 7: 3 (main) tabs

- (*Cockpit*) tab

After you have logged into Inxmail Professional, the (*Cockpit*) tab opens. This tab is the application's home page. The following entries are available in the Navigation area of the tab:

- *Quick start*
- *Sending overview*
- *Editorial overview*
- *List overview*

- After Inxmail Professional starts, the *Quick start* entry is active. Clicking the respective entries allows you to switch between overviews (*Cockpit – the application's home page* page 26).
- Main tab or (*Reports*) tab

  You can generate **all** the reports available in Inxmail Professional here. Detailed information on this can be found in *Creating reports* page 354.
- (*Global settings*) tab

  You can specify the following on this tab depending on your user rights:
  - *Global settings* section: You can use the global agents contained in this section (*Agents and workspace* page 18) to specify settings that apply to **all** mailing lists (for example, you can set up target groups that can be used in all mailing lists).
  - *Administration* section: Inxmail Professional administrators can specify system settings here (*Settings (license customers)* page 557, *Settings (optional)* page 592, *Inxmail Professional DBSync* page 604 and *Further tasks (license customers)* page 613).

6.2.3 Further tabs for opened mailing lists and child objects

In addition to the (main) tabs, other tabs may also appear in your tab bar:

- Tab for opened mailing lists

  When you open a mailing list (for example, by double-clicking the mailing list on the (*Cockpit*) tab, in the *Quick start* entry or in the *List overview* entry), the mailing list appears on a new tab in your tab bar.

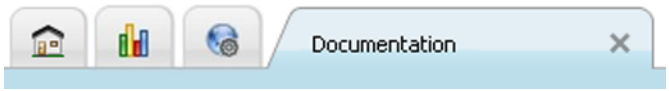
  

  Figure 8: Tab of the 'Documentation' mailing list

  You can open as many mailing lists as you like. Each mailing list is displayed on a new tab.
- Tab for opened child objects

  In an opened mailing list or on the (*Global settings*) tab, you can open the following objects as (child) tabs:

You can open as many objects as you like in a mailing list or on the (*Global settings*) tab. Each object is displayed on a new (child) tab.

As soon as you open a child object, the child object is disabled for editing by all other users. If another user attempts to open the object while it is disabled, the user is informed accordingly and can open the object in read-only mode until you have closed the object again.

The asterisk (***** symbol) on the tab of the object (for example, 'Mailing *') indicates an object that you have edited but not yet saved .

- Mailings
  You can open a mailing by double-clicking the mailing in the *Mailings* agent > *Mailings* tab (*Mailings* page 175).

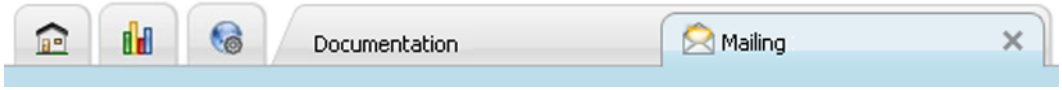


Figure 9: Tab of a mailing object

- Trigger mailings
  You can open a trigger mailing by double-clicking the trigger mailing in the *Mailings* agent > *Trigger mailings* tab (*Trigger mailings* page 307).

Figure 10: Tab of a trigger mailing object

- Email sequence mailings
  You can open an email sequence mailing by double-clicking the email sequence mailing in the *Email sequence* agent on the *Emails* tab (*Email sequences* page 390).

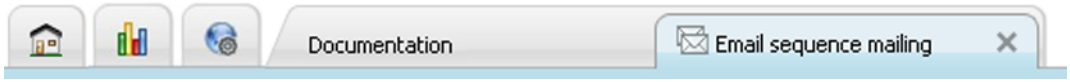


Figure 11: Tab of an email sequence mailing object

- Modules
  You can open a module by double-clicking the module in the *Modules* agent (*Creating modules* page 155).

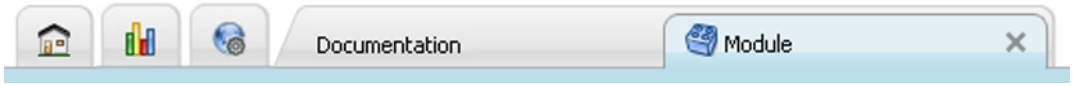


Figure 12: Tab of a module object

- Templates
  You can open a user template by double-clicking the user template in the *Templates* agent > *User templates* tab (*Setting up a user template (text, HTML, multipart)* page 402).

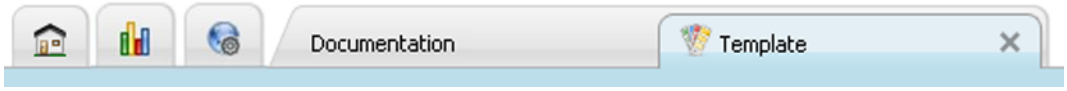


Figure 13: Tab of a user template object

- Data sources
  You can open a data source, whose external content can be imported into a newsletter

template, by double-clicking the data source in the *Templates* agent > *Data sources* tab (*Setting up a data source (for the transfer of content in the template)* page 397).

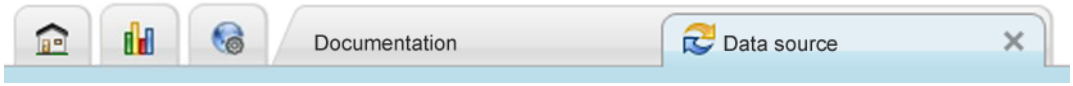


Figure 14: Tab of a data source object

- Subscribe and unsubscribe mailings:
  You can open a subscribe or unsubscribe mailing by double-clicking the mailing in the *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab (*Subscribe and unsubscribe mailings* page 147).

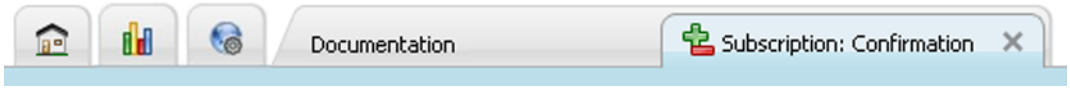


Figure 15: Tab of a subscribe or unsubscribe mailing object

6.2.4 Tab navigation

Figure 16: Tab navigation

Tab navigation gives you fast access to the tab you require when you have a number of tabs opened:

- You can use the and buttons to navigate through the tab bar when you have a number of tabs opened (and partly hidden).
- You can use the (*List all tabs*) button to open a drop-down list. You can select the tab you require in this list and jump to the tab directly.

6.2.5 Agents and workspace

Agents contain functions on a particular topic (for example, the *Mailings* agent includes all the functions for creating and dispatching mailings and the *Recipients* agent includes all the functions for managing recipient data).

The following tabs contain agents:

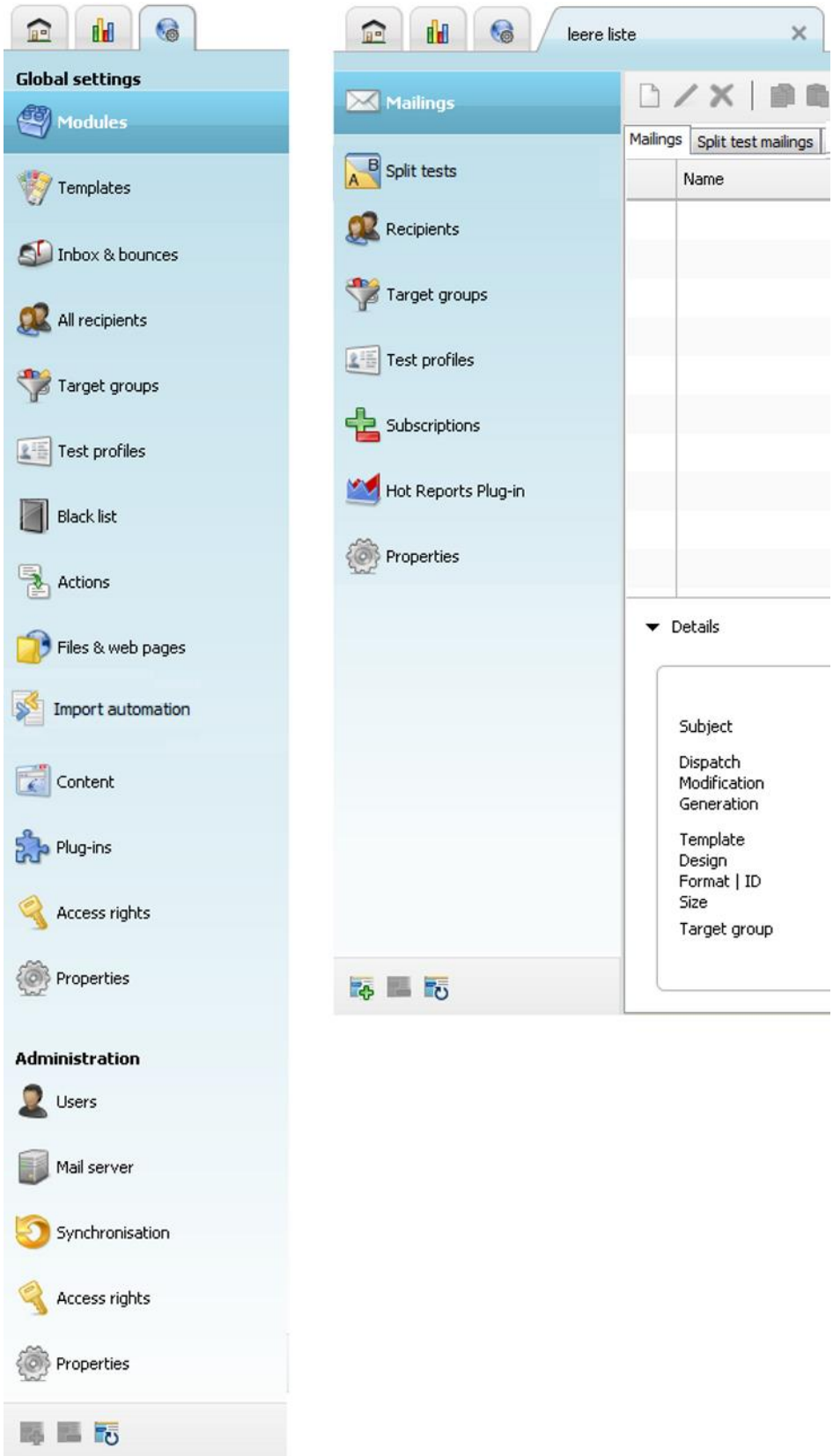


Figure 17: Agents on the "Global settings" tab and on the tab of the "Documentation" mailing list

Note Your user rights determine which agents are displayed to you.

- (*Global settings*) tab

  The agents on this (*Global settings*) tab allow you to specify settings that apply to **all** mailing lists (for example, target groups created here can be used in all mailing lists).
- Tab of a mailing list

  The agents on the tab of a mailing list are used to specify settings that apply to the current mailing list (for example, target groups created here may only be used for the current mailing list).

  You determine which agents are available on the tab of a mailing list when you first create the mailing list (*Creating standard mailing lists* page 77). Afterwards, you can add or remove agents as you choose (*Adding/deleting additional agents to mailing lists* page 80).

When you click an agent, a workspace with all the functions belonging to the agent appears to the right of the agent.

The workspace varies depending on the agent. It may contain further (child) tabs.

Related Topics

» *Agents - overview and functions* page 47.

6.2.6 Object tabs

6.2.6.1 Overview

You can open the following (child) object tabs on the tab of a mailing list:

- *Mailings tab* page 20
- *Trigger mailings tab* page 22
- *Email sequence mailings tab* page 23
- *Subscribe/unsubscribe mailings tab* page 23
- *Modules tab* page 24
- *Templates tab* page 24
- *Data sources tab* page 25

6.2.7 Mailings tab

6.2.7.1 Prerequisites

The tab of a mailing is displayed if you perform one of the following steps:

- You double-click a previously created mailing in the table in the *Mailings* agent > *Mailings* tab
- You create a new mailing in the *Mailings* agent > *Mailings* tab using the (*Create new mailing*) button
- You create a new mailing on the (*Cockpit*) tab in the *Quick start* entry using the *New mailing* button

6.2.7.2 Overview

You can perform the following workflow steps on the tab of a mailing:

- *Editing* workflow step

  You can create content for your mailing.
- *Check* workflow step

  You can check the content of your mailing (for example, you can display your mailing content for various recipients and test profiles).
- *Approval* workflow step

  The mailing must be approved before being sent.
- *Recipients* workflow step

  You can assign the recipients or target groups to whom your mailing is to be sent.
- *Dispatch* workflow step

  You can send your mailing.
- *Analysis* workflow step

  After dispatch, you can open a visual link analysis for the mailing.

Related Topics

» *Mailings (editing)* page 189

» *Mailings (advanced editing)* page 364

» *Mailings (check)* page 228

» *Mailings (approval)* page 253

6.2.8 Split-test mailings tab

6.2.8.1 Prerequisites

The tab of a split-test mailing opens if you perform one of the following steps in the *Mailings* agent > *Split-test mailings* tab:

- You double-click a previously created split-test mailing in the table in the *Mailings* agent > *Split-test mailings* tab
- You create a new split-test mailing in the *Mailings* agent > *Split-test mailings* tab using the (*Create new mailing*) button
- You create a new split-test mailing on the (*Cockpit*) tab in the *Quick start* entry using the *New mailing* button

6.2.8.2 Overview

You can perform the following workflow steps on the tab of a split-test mailing:

- *Editing* workflow step

  You can create content for your split-test mailing.
- *Check* workflow step

You can check the content of your split-test mailing (for example, you can display your split-test mailing content for various recipients and test profiles).

- *Approval* workflow step

  The split-test mailing must be approved before being sent.
- *Split-test* workflow step

  You can create a split-test with or without a rest dispatch and send the split-test versions.
- *Analysis* workflow step

  After dispatch, you can open a visual link analysis for the split-test mailings.

Related Topics

» *Mailings (editing)* page 189
» *Mailings (advanced editing)* page 364
» *Mailings (check)* page 228
» *Mailings (approval)* page 253
» *General* page 273
» *Mailing (dispatch analysis)* page 271

6.2.9 Trigger mailings tab

6.2.9.1 Prerequisites

The tab of a trigger mailing is displayed if you perform one of the following steps in the *Mailings* agent > *Trigger mailings* tab:

- You double-click a previously created trigger mailing in the table
- You create a new trigger mailing using the (Create *new trigger mailing*) button

6.2.9.2 Overview

You can perform the following workflow steps on the tab of a trigger mailing:

- *Editing* workflow step

  You can adjust the contents of the trigger mailing.
- *Check* workflow step

  You can check the content of your trigger mailing (for example, you can display your mailing content for various recipients and test profiles).
- *Approval* workflow step

  The trigger mailing must be approved before being sent.
- *Recipients* workflow step

  You can assign the recipients or target groups to whom your mailing is to be sent for timed trigger mailings.
- *Dispatch* workflow step

You can configure the dispatch settings for timed trigger mailings here.

- *Analysis* workflow step

  Once you have assigned the action mailing in an action sequence (initially), you can open the visual link analysis for the action mailing.

Related Topics

Trigger mailings page 307

6.2.10 Email sequence mailings tab

6.2.10.1 Prerequisites

The tab of an email sequence mailing is displayed if you perform one of the following steps in the *Email sequence* agent > *Emails* tab:

- You double-click a previously created email sequence mailing in the table
- You create a new email sequence mailing using the (*Create new mailing*) button

6.2.10.2 Overview

You can perform the following workflow steps on the tab of an email sequence mailing:

- *Editing* workflow step

  You can create or edit the content of an email sequence mailing.
- *Check* workflow step

  You can check the content of your email sequence mailing (for example, you can display the content of your email sequence mailing for various recipients and test profiles).

Related Topics

» *Creating a new email sequence mailing* page 391

6.2.11 Subscribe/unsubscribe mailings tab

6.2.11.1 Prerequisites

The tab of a subscribe or unsubscribe mailing is displayed if you perform one of the following steps in the *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab:

- You double-click a previously created subscribe or unsubscribe mailing in the table
- You create a new subscribe or unsubscribe mailing using the (*Create new subscribe/unsubscribe mailing* button

6.2.11.2 Overview

You can perform the following workflow steps on the tab of a subscribe/unsubscribe mailing:

- *Editing* workflow step

You can adjust the contents of the subscribe/unsubscribe mailing.

- *Check* workflow step

  You can check the content of your subscribe/unsubscribe mailing (for example, you can display your mailing content for various recipients and test profiles).

- *Activation* workflow step

  You can activate the subscribe/unsubscribe mailing to be able to assign it for dispatch.

Further information

Setting up, checking, approving and activating the subscribe/unsubscribe mailing page 151

6.2.12 Modules tab

6.2.12.1 Prerequisites

The tab of a module is displayed if you perform one of the following steps in the *Modules* agent:

- You double-click a previously created module in the table
- You create a new module using the (*Create new module*) button

6.2.12.2 Overview

You can perform the following workflow steps on the tab of a module:

- *Editing* workflow step

  You can create or edit the content of a module.

- *Check* workflow step

  You can check the content of your module (for example, you can display the content of your module for various recipients and test profiles).

Related Topics

» *Creating modules* page 155

6.2.13 Templates tab

6.2.13.1 Prerequisites

The tab of a user template is displayed if you perform one of the following steps in the *Templates* agent > *User templates* tab:

- You double-click a previously created user template in the table
- You create a new user template using the (*Create new user template*) button

6.2.13.2 Overview

You can perform the following workflow steps on the tab of a user template:

- *Editing* workflow step

You can create or edit the content of a user template.

- *Check* workflow step

  You can check the content of your user template (for example, you can display the content of your user template for various recipients and test profiles).

Related Topics

» *Setting up a user template (text, HTML, multipart)* page 402

6.2.14 Data sources tab

6.2.14.1 Prerequisites

The tab of a data source is displayed if you perform one of the following steps in the *Templates* agent > *Data sources* tab:

- You double-click a previously created data source in the table
- You create a new data source using the (*Create new data sources*) button

6.2.14.2 Overview

You can perform the following workflow steps on the tab of a data source:

- *Settings* workflow step

  You can set up the external data source in Inxmail Professional.
- *Check* workflow step

  You can check the transfer of content from the external data source (for example, you can check whether the content was transformed correctly).

Related Topics

» *Setting up a data source (for the transfer of content in the template)* page 397

7 Cockpit – the application's home page

In this chapter, you will learn:

- About the cockpit and the overviews it contains
- Which information is displayed in the individual overviews
- Which functionality is available in the individual overviews

7.1 Overview – Cockpit

After you have logged into Inxmail Professional, the (*Cockpit*) tab opens. This tab is the application's home page. The following entries are available in the Navigation area of the tab:

- *Quick start*
- *Sending overview*
- *Editorial overview*
- *List overview*

After Inxmail Professional starts, the *Quick start* entry is active. Clicking the respective entries allows you to switch between overviews.

The following section contains a detailed description of which information is displayed to you in the quick start and in the respective overviews, and which functions are available.

7.2 Quick start

The quick start provides a compact overview of the last sent and edited mailings, and the last used lists. You can also create new mailings or lists and import recipients using three prominent buttons. Finally, the Details section is a central point for information and performance indicators on the currently selected mailing.

The following contains a detailed description of the individual viewing and editing options.

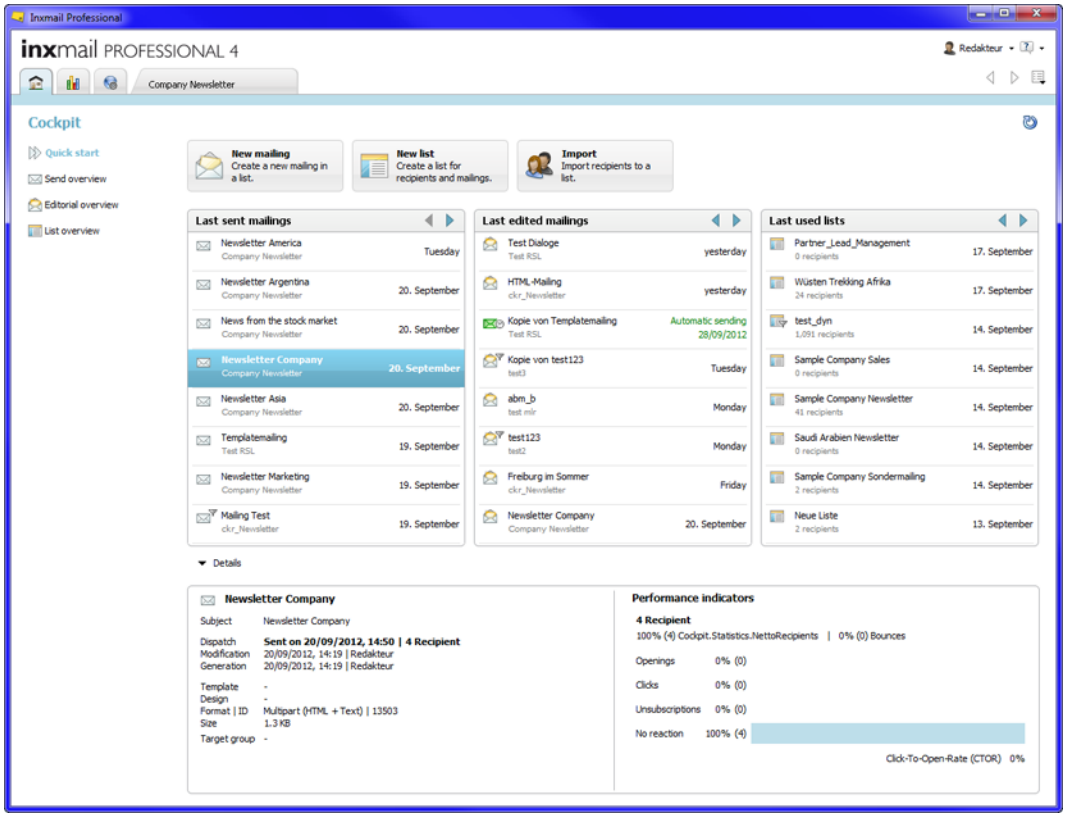


Figure 18: Cockpit - Quick start

7.2.1 You can

Create a new mailing

Click the *New mailing* button in the upper part of the Content area to create a new mailing (*Creating a new mailing* page 184).

Create new lists

Click the *New list* button in the upper part of the Content area to create a new mailing list (*Creating and setting up mailing lists* page 76). Mailing lists are required to create, send and edit mailings, as well as to manage recipients, among other things.

Import recipients

Click the *Import* button in the upper part of the Content area to import your recipient data (for example, data saved in a database or file) into Inxmail Professional (*Importing recipients (from an import source)* page 95).

Cancel dispatch

You can cancel the dispatch of mailings that are currently being sent.

Step-by-step

1. To do this, double-click the relevant mailing.

The Stop sending dialog box is displayed.

2. Click the *Stop sending* button.

You have stopped the dispatch.Open a mailing in the Editing workflow step

Double-clicking a mailing in the draft status allows you to open it in the Editing workflow step.

Open a mailing in the Analysis workflow step

Double-clicking a sent mailing allows you to open it in the Analysis workflow step (*Mailing (dispatch analysis)* page 271).

7.2.2 The following is displayed

Last sent mailings section

In the *Last sent mailings* section, you can see the last 20 mailings that were sent in Inxmail Professional (in the current client of your company). Mailings that are currently being sent and whose sending was cancelled are also displayed. The mailings in the *Last sent mailings* section are sorted by their send date.

'Special' mailings, such as email sequence mailings or trigger mailings, are not included in the quick start view.

If no mailings (that you have access to) have been sent yet, this section will be empty.

You can use the (*Show newer entries*) and (*Show older entries*) buttons, the up and down arrow keys and the mouse scroll wheel to navigate to the remaining mailings.

Number of displayed mailings The number of displayed mailings can be configured per client. A total of 20 mailings are displayed per section by default.

The mailings can be flagged with the following symbols:

Symbol	Description
	Mailing that is currently being sent
	Mailing that is currently being sent and whose recipients belong to one or more target groups
	Sent mailing
	Sent mailing whose recipients belong to one or more target groups
	Mailing whose dispatch was interrupted
	Mailing whose dispatch was interrupted and whose recipients belong to one or more target groups

Last edited mailings section

In the *Last edited mailings* section, you can see the last 20 mailings that were edited in Inxmail Professional (in the current client of your company). The symbols for the respective mailings also provide information on the approval status. You can also see if a mailing has been scheduled for dispatch.

The mailings in the *Last edited mailings* section are sorted by the date they were last saved.

If no mailings (that you have access to) are currently being edited, this section will be empty.

You can use the (*Show newer entries*) and (*Show older entries*) buttons, the up and down arrow keys and the mouse scroll wheel to navigate to the remaining mailings.

Number of displayed mailings The number of displayed mailings can be configured per client. A total of 20 mailings are displayed per section by default.

The mailings can be flagged with the following symbols:

Symbol	Description
	Created mailing that has not yet been sent or scheduled for dispatch
	Created mailing that has not yet been sent or scheduled for dispatch and whose recipients belong to one or more target groups
	Created mailing that has not yet been sent and for which approval has been requested. Dispatch has not (yet) been scheduled.
	Created mailing that has not yet been sent and for which approval has been requested and dispatch scheduled
	Created mailing that has been approved
	Created mailing whose recipients belong to one or more target groups and that has been approved
	Created mailing that has not yet been sent. The mailing has been approved and dispatch has been scheduled.
	Created mailing that has not yet been sent. The recipients of the mailing belong to one or more target groups. The mailing has been approved and dispatch has been scheduled.

Last used lists section

In the Last used lists section, you can see the last 20 mailing lists that were used in Inxmail Professional (in the current client of your company) to edit or send mailings.

These mailing lists are sorted by their last used date.

If no mailing lists (that you have access to) have been created yet, this section will be empty.

You can use the (*Show newer entries*) and (*Show older entries*) buttons, the up and down arrow keys and the mouse scroll wheel to navigate to the remaining mailings.

The mailing lists can be flagged with the following symbols:

Symbol	Description
	Standard mailing list (*Overview: Mailing lists* page 73)
	Dynamic mailing list (*Overview: Mailing lists* page 73)

Details section

In the Details section, you can see the following (depending on which mailing or mailing list has been selected):

- *Information on the mailing*: This section provides a summary of the most important data on the mailing (for example, whether the mailing is to be sent to all recipients or only to the recipients of specific target groups, whether the send date has already been scheduled for the mailing, when the mailing was last edited and what the current approval status of the mailing is).
- *Information on the list*: This section summarises the most important mailing list data and graphically displays the recipient development.
- *Performance indicators*: This section shows the number of recipients for the mailing. You can also see a bar chart with the most important key figures on the mailing dispatch (recipients, hard and soft bounces, openings, clicks, unsubscriptions, number of recipients who did not react; *Important key figures for reports* page 353).

7.3 Sending overview

The sending overview provides a comprehensive overview of the sent and scheduled mailings. A number of options are available to control which mailings are displayed. You can switch between daily, weekly and monthly views. At the same time, you can filter the view using lists and mailing types. You can use the calendar in the Navigation area of the sending overview to open the sending display for a specified date. The Details section is a central point for information and performance indicators on the currently selected mailing.

The following contains a detailed description of the individual viewing and editing options.

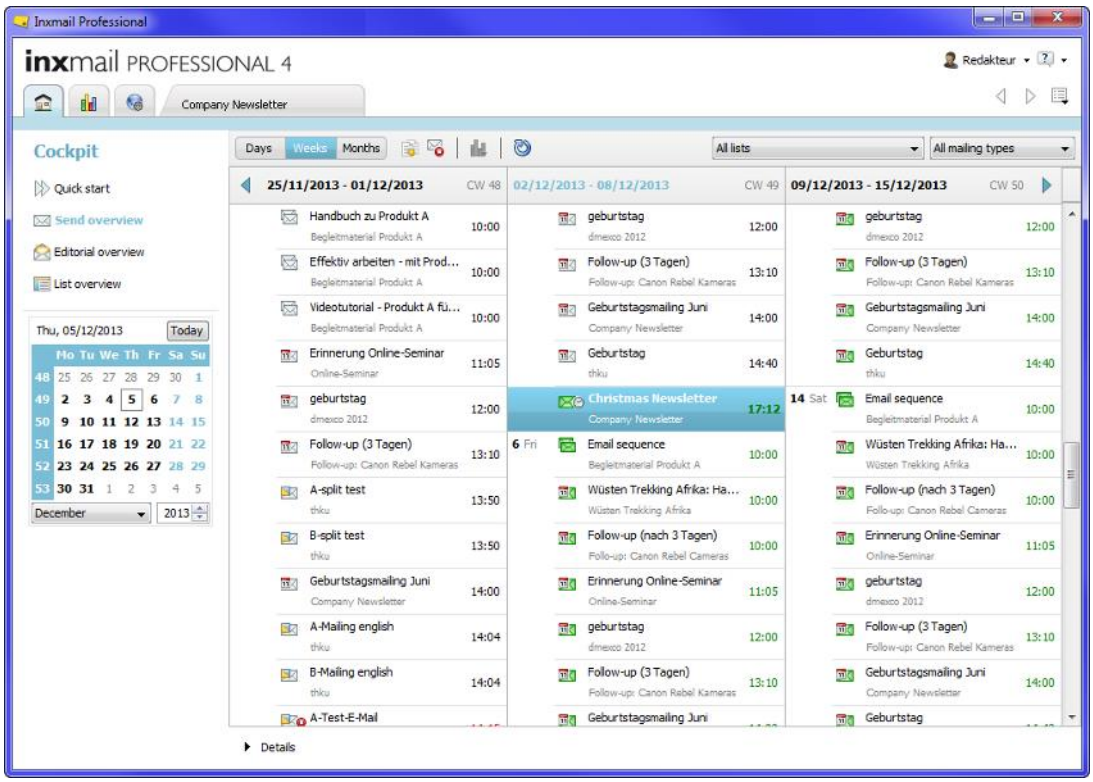


Figure 19: Cockpit - Sending overview

7.3.1 Duplicate mailing

Step-by-step

1. Select the mailing you want to duplicate.
2. Click the (*Duplicate mailing*) button.
   A dialog box appears.

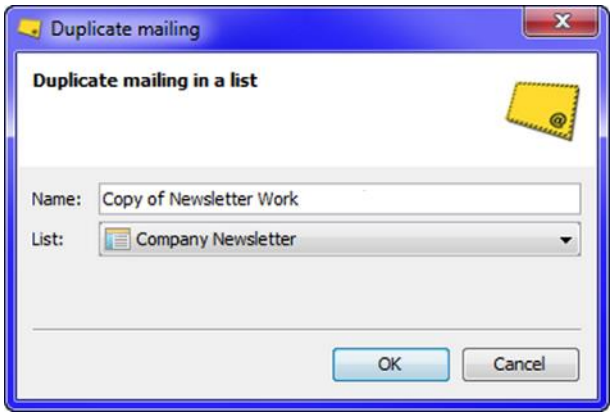


Figure 20: "Duplicate mailing" dialog box

3. Change the name for the mailing in the *Name* field.
   Use the *List* list box to select the list in which you want to create the mailing.
4. Confirm the dialog box by clicking *OK*.
   The mailing will open in the Editing workflow step.

Related Topics

» *Creating a new mailing* page 184

7.3.2 Stop/deactivate sending

You can stop sending for mailings currently in dispatch and deactivate sending of trigger mailings.

Step-by-step

1. Select the mailing or trigger mailing for which you want to stop or deactivate sending.
2. Right-click the mailing or trigger mailing.
   The shortcut menu appears.
3. Select *Stop sending* or *Deactivate sending*.
   The *Stop sending* or *Deactivate sending* dialog box is displayed.
4. Click the *Stop sending* or *Deactivate sending* button.

7.3.3 Open list

Step-by-step

1. Select the mailing or trigger mailing belonging to the list you want to open.
2. Right-click the mailing or trigger mailing.

The shortcut menu appears.

3. Select *Open list*.

   The list opens.

7.3.4 Open a mailing in the Analysis workflow step

Double-clicking a sent mailing or trigger mailing allows you to open it in the *Analysis* workflow step (*Mailing (dispatch analysis)* page 271).

7.3.5 Open a mailing in the Editing workflow step

Double-clicking a scheduled mailing or an active trigger mailing allows you to open it in the *Editing* workflow step (*Mailings (editing)* page 189).

Double-clicking a sent email sequence mailing displays it in the *Editing* workflow step.

Double-clicking an active email sequence directs you to the workspace of the *Email sequence* agent (*Email sequence agent* page 56).

7.3.6 Display selected reports

You can generate selected reports from the sending overview. See *Creating context-sensitive reports* page 357, section *Sending overview* page 30.

7.3.7 Daily, weekly and monthly views

Mailings, trigger mailings and sequence mailings are displayed in several columns in the Content area. You can select if the columns display the daily, weekly or monthly view. Use the Days Weeks Months button to switch between the daily, weekly and monthly views.

(The number of columns displayed varies depending on the configured screen resolution. For example, three columns are displayed at a resolution of 1024 x 768 pixels. Four columns are displayed at a resolution of 1280 x 800 pixels.)

7.3.8 Displayed mailing types

The sending overview only displays mailings if approval has been received or requested and dispatch is scheduled.

The following mailing types are displayed in the sending overview:

Type of mailing	Status
Mailings	In dispatch, dispatch scheduled, dispatch has taken place, dispatch interrupted Mailings for which dispatch has been scheduled will also indicate whether approval has been requested.
Trigger mailings	Active, inactive

Type of mailing	Status
Email sequences and email sequence mailings	Active Dispatch has taken place

Action mailings are not shown in the sending overview.

The mailings, trigger mailings and email sequence mailings are indicated using the following symbols:

Symbol	Description
	Sent mailing
	Mailing that is currently being sent
	Mailing that is currently being sent and whose recipients belong to one or more target groups
	Created mailing for which approval has been requested and that has been scheduled for dispatch
	Created mailing that has been scheduled for dispatch
	Created mailing whose recipients belong to one or more target groups. Mailing approval has been requested and dispatch has been scheduled.
	Created mailing that has been scheduled for dispatch and whose recipients belong to one or more target groups
	Mailing whose dispatch was interrupted
	Mailing whose dispatch was interrupted and whose recipients belong to one or more target groups
	The status of the trigger mailing is set to 'Active', that is, dispatch was activated.
	The status of the trigger mailing is set to 'Active', that is, dispatch was activated. The recipients of the trigger mailing belong to one or more target groups.
	The status of the trigger mailing is set to 'Inactive', that is, dispatch was deactivated.
	The status of the trigger mailing is set to 'Inactive', that is, dispatch was deactivated. The recipients of the trigger mailing belong to one or more target groups.
	Single, sent email sequence mailing
	Single, sent email sequence mailing whose recipients belong to one or more target groups
	Email sequence containing at least one email sequence mailing yet to be sent

Additional information

The individual dispatches are shown separately in active timed trigger mailings. A maximum of 24 dispatches can be shown per day for hourly interval mailings.

Email sequence mailings are displayed separately in the past. No individual email sequence mailings are displayed in the future. Instead, the email sequence as a whole is displayed.

7.3.9 Dispatch time

The time at which the mailing was sent or will be sent can be found on the right side of the relevant column or on the right next to the corresponding mailing. If the mailing is still awaiting dispatch, that is, the dispatch time is in the future, then the dispatch time will be displayed in green. If the dispatch time is in the past, it will be displayed in black.

Symbol	Description
Newsletter Marketing Company Newsletter 15:22	Time in black: Mailing has been sent
Newsletter Marketing Company Newsletter 16:00	Time in green: Mailing has yet to be sent

7.4 Editorial overview

The editorial overview provides a cross-list overview of mailings that have not yet been sent and that are not (yet) scheduled for dispatch.

The following contains a detailed description of the individual viewing and editing options.

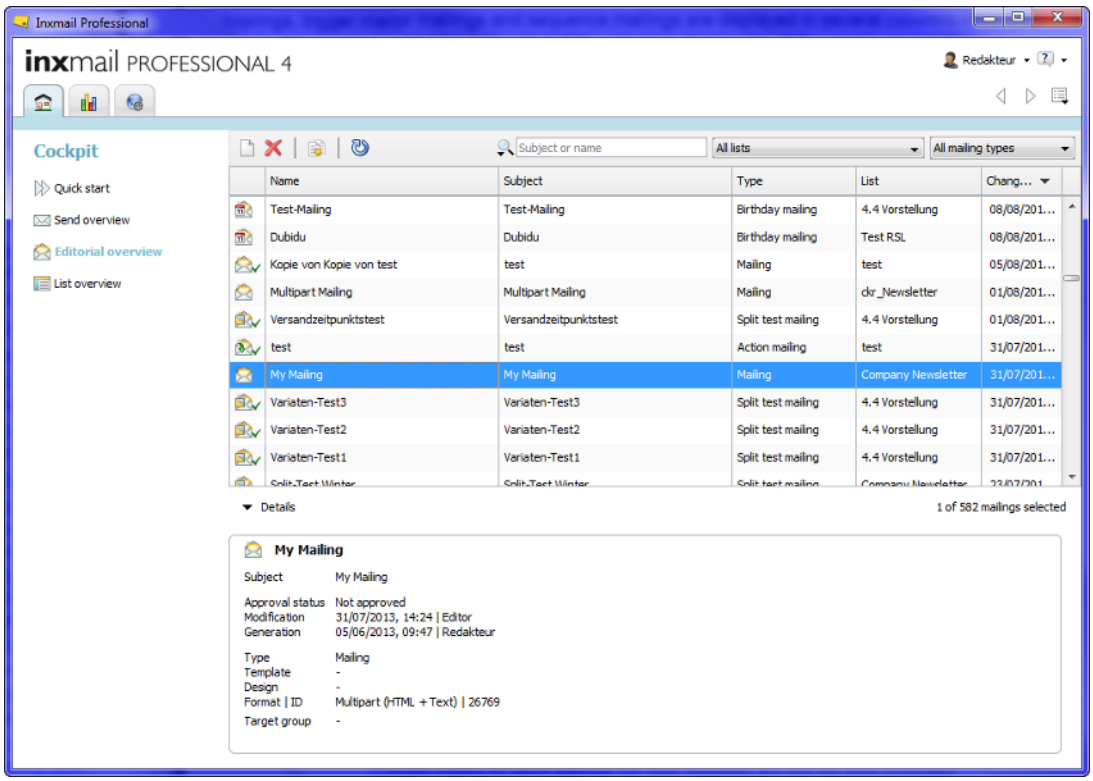


Figure 21: Cockpit – Editorial overview

7.4.1 Create new mailing

Click the *(New mailing)* button in the toolbar to create a new mailing (*Creating a new mailing* page 184).

7.4.2 Delete mailing

Click the (*Delete mailing*) button to delete mailings.

7.4.3 Duplicate mailing

Step-by-step

1. Select the mailing you want to duplicate.
2. Click the (*Duplicate mailing*) button.
   A dialog box appears.

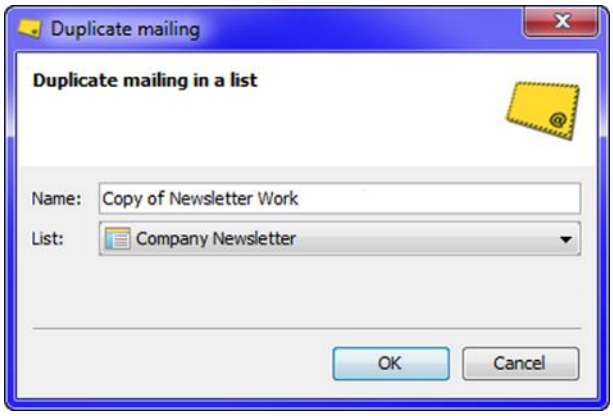


Figure 22: "Duplicate mailing" dialog box

3. Change the name for the mailing in the *Name* field.
   Use the *List* list box to select the list in which you want to create the mailing.
4. Confirm the dialog box by clicking *OK*.
   The mailing will open in the Editing workflow step.

Related Topics

» *Creating a new mailing* page 184

7.4.4 Open a mailing in the Editing workflow step

Double-clicking a mailing or trigger mailing allows you to open it in the *Editing* workflow step.

7.4.5 Open a list/mailing overview

Step-by-step

1. Select the mailing or trigger mailing belonging to the list you want to open.
2. Right-click the mailing or trigger mailing.

The shortcut menu appears.

3. Select *Open list*.

   The list opens.

7.4.6 Displayed mailing types

The following mailing types are displayed in the editorial overview:

Type of mailing	Status
Mailings	Draft, approval requested, approved
Trigger mailings	Draft, approval requested, approved
Action mailings	Draft, approval requested, approved
Email sequence mailings	Inactive email sequence

Subscribe/unsubscribe mailings are not shown in the sending overview.

The mailings, trigger mailings and email sequence mailings are indicated using the following symbols:

Symbol	Description
	Created mailing
	Created mailing whose recipients belong to one or more target groups
	Created mailing for which approval has been requested
	Created mailing for which approval has been requested and that has been scheduled for dispatch
	Created mailing whose recipients belong to one or more target groups and for which approval has been requested
	Created mailing whose recipients belong to one or more target groups. Mailing approval has been requested and dispatch has been scheduled.
	Created mailing that has been approved
	Created mailing whose recipients belong to one or more target groups and that has been approved
	Created trigger mailing
	Created mailing whose recipients belong to one or more target groups
	Created trigger mailing for which approval has been requested
	Created trigger mailing whose recipients belong to one or more target groups and for which approval has been requested
	Created trigger mailing for which approval has been granted

Symbol	Description
	Created trigger mailing whose recipients belong to one or more target groups and that has been approved
	Created action mailing
	Created action mailing for which approval has been requested
	Created action mailing for which approval has been granted
	Created email sequence mailing
	Created email sequence mailing whose recipients belong to one or more target groups

7.5 List overview

Mailing lists Detailed information related to mailing lists can be found in the chapter *Mailing lists* page 73.

The list overview provides a comprehensive overview of all lists created in the application.

The following is a condensed description of the individual viewing and editing options in the list overview. A detailed description of all functionality associated with lists can be found under *Mailing lists* page 73.

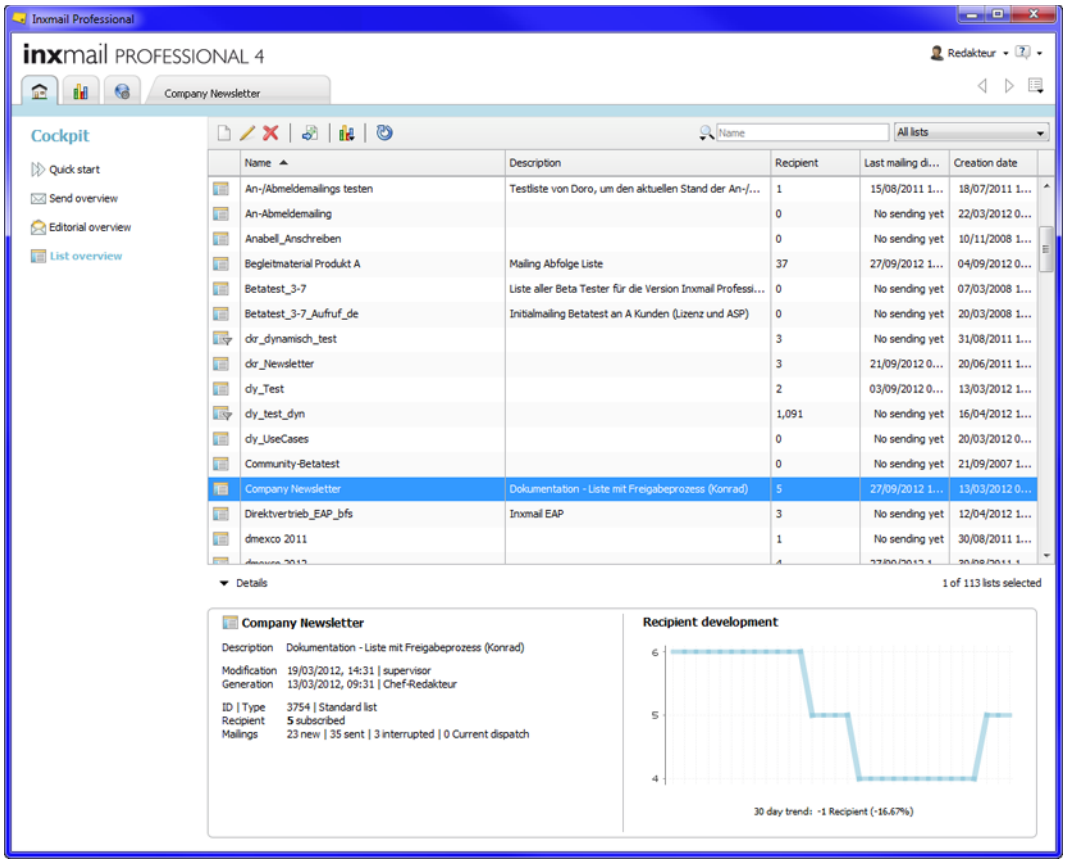


Figure 23: Cockpit - List overview

7.5.1 Create new lists

Click the (*New list*) button to create a new mailing list (*Creating and setting up mailing lists* page 76). You require mailing lists to be able to create, edit and send mailings.

7.5.2 Rename list

Click the (*Change name and description*) button to rename the list (*Renaming or deleting mailing lists* page 76).

7.5.3 Change the description of lists

Click the (*Change name and description*) button to change the description of the list (*Renaming or deleting mailing lists* page 76).

7.5.4 Delete list

Click the *(Delete list)* button to delete the list (*Renaming or deleting mailing lists* page 76).

7.5.5 Import recipients

Click the (*Import recipients*) button to import your recipient data (for example, data saved in a database or file) into Inxmail Professional (*Importing recipients (from an import source)* page 95).

7.5.6 Display selected reports

Click the (*Display selected reports*) button or use the shortcut menu to generate selected reports. See *Creating context-sensitive reports* page 357, section *List overview* page 37.

7.5.7 Open the mailing overview

You can open the mailing list tab by double-clicking. This tab contains an overview of all mailings created in this mailing list (*View and filter the mailings table* page 182).

7.5.8 Displayed lists

The list overview displays the lists created in the application. A distinction is made between standard and dynamic lists using the following symbols:

Symbol	Description
	Standard mailing list
	Dynamic mailing list

Mailing lists Detailed information related to mailing lists can be found in the chapter *Mailing lists* page 73.

8 User menu

In this chapter, you will learn which settings you can make in the user menu:

- Change password

  You can change the password you use to log in to Inxmail Professional in the Inxmail Professional user menu.
- Define start page in the cockpit

  Set the view which is displayed when you start the client.
- Configure and save maintenance log

  These entries are generally only relevant if you contact Inxmail GmbH support. (The maintenance log contains a .zip file of log files detailing system activities.)
- Configure Internet proxy

  If you use a special proxy server for connecting to the Internet, you can configure this in the Inxmail Professional user menu. Inxmail Professional saves the Internet proxy settings on your computer. This means you do not have to configure the Internet proxy each time you use Inxmail Professional (from your computer).

You can also exit Inxmail Professional from the user menu.

8.1 Changing your password

Step-by-step

1. To open the user menu, click <*User name*> in the header.

   The user menu drop-down list appears.

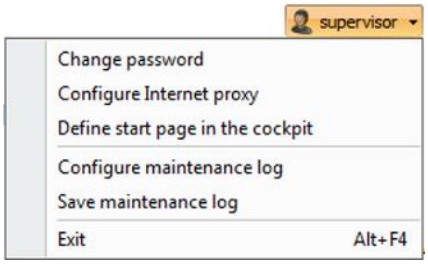
   

   Figure 24: User menu

2. Select *Change password* in the user menu drop-down list.

A dialog box appears.

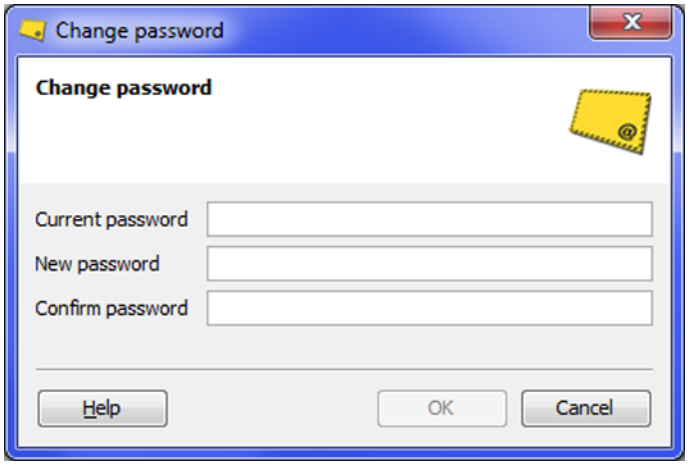


Figure 25: "Change password" dialog box

3. Enter your current password in the *Current password* field.

   You can stop changing your password in the dialog box at any time by clicking *Cancel*. The dialog box will close and your current password will remain unchanged.
4. Enter your new password in the *New password* and *Confirm password* fields.
5. Confirm your entries by clicking *OK*.

✓ Your current password has been overwritten.

Password guidelines If your Inxmail Professional administrator has specified password guidelines, your new password must comply with these guidelines. Otherwise, an error message will appear and you will need to change your new password accordingly in the dialog box.

8.2 Configuring an Internet proxy

Step-by-step

Open the *Configure Internet proxy* dialog box as follows:

1. To open the user menu, click *<User name>* in the header.

   The user menu drop-down list appears.
2. Select *Configure Internet proxy* in the user menu drop-down list.

A dialog box appears.

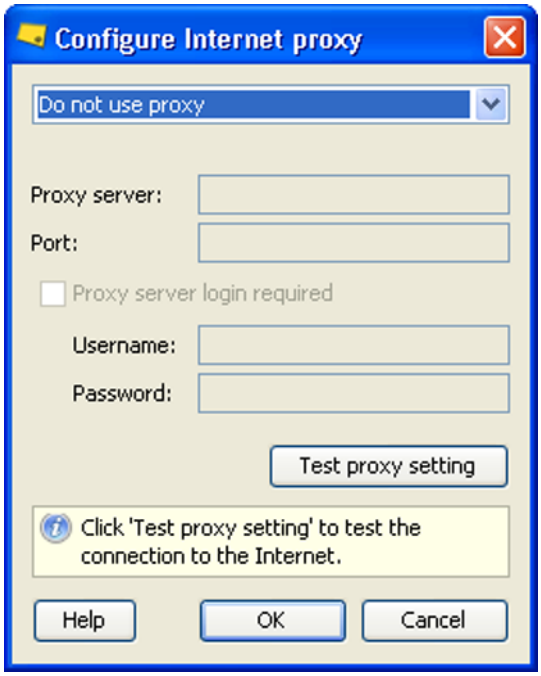


Figure 26: "Configure Internet proxy" dialog box

3. Select one of the following proxy server settings in the dialog box drop-down list:
   - *Do not use proxy* (if you do not require a proxy server to connect to the Internet)
   - *Same proxy as for Inxmail server connection* (to transfer your proxy server settings from the Inxmail Professional login section)
   - *Specify other proxy settings...* (to configure another proxy server)
4. Enter the following additional information in the dialog box if you selected the *Specify other proxy settings...* option:
   - Enter the HTTP address of the proxy server in the *Proxy server* fields, and in the *Port* field, enter the port number of the proxy server.
   - If you are required to complete an extra login to access the proxy server, select the *Proxy server login required* check box and enter the user name and password for the proxy server in the fields below.
5. To test your proxy settings, click *Test proxy setting*.
6. A message appearing below the button indicates whether a connection to the Internet could be established.

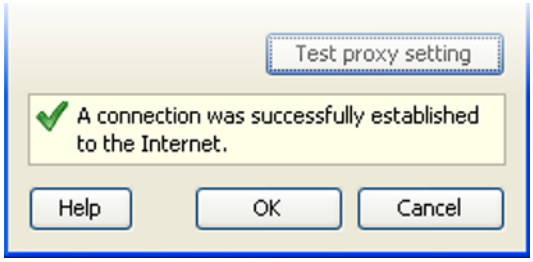


Figure 27: Message indicating that an Internet connection could be successfully established

7. If a connection to the Internet could be established in the test, click *OK* to confirm your settings.

✓ You have now configured the Internet proxy.

8.3 Defining the start page in the cockpit

Step-by-step

Open the *Define start page in the cockpit* dialog box as follows:

1. To open the user menu, click <*User name*> in the header.
   The user menu drop-down list appears.
2. Select *Define start page in the cockpit* in the user menu drop-down list.
   A dialog box appears.

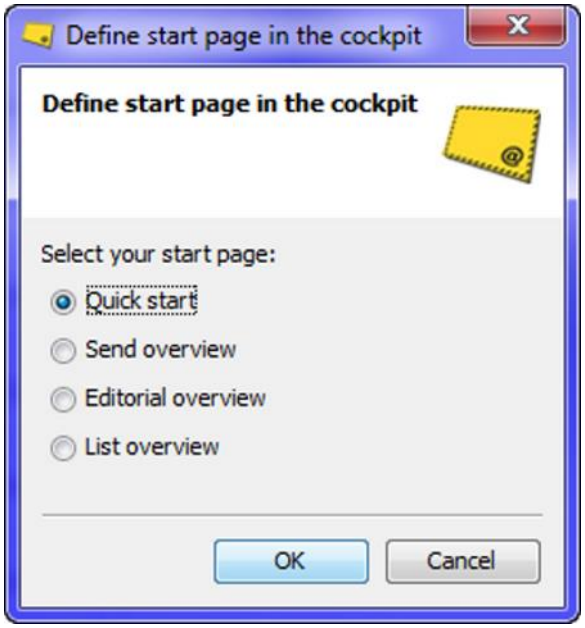


Figure 28: "Define start page in the cockpit" dialog box

3. Select one of the following overviews:
   - *Quick start*: Overview of the last sent and edited mailings and the last used lists.
   - *Sending overview*: Overview of the sent and scheduled mailings.
   - *Editorial overview*: Overview of the mailings not yet sent and unscheduled mailings.
   - *List overview*: Overview of all lists created.
4. Confirm your selection with *OK*.

✓ The selected overview is displayed as the start page the next time the client is opened.

Additional information

- Quick start is preset as the start page when you first open the dialog box.
- The selected setting is only stored under your user account and does not apply to other users.

Related Topics

» *Overview – Cockpit* page 26

8.4 Configure and save maintenance log

These entries are generally only relevant if you contact Inxmail GmbH support. (The maintenance log contains a .zip file of log files detailing system activities.)

8.5 Accessing the online help (context-sensitive)

You can access the *Inxmail Professional* online help at all times by clicking *Online help* on the Help menu or by pressing the *F1* function key.

If context-sensitive help (that is, a help topic that is directly related to the Inxmail Professional function that you have started) is available, this will be displayed after you have pressed the *F1* function key.

Example If you open an Import Automation in the *Conflicts* workflow step and then press *F1*, the online help for the respective workflow step will be displayed.

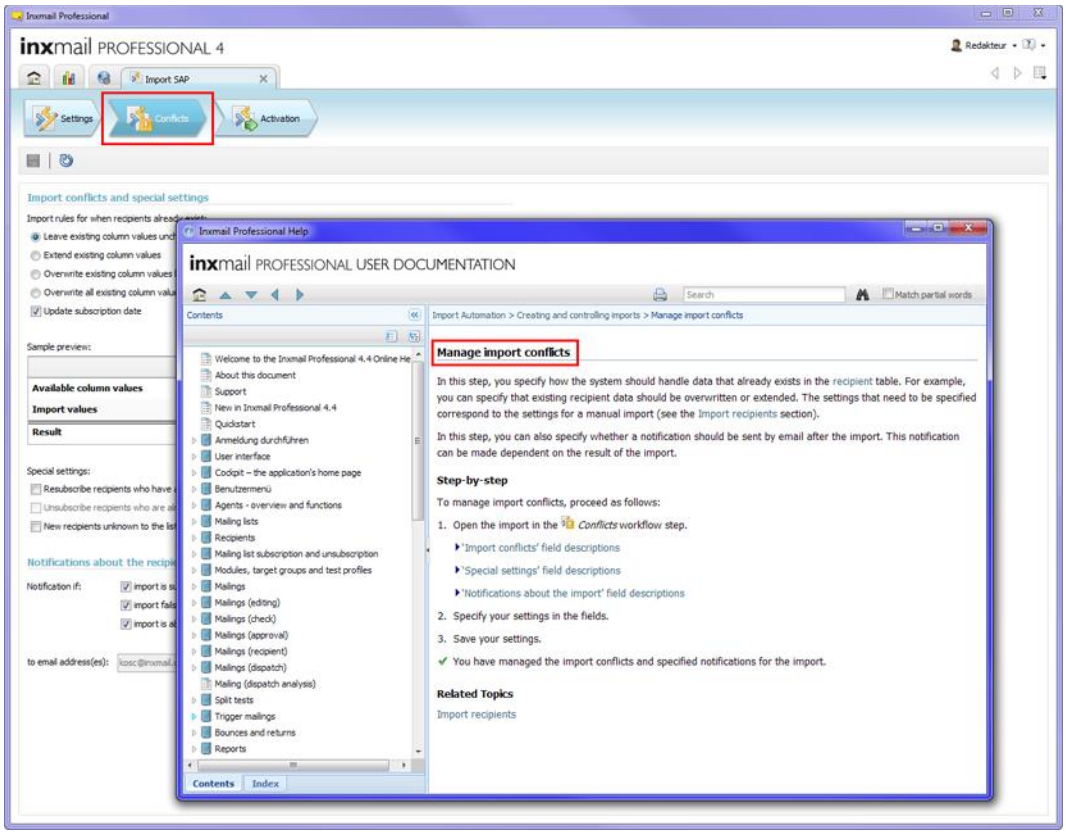


Figure 29: Context-sensitive online help (F1)

8.6 Downloading the user manual

In *Inxmail Professional 4.4* and above, the user manual is no longer supplied as part of the Inxmail Professional Client. Instead, you can download the user manual by clicking *Manual* on the Help menu and save it at a storage location of your choice. Afterwards, you can access or display the manual at any time by clicking *Manual* again.

Step-by-step

To download the user manual, proceed as follows:

1. Click (Help) to open the Help menu.
   The Help menu is displayed.

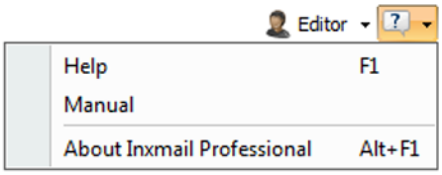


Figure 30: Help menu

2. Click Manual.
3. The *Save* dialog box opens.
4. Enter a storage location.
5. Click *Save*.
   The manual will be created at the specified storage location.

✓ You have now downloaded the user manual.

Additional information

You only need to download the user manual once for each new version of Inxmail Professional or each new version of the user manual. The system detects whether the user manual has been downloaded and stored locally. If this is the case, the user manual will be displayed if you click *Manual* again on the Help menu.

Related Topics

» *Displaying the user manual* page 45

8.7 Displaying the user manual

Prerequisites

The user manual has been downloaded.

Step-by-step

To display the user manual, proceed as follows:

1. Click (Help) to open the Help menu.
   The Help menu is displayed.

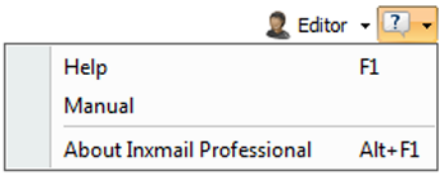


Figure 31: Help menu

2. Click Manual.

The user manual is displayed.

✓ You have now opened the user manual.

Related Topics

» *Downloading the user manual* page 44

9 Agents - overview and functions

This chapter provides an overview of the agents in Inxmail Professional. The functionality and use of each agent will also be described.

9.1 Introduction

Prerequisites

The following prerequisites must be met before you can use an agent:

- You have the rights to use the functions of the agent (for example, if you do not have certain rights, you cannot add the agent or use specific buttons). If necessary, consult your Inxmail Professional administrator.
- You have access rights to the tab on which you will use the agent (for example, *Setting up access rights for mailing lists* page 88).

You have added the agent on the tab, if required (*Adding/deleting additional agents to mailing lists* page 80).

Overview

Agents contain functions on a particular topic (for example, the *Mailings*agent includes all the functions for creating and dispatching mailings and the *Recipients* agent includes all the functions for managing recipient data).

The following tabs contain agents:

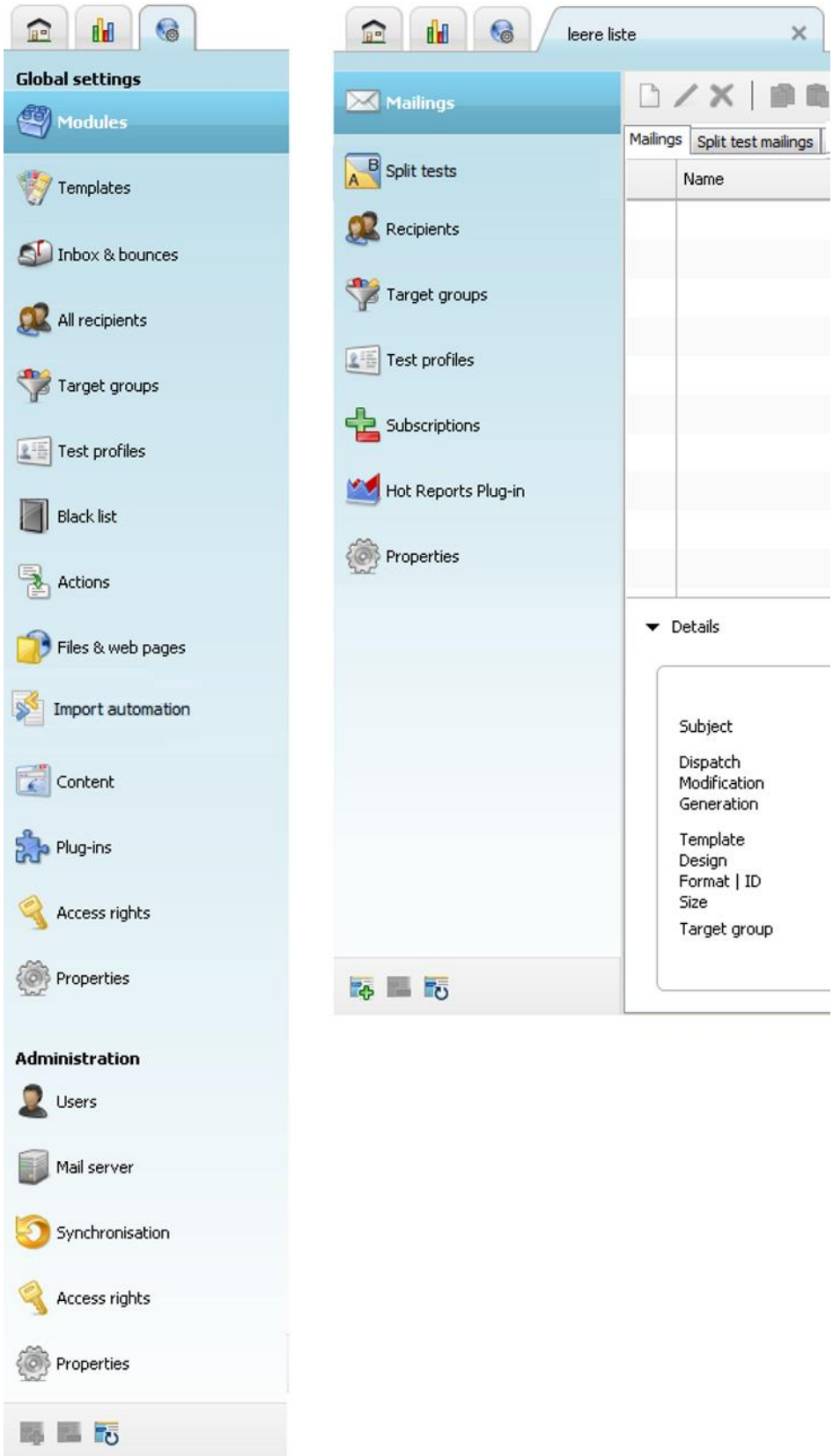


Figure 32: Agents on the "Global settings" tab and on the tab of the "Documentation" mailing list

Your user rights determine which agents are displayed to you.

- (*Global settings*) tab
  The agents on this (*Global settings*) tab allow you to specify settings that apply to **all** mailing lists (for example, target groups created here can be used in all mailing lists).
- Tab of a mailing list
  The agents on the tab of a mailing list are used to specify settings that apply to the current mailing list (for example, target groups created here may only be used for the current mailing list).

> **Note** You determine which agents are available on the tab of a mailing list when you first create the mailing list (*Creating standard mailing lists* page 77). Afterwards, you can add or remove agents as you choose (*Adding/deleting additional agents to mailing lists* page 80).

When you click an agent, a workspace with all the functions belonging to the agent appears to the right of the agent.

The workspace varies depending on the agent. It may contain further (child) tabs.

9.2 Actions agent

Use

The *Actions* agent can be used on the following tab:

- (*Global settings*) tab

Overview

You can define action sequences in this agent.

An 'action' refers to an action (for example, the unsubscribing of a recipient from a mailing list) that is automatically performed by the system when a particular event occurs (for example, the clicking of a link).

An event can trigger one or more actions. For this reason, the term 'action sequence' is used to refer to the triggering event and all subsequent successive actions.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new action sequence*)	To create a new action sequence
(*Save*)	To save changes to an action sequence
(*Delete action sequence*)	To delete the action sequence selected in the table
(*Copy*)	To copy the action sequence selected in the table
(*Paste*)	To paste the previously copied action sequence in the table
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

For further information on using this agent, see *Actions* page 405 (for example, find out how to create new action sequences).

9.3 Subscriptions agent

Use

Important Please note that if you delete the *Subscriptions* agent, none of the subscription and unsubscription functions will work anymore for this mailing list. This includes:
-The unsubscribe link in the mailing (even in the case of mailings that have already been sent)
-Unsubscriptions using the list unsubscribe header
-Subscriptions and unsubscriptions via JSP web pages
-Subscriptions and unsubscriptions via email
-Subscriptions and unsubscriptions using actions
For this reason, we recommend that you **never** delete this agent.

The *Subscriptions* agent can be used on the following tab:

- Tab of the standard mailing lists

Overview

In the case of standard mailing lists, this agent manages the subscriptions of recipients to and the unsubscriptions of recipients from the current list.

In this agent, you can also set up the subscribe and unsubscribe procedures you have chosen to use (for example, single opt-in/opt-out, confirmed opt-in/opt-out, double opt-in/opt-out) as well as the subscribe and unsubscribe mailings you require.

You can also view the subscriptions and unsubscriptions of recipients via the agent log.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Save*)	*Subscription* tab, *Cancel subscription* tab: To save changes
(*Create new mailing*)	*Subscribe/unsubscribe mailings* tab: To create a new subscribe or unsubscribe mailing
(*Rename mailing*)	*Subscribe/unsubscribe mailings* tab: To rename the subscribe or unsubscribe mailing selected in the table
(*Delete mailing*) or (*Delete log entry*)	*Subscribe/unsubscribe mailings* tab: To delete the mailing selected in the table *Log* tab: To delete the log entries selected in the table
(*Copy*)	*Subscribe/unsubscribe mailings* tab: To copy all the subscribe and unsubscribe mailings selected in the table
(*Paste*)	*Subscribe/unsubscribe mailings* tab: To paste all the previously copied subscribe and unsubscribe mailings in the table
(*Send test emails*)	*Subscribe/unsubscribe mailings* tab: To test a subscribe or

Button	Use
	unsubscribe email selected in the table by dispatching test emails
(*Force subscription*)	*Log* tab: To manually confirm the subscription of a recipient (for an unconfirmed subscription event selected in the table) Note: This is only available for unconfirmed subscriptions for the double opt-in subscribe method.
(*Force unsubscription*)	*Log* tab: To manually confirm the unsubscription of a recipient (for an unconfirmed unsubscription event selected in the table) Note: This is only available for unconfirmed unsubscriptions for the double opt-out unsubscribe method.
(*Export log*)	*Log* tab: To export the subscribe/unsubscribe log as a *.txt file
(*Search*)	*Log* tab: To search for log entries in the table
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the log)

Additional information

For further information on using this agent, see *Mailing list subscription and unsubscription* page 128 (for example, find out which subscribe/unsubscribe procedures can be used in Inxmail Professional, learn how to set up the *Subscriptions*agent for a mailing list and find out how to use the subscribe/unsubscribe log).

9.4 Modules agent

Use

The *Modules* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab

Overview

In the case of standard mailing lists, this agent manages the subscriptions of recipients to and the unsubscriptions of recipients from the current list.

In this agent, you can also set up the subscribe and unsubscribe procedures you have chosen to use (for example, single opt-in/opt-out, confirmed opt-in/opt-out, double opt-in/opt-out) as well as the subscribe and unsubscribe mailings you require.

You can also view the subscriptions and unsubscriptions of recipients via the agent log.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Save*)	*Subscription* tab, *Cancel subscription* tab: To save changes

Button	Use
(*Create new mailing*)	*Subscribe/unsubscribe mailings* tab: To create a new subscribe or unsubscribe mailing
(*Rename mailing*)	*Subscribe/unsubscribe mailings* tab: To rename the subscribe or unsubscribe mailing selected in the table
(*Delete mailing*) or (*Delete log entry*)	*Subscribe/unsubscribe mailings* tab: To delete the mailing selected in the table *Log* tab: To delete the log entries selected in the table
(*Copy*)	*Subscribe/unsubscribe mailings* tab: To copy all the subscribe and unsubscribe mailings selected in the table
(*Paste*)	*Subscribe/unsubscribe mailings* tab: To paste all the previously copied subscribe and unsubscribe mailings in the table
(*Send test emails*)	*Subscribe/unsubscribe mailings* tab: To test a subscribe or unsubscribe email selected in the table by dispatching test emails
(*Force subscription*)	*Log* tab: To manually confirm the subscription of a recipient (for an unconfirmed subscription event selected in the table) Note: This is only available for unconfirmed subscriptions for the double opt-in subscribe method.
(*Force unsubscription*)	*Log* tab: To manually confirm the unsubscription of a recipient (for an unconfirmed unsubscription event selected in the table) Note: This is only available for unconfirmed unsubscriptions for the double opt-out unsubscribe method.
(*Export log*)	*Log* tab: To export the subscribe/unsubscribe log as a *.txt file
(*Search*)	*Log* tab: To search for log entries in the table
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the log)

Additional information

For further information on using this agent, see *Mailing list subscription and unsubscription* page 128 (for example, find out which subscribe/unsubscribe procedures can be used in Inxmail Professional, learn how to set up the *Subscriptions*agent for a mailing list and find out how to use the subscribe/unsubscribe log).

9.5 Users agent

Use

Note This agent is required only for specifying settings in the Inxmail Professional administration section. This is why specific Inxmail Professional administrators are the only users who can access this agent. These settings are preconfigured for ASP customers.

The *Users* agent can be used by Inxmail Professional administrators on the following tab:

- (*Global settings*) tab > *Administration* section

Overview

You can create users and assign rights to these users in this agent. These rights can either be assigned directly or via roles. You can also configure security settings for user logins to Inxmail Professional and set up logging for the agent.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new user*) or (*Create new role*)	*Users* tab: To create a new user *Roles* tab: To create a new role
(*Save*)	*Users*, *Roles* or *Security* tab: To save changes
(*Delete user*) or (*Delete role*)	*Users* tab: To delete a user selected in the table *Roles* tab: To delete a role selected in the table
(*Export log*)	*Log* tab: To export the log as a *.txt file
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the log)

Additional information

- Inxmail Professional administrators can find additional information on using this agent (for example, on setting up users, roles, security settings and the log) in *Users, roles, rights and security* page 557.
- In *Further tasks (license customers)* page 613, Inxmail Professional administrators can learn how to unblock user accounts and reset user passwords in this agent.

9.6 Content agent

Use

The *Content* agent can be used on the following tab:

- (*Global settings*) tab

Overview

This agent can establish a connection to an external file, HTTP or PDF data source and insert this into your mailing as text or as a file attachment. Transformations allow you to also convert XML data to text or HTML format and then insert it into your mailing.

Example You would like the latest stock market prices or current weather forecast to be integrated in your mailing at all times.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new data sources*) or (*Create new transformation*)	*Data sources* tab: To create a new data source *Transformations* tab: To create a new transformation
(*Save*)	*Data sources* tab: To save changes to a data source *Transformation* tab: To save changes to a transformation
(*Delete data source*) or (*Delete transformation*)	*Data sources* tab: To delete a data source selected in the table from Inxmail Professional *Transformations* tab: To delete a transformation selected in the table from Inxmail Professional
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

For further information on using this agent, see *Inserting external content (Content-Include)* page 377 (for example, learn how to paste external content into your mailings).

9.7 Files & web pages agent

Use

The *Files & web pages* agent can be used on the following tab:

- (*Global settings*) tab

Overview

You can use the following functions in this agent:

- (*Webspace* tab) If your company has its own webspace set up (optional service), you can upload images or file attachments to this webspace and manage these there.
- (*Web pages* tab) You can create individual web pages for your email marketing activities. You can use the JSP templates provided in Inxmail Professional for this. For example, you can use JSP templates to create subscribe and unsubscribe web pages for your mailing lists, offer a mail archive on your web page or send a survey to your recipients).
- (*Uploaded files* tab): You can upload images or file attachments that you need for your mailings to the Inxmail Professional Server and approve them for one or all mailing lists. You can also

upload these files to the Inxmail Professional Server when you create your mailing (for example, when you paste your images).

The following buttons are available on the toolbar of this agent:

Button	Use
(*Add new webspace*) or (*Create new web page*) or (*Upload new file*)	*Webspace* tab: To set up a new webspace in Inxmail Professional *Uploaded files* tab: To upload a new file to the Inxmail Professional Server *Web page* tab: To create a new web page
(*Create new directory*)	*Webspace* tab: To create a new directory
(*Edit*) or (*Change name of web page*)	*Webspace* tab: To rename a directory or file selected in the table *Web pages* tab: To rename a web page selected in the table
(*Delete*)	*Webspace* or *Uploaded files* tab: To delete directories or files selected in the table *Web page* tab: To delete web pages selected in the table
(*Navigate one level up*)	*Webspace* tab: To go to a parent directory
(*Copy*)	*Webspace* or *Web page* tab: To copy the entries selected in the table
(*Cut*)	*Webspace* tab: To cut the directories or files selected in the table
(*Paste*)	*Webspace* or *Web page* tab: To paste previously copied or cut entries into the table
(*Publish web page*)	*Web page* tab: To publish a web page selected in the table Note: As a result, the web page is assigned a URL.
(*View web browser preview*)	*Web page* tab: To display a published web page selected in the table in the web browser
(*Export*)	*Uploaded files* tab: To export the entries in the table
(*Upload file*)	*Webspace* tab: To upload a new file to the webspace
(*Download file*)	*Webspace* tab: To download a file stored in the webspace (as a copy)
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

- For further information on using the *Webspaces* tab of this agent, see *Using webspaces* page 460 (for example, learn how to use and manage a webspace).

- For further information on using the *Web pages* tab of this agent, see *JSP templates for web pages* page 416 (for example, learn how to create web pages for your email marketing activities using Inxmail Professional JSP templates).
- For further information on using the *Uploaded files* tab of this agent, see *Managing uploaded files* page 466 (for example, learn how to manage your uploaded files).

9.8 Email sequence agent

Use

The *Email sequence* agent can be used on the following tab:

Mailing list tabs (standard and dynamic mailing lists)

Overview

You can define email sequences in this agent.

Email sequences contain email sequence mailings that are sent automatically in particular intervals to one another (for example, to send a learning series comprising lessons one to ten). This agent allows you to create, test and send the email sequence mailings.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new mailing*)	*Emails* tab: To create a new email sequence mailing Note: Once created, the email sequence mailing opens on a new tab.
(*Rename mailing*)	*Emails* tab: To rename an email sequence mailing selected in the table
(*Save*)	*Settings* tab: To save changes
(*Delete mailing*)	*Emails* tab: To delete the email sequence mailings selected in the table
(*Undo change*)	*Settings* tab: To undo the changes made since the last save
(*Move mailing up*)	*Emails* tab: To move an email sequence mailing selected in the table one row up Note: The order of the email sequence mailings in the table determines when the email sequence mailings are sent within the email sequence (the email sequence mailing at the top of the table is sent first).
(*Move mailing down*)	*Emails* tab: To move an email sequence mailing selected in the table one row down
(*Copy*)	*Emails* tab: To copy the email sequence mailings selected in the table
(*Paste*)	*Emails* tab: To paste previously copied email sequence mailings into the table
(*Send test emails*)	*Emails* tab: To test an email sequence mailing selected in the table by

Button	Use
	sending test emails
Start sending now	*Settings* tab: To start sending an email sequence straight away
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

For further information on using this agent, see *Email sequences* page 390 (for example, learn how to create and send an email sequence).

9.9 Email connector agent

Use

Note This agent should only be used (that is, set up) by Inxmail Professional administrators.

The *Email connector* agent can be used on the following tab:

Mailing list tabs (standard and dynamic mailing lists)

Overview

If you use the email connector in Inxmail Professional, you can create emails in a CMS system or an email client. When you then send these emails to a specified Inxmail Professional email address, the email connector automatically forwards your emails as mailings (to the corresponding recipients in the mailing list).

You can configure the email connector in this agent and see from the log which emails the email connector has or has not processed.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Save settings*)	All tabs: To save changes
(*Delete log entry*)	*Log* tab: To delete a log entry selected in the table
(*Export log*)	*Log* tab: To export the log
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the log)

Additional information

- For information on how to send emails using the email connector, see *Using the email connector* page 509.
- Inxmail Professional administrators can find additional information on using this agent (for example, on setting up the email connector and using the log) in *Email connector* page 596.

9.10 Properties agent

Use

The *Properties* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab
- (*Global settings*) tab > *Administration* section (may be used by Inxmail Professional administrators only)

Overview

In this agent, you can define formatting properties, dispatch properties and properties for configuring the editor and the system:

- You can define the properties of the current mailing list on the tab of the mailing list and overwrite some globally defined properties for the mailing list.
- On the (*Global settings*) tab, you can define properties for all mailing lists.
- The (*Global settings*) tab > *Administration* section allows you to define the system properties.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Save*)	To save changes
(*Copy*)	Only in the *Properties* agent of a mailing list: To copy the values from the rows selected in the table (and then paste them into the properties of a different mailing list, if required)
(*Copy all*)	Only in the *Properties* agent of a mailing list: To copy all the values configured in the properties of the mailing list
(*Paste*)	Only in the *Properties* agent of a mailing list: To paste previously copied values into the properties in a different mailing list
(*Export*)	To export the property settings as a *.txt file
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

- For further information on using this agent on the tab of a mailing list, see *Setting up the properties of mailing lists* page 82 (for example, find out how to configure properties).
- Inxmail Professional administrators can find additional information on using this agent on the (*Global settings*) tab (for example, on how to configure properties) in *Global access rights (Administration)* page 586.

9.11 Recipients/All recipients agent

Use

The *Recipients* or *All recipients* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab

Overview

You can manage your recipients in this agent. Recipient data such as the email address and name or place of residence of a recipient can be transferred to Inxmail Professional as follows:

- Recipients enter the recipient data themselves (for example, when subscribing to a mailing list via your web page).
- You can import recipient data from an external data source into the *Recipients* or *All recipients* agent.
- You can enter recipient data manually in the *Recipients* or *All recipients* agent.

Individual recipients are identified via their email addresses. Duplicate recipient data is not possible because email addresses are unique.

All recipient data is saved in the global recipient table (*All recipients* agent). The recipients in a specific mailing list are also held in the recipient table of the respective mailing list (*Recipients* agent).

The appearance of this agent varies depending on whether the mailing list is a standard mailing list or a dynamic mailing list.

Dynamic mailing lists always contain all the recipients in the system. However, you can use conditions to generate a specific subset of recipients (in a field in the recipient table).

The recipients in this agent are separated as follows for a standard mailing list:

- All recipients who are currently subscribed to the mailing list can be found on the *Subscribed* tab. Mailings from this mailing list may be sent to these recipients.
- All recipients who have unsubscribed from the mailing list in the meantime can be found on the *Unsubscribed* tab. Mailings from this mailing list may no longer be sent to these recipients.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new recipient*)	To create a new recipient Note: If you create a recipient on the tab of a mailing list, the recipient is also automatically entered into the recipient table on the (*Global settings*) tab.
(*Unsubscribe recipient*)	To unsubscribe the recipients selected in the recipient table of a (standard) mailing list on the *Subscribed* tab
(*Delete recipient*)	To delete a recipient selected in the table Note: If you attempt to delete a recipient on the tab of a mailing list, a message box appears asking you whether you want to delete the recipient in this mailing list only or in the entire system. Globally

Button	Use
	created recipients are irreversibly deleted from the system list.
(*Edit recipient*)	The drop-down list that opens when you click this button allows you to edit the recipients selected in the table (for example, you can subscribe recipients to or unsubscribe recipients from a mailing list, add recipient data to new test profiles to be created and select recipients as available or unavailable).
(*Configure columns*)	The drop-down list that opens when you click this button allows you to edit columns in the current recipient table (for example, you can create new columns, show and hide columns or change the column type).
(*Copy*)	To copy the recipients selected in the table
(*Paste*)	To paste the previously copied recipients
(*Import recipients*)	To import recipients from an external data source, such as a Microsoft Excel file or database. Note: If you import recipients on the tab of a mailing list, the recipients are also automatically entered into the recipient table on the (*Global settings*) tab. You cannot import recipients for a dynamic mailing list.
(*Export recipients*)	To export data for all recipients (or only for those selected in the table) as a Microsoft Excel, text or *.xml file
(*Search*)	To search for recipient data in the selected column
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the recipient table)

Additional information

For further information on using this agent, see *Recipients* page 90 (for example, find out which information is contained in a recipient table and how to manage your recipient data).

9.12 Import Automation agent

Use

The *Import Automation* agent can be used on the following tab:

- (*Global settings*) tab

Overview

The Import Automation agent allows you to import recipient data to Inxmail Professional automatically at regular intervals.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new import*)	You can use this button to create new imports.
(*Rename import*)	You can use this button to rename imports.
(*Delete import*)	You can use this button to delete imports.
(*Copy*)	You can use this button to copy imports.
(*Paste*)	You can use this button to paste imports.
(*Activate import*)	You can use this button to activate imports (*Activate import* page 489).
(*Deactivate import*)	You can use this button to deactivate imports (*Deactivate import* page 490).
(*View pending imports*)	You can use this button to view pending imports (*View pending imports* page 497).
(*View import details*)	You can use this button to view import details. **Double-click** You can also display these import details by double-clicking the required import process.
(*Export history*)	You can use this button to export import processes (*Export import processes* page 504).

Related Topics

» *Import Automation* page 468

9.13 Mailings agent

Use

The *Mailings* agent can be used on the following tab:

- Mailing list tabs (standard and dynamic mailing lists)

Overview

You can manage the mailings and trigger mailings belonging to a particular mailing list in this agent.

Note Newsletters are referred to as 'mailings' in Inxmail Professional.
Trigger mailings are 'special' mailings that are not sent via a regular mailing dispatch.

You can also:

- Create new mailings, fill your new mailings with content, check them, have them approved (if required) and send them to specific recipients or target groups.

- Create new split-test mailings, fill the new split-test mailings with content, check them, have them approved (if required) and perform a spit-test based on these mailings.
- Create new trigger mailings, fill them with mailing content, check and then approve and/or activate them.

After your mailings have been dispatched, you can also analyse how successful your mailings, split-test mailings and trigger mailings were.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new mailing*)	All tabs: To create a new (HTML, text or multipart) mailing or trigger mailing and then edit it via the workflow steps
(*Rename mailing*)	All tabs: To rename the mailing or trigger mailing selected in the table
(*Delete mailing*)	To delete the mailings or trigger mailings selected in the table
(*Copy*)	All tabs: To copy the mailings or trigger mailings selected in the table
(*Paste*)	All tabs: To paste the previously copied mailings or trigger mailings into the table
(*Send test emails*)	All tabs: To test the mailing or trigger mailing selected in the table by dispatching test emails
(*Start sending now*)	*Mailings* tab: To start sending a mailing selected in the table straight away
(*Schedule sending*)	*Mailings* tab: To schedule a mailing selected in the table for dispatch
(*Stop sending)*	*Mailings* tab: To stop sending a mailing selected in the table that is currently being sent
(Display sending information)	*Mailings* tab: To display sending information for a sent mailing selected in the table (for example, the send date, sending time required, number of recipients to whom the mailing was successfully sent or for whom the mailing was unsuccessful)
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

For further information on using this agent, please see the following sections:

- Further information on managing your mailings (in a table) and creating new mailings can be found in *Mailings* page 175.
- Further information on creating mailing content can be found in *Mailings (editing)* page 189 and *Mailings (advanced editing)* page 364.
- Further information on testing your mailing content can be found in *Mailings (check)* page 228.
- Further information on approving mailings, assigning recipients or target groups, sending mailings and analysing the success of your mailings can be found in *Mailings (approval)* page

253, *Mailings (dispatch)* page 266, *Mailings (recipient)* page 264 *Mailing (dispatch analysis)* page 271.

- Further information on adding action mailings to action sequences can be found in *Actions* page 405.

9.14 Mail server agent

Use

Note This agent is required only for specifying settings in the Inxmail Professional administration section. This is why specific Inxmail Professional administrators are the only users who can access this agent. These settings are preconfigured for ASP customers.

The *Mail server* agent can be used by Inxmail Professional administrators on the following tab:

- (*Global settings*) tab > *Administration* section

Overview

To be able to receive and send emails in Inxmail Professional, Inxmail Professional administrators must set up and activate specific mail server accounts in this agent.

The following buttons are available on the toolbar of this agent:

Buttons	Use
(*Add a new mail server account*)	*Email receipt* tab: To set up a new inbox mail server account *Sending emails* tab: To set up a new outbox mail server account
(*Save*)	All tabs: To save changes to a mail server account Note: Please note that the connection to the mail server must be deactivated before you can make changes to a mail server account.
(*Delete mail server account)*	All tabs: To delete a mail server account selected in the table
(*Copy*)	*Sending emails* tab: To copy a mail server account selected in the table
(*Paste*)	*Sending emails* tab: To paste a previously copied mail server account into the table
(*Activate connection to the mail server account*)	All tabs: To activate a connection to the mail server for a mail server account selected in the table
(*Deactivate connection to the mail server account*)	All tabs: To deactivate the connection to the mail server for a mail server account selected in the table
(*Poll emails*)	*Email receipt* tab: To immediately poll for emails from the mail server for a mail server account selected in the table

Buttons	Use
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

Inxmail Professional administrators can find additional information on using this agent (for example, on creating, setting up and activating mail server accounts for email receipt and for sending emails) in *Mail server* page 580.

9.15 Plug-ins agent

Use

Note This agent should only be used (that is, set up) by Inxmail Professional administrators.

The *Plug-ins* agent can be used on the following tab:

- (*Global settings*) tab

Overview

To enhance the functionality of Inxmail Professional, you can optionally integrate plug-ins into Inxmail Professional.

You can install, configure and manage all your plug-ins in this agent.

Note After installing and configuring a plug-in, you can optionally add the plug-in as an independent agent to a mailing list or to the (*Global settings*) tab. A plug-in agent automatically adopts the name of the respective plug-in (for example, *Twitter plug-in* agent).
The plug-in itself and your rights determine where you can use a plug-in (that is, in which mailing lists or on which tabs).

The following buttons are available on the toolbar of this agent:

Button	Use
(*Install plug-in*)	To install a new plug-in
(*Save*)	To save changes to the settings of a plug-in
(*Uninstall plug-in*)	To uninstall a plug-in selected in the table
(*Specify access*)	To configure proxy server settings for a plug-in selected in the table (for the connection to the plug-in) Note: This is not necessary for all plug-ins.
(*Configure plug-in*)	To configure a plug-in selected in the table Note: This is not necessary for all plug-ins.
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

- For further information on using plug-ins, see *Using plug-ins* page 510.

Inxmail Professional administrators can find additional information on using this agent (for example, on installing, configuring and uninstalling plug-ins) in *Plug-ins* page 606.

9.16 Inbox & bounces agent

Use

The *Inbox & bounces* agent can be used on the following tab:

- (*Global settings*) tab

Overview

In this agent, you can view all the bounces (*Bounces* tab) and returns (*Inbox* tab) that were received after your mailing was sent.

'Bounces' are all emails that could not be delivered (for example, as a result of invalid email addresses or full email inboxes). Returns include automatic holiday messages (autoresponders), replies or complaints.

Inxmail Professional automatically assigns all bounces and returns to specific categories (for example, 'spam', 'reply', 'soft bounce' or 'hard bounce').

In this agent, you can also specify, whether bounces and returns should be automatically deleted or forwarded to a specific email address.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Save*)	*Category* or *Options* tab: To save changes
(*Delete*)	*Inbox* or *Bounces* tab: To delete an entry (email) selected in the table
(*Show/hide rule editor*)	*Category* tab: To show or hide the rule editor Note: The rule editor should only be edited by Inxmail Professional administrators. The rule editor allows administrators to adjust the preconfigured settings for assigning bounces and returns to categories.
(*Export*)	*Inbox* or *Bounces* tab: To export all entries in the table (or only those that have been selected) as a *.txt file
(*Search*)	*Inbox* or *Bounces* tab: To search for entries in a selected table column
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

- For further information on using this agent, see *Bounces and returns* page 338 (for example, learn how to display and manage your bounces and returns).

- Inxmail Professional administrators can find additional information on adjusting the preconfigured settings for assigning bounces and returns to categories (for example, to the 'spam' category) in *Bounces and returns* page 338.

9.17 Black list agent

Use

Note This agent should only be used (that is, set up) by Inxmail Professional administrators.

The *Black list* agent can be used on the following tab:

- (*Global settings*) tab

Overview

This agent allows you to manage all the email addresses (or email address ranges) of recipients who are on your black list.

Recipients who are on your black list do not receive any of your mailings and are also unable to subscribe to any of your mailing lists.

Important Please bear in mind that when you add a recipient to your black list all the data of the recipient will be automatically (and irreversibly) deleted from your system. If you add an entire email address range (for example, *@company.co.uk), all recipients who have a corresponding email address will be deleted from your system.

The following buttons are available on the toolbar of this agent:

Buttons	Use
(*Create new entry*)	*Entries* tab: To add a new email address or an entire email address range to the black list
(*Save*)	*Entries* tab: To save changes to an entry
(*Delete entry*)	*Entries* or *Log* tab: To delete the entries selected in the table
(*Paste*)	*Entries* tab: To add recipients previously copied in a recipient table to the black list
(*Export*)	*Entries* or *Log* tab: To export all entries in the table (or only those previously selected) as a *.txt file
(*Search*)	*Entries* or *Log* tab: To search for entries in a selected table column
(*Refresh*)	All tabs: To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

Inxmail Professional administrators can find additional information on using this agent (for example, on adding recipients to the black list) in *Adding recipients to the black list* page 618.

9.18 Split-tests agent

Use

The *Split-tests* agent can be used on the following tab:

- Mailing list tabs (standard and dynamic mailing lists)

Overview

This agent displays an overview of all the split-test objects that have been created. You can create new split-test objects, edit them and send them immediately, if required. After dispatch, you can also analyse important key performance indicators for the individual mailing versions.

The following buttons are available on the toolbar of this agent:

Button	Description
(*Create new split-test*)	To create a new split-test object.
(*Rename split-test*)	To rename the selected split-test object.
(*Delete split-test*)	To irreversibly delete a selected split-test object. **Note** If you delete a split-test object, all split-test dispatches are aborted and can no longer be continued. The associated split-test mailings are retained on the *Split-test mailings* tab of the *Mailings* agent.
(*Copy*)	To make a copy of one or several split-test objects. A pasted copy of a split-test object is stored with the 'Draft' status.
(*Paste*)	To paste a copy of one or several split-test objects into a list of split-test objects.
(*Stop sending*)	To stop sending a split-test.
(*Open associated split-test mailings*)	Displays the associated split-test mailings on the *Split-test mailings* tab.
(*Display selected reports*)	To display important key figures for the split-test analysis after the split-test has been sent.
(*Refresh*)	To refresh the split-test objects table.

Related Topics

» *General* page 273

9.19 Synchronisation agent

Use

Note This agent is required only for specifying settings in the Inxmail Professional administration section. This is why specific Inxmail Professional administrators are the only users who can access this agent. These settings are preconfigured for ASP customers.

The *Synchronisation* agent can be used by Inxmail Professional administrators on the following tab:

- (*Global settings*) tab > *Administration* section

Overview

If you use the Inxmail Professional DBSync database synchronisation service (optionally integrated), you can set up and manage your DBSync sources (SQL databases) in this agent.

DBSync allows you to synchronise recipient data from several SQL databases of your choice with Inxmail Professional (unidirectional). This way, every new customer created in your customer database can be immediately included in your email marketing activities without the need for any programming.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new sync source*)	*Sync sources* tab: To set up a new DBSync source
(*Save*)	*Sync sources* tab: To save changes to DBSync source settings
(*Delete sync source*)	*Sync sources* tab: To delete the DBSync sources selected in the table
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the log)

Additional information

Inxmail Professional administrators can find additional information on using this agent (for example, on setting up DBSync sources) in *Inxmail Professional DBSync* page 604.

9.20 Test profiles agent

Use

Important Please note that this agent differs from all other agents in the following respect:
Once you add the *Test profiles* agent on the tab of a mailing list, you can **no** longer use all the globally created test profiles for this mailing list (that is, test profiles created on the (*Global settings*) tab) . You can only use the test profiles that have been specially created for the mailing list.
If you remove the *Test profiles* agent from the mailing list again, all test profiles for the mailing list are automatically **deleted** and you can use the globally created test profiles again.

The *Test profiles* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab

Overview

You define test profiles in this agent.

Test profiles are fictitious recipients that are created purely for test purposes (for example, to test how your mailing will look for various recipients prior to dispatch). The advantage of using test profiles is that you can tailor them to suit your specific test requirements.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new test profile*)	To set up a new test profile
(*Delete test profile*)	To delete the test profiles selected in the table
(*Move test profile right to the top*)	To move a test profile selected in the table right to the top
(*Move test profile up*)	To move a test profile selected in the table one row up
(*Move test profile down*)	To move a test profile selected in the table one row down
(*Move test profile right to the bottom*)	To move a test profile selected in the table right to the bottom
(*Copy*)	To copy the test profiles selected in the table
(*Paste*)	To paste previously copied test profiles
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent or to immediately refresh the log)

Additional information

For further information on using this agent, see *Creating test profiles* page 174 (for example, learn how to create new test profiles).

9.21 Templates agent

Use

The *Templates* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab

Overview

Templates help you to create mailings or JSP web pages quickly and consistently.

In this agent, you can:

- Import template libraries into Inxmail Professional (for example, newsletter templates that have been specially created for your company so that you can send your mailings complete with your company-specific corporate design).
- As a template developer, set up external data sources for previously imported newsletter templates so that editors can import content from these data sources with just a few clicks.

- Create your own user templates (for text, HTML or multipart mailings).

Templates or data sources that were created on the (*Global settings*) tab can be used in all mailing lists. Templates or data sources that were created on the tab of a mailing list may only be used in the respective mailing list.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Import template library*) or (*Create new data source*) or (*Create new template*)	*Template library* tab: To import newsletter templates or JSP template libraries *Data sources* tab: To create new data sources as a template developer and link these sources with newsletter templates *User templates* tab: To create your own user templates
(*Rename data source*) or (*Rename user template*)	*Data sources* tab: To rename a data source selected in the table *User templates* tab: To rename a user template selected in the table
(*Delete template library*) or (*Delete data source*) or (*Delete user template*)	All tabs: To delete the templates or data sources selected in the (current) table
(*Copy*)	*Data sources* tab: To copy the data sources selected in the table *User templates* tab: To copy the user template selected in the table
(*Paste*)	*Data sources* tab: To paste the previously copied data sources in the table *User templates* tab: To paste the previously copied user templates in the table
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

For further information on using this agent, see *Templates* page 395 (for example, learn how to import template libraries, set up data sources or create new user templates).

9.22 Target groups agent

Use

Important Please note that this agent differs from other agents in the following respect:
If you remove the *Target groups* agent from the tab of a mailing list, all the target groups created for this mailing list will be automatically **deleted**.

The *Target groups* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab

Overview

You can define target groups in this agent.

Target groups are subsets of a recipient group. The recipients in a target group are limited according to criteria you have specified (for example, according to place of residence, gender or areas of interest).

You can decide later whether to send your mailing to all your recipients, to one target group or to several target groups.

Target groups that you create on the (*Global settings*) tab can be used in all mailing lists. Target groups that you create on the tab of a mailing list may only be used in the respective mailing list.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Create new target group*)	To create a new target group
(*Save*)	To save changes to a target group
(*Delete target group*)	To delete the target groups selected in the table
(*Copy*)	To copy the target groups selected in the table
(*Paste*)	To paste the previously copied target groups in the table
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

For further information on using this agent, see *Creating target groups* page 160 (for example, learn how to create new target groups).

9.23 Access rights agent

Use

The *Access rights* agent can be used on the following tabs:

- Mailing list tabs (standard and dynamic mailing lists)
- (*Global settings*) tab
- (*Global settings*) tab > *Administration* section (may and should be used by Inxmail Professional administrators only)

Overview

In this agent, you can specify which users and roles are able to access the current tab or section.

The following buttons are available on the toolbar of this agent:

Button	Use
(*Save*)	To save changes to access rights

Button	Use
(*Refresh*)	To refresh the displayed information (for example, if multiple users are working in this agent)

Additional information

- For further information on using this agent on the tab of a mailing list, see *Setting up access rights for mailing lists* page 88 (for example, learn how to set up access rights for the tab of the mailing list for further users).

Inxmail Professional administrators can find additional information on using this agent on the (*Global settings*) tab (for example, on setting up access rights for further users for the (*Global settings*) tab and for the *Administration* section there, if required) in *Global access rights (Administration)* page 586.

10 Mailing lists

In this chapter, you will learn:

- You will receive an overview on the topic of 'Mailing lists' and learn to recognise the difference between dynamic and standard mailing lists.
- You will learn how to display, open and manage existing mailing lists in the Inxmail Professional list overview.
- You will learn how to create and then properly set up new mailing lists (for example, adding additional agents, setting up properties or specifying access rights).

10.1 Overview: Mailing lists

Mailing lists play a central role in Inxmail Professional. They provide the basis for creating and sending mailings.

You may create multiple mailings or a single email sequence in a mailing list. Avoid creating a new mailing list for each mailing.

Authorised users are able to make use of the following functions in each mailing list, for example:

- Prepare mailing creation (specify and constrain recipients, create mailing templates, create modules for reusable mailing content)
- Create, check, approve and send mailings
- Generate analyses

For functions and settings related to mailing lists, you use the (*Global settings*) tab.

10.2 Difference between standard and dynamic mailing lists

Inxmail Professional offers two different types of mailing lists. They differ as follows:

- **Standard mailing lists**

  Standard mailing lists are used to implement normal mailings (newsletters and mailing campaigns). Standard mailing lists have their own list of recipients that may be expanded or modified by, for example, importing recipient data (*Managing recipients* page 95) or by having recipients subscribe or unsubscribe themselves using your website (*Mailing list subscription and unsubscription* page 128).
- **Dynamic mailing lists**

  Recipients cannot explicitly subscribe to or unsubscribe from dynamic mailing lists; dynamic mailings initially contain all recipients from your Inxmail Professional system. You can then filter the recipients individually for each dynamic mailing list (for example, by creating conditions (*Information in the recipient table* page 92) or target groups (*Creating target groups* page 160)). For this reason, the set of mailing recipients may vary greatly for dynamic mailing lists.

Because the type of a mailing list must already be defined while it is being created (*Creating standard mailing lists* page 77), you must consider early on which mailings you want to create using the mailing list and to which recipients you want to send these mailings. The work process in both types

of mailing list is, however, identical. (You can, for example, create mailings and email sequences in both types of mailing list.)

10.3 Displaying and managing mailing lists

10.3.1 Displaying and filtering the list overview

Step-by-step

1. To open the list overview, select the (*Cockpit*) tab, *List overview* entry.

   The list overview is displayed and shows all mailing lists to which you have access.

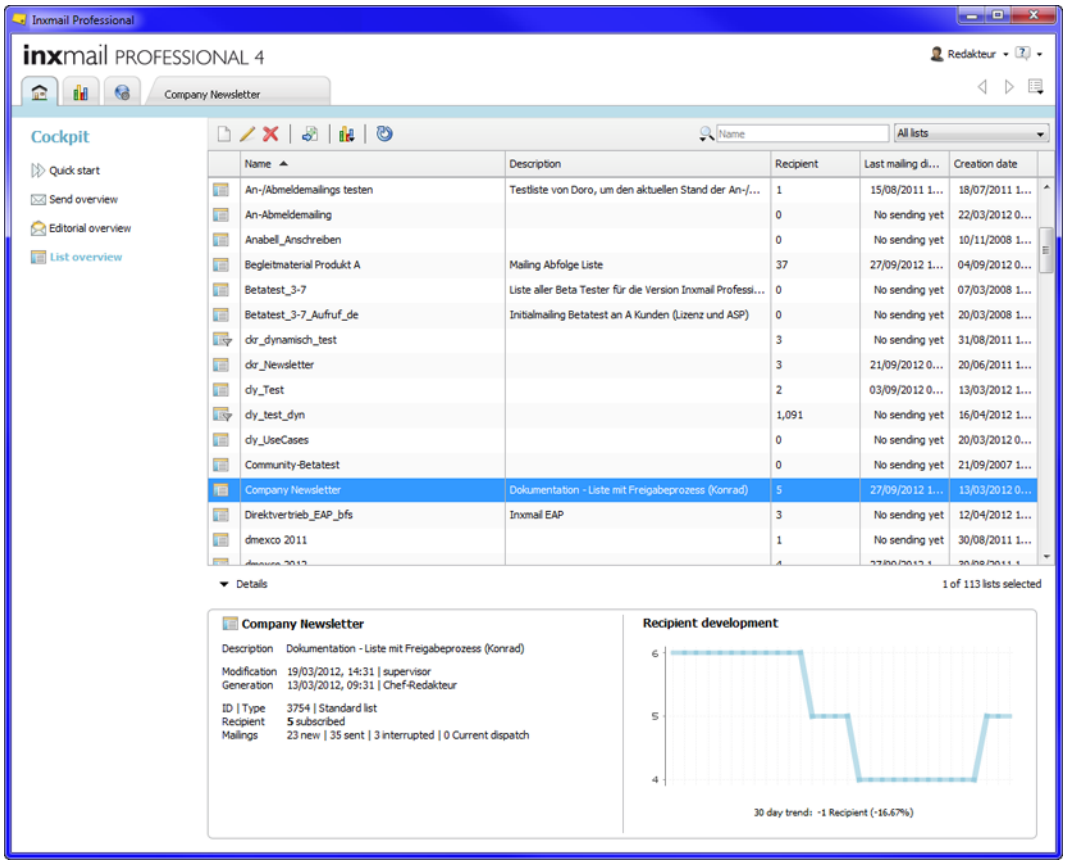


Figure 33: Cockpit - List overview

The following information is available for each mailing list in the table:

- In the first column, the symbols identify either a standard mailing list (symbol) or a dynamic mailing list (symbol).
- The *Name* column contains the name specified when the mailing list was created.
- The *Description* column contains a short description of the mailing list, specified when the mailing list was created.
- The *Recipient* column contains the number of recipients assigned to the mailing list.
- The *Last mailing dispatch* column contains the date on which a mailing was last sent from this mailing list.

- The *Creation date* column contains the date on which the mailing list was created.

The number of mailing lists currently displayed in the table appears on the right below the table.

If you select a mailing list in the table, further information on the mailing list is displayed in the Details section below the table.

Double-click a mailing list in the list overview to open the mailing list. The mailing list will appear on its own tab.

2. You can filter the list overview using the filter input field as follows:

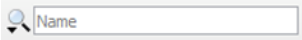


Figure 34: Filter input field

   a. Click the button and use the drop-down list to specify whether you want to filter the mailing lists by the *Name* table column and/or the *Description* table column.
   b. In the input field, enter the character string for filtering the name or description of the mailing lists.
   c. To apply the filter settings, click .

      To delete the filter settings, click .

3. Additionally, you can filter the list overview using the filter drop-down list.

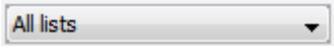


Figure 35: Filter drop-down list

If you set filters both in the filter input field and in the filter drop-down list, only mailing lists that fulfil the criteria of both settings are displayed.

Select one of the following entries in the drop-down list:

- *All lists*:
- *Standard*: All standard mailing lists are displayed.
- *Dynamic*: All dynamic mailing lists are displayed.
- *Mailings sent last 7 days*: All mailing lists that contain (at least) one mailing currently scheduled for dispatch or sent within the last seven days are displayed.
- *Mailings sent last 3 months*: All mailing lists that contain (at least) one mailing currently scheduled for dispatch or sent within the last three months are displayed.
- *Mailing change last 7 days*: All mailing lists that contain (at least) one mailing changed within the last seven days are displayed.
- *Mailing change last 3 months*: All mailing lists that contain (at least) one mailing changed within the last three months are displayed.
- *List generated last 7 days*: Only mailing lists that were generated within the last seven days are displayed.
- *List generated last 3 months*: Only mailing lists that were generated within the last three months are displayed.

✓ The table will only show the lists that correspond to your filter settings.

Related Topics

» *Setting up access rights for mailing lists* page 88

10.3.2 Searching for mailing lists

Step-by-step

1. On the (*Cockpit*) tab, *List overview* entry, click the (*Name*) button and then select the *Name* entry.
2. Enter the search term in the field and confirm by pressing Enter. The table now contains only mailing lists whose name contains the search term.

   If Inxmail Professional cannot find any mailing lists with your search term in the name, the table will appear empty.

✓ You have successfully run the search function.

To make the table display all mailing lists again after a successful search, delete the search term from the input field using the (*Remove filter*) button.

10.3.3 Renaming or deleting mailing lists

Important Please note that the renaming or deletion of mailing lists may affect the entire system. Deleting a mailing list will (irrevocably) delete all data and tasks contained within it.

Step-by-step

1. On the (*Cockpit*) tab, *List overview* entry, select the mailing list in the table.
2. Proceed as follows to rename the mailing list:
   a. Click the (*Change name and description*) button.

      A dialog box is displayed.

   b. Enter the new name for the mailing list in the dialog box and, if necessary, change the description.
   c. Confirm the dialog box by clicking *OK*.
      A message box appears.
   d. Confirm the message by clicking *OK*.
3. Proceed as follows to delete the mailing list:
   a. Click the (*Delete list*) button.

      A message box appears.

   b. Confirm the message by clicking *OK*.

✓ The mailing list will be renamed or deleted.

10.4 Creating and setting up mailing lists

10.4.1 Prerequisites

You must have the following rights in order to create a new mailing list:

- Generate lists (page 567)
- Edit editorial properties (page 571)

10.4.2 Creating standard mailing lists

Step-by-step

1. To open the *Create new list* dialog box, click the *New list* button in the (*Cockpit*) main tab, *Quick start* entry.

   Alternatively, you can open the dialog box as follows: Click the *Create new list* button in the (*Cockpit*) main tab, *List overview* entry.

   A dialog box appears.

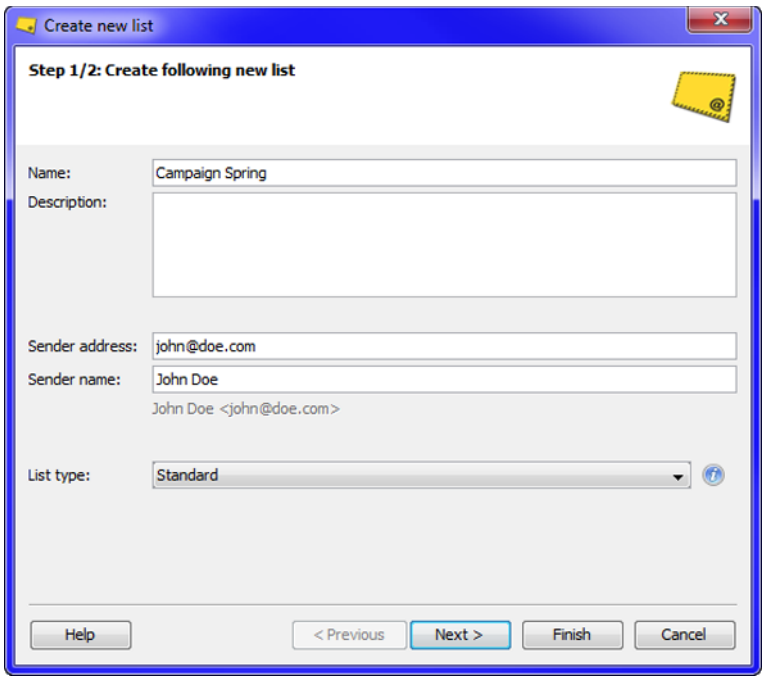


Figure 36: "Create new standard list – Step 1" dialog box

2. Enter the following in the dialog box:
   - A mailing list name
   - A description of the mailing list, if necessary
   - A sender address
     You can enter the email address directly into the *Sender address* field, or you can click the button and enter the email address and name of the sender in the following dialog box.
   - A sender name
   - The *Standard* list type (*Overview: Mailing lists* page 73)
3. Click *Next*.

A dialog box appears.

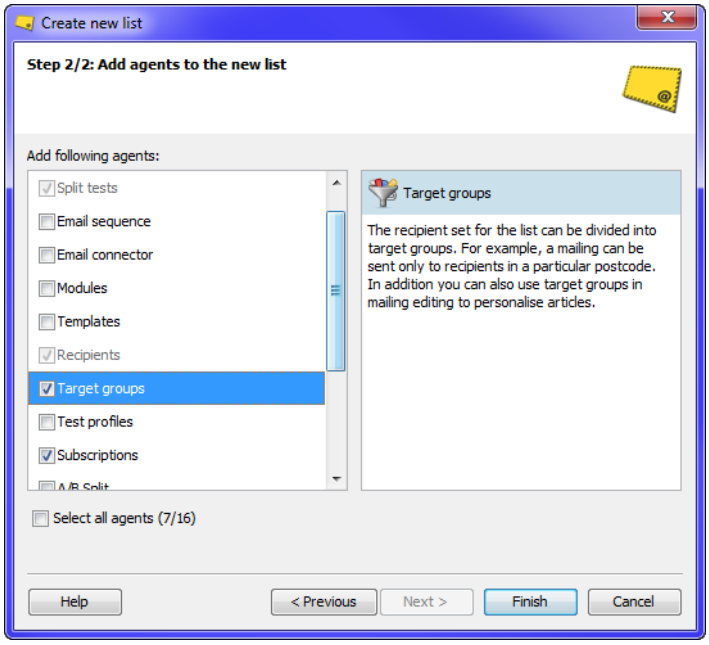


Figure 37: "Create new list – Step 2" dialog box

4. In the dialog box, enable the agents you wish to add to the mailing list.

   Description of the agents

   A description of the individual agents can be found on the right-hand side of the dialog box. To see the description, click the name of the agent on the left-hand side of the dialog box.

   When a mailing list is created, the *Mailings*, *Split-Tests*, *Recipients* and *Properties* agents are always present by default. For this reason, these agents cannot be activated or deactivated in the dialog box.

   You can subsequently add further agents to the mailing list (*Adding/deleting additional agents to mailing lists* page 80).

   Example For standard mailings, you additionally require the *Subscriptions* agent.

5. Click *Finish*.

✓ The newly created mailing list is opened in a tab. It is also added to the list overview.

10.4.3 Creating a dynamic mailing list

Step-by-step

1. To open the *Create new list* dialog box, click the *New list* button in the (*Cockpit*) main tab, *Quick start* entry.

   Alternatively, you can open the dialog box as follows: Click the *Create new list* button in the (*Cockpit*) main tab, *List overview* entry.

   A dialog box appears.

2. Enter the following in the dialog box:

- A mailing list name
- A description of the mailing list, if necessary
- A sender address

  You can enter the email address directly into the *Sender address* field, or you can click the button and enter the email address and name of the sender in the following dialog box.
- A sender name
- The *Dynamic* list type (*Overview: Mailing lists* page 73)

  You can now select a target group as a filter in the dialog box.

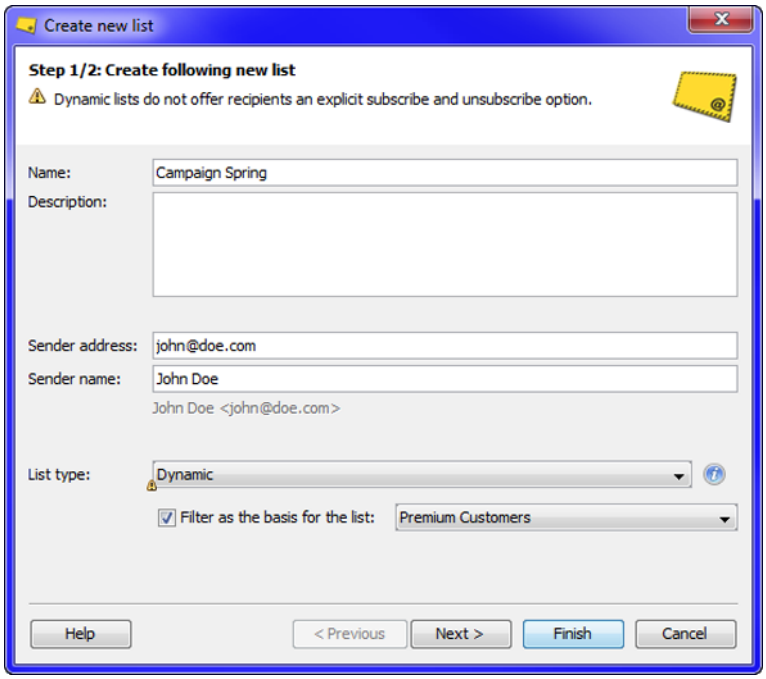


Figure 38: "Create new dynamic list – Step 1" dialog box

3. Click *Next*.

   The *Create new list – Step 2* dialog box is displayed.
4. In the dialog box, enable the agents you wish to add to the mailing list.

   Description of the agents

   A description of the individual agents can be found on the right-hand side of the dialog box. To see the description, click the name of the agent on the left-hand side of the dialog box.

   When a mailing list is created, the *Mailings*, *Split-Tests*, *Recipients* and *Properties* agents are always present by default. For this reason, these agents cannot be activated or deactivated in the dialog box.

   You can subsequently add further agents to the mailing list (*Adding/deleting additional agents to mailing lists* page 80).
5. Click *Finish*.

✓ The newly created mailing list is opened in a tab. It is also added to the list overview.

10.4.4 Adding/deleting additional agents to mailing lists

10.4.4.1 Overview

When creating a mailing list, you are able to specify which agents are added to the mailing list. You can also add further agents to, or delete added agents from, already existing mailing lists.

Important Note that adding or deleting agents is visible to all users with access to the mailing list.

Note that deleting agents may cause important settings and functions to be lost, for example:

- If you delete the *Subscriptions* agent on a mailing list tab, no subscription and unsubscription functions will work anymore for this mailing list. It is therefore advisable **never** to delete this agent.
- If you delete the *Target groups* agent on a mailing list tab, all target groups created for this mailing list will be automatically deleted.
- If you delete the *Test profiles* agent on a mailing list tab, all test profiles created for this mailing list will be deleted, and the globally available test profiles will be offered instead when testing the mailing.

Related Topics

» *Mailing list subscription and unsubscription* page 128

» *Creating target groups* page 160

» *Creating test profiles* page 174

10.4.4.2 Adding agents

To add agents to a mailing list at a later point, open the *Add agents* dialog box as follows:

Step-by-step

1. Double-click the mailing list in the list overview to open the mailing list.
   The mailing list will appear in a new tab.
2. Click the (*Add agents*) button below the displayed agents on the mailing list tab.

This button will be greyed out if it is not possible to add more agents to the mailing list.

The *Add agents* dialog box is displayed.

It contains only the agents that may be added to the selected mailing list.

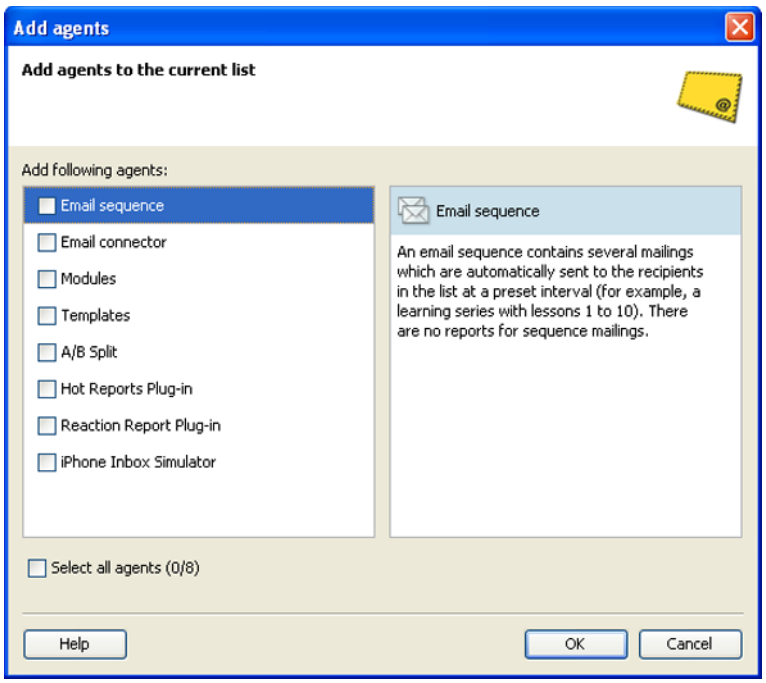


Figure 39: "Add agents" dialog box

3. In the dialog box, activate the agents you want to additionally add and click *OK*.

✓ The agents will appear on the tab of the mailing list and may be used immediately.

Related Topics

» *Displaying and filtering the list overview* page 74

10.4.4.3 Deleting agents

Important Only delete an agent if you are certain that no important settings and functions will be lost.

Standard agents

The *Mailings*, *Recipients* and *Properties* agents are standard agents. They cannot be deleted.

To delete an agent from a mailing list at a later point in time, proceed as follows:

Step-by-step

1. Double-click the mailing list in the list overview to open the mailing list.
   The mailing list is displayed in a new tab.
2. Select the agent to be deleted in the mailing list tab and click the (*Delete agent*) button.

This button will appear greyed out if the selected agent cannot be deleted from the mailing list.

A message box appears.

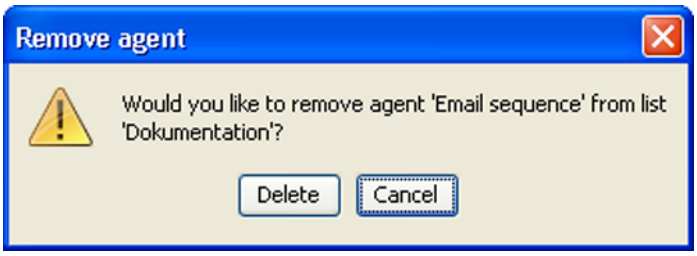


Figure 40: "Delete agent" message box

3. Confirm the message box with *OK* to delete the agent.

✓ The agent will be deleted. For certain agents (for example, the *Target groups* agent or the *Test profiles* agent), the settings made for the mailing list in this agent will also be deleted.

You can add the agent again at any time.

Related Topics

» *Displaying and filtering the list overview* page 74

10.4.5 Setting up the properties of mailing lists

10.4.5.1 Overview

You can specify the properties of mailing lists in the following locations:

- You can specify properties that affect all mailing lists in the (*Global settings*) tab > *Properties* agent.
- You can overwrite globally specified properties (these may be recognised by the use of italics) for the current mailing list on the mailing list tab > *Properties* agent. You can also specify additional properties that only affect the current mailing list.

Only certain users can view the *Properties* agent or the *Advanced properties* and *Administrative properties* areas contained within it (the user must be assigned the corresponding right).

The property value will appear greyed out if you have not been assigned the appropriate rights to modify a particular property.

You can copy a single selected property, multiple selected properties or all properties from a mailing list and paste them into another mailing list. To do so, use the (*Copy*), (*Copy all*) and (*Paste*) buttons.

10.4.5.2 Editorial properties

Editorial properties are properties that (in addition to the email sender address) above all affect the formatting of your mailings. You can specify the following editorial properties:

Property	Description
Regional settings for formatting	This drop-down list allows you to specify the region-specific format for the display of numbers and date values in your mailings. If you do not make an entry, the regional settings from your Inxmail Professional Client will be automatically applied. **Example** Country: Number (1020,30) / Date value (15.02.2010) • Germany: 1.020,30 / 15.02.2010 • Switzerland: 1'020.30 / 15.02.2010 • U.S.: 1,020.30 / Feb 15, 2010 • England: 1,020.30 / 15-Feb-2010 • France: 1 020,30 / 15 févr. 2010
Number of decimal places	Specifies how many decimal places should be used to display decimal numbers (for example, read from the recipient table) in your mailings.
Format numbers with 1000s separator	If this check box is selected, the steps of 1000s will be indicated by a separator character (for example, '1,000,000'). The 1000s separator in use depends on the settings in the *Regional settings for formatting* field.
Number of characters up to the line break in text mailings	Specifies the number of characters after which a line break will occur in mailings created in the 'Text' format. In the *Editing* workflow step, a line will appear at this position. The property is disabled when the value is removed.
Direction of text	Select whether you want to write from left to right or from right to left when creating mailings. The direction of text only affects the input field for the subject line and the text input components of templates or template libraries.

10.4.5.3 Advanced properties

In the Advanced properties section, you can specify technical settings for your mailing lists (for example, whether you approve your mailings via immediate approval or via the advanced approval process). You can specify the following advanced properties:

Property	Description
Reply address	Specifies the email address to which returns for your mailing (that is, replies from recipients or automatically generated replies) are sent or redirected. If you do not make a selection, returns will be sent to the sender email address (editorial properties). So that returns are displayed on the (*Global settings*) tab > *Inbox & bounces* agent > *Inbox* tab (*Displaying and filtering returns* page 339), and so that you can later view reports on the returns (*Reports on returns* page 352), you must enter the email address of the (news) POP3 mail server account (*Configuring email receipt* page 581; ask your Inxmail Professional Administrator, if necessary).
Select the email format	Specifies the format in which mailings (in the *Mailings*, *Email sequence* and *Subscriptions* agents) in this mailing list may be created (*Creating a new mailing* page 184). Click in the input field, click the button at the end of the input field, and select one of the following settings in the dialog box: • Free selection: You may individually select the format of each created mailing. • Fixed: All mailings generated in the mailing list must be created in the same format (as selected in the dialog box). When creating new mailings, the option fields to select the format are preselected and greyed out. • Determined by column value: The format may be made dependent on a recipient column value. When creating new mailings, the option fields to select the format are preselected and greyed out. **Example** You have created an 'HTML email' column in the recipient table (*Creating a new column* page 123). The following may now be defined: ▪ All recipients for whom the column contains the 'problematic' entry will only receive mailings in the 'Text' format. ▪ All recipients for whom the column contains the 'HTML' entry will receive mailings in the 'HTML' format. ▪ All recipients for whom the column contains no entry will receive mailings in the 'Multipart' format.
Character set encoding	Specifies which character set encoding is used for mailings. Select the character set encoding that will correctly display the characters contained in your mailing (for example, for mailings with German umlauts, select the 'Western (ISO-8859-1)' character set encoding). If you do not enter anything, mailings will be automatically encoded in 'Unicode (UTF-8)'. This character set encoding supports all common characters and special characters.

Property	Description
Assigning a special mail server	Specifies which mail server is used to send mailings from this mailing list. You can use your standard mail server, or specify a special list mail server (*Configuring email sending* page 583; ask your Inxmail Professional administrator, if necessary).
Assigning a special priority mail server	Defines whether test and confirmation mailings for this mailing list are to be sent via a list-specific priority mail server (for example, because the assigned list mail server of the mailing list delays test emails when mailings are sent). **Note** Your Inxmail Professional administrator must have set up the list-specific priority mail server for you to be able to select it (*Configuring email sending* page 583).
Maximum send rate	Throttling of the maximum send rate **per mailing** (that is, the maximum number of emails sent per hour for a mailing) to avoid overloading when sending large amounts of data. **Example** This can be useful if, for example, you send your mailing to a large number of recipients and do not want all the recipients to simultaneously access your shop system after the mailing has been sent. You can throttle the send rate in steps of 3,600 (for example, 3,600 emails per hour, that is, one email sent per second; 7,200 emails per hour; 10,800 emails per hour). If you do not wish to throttle, enter: 0

Property	Description
Mailing approval	Defines the approval type with which mailings must be approved prior to dispatch. Click in the input field, click the button at the end of the input field, and then make the following settings in the dialog box: When editing the properties in a mailing list, you can specify if the system settings (that is, approval settings on the (*Global settings*) tab) should be applied or not. Deactivate the check box to change the approval settings for the current mailing list. Select the approval type: ▪ *Simple immediate approval:* If you select simple immediate approval, confirm the dialog box by clicking *OK* (*Start immediate approval* page 253). ▪ *Advanced approval process*: If you select the advanced approval process, follow steps 3 to 5. Select the form of the approval process to be carried out: ▪ *Escalating*: A primary approver must approve the mailing. If this approver declines, the mailing is rejected; if approval is granted, the mailing may be sent. If the primary approver does not respond before the set escalation date, the approval is sent to an alternative approver who then has the sole right of approval. ▪ *Equivalent*: With this option, two approvers must approve the mailing. If one of the two approvers declines the mailing, the mailing is rejected. If both approvers approve the mailing, or if it is only approved by one approver before the deadline and the other does not respond, the mailing is approved and can be sent. Select the persons who must approve the mailing. To do so, click (for each approver and/or alternative approver) the button and specify the following in the dialog box: a. If the person is not yet displayed in the list in the dialog box, create the person first. To do this, click the (*Create new approver*) button. Then enter an email address, a name and a short, concise description of the person. When editing the properties on the (*Global settings*) tab, you can also select if the person is allowed to provide approval across the entire system (that is, for all lists) or only for specific mailing lists. Save your settings. b. Select the person from the list. When editing the properties on the (*Global settings*) tab, note that you can only select approvers with approval rights for the entire system. c. Confirm your entries by clicking *OK*. To apply your approval settings, confirm the dialog box by clicking *OK*. **Note**: Users with the 'Bypass approval process' right can approve mailings with immediate approval even if the advanced approval process is required.

Property	Description
Perform unsubscribe test	Determines whether the unsubscription test is performed as part of the quality test. When the property is deactivated, the unsubscription test is not displayed in any mailing on the list or performed. Please note that a mailing unsubscribe option is required by law. You should only deactivate the unsubscription test in the following two cases: Mailings on the list will be sent to an internal distribution list (for example, only to in-house recipients). An unsubscribe option in the mailing is not necessary in this case. Unsubscriptions will not be processed in Inxmail Professional, but in a third-party system.
Enable unsubscription of deleted recipients	Specifies whether it is possible to unsubscribe recipients even when they have already been deleted from the mailing list. In other words, this enables unsubscription when the recipient is no longer recorded in the recipient table of the list ('Subscribed' and 'Unsubscribed' tabs). The recipient is then transferred to the 'Unsubscribed' tab (see *Information in the recipient table* page 92). Enabling this option may prove useful, for example, if you delete your recipients from the list after you have sent the mailing but you still want recipients to be able to unsubscribe themselves from the list.

10.4.5.4 Administrative properties

Administrative properties should only be configured by Inxmail Professional administrators. For this reason, the following settings are typically only editable by people with the corresponding rights:

Property	Description
Reply address for bounces	Specifies the email address to which bounces (that is, undeliverable emails) that arrive after your mailing has been sent should be sent or redirected. If you do not make a selection, bounces will be sent to the sender email address (editorial properties). So that bounces are displayed on the (*Global settings*) tab > *Inbox & bounces* agent > *Bounces* tab (*Displaying and filtering bounces* page 338), and so that you can later view reports on the bounces (*Reports on bounces* page 351), you must enter the email address of the (bounce) POP3 mail server account (*Configuring email receipt* page 581; ask your Inxmail Professional Administrator, if necessary).

Property	Description
URL for linking web pages	A URL is required for the following (a URL is required for these reasons): The access of Inxmail Professional internal web pages (for example, web pages that were created with JSP templates; *JSP templates for web pages* page 416) The [%application-url] (for example, link to the alternative view; *Inserting links to the alternative view in the web browser (HTML mailings only)* page 217) **Note** You can enter the same URL as in the *URL for tracking links* field. **Example** http://my.inxmail-server.de:8080/inxmail2
URL for tracking links	A URL is required for the following: To count how many times a link is clicked (*Overview: Link tracking* page 207) To redirect links in the mailing **Example** http://my.inxmail-server.de:8080/inxmail2
Descriptive name for list ID header	All emails sent via Inxmail Professional automatically contain a list ID header in the following format: 'Descriptive list name (optional)' <Mail-ID.List-ID.localhost> This field defines the descriptive name that is contained in this list ID header (if any).

10.4.6 Setting up access rights for mailing lists

Step-by-step

1. Double-click the mailing list in the list overview to open the mailing list.
   The mailing list is displayed in a new tab.
2. Click the *Access rights* agent.

Not every user can view the *Access rights* agent (the user must be assigned with the corresponding right).

3. Enable all roles and users that should have access to the mailing list.

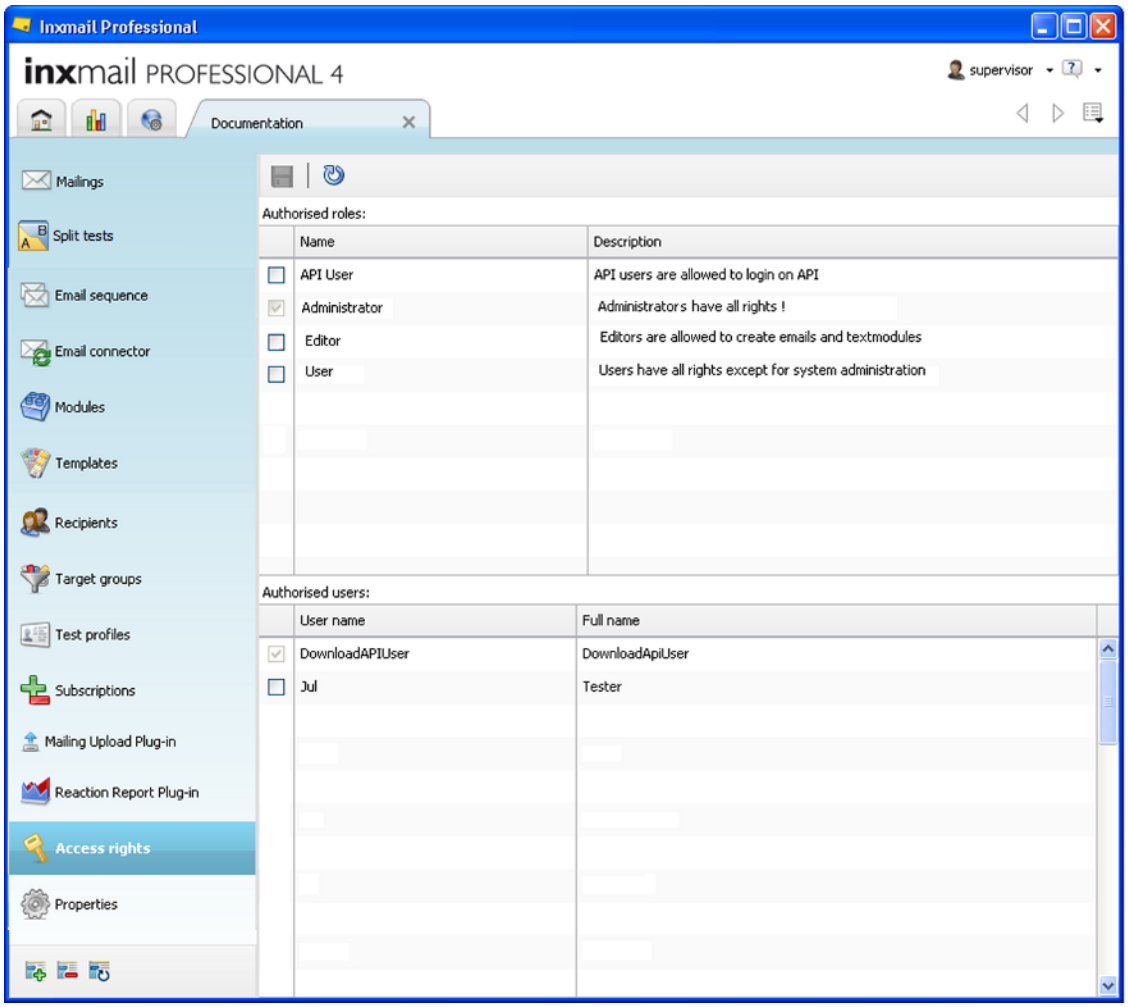


Figure 41: "Access rights" agent for a mailing list

4. Save your settings.

✓ You have assigned the corresponding roles and users with the access rights for the mailing list. These roles and users will see the mailing list in the list overview effective immediately and can open it from there.

Related Topics

» *Displaying and filtering the list overview* page 74

11 Recipients

You must integrate your recipient data in Inxmail Professional to be able to send mailings in Inxmail Professional. In this chapter, you will learn:

- the methods you can use to transfer recipient data to Inxmail Professional and where you can find this data in Inxmail Professional
- how to display recipients, which information is contained in the recipient table (for example, also for dynamic lists) and how to filter recipients
- how to manage recipients in Inxmail Professional (for example, how to import/export recipients, add/delete recipients, search for and replace recipients, or exclude recipients from a mailing dispatch by unsubscribing them from mailing lists or marking them as 'unavailable')

  When managing recipients, you can place recipients on the black list to globally exclude them from Inxmail Professional. However, as this can result in the recipients being deleted from all recipient tables, we recommend only allowing Inxmail Professional administrators to perform this (*Adding recipients to the black list* page 618).
- how to configure the columns of the recipient table so that you can use additional functions (for example, create new columns or edit the column type).

11.1 Overview: Recipients

Recipient data (for example, the email address, name and address of the recipient) is required for many different functions in Inxmail Professional (for example, sending mailings, creating target groups or generating reports).

Recipient data can be transferred to Inxmail Professional as follows:

- Recipients enter the recipient data themselves (for example, when subscribing to a mailing list via your web page; *Overview: Subscription and unsubscription* page 128).
- You import recipient data from an external data source (*Importing recipients (from an import source)* page 95 and *Importing recipients through copy and paste* page 106).
- You enter recipient data manually in Inxmail Professional (*Creating recipients manually and editing them* page 109).

Individual recipients are identified via their email address. Duplicate recipient data is not possible because email addresses are unique.

All recipient data is saved in the global recipient table (*All recipients* agent). The recipients in a specific mailing list are also held in the recipient table of the respective mailing list (*Recipients* agent). The recipients are subdivided there as follows (for a standard mailing list):

- All recipients who are currently subscribed to the mailing list can be found on the *Subscribed* tab. Mailings from this mailing list may be sent to these recipients.
- All recipients who have unsubscribed from the mailing list in the meantime can be found on the *Unsubscribed* tab. Mailings from this mailing list may no longer be sent to these recipients.

You can display the recipients (*Displaying recipients* page 91) and manage them (*Managing recipients* page 95) in all recipient tables.

The recipient tables are linked to one another, meaning that when you change the data of a recipient (for example, the last name) in one recipient table, this action automatically changes the data for the recipient in the other recipient tables (if applicable).

11.2 Displaying recipients

11.2.1 Opening a recipient table

Proceed as follows to open a recipient table:

- To open the global recipient table that contains all recipients in the system, click the (*Global settings*) tab > *All recipients* agent.

  The recipient table is displayed.
- To open the recipient table of a standard mailing list that contains only the recipients from that mailing list, click the tab of the mailing list > *Recipients* agent.

  The *Subscribed* tab displays a recipient table containing all recipients that may be emailed for this mailing list.

  The *Unsubscribed* tab displays a recipient table containing all recipients that have ever unsubscribed themselves from this mailing list and all recipients that have been manually unsubscribed.
- To open the recipient table of a dynamic mailing list that contains all of the recipients in the system (that correspond to the conditions specified in the recipient table), click the tab of the mailing list > *Recipients* agent.

  The recipient table is displayed.

Related Topics

» *Overview: Mailing lists* page 73

» *Information in the recipient table* page 92

11.2.2 Information in the recipient table

You can view the following information in the recipient table:

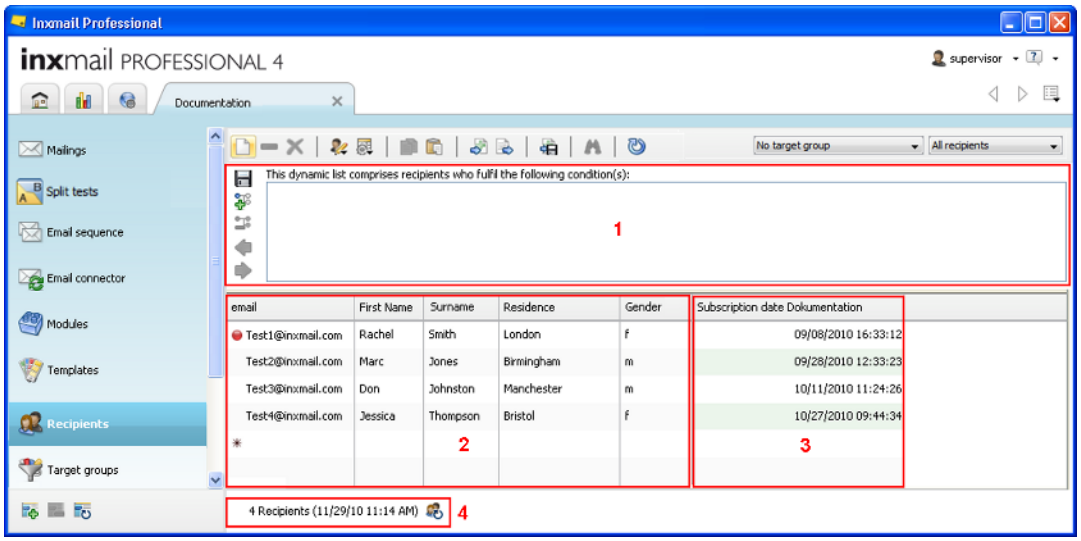


Figure 42: Recipient table

- Condition area (for dynamic mailing lists only)

  After you have created the recipient tables for dynamic mailing lists, these tables are automatically populated with all recipients in the system. You can use the condition area (in the recipient table) to generate a specific subset of the recipients in a dynamic mailing list. The recipient table now contains only the recipients that correspond to the conditions that you have specified and the mailings in this dynamic mailing list are sent to these recipients only.

  To specify the conditions for dynamic mailing lists, go to the condition area and click the (*Add condition*) button. Then create a condition in the same way as you would create conditions for target groups.

- Columns of the recipient table

  You can hide or display all columns.

  When you move the mouse over a column header, you can see the column type of this column. The column type determines the required format for the data stored in this column (for example, the 'Birthday' column with the column type 'Date' can contain only date values).

  - System columns

System columns can be recognised by the cells that alternate in colour between light green and white. System columns contain values read out by the system. Therefore, you cannot change the contents of these columns. System columns can be displayed in any recipient table.

The following system columns exist:

System column	Description
Subscription date <Name of mailing list>	Displays the date on which the recipient subscribed to the mailing list (that is, the date of subscription or import, or the date on which the recipient was manually created). This column is available in the following recipient tables only: On the (*Global settings*) tab > *All recipients* agent, you can find a column containing the subscription date for each mailing list. On the tab of the standard mailing lists > *Recipients* agent > *Subscribed* tab
Change date	Displays the date on which the recipient data set was last modified. This column is always present.

- User-defined columns

  User-defined columns in the recipient table can be recognised by the cells that alternate in colour between light grey and white. You can add as many user-defined columns as you need. When you create user-defined columns, you must specify whether the individual columns are to be displayed in all recipient tables or in the current recipient table only.

  Recipient tables may contain the following user-defined columns, for example:

User-defined columns	Description
email	Displays the email address of the recipient; this makes a data record unique. The column must always be present and cannot be deleted.
For example, first name, surname, postcode, sex	You can create this and many other columns yourself. Note: If you offer a web page where recipients can manage their own profiles ('Profile management' JSP template), then recipients are able to change the contents of this column themselves.
Sequence no.	Displays which sequential mailing the recipient has already received. This column is only present if an email sequence has been created. The cells in this table alternate in colour between light grey and dark grey.

- Recipient data

  Recipient data is only available in the recipient table once you have imported or manually created this data in Inxmail Professional.

  A maximum of 100,000 recipients will be shown in the recipient table.

  If the recipient table contains more than 100,000 recipients, a note appears on the bottom edge of the recipient table along with a button that allows you to load the rest of the recipients. The functions of Inxmail Professional (for example, the search function or indicators for recipients) always take all recipients into account.
- Identifying unavailable recipients

  In the *email* column, you can see which email addresses are unavailable for sending mailings. A red indicator is displayed next to the email address for recipients who are unavailable.

  These indicators can be inserted as follows:
  - automatically by the system (this depends on the settings for your system)
  - manually by you
- Number of recipients

  The number of recipients currently **displayed** in the recipient table is displayed below the table.

  The filter settings can influence, for example, the number of recipients displayed in the table.

  Because the number of recipients subscribed to the mailing list can change frequently, the time at which this number was last calculated is displayed in parenthesis.

  To recalculate the number of recipients, refresh the display of the recipient table by clicking the (*Refresh*) button.

Related Topics

» *Adding a condition* page 163
» *Showing/hiding columns* page 122
» *Changing the column type* page 126
» *Creating a new column* page 123
» *Importing recipients (from an import source)* page 95
» *Creating recipients manually and editing them* page 109
» *Manually marking recipients as available/unavailable* page 121
» *Filtering the recipient table* page 94

11.2.3 Filtering the recipient table

Note The filter settings serve only to improve the clarity of the table and do not influence the recipients to whom you can send mailings.

Step-by-step

1. Open the relevant recipient table.

2. Make the following filter settings to filter the recipient table (if applicable):

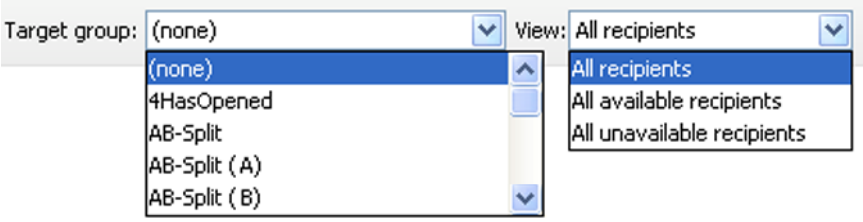


Figure 43: Drop-down lists for filtering the recipient table

- Target group

  Select the appropriate target group in the *Target groups* drop-down list to display only those recipients that are assigned to a particular target group.

  If you have not yet created any target groups, you can only select the entry *None* in the drop-down list.

  To undo this target group filter setting, select the entry *None* in the drop-down list.
- Recipients

  All recipients: With this filter setting, all recipients stored in the system are displayed.

  All available recipients: With this filter setting, all available recipients are displayed.

  All unavailable recipients: With this filter setting, all unavailable recipients are displayed. They are indicated in red in the table.

  Recipients with no list association: With this filter setting, all recipients that are not subscribed to any standard list are displayed. Recipients that were unsubscribed from one or more standard lists or that belong to one or more dynamic lists are also displayed.

3. Select the filter setting you require.

✓ The table now displays only the recipient data that corresponds to your filter settings.

Related Topics

» *Opening a recipient table* page 91

» *Creating target groups* page 160

» *Information in the recipient table* page 92

11.3 Managing recipients

11.3.1 Importing recipients (from an import source)

General information

- The import of recipient data is not possible in dynamic mailings lists (*Overview: Mailing lists* page 73).
- To be able to make full use of the import function, you will need the relevant Inxmail Professional rights. If necessary, consult your Inxmail Professional administrator.
- You can import recipient data from the following sources to Inxmail Professional:
  - Microsoft Excel files (in the formats *.xls, *.xlsx)
  - Other files (in the formats *.txt, *.csv, *.tab)

- Relational databases (via ODBC/JDBC)

  In the case of very large files (several MBs), we recommend importing *.csv files.

- You can, for example, transfer Microsoft Outlook address data to Inxmail Professional by exporting this data from Microsoft Outlook as a text file.

Overview

The recipient import process basically comprises four steps:

1. Select the data source that contains the recipient data
2. Enter information on the structure of the source file
3. Select and assign columns
4. Specify import rules and special settings

Each step is described in detail below.

11.3.1.1 Step 1 (Option 1): Start import from the Cockpit – Select source

To open the Import recipients dialog box, proceed as follows:

Step-by-step

1. Click the *Import* button in the (*Cockpit*) tab.

   A dialog box appears.

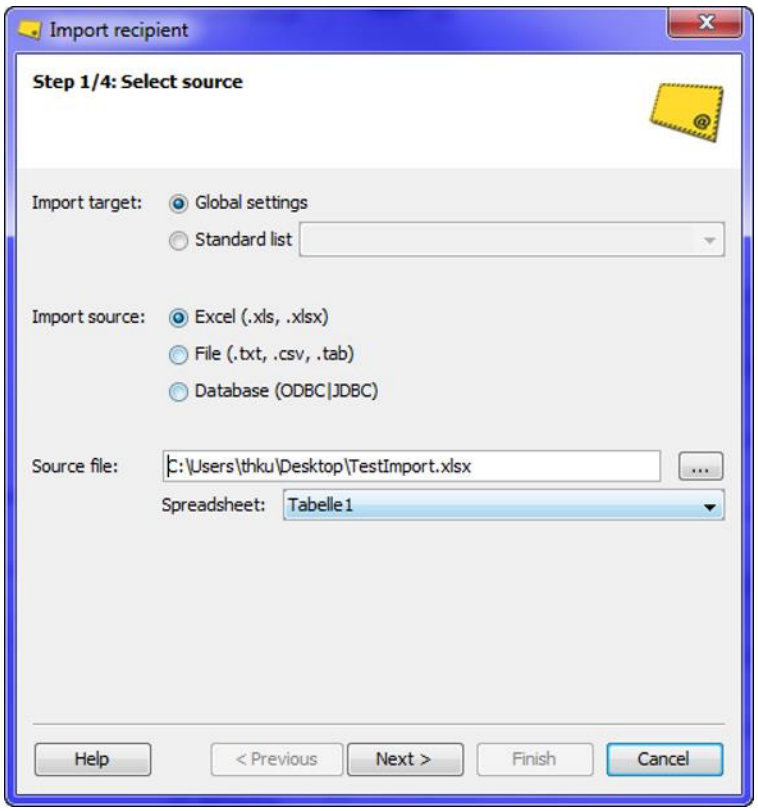


Figure 44: "Import recipients" dialog box: Step 1

2. Under *Import target*, select the target to which you would like to import recipient data.

Note If you import recipient data to a (standard) mailing list, then this data is also automatically created in the global settings.

3. Under *Import source*, select the format of your source data. The options are the Excel (.xls, .xlsx), file (.txt, .csv, .tab) or database (ODBC|JDBC) formats.

   The dialog box will behave dynamically under *Source file* in accordance with your selection.
4. Make the necessary entries under *Source file* or *Data source* (for the database ODBC|JDBC format).

   Note Detailed instructions on specifying the storage location of the import source can be found on the following pages.
5. Click *Next*.

✓ You will be directed to *Step 2/4: Structure of the source file*.

Related Topics

» *Step 1 of the dialog box: Select source (Excel)* page 97

» *Step 1 of the dialog box: Select source (file)* page 97

» *Step 1 of the dialog box: Select source (database)* page 98

11.3.1.1.1 Step 1 of the dialog box: Select source (Excel)

If you selected *Excel (.xls, .xlsx)* as the import source, proceed as follows:

Step-by-step

1. Click the button next to the *Source file* field to specify the current storage location.
2. Under *Spreadsheet*, select the spreadsheet from which you would like to import the data.

   You may select only spreadsheets that contain data. Empty spreadsheets are not included in the drop-down list.

   You can only import data from **one** spreadsheet per import process.
3. Click *Next*.

✓ You will be directed to *Step 2/4: Structure of the source file*.

11.3.1.1.2 Step 1 of the dialog box: Select source (file)

Step-by-step

If you selected *File (.txt, .csv, .tab)* as the import source, proceed as follows:

1. Click the button next to the *Source file* field to specify the current storage location.
2. Under *Character set encoding*, select the following character set encoding for your operating system:

Operating system	Standard character set encoding
Windows	For example, Windows Eastern European (Cp1250)
MacOS X	For example, Macintosh Latin-2 (MacCentralEurope)

Operating system	Standard character set encoding
Linux	Freely configurable, locale dependent (changeable at runtime); usually Unicode (UTF-8), sometimes also Western (ISO-8859-1) or Western (ISO-8859-15)

3. Click *Next*.

✓ You will be directed to *Step 2/4: Structure of the source file*.

11.3.1.1.3 Step 1 of the dialog box: Select source (database)

Step-by-step

If you selected *Database (ODBC I JDBC)* as the import source, proceed as follows:

1. Under Data source, select whether you are importing the data from an ODBC or a JDBC database.

   Inxmail Professional can import data directly from databases. With Microsoft Windows, you can choose any ODBC data sources (for example, including Microsoft Excel spreadsheets). With other operating systems, an appropriate JDBC database driver is required.
2. If you enable the *ODBC* option, enter the name of the ODBC data source.

   The ODBC connection name is specified in the ODBC settings in Microsoft Windows.
3. If you enable the *JDBC* option, select the database (for example, Oracle).
4. In addition, enter a (connection) character string in the *URL* field.

   The character string depends on the JDBC database.
5. Enter the user name and password to log in to the database (if applicable).
6. Test the connection to the database.
7. Click *Next* if the connection to the database is successful.

✓ You will be directed to *Step 2/4: Structure of the source file*.

JDBC drivers

If you do not use ODBC data sources, a corresponding JDBC driver is required for you to import recipient data from databases.

Note For legal reasons, we cannot deliver JDBC drivers with the Inxmail Professional Client. You can obtain the driver from the manufacturer of your database.

You must register the driver with the Java Runtime Environment of Inxmail Professional as follows:

- Local installation for Windows and Linux:

  The local installation includes its own Java Runtime Environment. Copy the driver files and paste these files into the installation directory of the Inxmail Professional Client under the following subdirectory: 'work > ext'.
- Web Start for Windows and Linux:

The system's Java Runtime Environment is used for the installation with Web Start. For this reason, the driver files must be registered with this Java Runtime Environment.

Copy the driver files and open the installation directory (this is 'C:\Programs\Java\jre+Version' for the standard installation where '+Version' stands for the installed version number (for example, for the version number '1.5.0_02')). Then paste the driver files into the following subdirectory: 'lib > ext'.

- Local installation and Web Start for Mac OS X:

  The preinstalled Java Runtime Environment is always used with Mac OS X. A special feature of this extension directory is that it supports all users.

  Copy these driver files and paste them in your user directory under the following subdirectory: 'Library > Java > Extensions'. You must create this directory if it does not exist.

Additional information

You can define any ODBC capable data source in the ODBC settings, including, for example, Microsoft Excel, Microsoft Access or other database systems. See the appropriate manual for your operating system to find out how these ODBC connections are defined.

To find out how the (connection) string should appear, see the appropriate documentation for your database driver.

11.3.1.2 Step 1 (Option 2): Start import from the import target – Select source

You can also open the *Import recipients* dialog box directly from the import target:

- Import target: *Global settings* tab

  To import recipients to the global settings, click the *Global settings* tab > *All recipients* agent. Then click the (*Import recipients*) button.

- Import target: tab of a (standard) *mailing list*

  To import recipients to a particular mailing list, you have the following options:

  - To import recipients so that they are **subscribed** to the mailing list, click the tab of the mailing list > *Recipients* agent > *Subscribed* tab. Then click the (*Import recipients*) button.
  - To import recipients so that they are **unsubscribed** from the mailing list, click the tab of the mailing list > *Recipients* agent > *Unsubscribed* tab. Then click the (*Import recipients*) button.

    Note that when you import recipient data to the *Unsubscribed* tab, only the email addresses of the recipients are imported. The recipients table may, however, show other recipient data after the import if these recipients are already created in the system (*Unsubscribe recipients via import (from import source)* page 115).

Note The procedure varies slightly for the different import targets (for example, if the import target is already preset in Step 1 of the dialog box).

11.3.1.3 Step 2 of the dialog box: Structure of the source file

In Step 2, you specify the structure of the source file. Different entries are required depending on the import source you selected in Step 1.

11.3.1.3.1 Step 2 of the dialog box: Structure of the source file (Excel)

If you selected Excel (.xls, .xlsx) as the import source in *Step 1/4: Select source*, proceed as follows:

Step-by-step

1. If the first row of your selected spreadsheet contains column names, enable the *The first row contains column names* check box.
2. How the source columns in the import file will appear is shown under *Preview of source columns*.
3. Click *Next*.

✓ You will be directed to *Step 3/4: Column selection and allocation*.

11.3.1.3.2 Step 2 of the dialog box: Structure of the source file (file)

If you selected File (.txt, .csv, .tab) as the import source in *Step 1/4: Select source*, proceed as follows in the dialog box displayed:

Step-by-step

1. Under *Separator of columns*, select a preset character that is used in your file to separate the individual values (columns).

   Alternatively, you can specify a character of your own.
2. If the first row of your selected file contains column names, enable the *The first row contains column names* check box.
3. If your file contains text delimiting characters, then enable the *Values have text delimiters* check box.

   Note You use text delimiting characters if a file contains special characters within the data (for example, commas within decimal values), which then have to be marked accordingly.
4. In addition, you need to mask text delimiters within a column value, in order that these may be differentiated from other text delimiters.
5. To do this, select *Duplicate text delimiters* or Preceding backslash under Masking of text delimiters.
6. Click the *Show information* button to view detailed information on the masking of text delimiters.
7. Click *Next*.

✓ You will be directed to *Step 3/4: Column selection and allocation*.

11.3.1.3.3 Step 2 of the dialog box: Structure of the source file (database)

If you selected Database (ODBC|JDBC) as the import source in *Step 1/4: Select source*, proceed as follows:

Step-by-step

1. Select the database table record that contains the recipient data you want to import.

   You can also select a predefined query here for Microsoft Access.

   Note If necessary, you can also enter a query directly as SQL. In this case, you must first test the SQL query before proceeding to the next dialog step.

2. Create a corresponding ODBC data source to import data from Microsoft Excel. The SQL command to import from Excel may be, for example:
   `SELECT * FROM [Table1$]`
3. Click *Next*.

✓ You will be directed to *Step 3/4: Column selection and allocation*.

11.3.1.4 Step 3 of the dialog box: Column selection and allocation

In Step 3, you assign the source columns to the target columns of the recipient table.

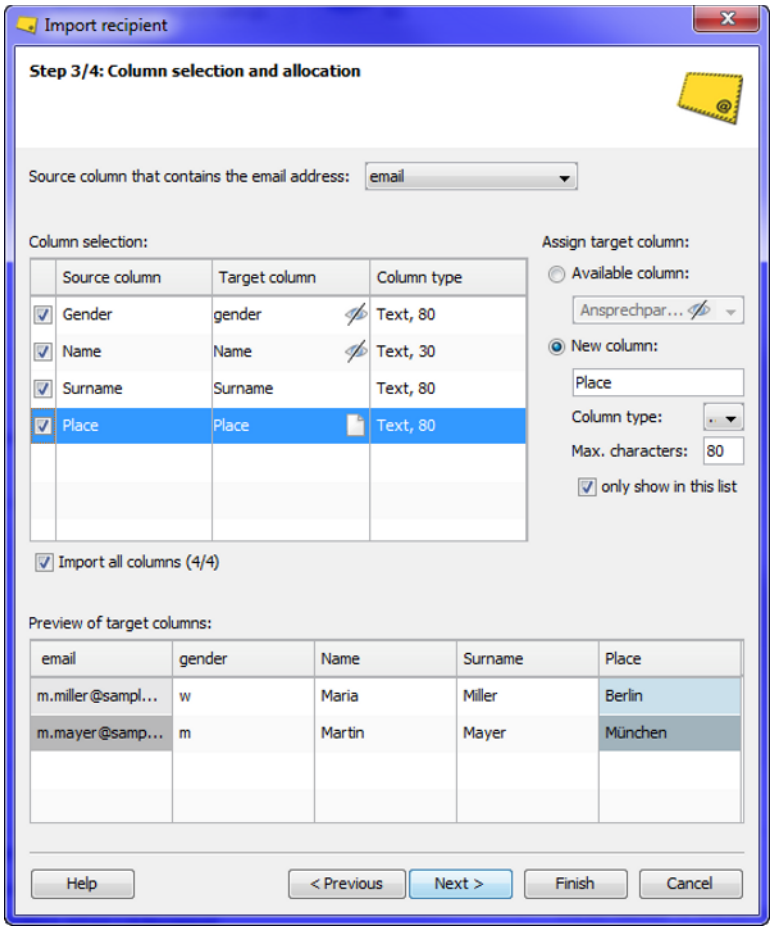


Figure 45: 'Import recipients' dialog box: Step 3

Proceed as follows:

Step-by-step

1. Use the *Source column that contains the email address* list box to select the column of your source file that contains the email addresses of the recipients.
2. In the table under *Column selection*, enable the source columns to be imported.

   Inxmail Professional automatically enables the columns that are already created and shown in the recipient table of the import target.
3. You can use the *All columns* check box to enable or disable all source columns.
4. Assign a target column of the recipient table to every source column being imported.

5. To do this, select the (enabled) source column in the *Column selection* table.
6. To assign a target column that already exists in the recipient table, select the *Available column* option button under *Assign target column*. Then select the target column from the drop-down list.
7. To assign a new target column, select the *New column* option button under *Assign target column*. Then set up the new target column.
8. Once you have assigned a target column, the table under *Column selection* is updated. The following symbols show you which target columns were assigned:
   - No symbol: existing target column that is currently shown in the recipient table
   - (*Hidden column*) symbol: existing target column that is currently hidden in the recipient table
   - (*New column*) symbol: new target column to be created
9. Click *Next*.

✓ You will be directed to *Step 4/4: Import conflicts and special settings*.

Additional information

You cannot import any information to system columns. If, for example, you have previously exported recipient data from Inxmail Professional and now want to import it back again, then you can only import the data to user-defined columns.

Related Topics

» *Step 3 of the dialog box: Create new target column* page 102

11.3.1.5 Step 3 of the dialog box: Create new target column

Step-by-step

1. Enter a column name.
2. Define the required column type for the new target column.

   You can change the settings for the column type after the import (*Changing the column type* page 126).

   Note If you set date/time column types, Inxmail Professional automatically uses the formats specified by your operating system's regional settings (for example, the format 'DD.MM.YYYY') and, if necessary, converts the data accordingly.
3. If you selected the 'Text' column type, enter the maximum allowed text length (number of characters) in the dialog box.
4. If you want the new column to be visible only in the recipient table to which the data is imported, then enable the *only show in this list* check box.

11.3.1.6 Optional step of the dialog box: Define data format

If Inxmail Professional has problems in assigning your source column values to the selected column type of the target columns, then an additional dialog step *Step 4/5: Define data format* is displayed.

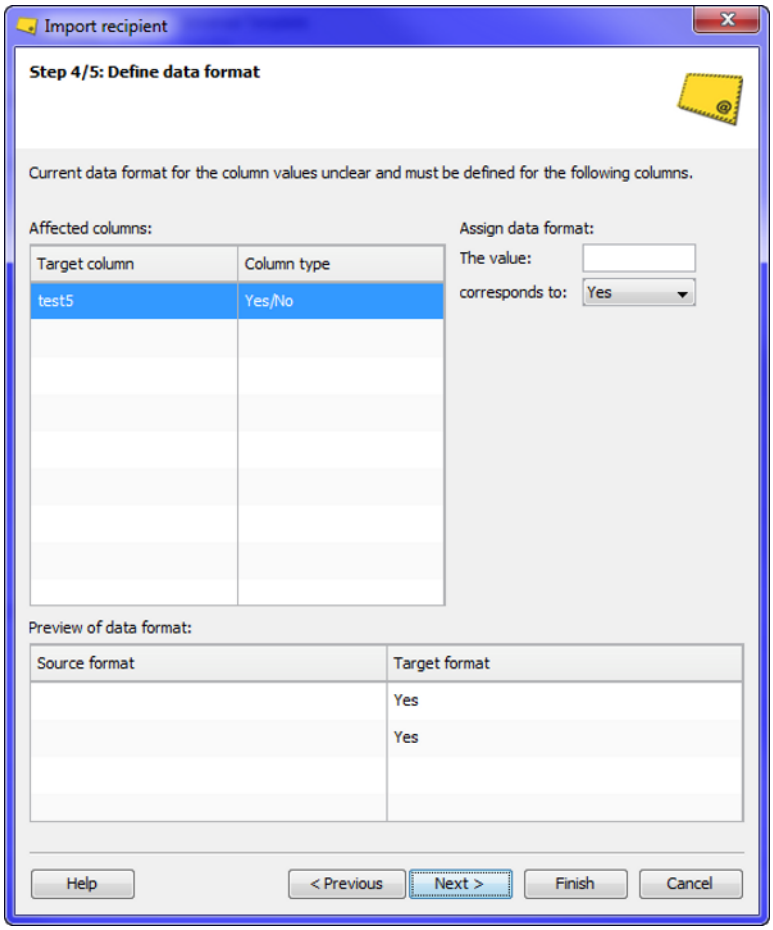


Figure 46: "Import recipient" dialog box: Step 4 (optional)

Step-by-step

Proceed as follows to define the data format of the affected target columns more precisely:

1. Select the source column in the table under *Affected columns*.
2. Define the settings for the data format of the target column under *Assign data format*.
3. Click *Next*.

✓ You will be directed to *Step 4/5: Import conflicts and special settings*.

11.3.1.7 Steps 4 and 5 of the dialog box: Import conflicts and special settings

In Steps 4 and 5 of the dialog box, you specify whether column values of existing recipients are to be retained in the system, extended or overwritten.

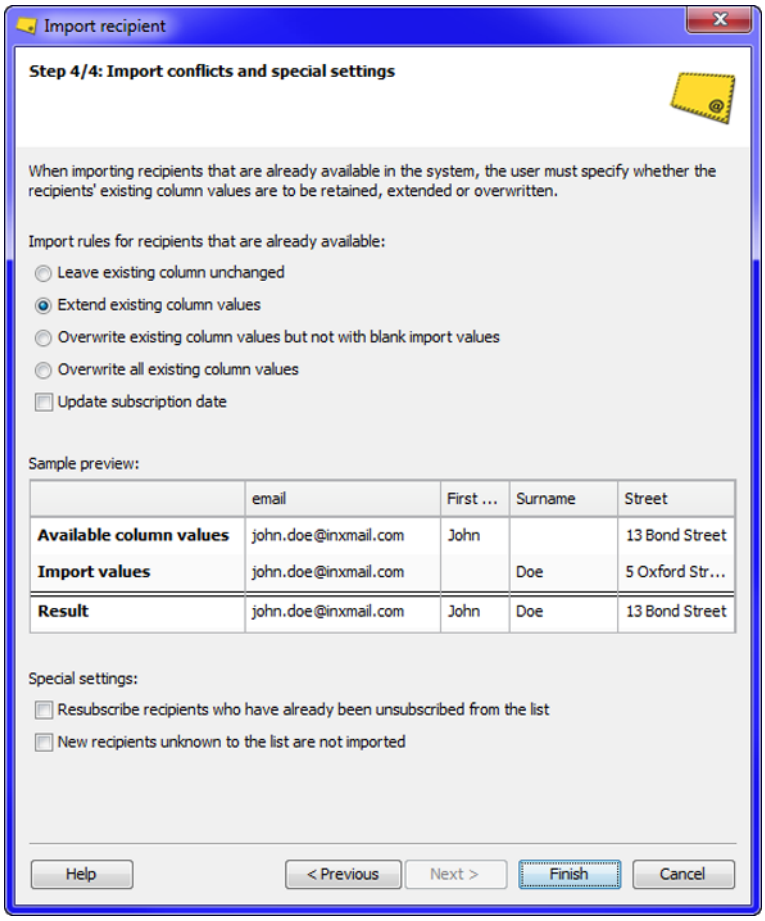


Figure 47: Dialog „Import recipient": Step 4

Step-by-step

4. Enable one of the following options under *Import rules for recipients that are already available*:

Import rules	Description
Leave existing column values unchanged	• Columns that exist in the import source and in the recipient table: Existing values in the recipient data record are retained and are not overwritten. • Columns that exist only in the import source: The new columns are added to the recipient data record. The values from the import source are **not** imported.

Extend existing column values	• Columns that exist in the import source and in the recipient table: Existing values in the recipient data record are retained and are not overwritten. Column fields that contain no values in the recipient data record are filled with the values from the import source. • Columns that exist only in the import source: The new columns are added to the recipient data record. The new column fields are filled with the import values.
Overwrite existing column values but not with blank import values	• Columns that exist in the import source and in the recipient table: Existing values of the recipient data record are overwritten with the values from the import source. If the import source contains column fields without values, the values of the recipient data record are retained. • Columns that exist only in the import source: The new columns are added to the recipient data record. The values from the import source are **not** imported.
Overwrite all existing column values	• Columns that exist in the import source and in the recipient table: Existing values of the recipient data record are overwritten with the values from the import source. If there are column fields in the import source that contain no values, the corresponding column fields of the recipient data record are deleted. • Columns that exist only in the import source: The new columns are added to the recipient data record. The new column fields are filled with the import values.
Update subscription date	If you activate this check box, the date on which recipients were subscribed to the current mailing list will be updated if new data is being imported for them.

5. Update the subscription date for those recipients for whom new data is being imported.
6. Enter additional settings under *Special settings*.

Special settings	**Description**
Resubscribe recipients who have already been unsubscribed from the list	If you select this check box, data of recipients who are currently unsubscribed from the mailing list is also imported. In this case, these recipients are then resubscribed to the mailing list (that is, moved from the *Unsubscribed* tab to the *Subscribed* tab). This check box is only activated when you import recipients to the *subscribed* tab of a specific list. **Note** You need the consent of the affected recipients in order to do this.
New recipients unknown to the list or system are not imported	If you select this check box, only existing recipient data is updated in accordance with the import rules. New recipients are not imported. This check box is only activated when you import recipients to the *subscribed* tab of a specific list or to the system list.

7. Confirm your settings by clicking *Finish*.

   A message box informs you that the import process was started.

   Note You can close the message box and continue to work as usual while the import process runs.

8. The message box informs you when the import process is completed.

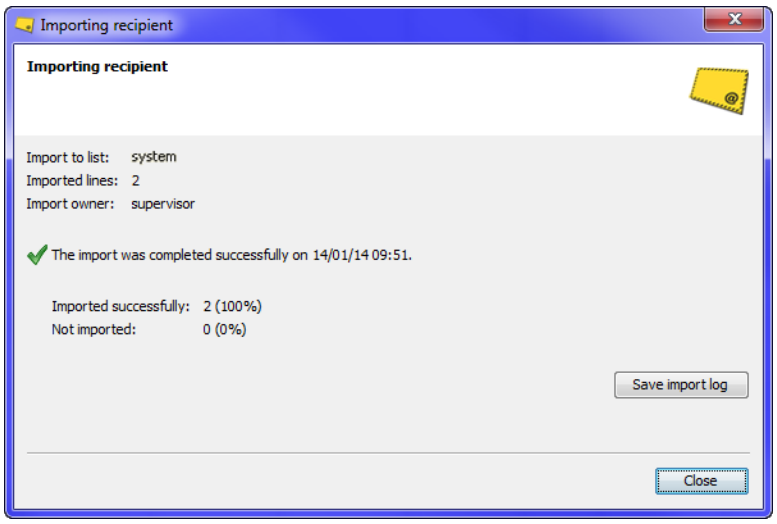


Figure 48: Message box with button for calling up the import log

9. Click the *Display* button to call up the import log.

   The import log contains any error messages, as well as information on the number of recipients imported.

10. Save the import log if you wish to view it again later.

✓ The imported recipient data appears in the recipient table.

11.3.2 Importing recipients through copy and paste

Manual copying and pasting is only suitable for small datasets. For large datasets, use the import wizard in Inxmail Professional.

Step-by-step

Proceed as follows to import recipients through copy and paste:

1. Select in your source file (for example, Microsoft Excel or Access file) the recipient data you wish to import.

   Make sure that an email address is included per recipient data record. In addition, the recipient data (to be allocated to the columns) must be separated by a separator (for example, tab, comma or space).

2. Copy the selected data using the CTRL + C shortcut key.
3. Open the relevant recipient table.
4. Click in any cell of the last row in the recipient table (this row is marked with an asterisk).
5. Paste the data using the CTRL + V shortcut key.

A message box appears asking whether you want to open the *Import recipients* dialog box. Here you will be supported in assigning the data to recipient table columns.

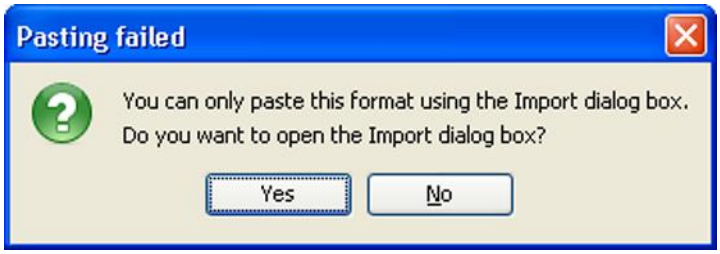


Figure 49: "Pasting failed" message box

6. Make your settings as appropriate in the dialog box.

✓ The recipient data that has been imported through copy and paste appears in the recipient table. If you have imported the data to a recipient table of a mailing list, it will additionally appear in the global recipient table.

Related Topics

» *Importing recipients (from an import source)* page 95

» *Opening a recipient table* page 91

11.3.3 Exporting recipients

You can export your existing recipient data in the following formats:

- As a Microsoft Excel file (Excel 2007/2010 or Excel 97/2000/2003/XP)
- As a CSV file
- As an XML file (*.xml)

In the case of very large files (several MBs), we recommend using the CSV format for export.

By default, Inxmail Professional exports data using UTF-8 character set encoding.

You must have the right to 'Export and copy recipients' in order to export recipients (page 569).

Step-by-step

Open the *Export recipients* dialog box as follows:

1. Open the relevant recipient table.

   When you export data from recipient tables of mailing lists, only data from the tab currently open is exported.
2. If you wish to export only particular recipients in the recipient table, select them in the recipient table (that is, hold down the CTRL key as you click each recipient).
3. Click the (*Export recipients*) button.

A dialog box appears.

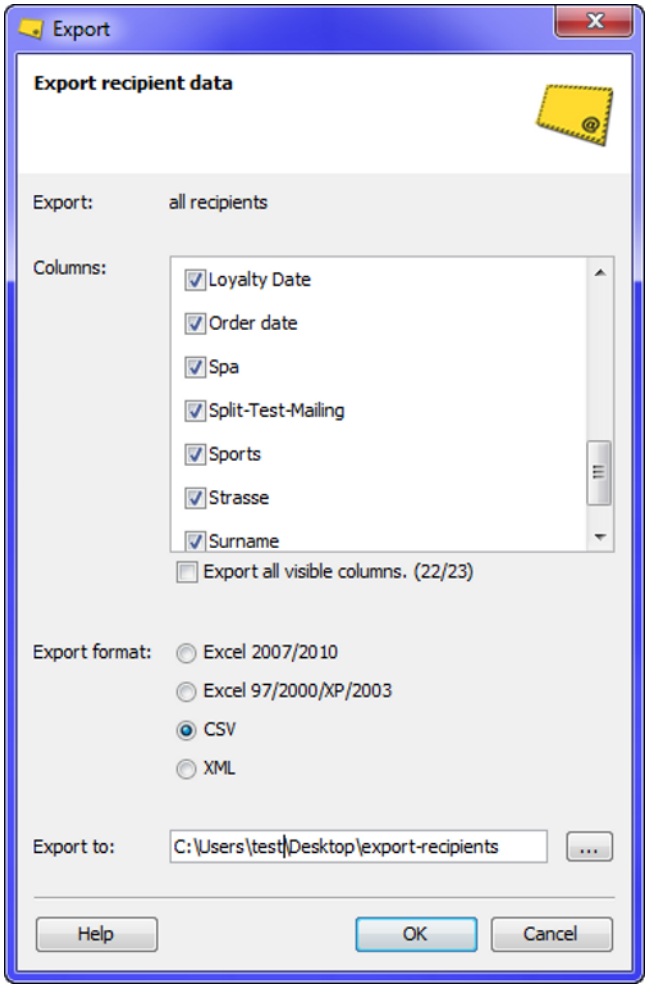


Figure 50: "Export recipients" dialog box

4. If you selected particular recipients beforehand, you can specify in the dialog box whether the data of all recipients or only that of the selected recipients should be exported from the recipient table.
5. Enable all recipient table columns that you want to export.

   You can only export columns that are currently shown in the recipient table.

   The column that contains the email addresses of the recipients is always automatically enabled and is therefore always exported.

   If, in addition to the recipient data, you would like to export information on available and unavailable recipients, then enable the *Hardbounce ('available'/'not available' status)* column.

   All system columns are disabled by default; while these columns can be exported, they cannot be imported back **as system columns**.
6. Select the format in which the data is to be exported.
7. In the *Export to:* field, click the ... button and specify the path in which Inxmail Professional is to save the exported file.
8. Confirm you wish to proceed with the export by clicking *OK*.

✓ Inxmail Professional saves the export file in the path you specified.

Related Topics

» *Opening a recipient table* page 91

11.3.4 Creating recipients manually and editing them

Note In the recipient table on the tab of the mailing list > *Recipients* agent > *Unsubscribed* tab, you **cannot** create any recipient data manually, since the entries there cannot be edited.

Step-by-step

1. Open the relevant recipient table.
2. In the last row of the recipient table (this row is marked with an asterisk), double-click in the 'email' column and enter the email address of the new recipient you are creating.
3. To enter further data for this recipient, double-click in the respective column and enter the data.

✓ The new data record is automatically saved. If you have created the data in a recipient table of a mailing list, it will additionally appear in the global recipient table.

You **cannot** change recipient data on the tab of the mailing list > *Recipients* agent > *Unsubscribed* tab.

In all other recipient tables, you can change the recipient data at any time. To do this, double-click in the column and make the change.

Related Topics

» *Opening a recipient table* page 91

11.3.5 Deleting recipients

Important Note that the deletion of recipients cannot be undone.

Deleting recipients does not rule out the possibility of them being resubscribed, for example, during a data import. To prevent recipients from being automatically resubscribed, you should manually unsubscribe them from the list.

Step-by-step

Proceed as follows to delete recipients:

1. Open the relevant recipient table.
2. Hold down the CTRL key and select the recipients you wish to delete in the recipient table.
3. Click the (*Delete recipient*) button.

A dialog box appears.

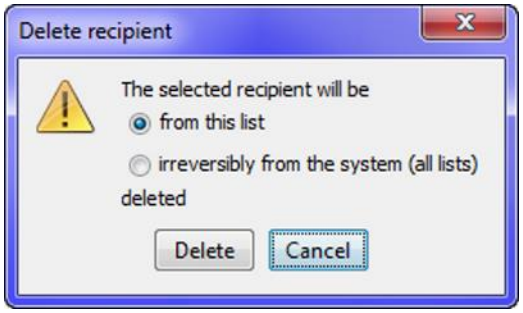


Figure 51: "Delete recipient" dialog box

4. To delete the selected recipients only from the current recipient table, select the *from this list* option button.
5. To delete the selected recipients from all recipient tables of the system, select the *irreversibly from the system (all lists)* option button.

   If you do not have permissions to delete recipients from the entire system, then you will only have the option to delete the recipients from this list.

✓ The recipients are deleted from the mailing list or from the system.

Related Topics

» *Unsubscribing recipients manually* page 114

» *Opening a recipient table* page 91

11.3.6 Unsubscribe deleted recipients

11.3.6.1 Background

Unsubscribe subscribed recipient

When recipients (successfully) subscribe to a newsletter, they are listed in the recipient table of the relevant mailing list on the *Subscribed* tab in the Recipients agent. They are also recorded in Inxmail Professional's system list. If the recipient is unsubscribed at a later stage, they are moved from the *Subscribed* tab to the *Unsubscribed* tab in the Recipients agent in the mailing list's recipient table. The recipient's data continues to be stored in the system list. The recipient is listed in the mailing list on the *Unsubscribed* tab in the Recipients agent. For example, this avoids unwanted duplicate subscriptions when recipients are imported into the mailing list.

Delete recipient

Inxmail Professional allows you to delete recipients from mailing lists or from the system list. For each delete process, you will be asked whether you want to delete the recipient only from the mailing list in question or from the entire system, i.e., from all mailing lists and from the system list. Once a recipient has been deleted from a mailing list, they are no longer listed on either the *Subscribed* or *Unsubscribed* tabs in the Recipients agent. If you selected the *Permanently deleted from the system (all lists)!* option when deleting the recipient, they will also be deleted from the system list.

Deleting recipients can be useful in certain situations. One such situation is when recipients are maintained in third-party systems, are only imported in order to send mailings in Inxmail Professional and are to be deleted after dispatch.

Unsubscribe deleted recipient

Until now, it has not been possible for recipients to unsubscribe themselves from a mailing list from which they had previously been deleted. It is now possible to do this thanks to the advanced property *Enable unsubscription of deleted recipients*. If a recipient unsubscribes from a mailing list from which they have been deleted, they are listed on the *Unsubscribed* tab in the Recipients agent. However, this only works if the recipient was deleted only from the mailing list in question and not from the system list.

Related Topics

» *Recipients/All recipients agent* page 59

» *Setting up the properties of mailing lists* page 82

» *Deleting recipients* page 109

11.3.6.2 Description of the advanced property 'Enable unsubscription of deleted recipients'

Property	Description
Enable unsubscription of deleted recipients	Specifies whether it is possible to unsubscribe recipients even when they have already been deleted from the mailing list. In other words, this enables unsubscription when the recipient is no longer recorded in the recipient table of the list ('Subscribed' and 'Unsubscribed' tabs). The recipient is then transferred to the 'Unsubscribed' tab (see *Information in the recipient table* page 92). Enabling this option may prove useful, for example, if you delete your recipients from the list after you have sent the mailing but you still want recipients to be able to unsubscribe themselves from the list.

11.3.6.3 Setting up the property 'Enable unsubscription of deleted re-cipients'

The *Enable unsubscription of deleted recipient* property is an advanced mailing list property. You can configure this property either for individual mailing lists or across the board for all mailing lists.

The *Enable unsubscription of deleted recipients* property is disabled by default.

You can specify the properties of mailing lists in the following locations:

- You can specify properties that affect all mailing lists in the (*Global settings*) tab > *Properties* agent.
- You can overwrite globally specified properties (these may be recognised by the use of italics) for the current mailing list on the mailing list tab > *Properties* agent. You can also specify additional properties that only affect the current mailing list.

Only certain users can view the *Properties* agent or the *Advanced properties* and *Administrative properties* areas contained within it (the user must be assigned the corresponding right).

The property value will appear greyed out if you have not been assigned the appropriate rights to modify a particular property.

You can copy a single selected property, multiple selected properties or all properties from a mailing list and paste them into another mailing list. To do so, use the (*Copy*), (*Copy all*) and (*Paste*) buttons.

11.3.6.4 Display behaviour in the Recipients agent when the 'Enable unsubscription of deleted recipients' property has been enabled

Recipients that were deleted from a mailing list are not listed in the *Recipients* agent or in the recipient table. If the (deleted) recipient unsubscribes from the mailing list, they are then listed on the *Unsubscribed* tab in the *Recipients* agent. This requires that the recipient in question is not recorded in the system list.

The *Unsubscribed* tab then displays the recipient's email address and all other data that is recorded in the system list.

11.3.6.5 Log entries in the 'Subscriptions' agent

The subscriptions and unsubscriptions that have been carried out are logged on the *Log* tab in the Sub-scriptions agent. Once the *Enable unsubscription of deleted recipients* property has been enabled, the following unsubscription events are logged alongside the existing events:

1. *Successful simple unsubscription (not in the list)*

   This log entry is generated when the recipient unsubscribed using the single opt-out unsubscribe procedure. The recipient had already been deleted from the mailing list in question.

2. *Confirm double opt-out unsubscription (not in the list)*

   This log entry is generated when the recipient unsubscribed using the double opt-out unsubscribe procedure. The recipient had already been deleted from the mailing list in question.

3. *Unconfirm double opt-out unsubscription (not in the list)*

   This log entry is generated when the recipient unsubscribed using the double opt-out unsubscribe procedure but has not confirmed the unsubscription. The recipient had already been deleted from the mailing list in question.

4. *Unsubscription via list-unsubscribe header (not in the list)*

   This log entry is generated when the recipient unsubscribed using the list unsubscribe header un-subscribe procedure. The recipient had already been deleted from the mailing list in question.

5. *Unsubscription: already unsubscribed*

This log entry is generated any time a recipient unsubscribes for a second time or more, even though they had already been deleted from the mailing list in question. In other words, a recipient can un-subscribe as many times as they like, even if they have not subscribed in the meantime.

6. *Unsubscription: not in the system*

   This log entry is generated any time a recipient unsubscribes for a second time or more, even though they had already been deleted from the system list. In other words, a recipient can unsubscribe as many times as they like, even if they have not subscribed in the meantime.

11.3.6.6 Identifying key figures for reports

Unsubscriptions with regard to recipients that have already been deleted are not recorded separately.

11.3.7 Searching and replacing recipient data

11.3.7.1 Searching (in a column)

Step-by-step

Open the *Search in column <column name>* dialog box as follows:

1. Open the relevant recipient table.
2. Click in the column in which you would like to search for the recipient data.

   The row is highlighted in blue and the cell of the column is marked with a dotted border.

   If you do not select a column, the search will always apply to the first column of the recipient table.
3. Click the (*Search*) button.

   A dialog box appears.

   The dialog box displayed will depend on the data type of the column selected beforehand (for example, the dialog box differs according to whether the data type is 'Text' or 'Date').
4. Enter your criteria for the search in the dialog box.
5. To start the search function, click the *Search* button.

✓ The search is performed for this column.

A message box appears if the search was unsuccessful.

If the search was successful, you will see the number of matches displayed in the dialog box. In addition, the row of the first match is selected. To go to the row of the next match, click the *Search* button once again.

Related Topics

» *Opening a recipient table* page 91

» *Creating a new column* page 123

11.3.7.2 Searching and replacing (in a column)

Step-by-step

Open the *Search in column <column name>* dialog box as follows:

1. Open the relevant recipient table.
2. Click in the column in which you would like to replace recipient data.

   The row is highlighted in blue and the cell of the column is marked with a dotted border.

   You cannot replace recipient data in the *email* column.
3. Right-click and select *Replace* on the shortcut menu.

   A dialog box appears.

   The dialog box displayed will depend on the data type of the column selected beforehand (for example, the dialog box differs according to whether the data type is 'Text' or 'Date').
4. In the dialog box, enter the term you want to replace in the *Search* field and enter the new term in the *Replace* field.
5. You have the following options for starting the function:
   - If you want each match to be highlighted in turn, click the *Search* button.
   - If you want the next match to be immediately replaced by the new term, click *Replace*.
   - If you want all matches to be automatically replaced by the new term, click the *Replace all* button.

     This button is only enabled if you have selected the *Only whole words* check box under *Search options*.

✓ Inxmail Professional performs the 'Replace' function.

Related Topics

» *Opening a recipient table* page 91

» *Creating a new column* page 123

11.3.8 Unsubscribing recipients manually

The advantage of manually unsubscribing recipients as opposed to deleting recipients:

If you delete recipients from a list, the recipients can be automatically created again and therefore resubscribed to the mailing list when data is imported.

If you manually unsubscribe recipients from a list, the recipients are no longer imported during the import of data. Unsubscribing recipients therefore provides a safeguard against accidental resubscription.

Step-by-step

1. Open the recipients table of the corresponding mailing list.
2. On the *Subscribed* tab, hold down the CTRL key and select the recipients you wish to unsubscribe in the recipient table.
3. Click the (*Unsubscribe recipient*) button.
4. A message box appears asking if you really want to unsubscribe the recipients.

5. Click *Unsubscribe* to confirm.

✓ The recipients will be unsubscribed from the mailing list and moved to the recipient table on the *Unsubscribed* tab.

Related Topics

» *Unsubscribing recipients manually* page 114

» *Opening a recipient table* page 91

11.3.9 Unsubscribe recipients via import (from import source)

You have the option to unsubscribe recipients via import. The respective recipients are moved from the *Subscribed* tab to the *Unsubscribed* tab. Note that when you import recipient data to the *Unsubscribed* tab, only the email addresses of the recipients are imported. The recipients table may, however, show other recipient data after the import if these recipients are already created in the system.

Step-by-step

1. Open the recipients table of the corresponding mailing list.
2. Click the *Unsubscribed* tab.
3. Click the (*Import recipients*) button.

A dialog box appears.

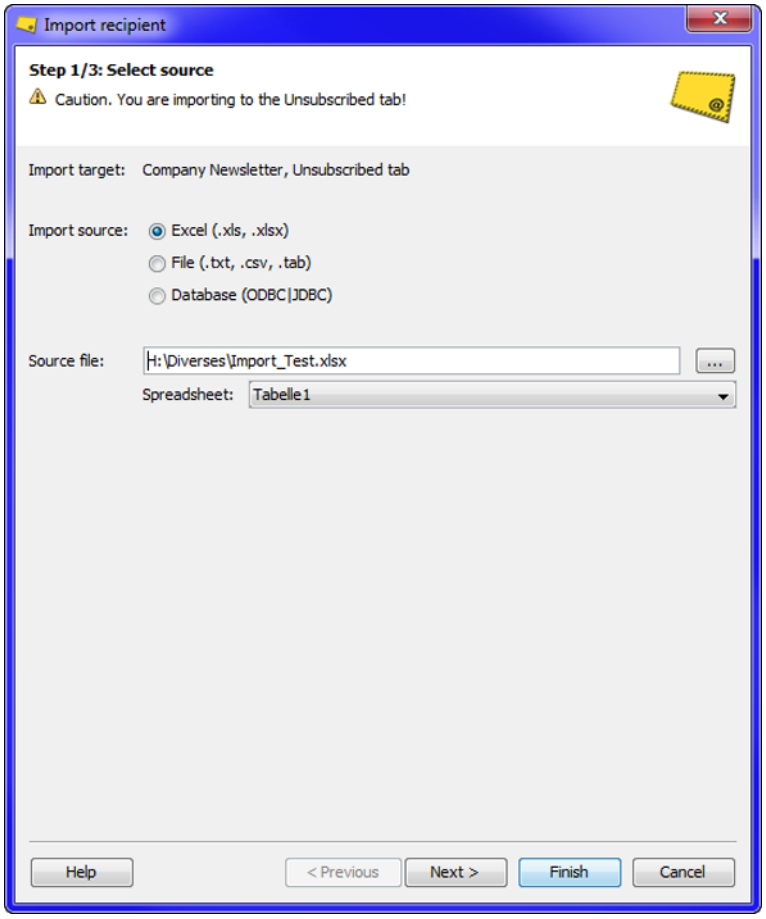


Figure 52: "Import recipients – Select source – Step 1" dialog box

4. Select import target and source file.
5. Click *Next*.

A dialog box appears.

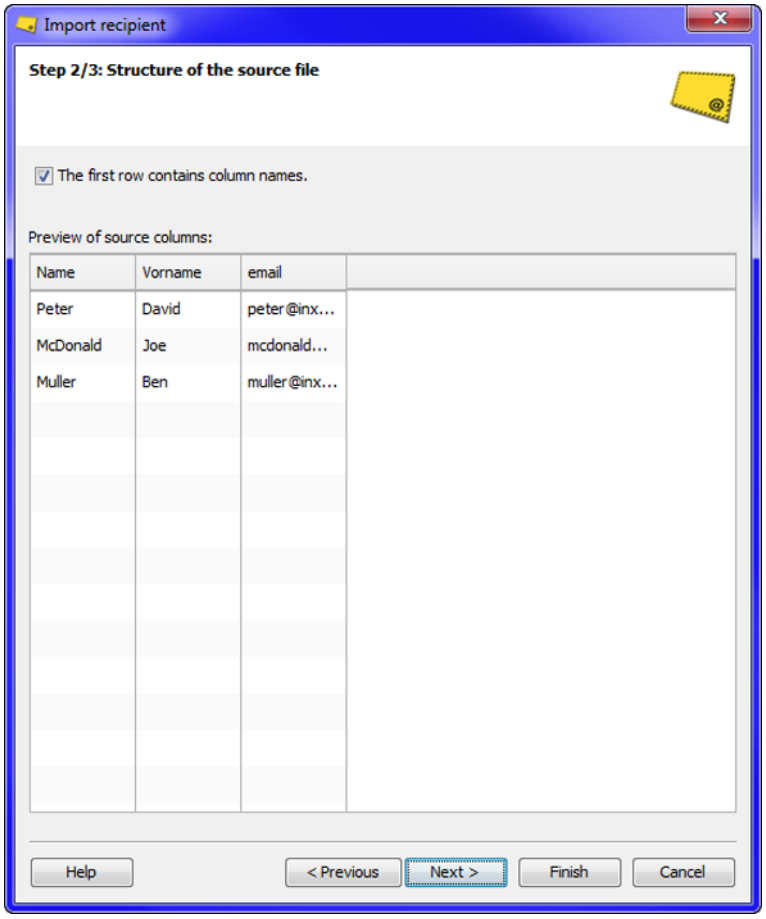


Figure 53: "Import recipients – Select source – Step 2" dialog box

6. Click *Next*.

A dialog box appears.

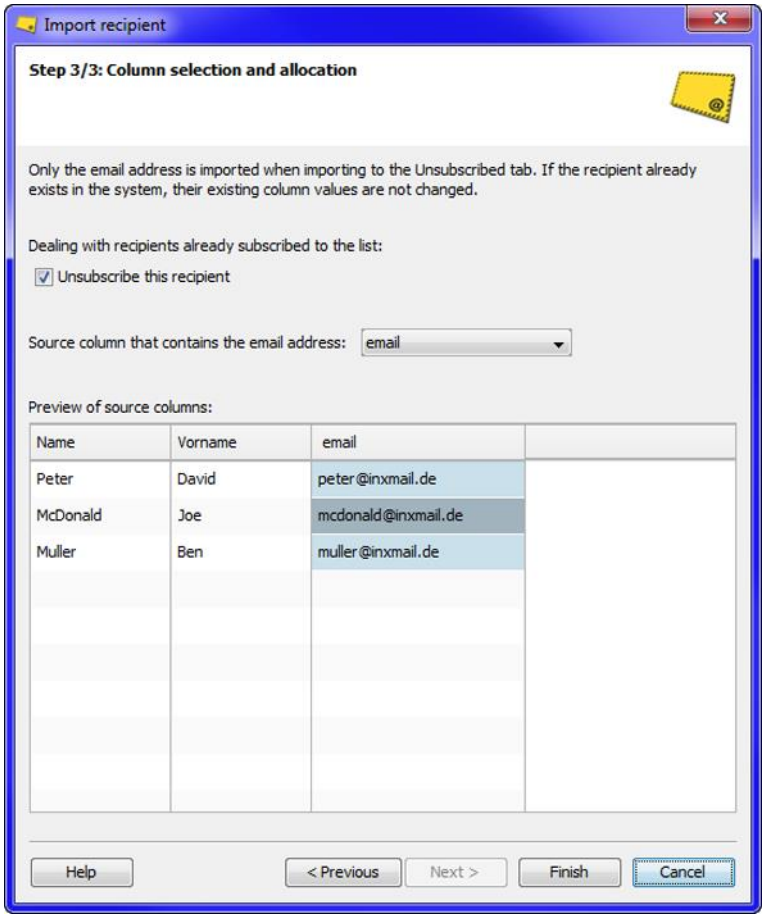


Figure 54: "Import recipients – Select source – Step 3" dialog box

7. Place a check mark next to *Unsubscribe this recipient*.
8. Click the *Finish* button.

✓ You have unsubscribed the recipients listed in the import source in the corresponding list.

Related Topics

» *Importing recipients (from an import source)* page 95

» *Opening a recipient table* page 91

11.3.10 Manually resubscribing recipients

Important Ensure that recipients who have explicitly unsubscribed from a list are not resubscribed to the list without their consent. You may only send a mailing to recipients who have given their consent to receive the mailing.

Step-by-step

1. Open the recipients table of the corresponding mailing list.
2. On the *Unsubscribed* tab, hold down the CTRL key and select the recipients you wish to resubscribe in the recipient table.

3. Click the (*Edit recipient*) button and select *Resubscribe recipient*.
   A dialog box appears.
4. In the dialog box, specify whether the original subscription date (that is, the date on which the individual recipients originally subscribed to the mailing list) or the current date should be copied to the *Subscription date <Name of mailing list>* system column.
5. Click *Yes* to confirm the resubscription.

✓ The recipients will be resubscribed to the mailing list and moved to the recipient table on the *Subscribed* tab.

Related Topics

» *Opening a recipient table* page 91

11.3.11 Managing list association

Step-by-step

Open the *Manage list association* dialog box as follows:

1. Open a recipient table.
2. Select the recipient you require in the recipient table.
3. Click the (*Edit recipient*) button and then select *Manage list association*.
   A windows appears.

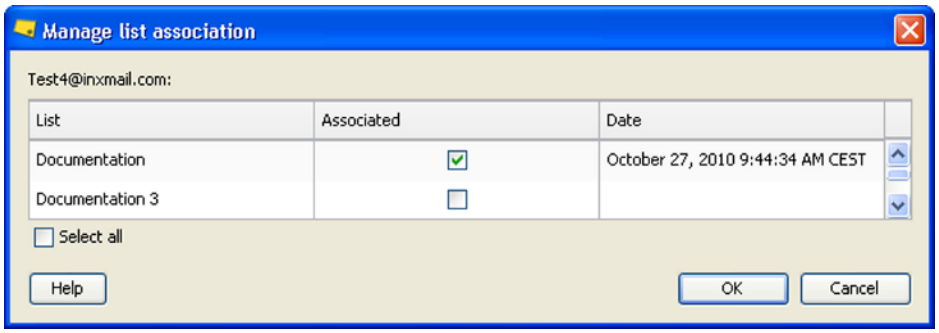


Figure 55: "Manage list association" dialog box

4. The dialog box displays the list association of the first selected recipient. All the lists to which the recipient is currently subscribed are selected in the *Associated* column. In the *Subscription date* column (corresponds to the *Subscription date <Name of the mailing list>* system column), you can see the date on which this recipient subscribed to the respective mailing list.

   To edit the list association of the recipient, proceed as follows:

   - To subscribe the recipient to further mailing lists, select the check boxes for the required mailing lists in the *Associated* column.
   - To unsubscribe the recipient from mailing lists, clear the check boxes for the respective mailing lists in the *Associated* column.
5. Confirm your entries by clicking *OK*.
6. The dialog box now displays the list association of the next selected recipient.

In the dialog box, specify the list association for all the remaining recipients.

✓ Each recipient is now subscribed to the mailing lists that you have activated and/or unsubscribed from the mailing lists that you have deactivated.

Related Topics

» *Opening a recipient table* page 91

11.3.12 Creating recipients as test profiles

Note You must have the right to 'Export and copy recipients' in order to export recipients.

Step-by-step

1. Open a recipient table.
2. In the recipient table, hold down the CTRL key and select the recipients whose data is to be added to the new test profiles (that is, one test profile for each recipient).
3. Click the (*Edit recipient*) button and select *Create recipient as test profile*.
4. Different windows appear, depending on how many recipients you previously selected:
   - If you only selected one recipient, a dialog box appears.

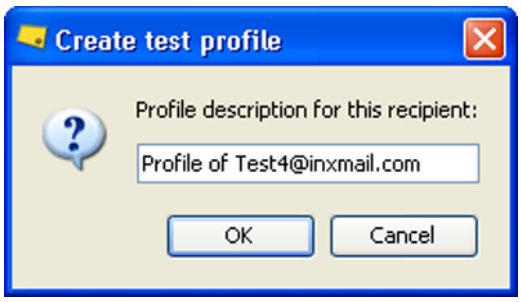


Figure 56: "Create test profile" dialog box

If required, change the name suggested for the new test profile and click *OK* to confirm.

   - A message box appears if you selected several recipients.

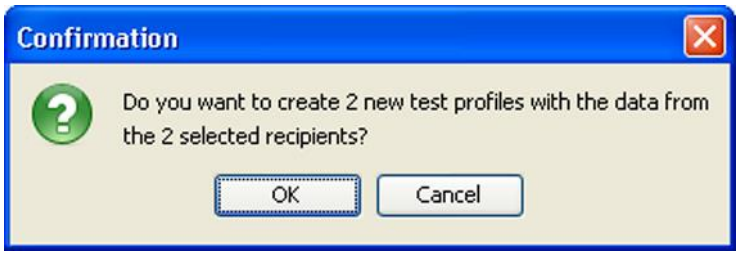


Figure 57: "Confirmation" message box

5. Confirm the dialog box by clicking *OK*.

✓ The test profiles are now created.

If you created your test profiles using the recipient table of a mailing list in which the *Test profiles* agent has been added, you can view the new test profiles only in the *Test profiles* agent of the mailing list. Otherwise, you can view the newly added test profiles only on the (*Global settings*) tab > *Test profiles* agent.

Related Topics

» *Creating test profiles* page 174

» *Content check using test or recipient profiles* page 228

» *Opening a recipient table* page 91

11.3.13 Manually marking recipients as available/unavailable

All recipients marked as 'unavailable' have a red indicator in front of their email address in the recipient table.

The following explains how to manually mark recipients as 'unavailable'. Recipients can also be marked as 'unavailable' automatically by the system. By default, the unavailable indicator is set following **one** unsuccessful attempt (as a result of a hard bounce) at delivering an email to a recipient. Your Inxmail Professional administrator can, however, change when this automatic indicator is set or deactivate it completely.

By default, all recipients marked as 'unavailable' are automatically excluded from any mailings. However, your Inxmail Professional administrator can change this setting.

Step-by-step

1. Open a recipient table.
2. Hold down the CTRL key and select the recipients in the recipient table whom you would like to mark accordingly.
3. Click the (*Edit recipient*) button and then select one of the following options:
   - To mark the selected recipients as 'unavailable', select *Select recipient as unavailable*.
   - To remove the 'unavailable' indicator for the selected recipients, select *Select recipient as available*.

     If you remove the 'unavailable' indicator for a recipient, the hard bounce counter is reset to zero for the recipient.

   A message box appears.
4. Confirm the message by clicking Yes.

✓ The recipients are marked accordingly in all the recipient tables.

Related Topics

» *Information in the recipient table* page 92

» *Global properties (Administration)* page 587

» *Global access rights (Administration)* page 586

» *Opening a recipient table* page 91

11.4 Configuring columns

11.4.1 Moving a column

Step-by-step

1. Open the recipient table.
2. To move a column, click the header of the column and drag it to the required position (keeping the mouse button pressed).

✓ You have now moved the column to the required position.

Note that this setting is applied for all users (of your client).

Related Topics

» *Opening a recipient table* page 91

11.4.2 Showing/hiding columns

Step-by-step

Open the *Show and hide columns* dialog box as follows:

1. Open the recipient table.
2. Click the (*Configure columns*) button and select *Show/hide columns*.

   A dialog box appears.

Figure 58: "Show and hide columns" dialog box

3. In the dialog box, enable the columns you want to display in your recipient table.
4. Confirm your entries by clicking *OK*.

✓ Only the selected columns now appear in the recipient table. The disabled columns are hidden.

Please note the following for the recipient table of a mailing list:

- In the recipient table, you can also show or hide all columns that are available globally in Inxmail Professional.

- Besides affecting the clarity of the recipient table, the following also applies to hidden columns: Hidden columns cannot be selected when you later create your personalised mailing content.
- In the *Test profiles* agent or when assigning recipients to mailings, Inxmail Professional displays only the columns that are shown in the *Recipients* agent.

Related Topics

» *Opening a recipient table* page 91
» *Creating personalised texts* page 198
» *Mailings (recipient)* page 264

11.4.3 Creating a new column

Step-by-step

To create a new column in a mailing list, proceed as follows:

1. Open the recipient table.
2. Click the (*Configure columns*) button and select *Create new column*.
   A dialog box appears.

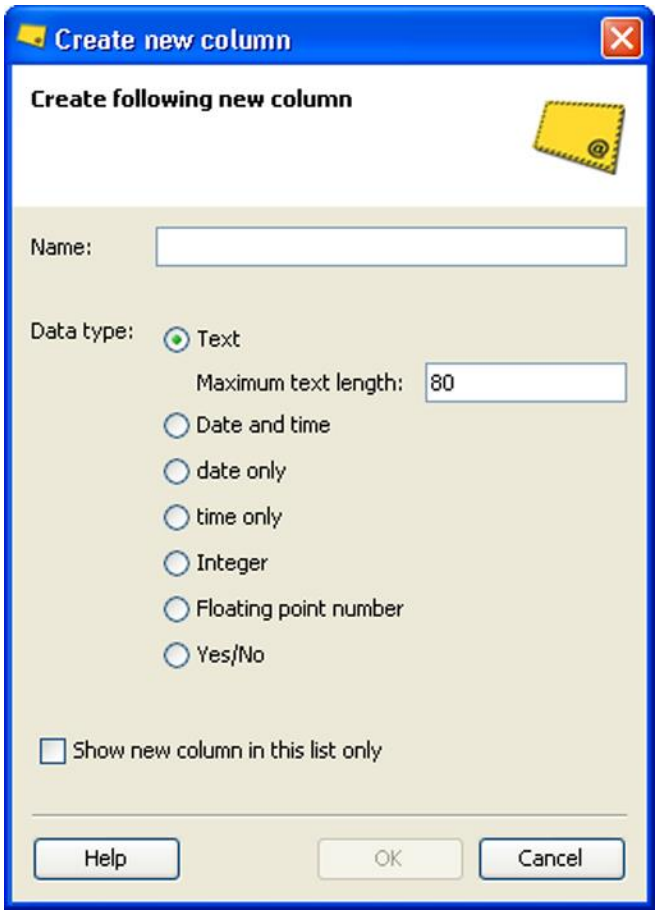


Figure 59: "Create new column" dialog box

3. Enter a name for the new column in the dialog box.

Note Avoid using accented characters, umlauts and special characters in column names.

4. In the dialog box, select the appropriate column type (that is, the data type of the column):

Column type	Description
Text	Recipient data in this column may contain text and numbers of various string lengths (up to 255 characters).
Date and time	Recipient data in this column may contain date values and time values.
date only	Recipient data in this column may contain date values only.
time only	Recipient data in this column may contain time values only.
Integer	Recipient data in this column may contain whole numbers only (for example, '-1' or '45').
Floating point number	Recipient data in this column may contain decimal numbers only (for example, '3.56' or '-0.75').
Yes/No	Recipient data in this column may contain the values 'Yes' or 'No' (for example, if the values from radio buttons or check boxes are saved in the columns).

By selecting the appropriate column type you ensure that:

- no incorrect values are entered in the recipient data.
- specific operations can be carried out (for example, analysis of monthly values).
- target group filters and case differentiations are created more easily.
- data volumes are reduced, which means that the total speed of the system is increased.
- comparisons with existing databases are simplified.

Example

• Assign the 'Text' data type to columns that contain elements such as surnames, first names, streets or cities.

• Assign the 'Yes/No' data type to columns that contain the gender of recipients.

• Assign the 'Date' data type to columns that contain the birthday of recipients.

5. If you selected the 'Text' column type, enter the maximum allowed text length in the dialog box.

   The maximum text length must not exceed 255 characters.
6. If you want your new column to be visible in the current recipient table only (and not in the recipient tables of other mailing lists or in the global settings), select the *Create new column in this list only* check box in the dialog box.
7. Confirm your entries by clicking *OK*.

✓ Depending on the settings you specified, your new column will either appear in the current recipient table only or it will appear in all the recipient tables. If you move the mouse over the column header, you can see the column type defined for the column.

Related Topics

» *Opening a recipient table* page 91

11.4.4 Renaming a column

Important Please note that when you rename a column, the change can affect all the recipient tables. Therefore, only rename columns if you are certain that no procedures need to access the old column names (for example, to send mailings).

Step-by-step

1. Open the recipient table.
2. Click in the column that you would like to rename.
   The row is highlighted in blue and the cell of the column is marked with a dotted border.
3. Click the (*Configure columns*) button and select *Rename column*.
   A message box appears.

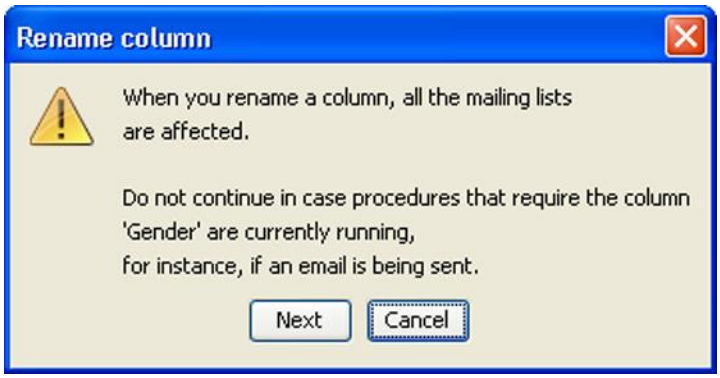


Figure 60: "Rename column" message box

4. Confirm the message by clicking *Next*.
   A dialog box appears.

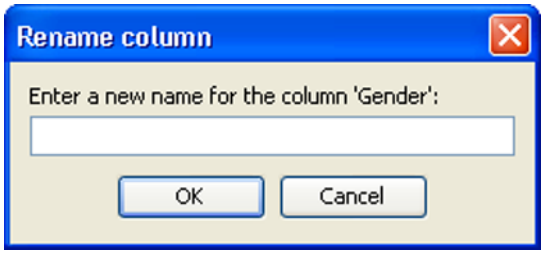


Figure 61: "Rename column" dialog box

5. Enter a new name for the column in the dialog box.

   Note Avoid using umlauts and special characters in column names.

6. Confirm your entries by clicking *OK*.

✓ You have now renamed the column. The new column name appears in the column header in the recipient table.

Related Topics

» *Opening a recipient table* page 91

11.4.5 Changing the column type

Step-by-step

Open the *Change column type* dialog box as follows:

1. Open the recipient table.
2. Click in the column whose column type you would like to change.
   The row is highlighted in blue and the cell of the column is marked with a dotted border.
3. Click the (*Configure columns*) button and select *Change column type*.
   A dialog box appears.

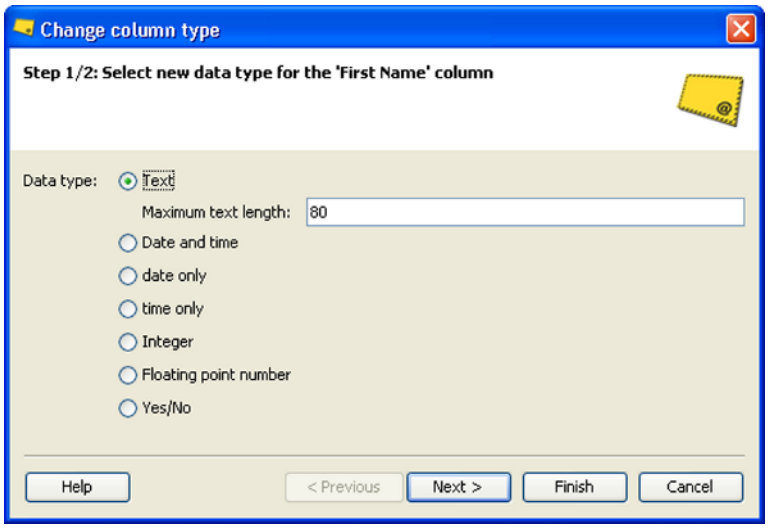


Figure 62: "Change column type" dialog box

4. In the dialog box, select the new column type. If you selected the 'Text' column type, enter the maximum allowed text length in the dialog box. The maximum text length should not exceed 255 characters.
5. Click *Next*.
6. Depending on which column type you selected, specify the following additional information in the dialog box (where required):
   - If you selected the 'Date and time', 'Date only' or 'Time only' column type, select the appropriate format for the date or time from the list. Then click *Next*.
   - If you selected the 'Floating point number' column type, select the decimal character (for example, '.' for '0.1') and the 1000s separator (for example, ',' for '1,000') from the drop-down lists. Then click *Next*.
   - If you selected the 'Yes/No' column type, specify the comparison word in the dialog box (for example, for the 'Yes' column type, specify the comparison word 'true'). Then click *Next*.
7. In the dialog box, select one of the following options under *Column assignment*:
   - To leave the original column unchanged and change the column type in a copy of the column, select *Keep the original column and save the converted values in the following column:*.
     In the input field, a name is suggested for the copy that is to be made.
   - To make a backup copy of the original column and change the column type of the original column, select *Save a backup copy of the original values in the following column:*.

In the input field, a name is suggested for the backup copy that is to be made.

8. Confirm your settings by clicking *Finish*.

✓ The column type of this column is changed in all the respective recipient tables in Inxmail Professional. This procedure may take some time.

Related Topics

» *Opening a recipient table* page 91

» *Creating a new column* page 123

11.4.6 Deleting a column

Important Please note that when you delete a column the deletion is irreversible. The column (including any entries) will be deleted from the entire system. Therefore, only delete a column if you are certain that no procedures need to access the column (for example, to send mailings).

Step-by-step

1. Open the recipient table.
2. Click in the column that you would like to delete.
   The row is highlighted in blue and the cell of the column is marked with a dotted border.
3. Click the (*Configure columns*) button and select *Delete column*.
   A message box appears.

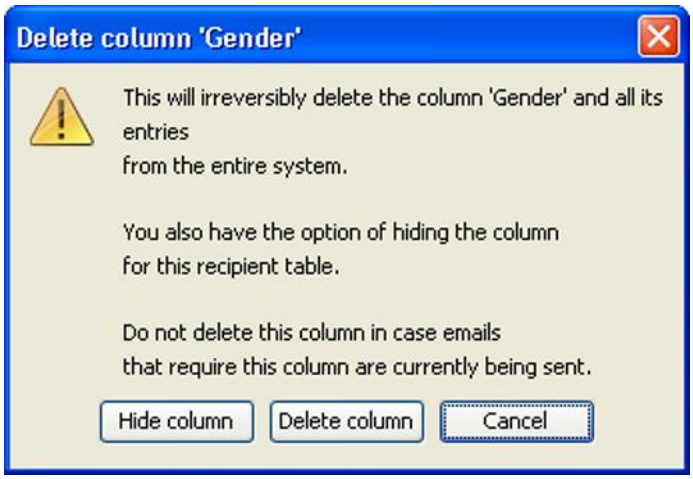


Figure 63: "Delete column" message box

4. To delete the column, click the *Delete column* button in the message box.

✓ The column is deleted from the system and no longer appears in the recipient table.

Related Topics

» *Opening a recipient table* page 91

12 Mailing list subscription and unsubscription

This chapter includes the following:

- You are given an overview of the options available for subscribing recipients to and unsubscribing recipients from standard mailing lists.
- You learn which subscribe and unsubscribe procedures you can use in Inxmail Professional.
- You learn how to set up subscriptions and unsubscriptions for standard mailing lists in the *Subscriptions* agent.
- You find out how to set up the subscribe and unsubscribe mailings required for subscriptions and unsubscriptions (for example, welcome, confirmation or farewell mailings) and how to filter the mailings to get a better overview.
- You also get to know the subscribe/unsubscribe log.

12.1 Overview: Subscription and unsubscription

Recipients only receive mailings from a standard mailing list if they have subscribed to the respective mailing list.

Mailings from dynamic mailing lists are always sent to all the recipients in the system or to the recipients in the system who belong to the dynamic mailing list target group (*Overview: Mailing lists* page 73).

Recipients cannot be explicitly subscribed to or unsubscribed from dynamic mailing lists.

Subscription

The following options are available for subscribing recipients to a standard mailing list:

- Recipient data is imported into the standard mailing list (*Importing recipients (from an import source)* page 95 and *Importing recipients through copy and paste* page 106)
- Recipient data is set up manually (*Creating recipients manually and editing them* page 109)
- The list association of recipients is changed (*Managing list association* page 119)
- Recipients who have unsubscribed from the standard mailing list are manually resubscribed (*Manually resubscribing recipients* page 118)
- Recipients are subscribed via actions (*Actions* page 405)
- Recipients subscribe to the mailing list themselves using a form on your web page (JSP 'Subscription' template)

Inxmail Professional also continues to allow subscription by email. In this old-established subscription procedure, recipients use an email to subscribe to a standard mailing list (*Mailing list subscription and unsubscription by email* page 512).

Unsubscription

The following options are available for unsubscribing recipients from a standard mailing list:

- The recipients are deleted (*Deleting recipients* page 109)
- The list association of the recipients is changed (*Managing list association* page 119)

- The recipients are manually unsubscribed (*Unsubscribing recipients manually* page 114)
- Recipients are unsubscribed via actions (*Actions* page 405)
- Recipients unsubscribe from the mailing list themselves using a form on your web page (*JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)

  Make sure you give your subscribers in each of your mailings the option to unsubscribe at any time via a link. This unsubscribe link is also of legal relevance.

  Inxmail Professional also continues to allow unsubscription by email (*Mailing list subscription and unsubscription by email* page 512) In this old-established unsubscription procedure, recipients use an email to unsubscribe from a standard mailing list.

Recipients unsubscribe themselves using an unsubscribe link in a mailing sent to them (*Inserting an unsubscribe link* page 212)

The processes for subscribing to and unsubscribing from a mailing list depend on the subscribe and unsubscribe procedures that you use (*Unsubscribe procedures* page 131).

To allow subscriptions to and unsubscriptions from a standard mailing list to take place, you must configure various settings on the tab of the standard mailing list in the Subscriptions agent (*Subscription and unsubscription setup* page 135 and *Subscribe and unsubscribe mailings* page 147).

Prerequisites

The *Subscriptions* agent is displayed on the tab of the standard mailing list (*Adding/deleting additional agents to mailing lists* page 80).

Important Please note that if you delete the *Subscriptions* agent, none of the subscription and unsubscription functions will work anymore for this standard mailing list. For this reason, we recommend **never** deleting this agent.

12.2 Overview: Subscribe and unsubscribe procedures

We recommend using the following subscribe and unsubscribe procedures as they offer increased protection against the misuse of data.

- Confirmed opt-in or double opt-in subscription
- Single opt-out or confirmed opt-out unsubscription

We do **not**recommend using the double opt-out unsubscribe procedure, since this method has many intermediate steps and therefore makes unsubscription more difficult.

It is important that you always let your recipients know what the next step involves (for example, on landing pages or in confirmation mailings).

Try not to make your subscription and unsubscription processes too complicated, otherwise you may lose prospective subscribers.

12.2.1 Subscribe procedures

The following subscribe procedures are explained using the example of a subscription via your web page.

12.2.1.1 Single or confirmed opt-in (simple subscription)

Figure 64: Single/confirmed opt-in subscribe procedures

Description of subscribe procedure step	Necessary settings
The interested party enters their subscription data on your web page.	• Set up single or confirmed opt-in subscribe procedure for the mailing list (*Subscription setup* page 135) • Create a subscription web page (either manually or using the JSP 'Subscription' template in Inxmail Professional, JSP 'Subscription' template).
A landing page informs the interested party that they have been subscribed.	Create a landing page (either manually or using the JSP 'Subscription' template in Inxmail Professional, JSP 'Subscription' template).
Optional for single opt-in, mandatory for confirmed opt-in: The interested party receives a welcome mailing containing an unsubscribe link that they can use to unsubscribe again in case they have subscribed by mistake or have been subscribed by another person.	Optional for single opt-in, mandatory for confirmed opt-in: Customise, approve and activate welcome mailings (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)

12.2.1.2 Double opt-in (subscription to be confirmed by email)

Figure 65: Double opt-in subscribe procedure

Description of subscribe procedure step	Necessary settings
The interested party enters their subscription data on your web page.	• Set up double opt-in subscribe procedure for the mailing list (*Subscription setup* page 135) • Create a subscription web page (either manually or using the JSP 'Subscription' template in Inxmail Professional, JSP 'Subscription' template).
A landing page informs the interested party that a confirmation mailing has been sent to them and they must click the link (verify opt-in link) contained in the mailing to complete the subscription process.	Create a landing page (either manually or using the JSP 'Subscription' template in Inxmail Professional, JSP 'Subscription' template).
The interested party clicks the link in the confirmation mailing.	Customise, approve and activate the confirmation mailing (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)
A (further) landing page informs the interested party that they have been subscribed.	Create a landing page (either manually or using the JSP 'Subscription' template in Inxmail Professional, JSP 'Subscription' template).
Optional: The interested party receives a welcome mailing containing an unsubscribe link that they can use to unsubscribe again in case they have subscribed by mistake or have been subscribed by another person.	Optional: Customise, approve and activate the welcome mailing (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)

The double subscription confirmation (subscription web page and confirmation mailing) of this double opt-in procedure ensures that data is not misused during the subscription process.

Recipients are only subscribed to a mailing list after they have confirmed their subscription.

12.2.2 Unsubscribe procedures

The following unsubscribe procedures are explained using the example of an unsubscription via a click of an unsubscribe link (either in your mailing or on your web page).

12.2.2.1 Single opt-out (simple unsubscription)

Figure 66: Single opt-out unsubscribe procedure

Description of unsubscribe procedure step	Necessary settings
The recipient clicks the unsubscribe link.	Set up single opt-out unsubscribe procedure for the mailing list (*Unsubscription setup* page 141) Insert an unsubscribe link (in your mailing, *Inserting an unsubscribe link* page 212, or on your web page, for example, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)
A landing page informs the recipient that they have successfully unsubscribed from the mailing list and their data has been deleted.	Create a landing page (either manually or using the JSP 'Cancel subscription' template in Inxmail Professional, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)
Optional: The recipient receives a farewell mailing.	Optional: Customise, approve and activate the farewell mailing (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)

12.2.2.2 Confirmed opt-out (confirmed unsubscription)

Figure 67: Confirmed opt-out unsubscribe procedure

Description of unsubscribe procedure step	Necessary settings
The recipient clicks the unsubscribe link.	• Set up confirmed opt-out unsubscribe procedure for the mailing list (*Unsubscription setup* page 141) • Insert an unsubscribe link (in your mailing, *Inserting an unsubscribe link* page 212, or on your web page, for example, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)

Description of unsubscribe procedure step	Necessary settings
A (JSP) unsubscription confirmation web page appears, on which the recipient must confirm their unsubscription.	Create a (JSP) unsubscription confirmation web page (either manually or using the JSP 'Confirm unsubscribe' template in Inxmail Professional, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)
After confirming, a landing page informs the recipient that they have successfully unsubscribed from the mailing list and their data has been deleted.	Create a landing page (either manually or using the JSP 'Confirm unsubscribe' template in Inxmail Professional, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)
Optional: The recipient receives a farewell mailing.	Optional: Customise, approve and activate the farewell mailing (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)

12.2.2.3 Double opt-out (unsubscription to be confirmed by email)

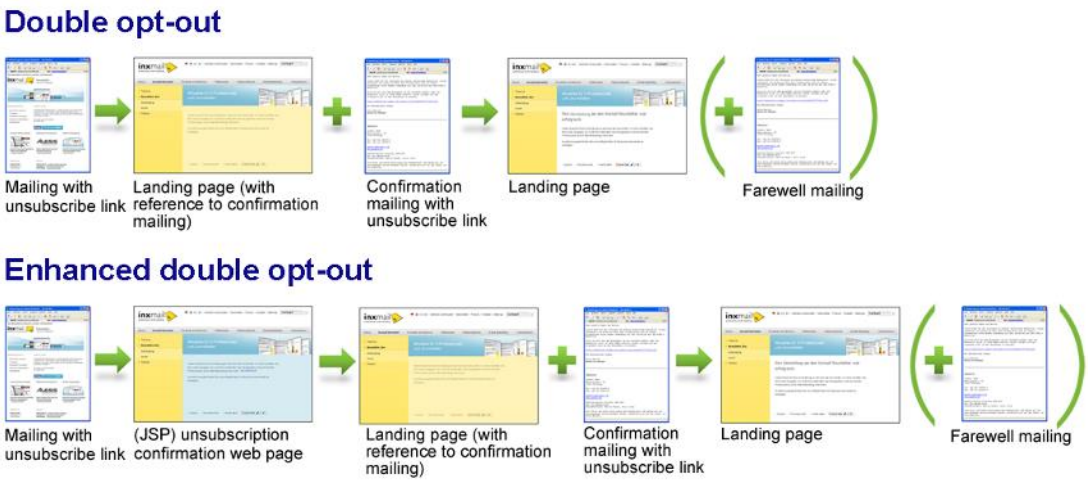


Figure 68: Double opt-out unsubscribe procedure

Description of unsubscribe procedure step	Necessary settings
The recipient clicks the unsubscribe link.	• Set up double opt-out unsubscribe procedure for the mailing list (*Unsubscription setup* page 141) • Insert an unsubscribe link (in your mailing, *Inserting an unsubscribe link* page 212, or on your web page, for example, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)

Description of unsubscribe procedure step	Necessary settings
Optional (i.e., only for extended double opt-out): A (JSP) unsubscription confirmation web page appears, on which the recipient must confirm their unsubscription.	Optional (i.e., only for extended double opt-out): Create a (JSP) unsubscription confirmation web page (either manually or using the JSP 'Confirm unsubscribe' template in Inxmail Professional, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)
A landing page informs the recipient that a confirmation mailing has been sent to them and they must click the link (verify opt-out link) contained in the mailing to complete the unsubscription process.	Create a landing page (either manually or using the JSP 'Cancel subscription' or 'Confirm unsubscribe' template in Inxmail Professional, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418)
The recipient clicks the unsubscribe link in the confirmation mailing.	Customise, approve and activate the confirmation mailing (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)
A (further) landing page informs the recipient that they have successfully unsubscribed from the mailing list and their data has been deleted.	Create a landing page (manually)
Optional: The recipient receives a farewell mailing.	Optional: Customise, approve and activate the farewell mailing (*Displaying, sorting and filtering the subscribe/unsubscribe mailings table* page 147)

The recipients remain subscribed to the mailing list until they have confirmed their unsubscription.

12.3 Subscription and unsubscription setup

12.3.1 Subscription setup

To allow subscriptions to a standard mailing list to be carried out, you must set this up. On the tab of the mailing list, click the *Subscriptions* > agent *Subscription* tab.

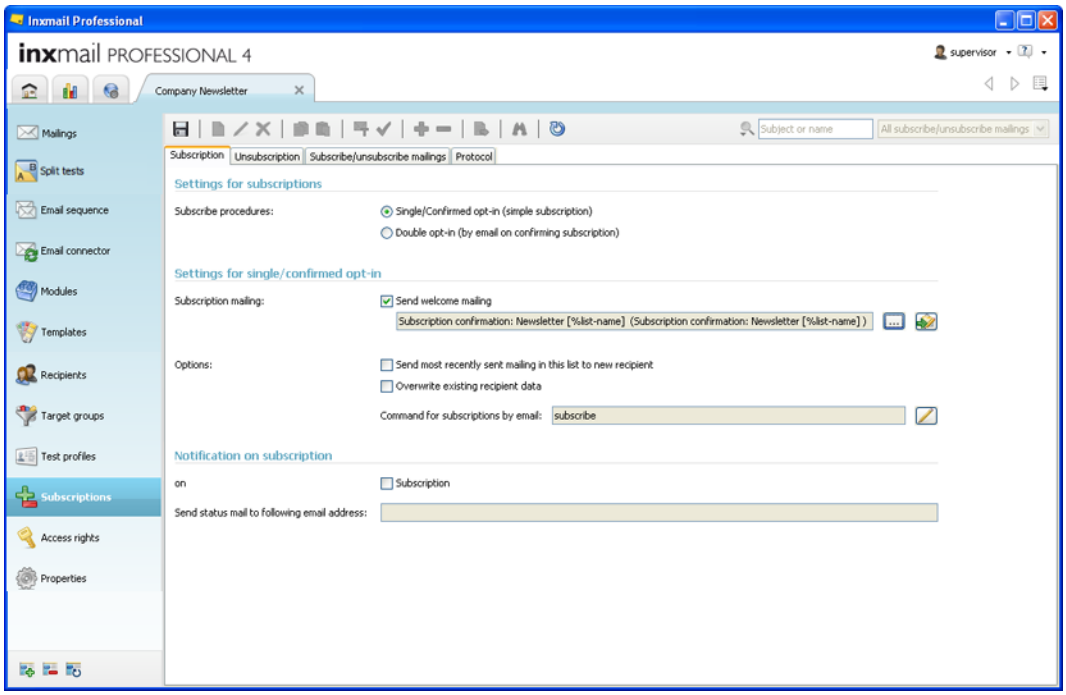


Figure 69: "Subscriptions" agent > "Subscription" tab

The following settings depend on the subscribe procedure that you have chosen to use for the mailing list (*Overview: Subscribe and unsubscribe procedures* page 129).

12.3.1.1 Single opt-in or confirmed opt-in subscribe procedure

In the *Settings for subscription* section, select *Single/Confirmed opt-in (simple subscription)*.

Step-by-step

1. Specify the following in the *Settings for single/confirmed opt-in* section:

Field	Description
Send welcome mailing	If this check box is selected, Inxmail Professional will send a welcome mailing to the new recipient following successful subscription. Click the ... (*Select mailing*) button to select the welcome mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing in the *Analysis* workflow step • Copy and edit selected mailing • Create new mailing (*Creating and editing subscribe mailings on the Subscription tab* page 136)
Send most recently sent mailing in this list to new recipient	If this check box is selected, Inxmail Professional will send the most recently sent mailing from the mailing list to the new recipient following successful subscription.
Overwrite existing recipient data	If this check box is selected, Inxmail Professional will overwrite existing recipient data during subscription if the recipient already exists in Inxmail Professional.
Command for subscription by email	The (*Edit*) button allows you to change the command that is required for subscription by email (*Mailing list subscription and unsubscription by email* page 512).

2. To ensure that Inxmail Professional automatically sends notifications to a particular email address when an interested party subscribes to the mailing list, specify the following in the *Notification of subscription* section:
   a. Select the *Notification on subscription* check box.
   b. Enter the email address to which the notifications are to be sent in the *to email address* field.
3. Save your settings.

✓ You have now activated and set up the single or confirmed opt-in subscribe procedure for the mailing list.

You must also create the subscription web pages required for the single or confirmed opt-in subscribe procedure, *Overview: Subscribe and unsubscribe procedures* page 129.

12.3.1.2 Creating and editing subscribe mailings on the Subscription tab

Subscribe and unsubscribe mailings are generally created and edited on the *Subscribe/Unsubscribe mailings* tab.

You can also view, edit and create new subscribe and unsubscribe mailings directly on the *Subscription* or *Cancel subscription* tabs. This saves you toggling between the different tabs.

Click the *(Mailing options)* button on the right next to the corresponding mailing type. The following choices are available:

- Open selected mailing as read-only

Welcome mailings are shown in the *Analysis* workflow step. All other mailing types are displayed in the *Editing* workflow step.

- Copy and edit selected mailing
- Create new mailing

  Select this option to create a welcome mailing.

Step-by-step

To copy or edit a selected mailing, proceed as follows:

1. Click the (*Mailing options*) button.

   The drop-down list will appear.
2. Select *Copy and edit selected mailing*.

   A dialog box appears.

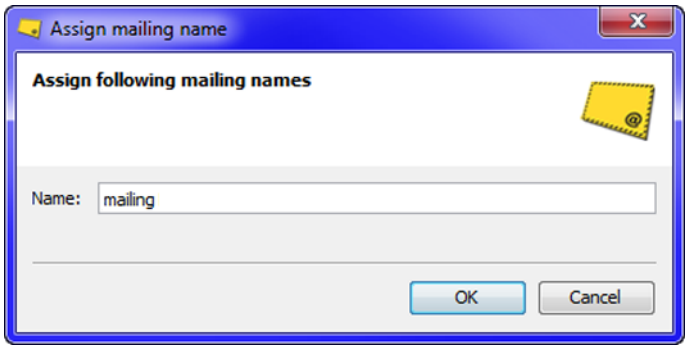


Figure 70: "Assign mailing name" dialog box

3. Confirm the dialog box by clicking *OK*.

   The mailing will open in the *Editing* workflow step.
4. Perform the required workflow steps.

If immediate approval is set for the mailing list, the following dialog box will be displayed:

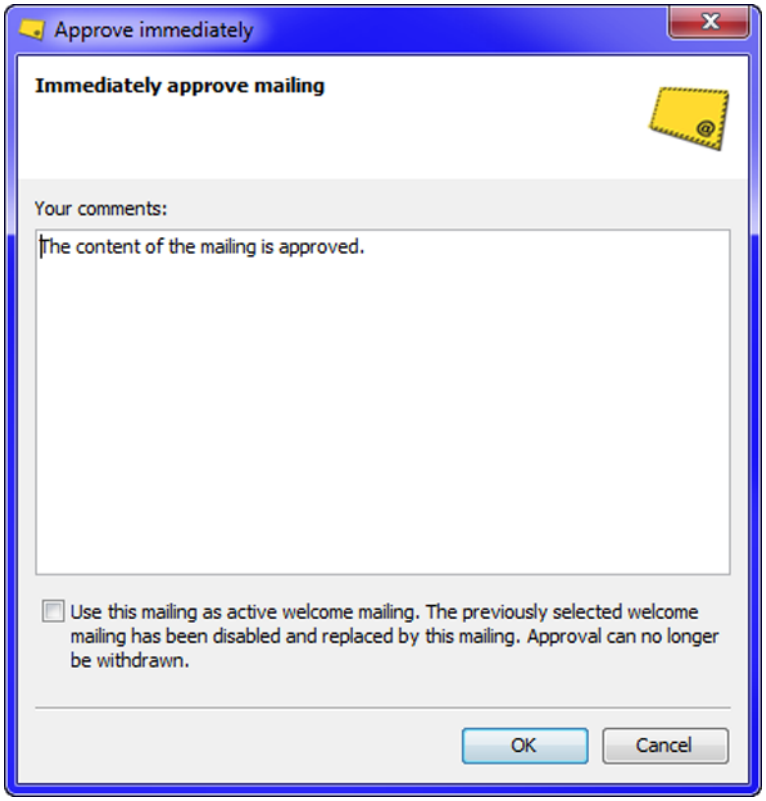


Figure 71: "Approve immediately" dialog box

5. Select the check box at the bottom of the dialog box in order to approve and activate the mailing in one step.
6. Confirm the dialog box by clicking *OK*.

Related Topics

» *Creating a new subscribe/unsubscribe mailing* page 149

» *Creating a new subscribe/unsubscribe mailing* page 149

12.3.1.3 Double opt-in subscribe procedure

Step-by-step

1. In the *Settings for subscription* section, select *Double opt-in (subscription to be confirmed by email)*.
2. Specify the following in the *Settings for double opt-in* section:

Field	Description
Send confirmation mailing	If this check box is selected, the interested party will be sent a mailing with a link that they must click to confirm their subscription. Click the ... (*Select mailing*) button to select the confirmation mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing • Create new mailing (*Creating and editing subscribe mailings on the Subscription tab* page 136) The *Send confirmation mailing* check box is always selected for double opt-in, as a confirmation mailing must always be sent as part of this subscribe procedure.
Send timeout mailing	If this check box is selected, a mailing will be sent if the interested party clicks the link in the confirmation mailing after the confirmation deadline has passed (*Number of days in which double opt-in must be confirmed* field). Click the ... (*Select mailing*) button to select the timeout mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing • Create new mailing (*Creating and editing subscribe mailings on the Subscription tab* page 136)
Send welcome mailing	If this check box is selected, Inxmail Professional will send a welcome mailing to the new recipient following successful subscription. Click the ... (*Select mailing*) button to select the welcome mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing • Create new mailing (*Creating and editing subscribe mailings on the Subscription tab* page 136)

Field	Description
Number of days in which double opt-in must be confirmed	Period of time in which interested parties must confirm their subscription. If an interested party confirms their subscription later, they are sent to a special landing page (*Landing page if the confirmation period has expired* field) and are not subscribed.
Landing page in case double opt-in already confirmed	URL of the landing page that appears if an interested party clicks the subscription confirmation link in the confirmation mailing again.
Landing page if the confirmation period has expired	URL of the landing page that appears if an interested party clicks the subscription confirmation link in the confirmation mailing after the specified time period has expired (*Number of days in which double opt-in must be confirmed* field).
Send most recently sent mailing in this list to new recipient	If this check box is selected, Inxmail Professional will send the most recently sent mailing from the mailing list to the new recipient following successful subscription.
Overwrite existing recipient data	If this check box is selected, Inxmail Professional will overwrite existing recipient data on successful subscription if the recipient already exists in Inxmail Professional.
Command for subscription by email	The (*Edit*) button allows you to change the command that is required for subscription by email. (*Mailing list subscription and unsubscription by email* page 512)

The (*Open mailing in the 'Editing' step*) button allows you to open the previously selected mailing directly in the *Editing* workflow step.

3. To ensure that Inxmail Professional automatically sends notifications to a particular email address when an interested party subscribes to the mailing list, specify the following in the *Notification of subscription* section:
   a. To ensure that a notification is sent as soon as an interested party has subscribed to the mailing list but not confirmed, select the *Notifications on unconfirmed subscription* check box.
   b. To ensure that a notification is sent as soon as an interested party has confirmed their subscription to the mailing list (via a confirmation mailing), select the *Notifications on finalised subscription* check box.
   c. Enter the email address to which the notifications are to be sent in the *to email address* field.
4. Save your settings.

✓ You have now activated and set up the double opt-in subscribe procedure for the mailing list.

You must also create the subscription web pages required for the double opt-in subscribe procedure.

Use

» *Overview: Subscribe and unsubscribe procedures* page 129

12.3.2 Unsubscription setup

To allow unsubscriptions from a standard mailing list to be carried out, you must set this up. On the tab of the standard mailing list, click the *Subscriptions* > agent *Cancel subscription* tab.

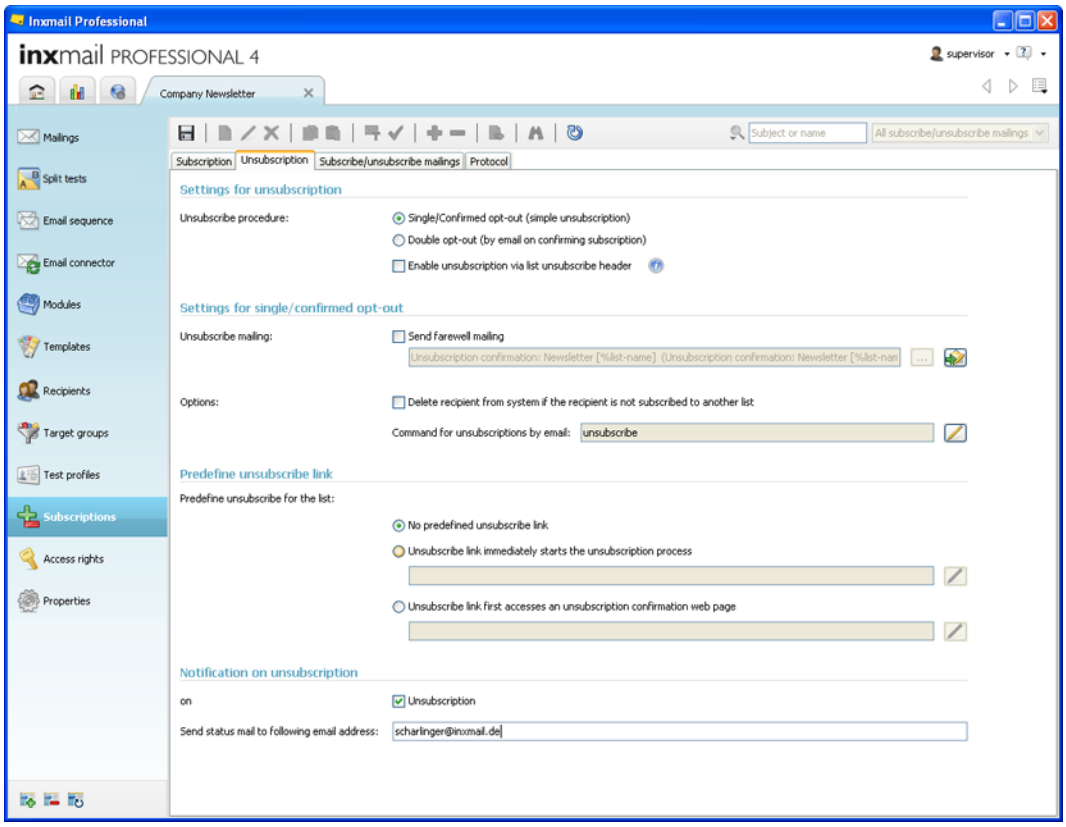


Figure 72: "Subscriptions" agent > "Cancel subscription" tab

The following settings depend on the unsubscribe procedure that you have chosen to use for the mailing list (*Overview: Subscribe and unsubscribe procedures* page 129).

You can also offer the standardised 'list-unsubscribe' unsubscribe procedure **in addition** to the unsubscribe procedure used. To do this, select the *Enable unsubscription via list unsubscribe header* check box.

If this check box is selected, Inxmail Professional will automatically insert a list-unsubscribe header in all the new mailings in the mailing list when the mailings are dispatched.

When a mailing contains a list-unsubscribe header, recipients can unsubscribe from the respective mailing list with just one click and always in the same place in their email client (independent of any unsubscribe link in the mailing).

Prerequisite: The email client supports the standardised 'list-unsubscribe' unsubscribe procedure (for example, Google Mail).

Note for Inxmail Professional administrators:
All unsubscriptions that are performed via a list-unsubscribe header are automatically sent to the email address of the (news) POP3 receiving mail server account (*Configuring email receipt* page 581).
If you are a licence customer and have set up multiple (news) POP3 accounts for your receiving mail server, you can choose which (news) POP3 account should receive the list-unsubscribe header unsubscriptions (*Global properties (Administration)* page 587).

12.3.2.1 Single opt-out or confirmed opt-out unsubscribe procedure

1. In the *Settings for unsubscription* section, select *Single/Confirmed opt-out (simple unsubscription)*.
2. If required, select the *Enable unsubscription via list unsubscribe header* check box (*Unsubscription setup* page 141).
3. Specify the following in the *Settings for single/confirmed opt-out* section:

Field	Description
Send farewell mailings	If this check box is selected, Inxmail Professional will send a farewell mailing to the recipient following successful unsubscription. Click the (*Select mailing*) button to select the farewell mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing • Create new mailing (*Creating and editing unsubscribe mailings on the Cancel subscription tab* page 143)
Delete recipient from system if the recipient is not subscribed to another list	If this check box is selected, Inxmail Professional will delete the recipient's data after successful unsubscription, provided the recipient is not subscribed to any other mailing lists.
Command for unsubscription by email	The (*Edit*) button allows you to change the command that is required for unsubscription by email (*Mailing list subscription and unsubscription by email* page 512).

4. In the *Predefine unsubscribe link* section, specify whether you want to predefine an unsubscribe link that you can subsequently use for all mailings in the mailing list:

   You can use the predefined unsubscribe link for a mailing simply by selecting it when you insert an unsubscribe link in your mailing (*Inserting an unsubscribe link* page 212).

   Alternatively, you can always choose not to use the predefined unsubscribe link and instead create an individual unsubscribe link (*Inserting an unsubscribe link* page 212).

   - *No predefined unsubscribe link*: Select this option if you do not want to predefine an unsubscribe link.
   - *Unsubscribe link immediately starts the unsubscription process*: Select this option to predefine an unsubscribe link that immediately starts the unsubscribe procedure that has been set up. Click the (*Edit*) button to define the unsubscribe link.

     Specify the following in the dialog box for the predefined unsubscribe link:

     - Link address, i.e., the URL of the landing page to which the unsubscribe link points
     - (Optional) link text, i.e., the text displayed as the 'unsubscribe link' in the (HTML) mailing Note: In text mailings, this link text is displayed in front of the link address.

- (Optional) name in the report, i.e., information on the unsubscribe link can be found under this name in the respective reports
- (Optional) options: You can use HTML parameters, for example, to format your unsubscribe link (*Specify options (HTML parameters) for a link (optional)* page 205).

▪ *Unsubscribe link first accesses an unsubscription confirmation web page*: Select this option if you want the unsubscribe link to first take the recipient to a (JSP) unsubscription confirmation web page (for example, for the confirmed opt-out unsubscribe procedure). The previously set up unsubscribe procedure is not started until the recipient has confirmed their unsubscription on the unsubscription confirmation web page.

Click the (*Edit*) button to define the unsubscribe link.

Only select this option if your unsubscribe pages contain a (JSP) unsubscription confirmation web page (including a 'confirm unsubscribe' link) (*Unsubscribe procedures* page 131).

In this case, you must specify the unsubscription confirmation web page under *Link address* in the dialog box. To specify a JSP web page created in Inxmail Professional as the unsubscription confirmation web page (*JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418), select it using the (*Select JSP web page*) button.

5. To ensure that Inxmail Professional automatically sends notifications to a particular email address when a recipient unsubscribes from the mailing list, specify the following in the *Notification of unsubscription* section:
   a. Select the *Notifications on unsubscription* check box.
   b. Enter the email address to which the notifications are to be sent in the *to email address* field.
6. Save your settings.

✓ You have now activated and set up the single or confirmed opt-out unsubscribe procedure for the mailing list.

You must also create the unsubscription web pages required for the single or confirmed opt-out unsubscribe procedure, *Overview: Subscribe and unsubscribe procedures* page 129.

12.3.2.2 Creating and editing unsubscribe mailings on the Cancel subscription tab

Subscribe and unsubscribe mailings are generally created and edited on the *Subscribe/Unsubscribe mailings* tab.

You can also view, edit and create new subscribe and unsubscribe mailings directly on the *Subscription* or *Cancel subscription* tabs. This saves you toggling between the different tabs.

Click the *Mailing options* button on the right next to the corresponding mailing type. The following choices are available:

- Open selected mailing as read-only

  The mailing will open in the *Editing* workflow step.
- Copy and edit selected mailing
- Create new mailing

  Select this option to create a welcome mailing.

Step-by-step

To copy or edit a selected mailing, proceed as follows:

1. Click the *Mailing options* button.
   The drop-down list will appear.
2. Select *Copy and edit selected mailing*.
   A dialog box appears.
3. Confirm the dialog box by clicking *OK*.
   The mailing will open in the *Editing* workflow step.
4. Perform the required workflow steps.
   If immediate approval is set for the mailing list, the following dialog box will be displayed:

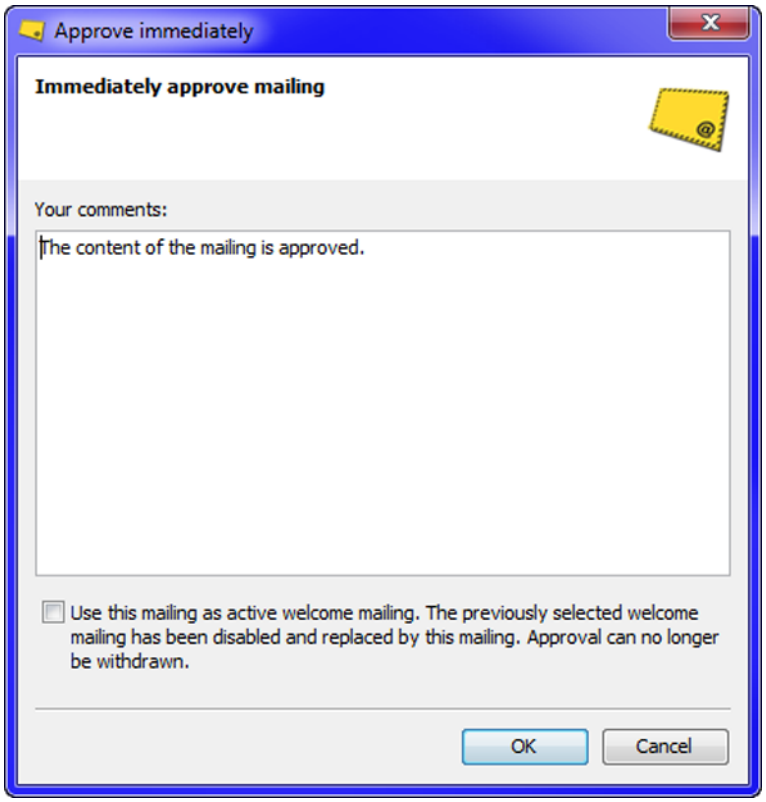


Figure 73: "Approve immediately" dialog box

5. Select the check box at the bottom of the dialog box in order to approve and activate the mailing in one step.
6. Confirm the dialog box by clicking *OK*.

Related Topics

» *Creating a new subscribe/unsubscribe mailing* page 149

12.3.2.3 Double opt-out unsubscribe procedure

Step-by-step

1. In the *Settings for unsubscription* section, select *Double opt-out (unsubscription to be confirmed by email)*.
2. If required, select the *Enable unsubscription via list unsubscribe header* check box.

3. Specify the following in the *Settings for double opt-out* section:

Field	Description
Send confirmation mailing	If this check box is selected, Inxmail Professional will send the recipient a mailing with a link that they must click to confirm their unsubscription. Click the ... (*Select mailing*) button to select the confirmation mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing Create new mailing (*Creating and editing unsubscribe mailings on the Cancel subscription tab* page 143) The *Send confirmation mailing* check box is always selected for double opt-out, as a confirmation mailing must always be sent as part of this unsubscribe procedure.
Send timeout mailing	If this check box is selected, a mailing will be sent if the interested party clicks the link in the confirmation mailing after the confirmation deadline has passed (*Number of days in which double opt-in must be confirmed* field). Click the ... (*Select mailing*) button to select the timeout mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing • Create new mailing (*Creating and editing unsubscribe mailings on the Cancel subscription tab* page 143)
Send farewell mailing	If this check box is selected, Inxmail Professional will send a farewell mailing to the recipient following successful unsubscription. Click the ... (*Select mailing*) button to select the farewell mailing to be sent. Please note that this mailing must have been approved (*Subscribe and unsubscribe mailings* page 147). The following options are available via the (*Mailing options*) button: • Open selected mailing as read-only • Copy and edit selected mailing Create new mailing (*Creating and editing unsubscribe mailings on the Cancel subscription tab* page 143)

Field	Description
Number of days in which double opt-out must be confirmed	Period of time in which recipients must confirm their unsubscription. If a recipient confirms their unsubscription later, they are sent to a special landing page (*Landing page if the confirmation period has expired* field) and are not unsubscribed.
Landing page in case double opt-out already confirmed	URL of the landing page that appears if a recipient clicks the unsubscription confirmation link in the confirmation mailing again.
Landing page if the confirmation period has expired	URL of the landing page that appears if a recipient clicks the unsubscription confirmation link in the confirmation mailing after the specified time period has expired (*Number of days in which double opt-out must be confirmed* field).
Delete recipient from system if the recipient is not subscribed to another list	If this check box is selected, Inxmail Professional will delete the recipient's data after successful unsubscription, provided the recipient is not subscribed to any of your other mailing lists.
Command for unsubscription by email	The (*Edit*) button allows you to change the command that is required for unsubscription by email (*Mailing list subscription and unsubscription by email* page 512).

The (*Open mailing in the 'Editing' step*) button allows you to open the previously selected mailing directly in the *Editing* workflow step.

4. In the *Predefine unsubscribe link* section, specify whether you want to predefine an unsubscribe link that you can subsequently use for all mailings in the mailing list.
5. To ensure that Inxmail Professional automatically sends notifications to a particular email address when a recipient unsubscribes from the mailing list, specify the following in the *Notification of unsubscription* section:
   a. To ensure that a notification is sent as soon as a recipient has unsubscribed from the mailing list but not yet confirmed, select the *Notifications on unconfirmed unsubscription* check box.
   b. To ensure that a notification is sent as soon a recipient has confirmed their unsubscription from the mailing list (via a confirmation mailing), select the *Notifications on finalised unsubscription* check box.
   c. Enter the email address to which the notifications are to be sent in the *to email address* field.
6. Save your settings.

✓ You have now activated and set up the double opt-out unsubscribe procedure for the mailing list.

You must also create the unsubscription web pages required for the double opt-out unsubscribe procedure.

Related Topics

» *Unsubscription setup* page 141

» *Single opt-out or confirmed opt-out unsubscribe procedure* page 142

» *Overview: Subscribe and unsubscribe procedures* page 129

12.4 Subscribe and unsubscribe mailings

12.4.1 Displaying, sorting and filtering the subscribe/unsubscribe mailings table

Step-by-step

1. On the tab of the mailing list, click the *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab.
   The table provides an overview of the subscribe and unsubscribe mailings created in the mailing list.

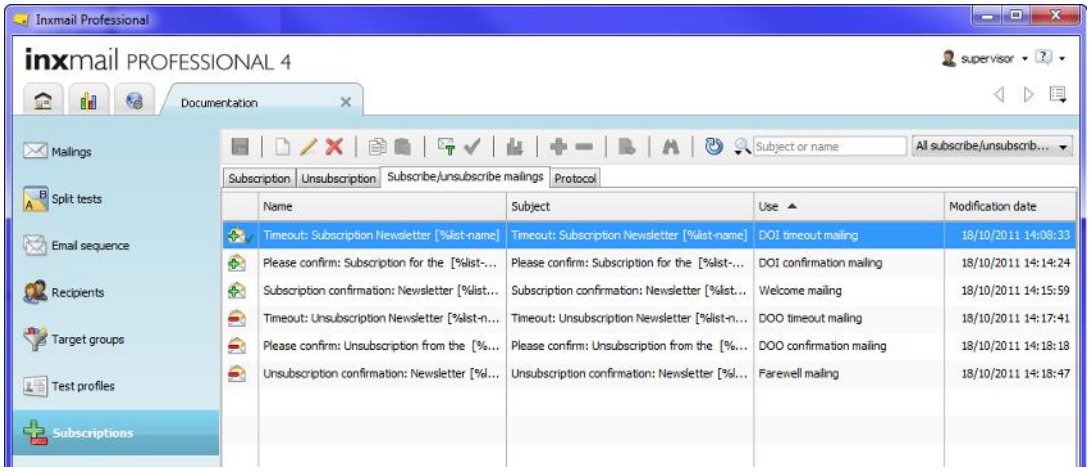


Figure 74: "Subscriptions" agent: subscribe/unsubscribe mailings table

The symbol in front of the subscribe/unsubscribe mailing in the table indicates the current status of the subscribe/unsubscribe mailing:

Symbol	Status	Description
	Draft	The subscribe/unsubscribe mailing has the *Draft* status. It still has to be approved and activated before it can be used as a subscribe/unsubscribe mailing.
	Approval requested	Approval has been requested for the subscribe/unsubscribe mailing. A response is still pending. If approval is granted, the subscribe/unsubscribe mailing will acquire the *Approved* status. If approval is denied, the mailing will be reset to the *Draft* status.
	Approved	The subscribe/unsubscribe mailing is approved. It can now be activated, that is, assigned to the relevant list.
	Active	The subscribe/unsubscribe mailing has the *Active* status, meaning that it has been approved and is currently assigned to the relevant list.

Symbol	Status	Description
	Inactive	The subscribe/unsubscribe mailing has the *Inactive* status, meaning that it was assigned to a list in the past, but the assignment was removed.

When you select a subscribe or unsubscribe mailing in the table, further information on the mailing is displayed in the Details section beneath the table (for example, you can see which template was used (if any), the format in which the subscribe/unsubscribe mailing was created and the subscribe/unsubscribe mailing ID).

2. To sort the table by columns, double-click the relevant column header, for example, *Name*.
3. You can filter the subscribe and unsubscribe mailings using the filter input field (*View and filter the mailings table* page 182).

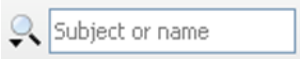


Figure 75: Filter input field

4. In addition, you can filter the subscribe and unsubscribe mailings using the filter drop-down list.

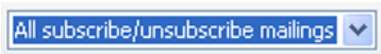


Figure 76: Filter drop-down list

Note If you set filters both in the filter input field and in the filter drop-down list, only subscribe and unsubscribe mailings that fulfil the criteria of both settings are displayed.

Select one of the following entries in the drop-down list:

- *All subscribe/unsubscribe mailings*: Does not filter the subscribe and unsubscribe mailings
- *Draft:* Displays only subscribe and unsubscribe mailings for which approval has not been requested and therefore not given.
- *Approval requested:* Displays only subscribe and unsubscribe mailings for which approval has been requested.
- *Approved:* Displays only subscribe and unsubscribe mailings for which approval has been granted.
- *Active:* Displays only subscribe and unsubscribe mailings that have been assigned to a list as a subscribe/unsubscribe mailing in *the* *Subscriptions* agent > *Subscription* or *Cancel subscription* tab (*Subscription and unsubscription setup* page 135).
- Inactive: Displays only subscribe and unsubscribe mailings that were assigned to a list in the past (that is, the assignment was removed).
- *Subscription: welcome, subscription: confirmation, subscription: timeout, unsubscription: farewell, unsubscription: confirmation, unsubscription: Timeout*: Only displays the corresponding subscribe or unsubscribe mailings

✓ The table now displays only the subscribe and unsubscribe mailings that match your filter settings. The filter settings serve only to improve the clarity of the table and do **not**influence whether subscribe and unsubscribe mailings are sent or which subscribe and unsubscribe mailings are sent.

12.4.2 Managing subscribe and unsubscribe mailings

On the tab of the mailing list > *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab, the following options are available for editing one or more subscribe/unsubscribe mailings selected in the table:

- The (*Rename mailing*) button allows you to rename a subscribe/unsubscribe mailing.
- The (*Delete mailing*) button allows you to delete a subscribe/unsubscribe mailing.

  You cannot delete subscribe or unsubscribe mailings that are currently active (that is, ones that are assigned for automatic dispatch during subscription/unsubscription in the *Subscriptions* agent > *Subscription* or *Cancel subscription* tab).
- You can use the (*Copy*) and (*Paste*) buttons to make copies of the subscribe/unsubscribe mailings.
- By double-clicking a subscribe/unsubscribe mailing, you can open it in a separate tab for editing (*Setting up, checking, approving and activating the subscribe/unsubscribe mailing* page 151).

12.4.3 Creating a new subscribe/unsubscribe mailing

Note You can, if you wish, create new subscribe and unsubscribe mailings, but you do not have to. Instead, you can use the predefined subscribe and unsubscribe mailings (created in text format) in the *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab. You then simply have to adapt them to suit your requirements, and approve and activate them (*Setting up, checking, approving and activating the subscribe/unsubscribe mailing* page 151).

Step-by-step

1. To open the *Create new mailing* dialog box, click the tab of the mailing list > *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab and then click the (*Create new mailing*) button. A dialog box appears.

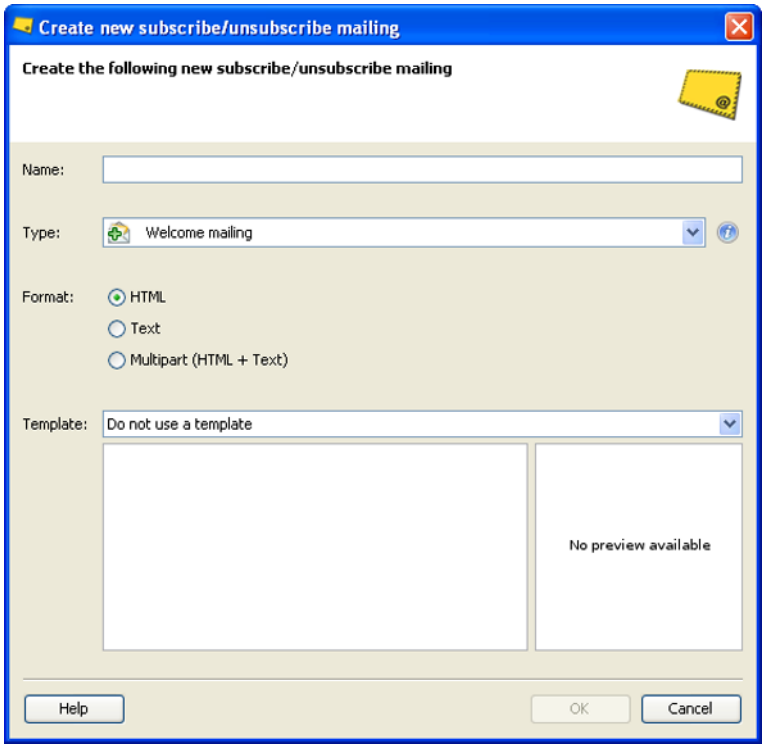


Figure 77: "Create new mailing" dialog

2. Enter the following in the dialog box (*Creating a new mailing* page 184):
   a. Specify a name for the subscribe/unsubscribe mailing.
   b. Select a format for the subscribe/unsubscribe mailing.

      If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset (*Setting up the properties of mailing lists* page 82).
   c. Select whether you wish to use a template to create the subscribe/unsubscribe mailing.
3. In the dialog box, select the type of subscribe/unsubscribe mailing:
   - Subscription: Welcome
     A welcome mailing informs the interested party that they have been subscribed to one or more mailing lists.
   - Subscription: Confirmation
     A confirmation mailing must contain a link (verify opt-in link) that the interested party can use to confirm their subscription.
   - Subscription: Timeout
     A timeout mailing informs the interested party that the period of time in which they can confirm their subscription has expired. This mailing is sent if the interested party clicks the link in the confirmation mailing after the confirmation period has expired.

- Unsubscription: Farewell mailing
  A farewell mailing informs the recipient that they have been unsubscribed from one or more mailing lists.
- Unsubscription: Confirmation mailing
  A confirmation mailing contains a link (verify opt-out link) that the recipient can use to confirm their unsubscription.
- Unsubscription: Timeout mailing
  A timeout mailing informs the recipient that the period of time in which they can confirm their unsubscription has expired.

4. Confirm your entries by clicking *OK*.
5. The subscribe/unsubscribe mailing opens on a new tab where it can be edited.

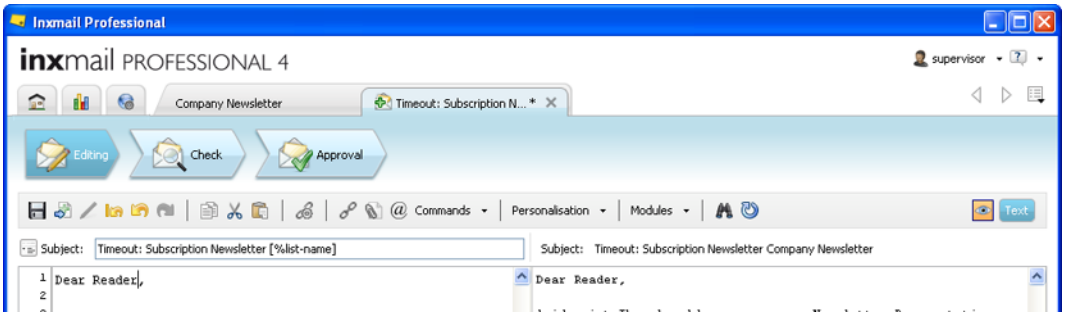


Figure 78: Tab of the subscribe/unsubscribe mailing

The mailing is also automatically added to the table on the tab of the mailing list > *Subscriptions* agent > *Subscribe/unsubscribe mailings* tab.

✓ You have created a new subscribe/unsubscribe mailing.

12.4.4 Setting up, checking, approving and activating the subscribe/unsubscribe mailing

Step-by-step

1. Open the subscribe/unsubscribe mailing in the *Editing* workflow step.
2. Create the content of the subscribe/unsubscribe mailing.
3. Check your subscribe/unsubscribe mailing in the *Check* workflow step, for example, using the quality test.
4. Approve your checked subscribe/unsubscribe mailing to be able to activate it for dispatch on the *Subscription* or *Cancel subscription* tab.

   Note Please note that only approved subscribe/unsubscribe mailings can be activated for dispatch on the *Subscription* or *Cancel subscription* tab.

5. In the *Approval* workflow step, click the *Request approval* button.
   A dialog box appears.
6. Either implement an immediate approval or initiate the approval process.

Once approval has been granted, this will be shown to you in the *Approval* workflow step.

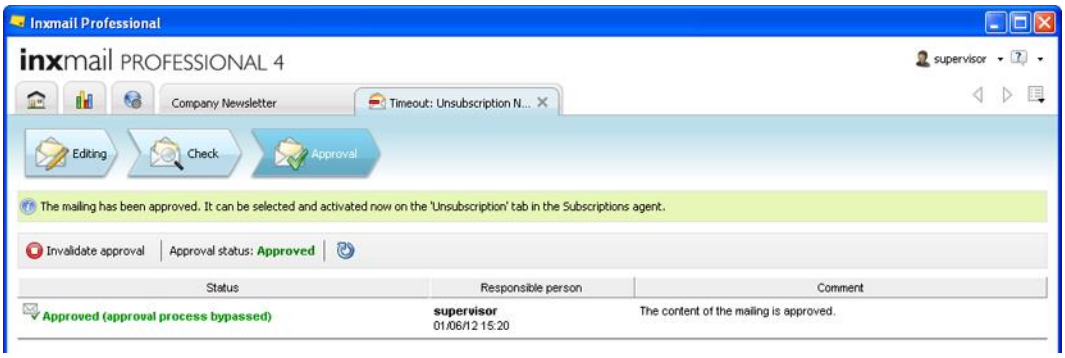


Figure 79: Approved mailing

Approved subscribe or unsubscribe mailings can be copied, renamed or deleted, however, they can **no** longer be edited.

If you need to edit an approved subscribe or unsubscribe mailing, you can revoke the approval in the *Approval* workflow step using the *Revoke approval* button.

7. Close the tab of the subscribe/unsubscribe mailing.
8. In the *Subscriptions* agent > *Subscription* or *Cancel subscription* tab, activate your subscribe/unsubscribe mailing for automatic dispatch during subscription/unsubscription:

> **Note** As soon as you have activated an approved subscribe or unsubscribe mailing for automatic dispatch, you can **no** longer revoke the approval for this subscribe/unsubscribe mailing (and can therefore **no** longer edit the subscribe/unsubscribe mailing). In addition, the subscribe/unsubscribe mailing is also assigned the 'Active' status. Subscribe/unsubscribe mailings with this status cannot be deleted.
> If you activate another subscribe or unsubscribe mailing for automatic dispatch in the *Subscriptions* agent > *Subscription* or *Cancel subscription* tab, the previously assigned subscribe/unsubscribe mailing is given the 'Inactive' status. The subscribe/unsubscribe mailing can now be deleted again.

9. Select the check box for sending the respective subscribe/unsubscribe mailing (for example, welcome mailing).
10. Select your approved subscribe/unsubscribe mailing in the drop-down list.
11. Save your settings.

✓ You have now set up, checked and approved a subscribe/unsubscribe mailing, and have activated it for dispatch.

Additional information

You create links for confirming subscriptions and unsubscriptions in the same way that you create unsubscribe links. When you open the Link dialog box in a subscription or unsubscription confirmation mailing, you can select the *Subscription confirmation (verify opt-in)* or *Unsubscription confirmation (verify opt-out)* link type in place of the *Unsubscribe link (unsubscribe link)* link type.

Related Topics

» *Mailings (editing)* page 189

» *Mailings (advanced editing)* page 364
» *Inserting an unsubscribe link* page 212
» *Mailings (check)* page 228
» *Start immediate approval* page 253
» *Performing the approval process* page 257
» *Subscription and unsubscription setup* page 135

12.5 Displaying and filtering the subscribe/unsubscribe log

Step-by-step

1. On the tab of the mailing list, click the *Subscriptions* > agent *Log* tab. The log entries are displayed.

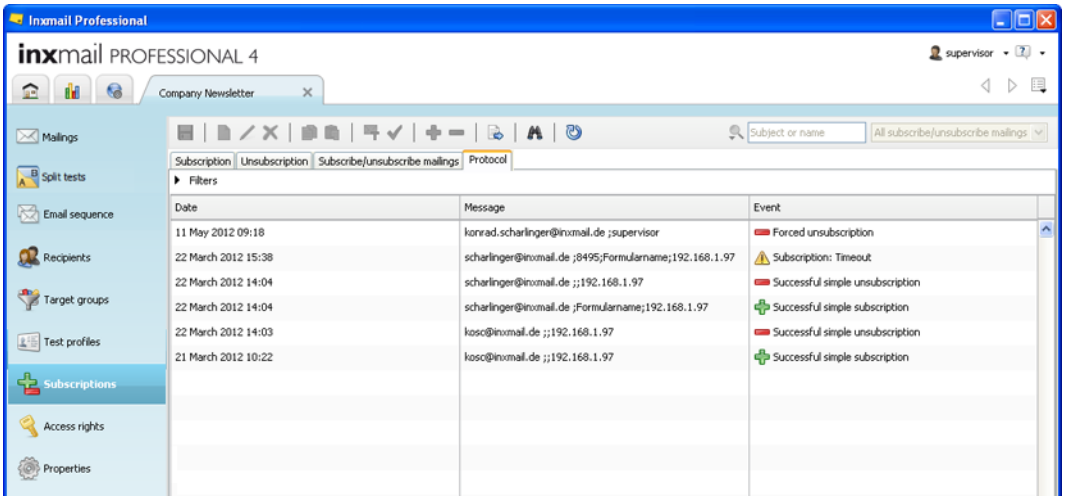


Figure 80: "Subscriptions" agent > "Log" tab

You can use the log to track when and how recipients were subscribed or unsubscribed.

The following subscribe and unsubscribe options (*Overview: Subscription and unsubscription* page 128) are logged:

- Recipients who have already subscribed to or unsubscribed from a mailing list are manually unsubscribed or subscribed (*Manually resubscribing recipients* page 118)
- Recipients are subscribed or unsubscribed via actions (*Actions* page 405)
- Recipients subscribe or unsubscribe themselves using a form on your web page (JSP-Vorlage „Anmeldung")
- Recipients subscribe to or unsubscribe from a mailing list by email (*Mailing list subscription and unsubscription by email* page 512)
- Recipients unsubscribe themselves using an unsubscribe link in a mailing sent to them (*Inserting an unsubscribe link* page 212)
- Recipients unsubscribe from the mailing list themselves in the email client using the standardised 'list-unsubscribe' unsubscribe procedure (*Unsubscription setup* page 141)

Each event in the subscribe or unsubscribe process is logged. The log has the following columns:

- *Date*: This column shows when exactly a person was subscribed or unsubscribed (date and time).
- *Message*: This column can contain the email address of the subscribed or unsubscribed person, additional information (for example, the ID of the task object or form name of the JSP web page) and the IP address from which the recipient subscribed or unsubscribed.
- *Event*: This column shows which event was logged (for example, whether an event was logged during a subscribe process (symbol) or unsubscribe process (symbol).

If an unconfirmed subscription or unsubscription event has been logged in this column (for the double opt-in or double opt-out methods), you can manually force the subscription or unsubscription of the recipient as follows:

a. Select the log entry for the event in the table.

b. Click the *(Force subscription)* button or the *(Force unsubscription)* button.

2. To filter the log entries, proceed as follows:

   a. To expand the filter settings, click the *Filters* button.

   b. Use the option buttons (*Do not use a date filter*, *The last … days*, *From… to…*) to define whether a date filter is to be applied.

   c. Use the *Only following events* check box to define whether the table is to be filtered according to the *Event* column. Then choose which logged events are to be displayed in the table from the drop-down list.

   d. Click the *Apply filter* button
   The log display is updated.

✓ The log entry table now contains only the log entries that match your filter settings.

13 Modules, target groups and test profiles

In this chapter, you will learn how to prepare the following for the mailings you subsequently create and send:

- How to create modules – useful if you use particular mailing contents in several mailings and therefore want to store them centrally
- Create target groups that allow you to send your mailings to specific recipients rather than to all your recipients
- Create test profiles that allow you to test your mailings for specific (test) recipient profiles prior to sending

13.1 Creating modules

13.1.1 Overview

If you would like to use mailing content in several mailings, you can create these mailing contents as modules and store them centrally.

The use of modules saves you time when creating mailings and guarantees consistent use of these mailing contents.

In Inxmail Professional, there are two ways to create a module:

1. Manual creation of a module

   Create a new module if, for example, you would like to use the legal notice in several mailings (*Creating a new module* page 155). You create the contents of the module manually in the Editing workflow step.
2. Dialog-aided creation of a salutation module

   Create a new module, and in the dialog box, enable the *Use wizard for creating a salutation* check box (*Creating a new salutation module* page 157). The module with the personalised salutation is created and is opened in the Editing workflow step.

Existing modules can be found (always on the tab where you created the module, for example, on the tab of the mailing list) in the table in the *Modules* agent.

Related Topics

» *Inserting modules* page 227

13.1.2 Creating a new module

Prerequisites

The *Modules* agent is displayed on the tab where you would like to create a module.

Step-by-step

Open the *Create new module* dialog box as follows:

1. To create a new module that will only be available for one particular mailing list, click the tab of the mailing list > *Modules* agent. Then click the (*Create new module*) button.
2. To create a global module that will be available for all mailing lists, click the (*Global settings*) tab > *Modules* agent. Then click the (*Create new module*) button.

   A dialog box appears.

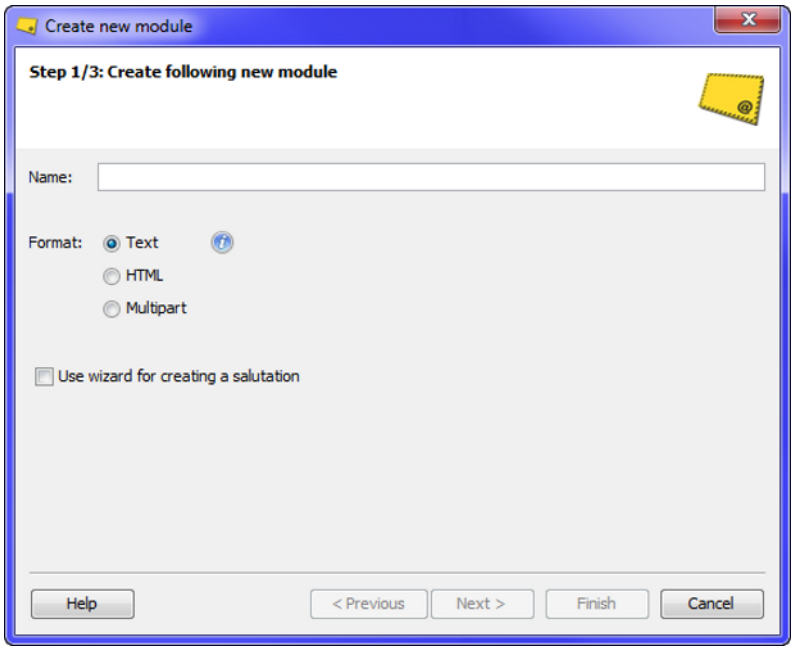


Figure 81: 'Create new module' dialog box

3. In the dialog box, enter a name for the module (for example, 'Legal notice').
4. Select the format of the module and confirm by clicking *OK*.

   The format determines in which mailings you can later use the module:
   - HTML modules can be used in HTML and multipart mailings.
   - Text modules can be used for text, HTML and multipart mailings.
   - Multipart modules can be used for text, HTML and multipart mailings.

Note Click the information button if you wish to see more detailed information on the individual formats.

The new module is added to the table. At the same time, it is opened on a new tab for editing.

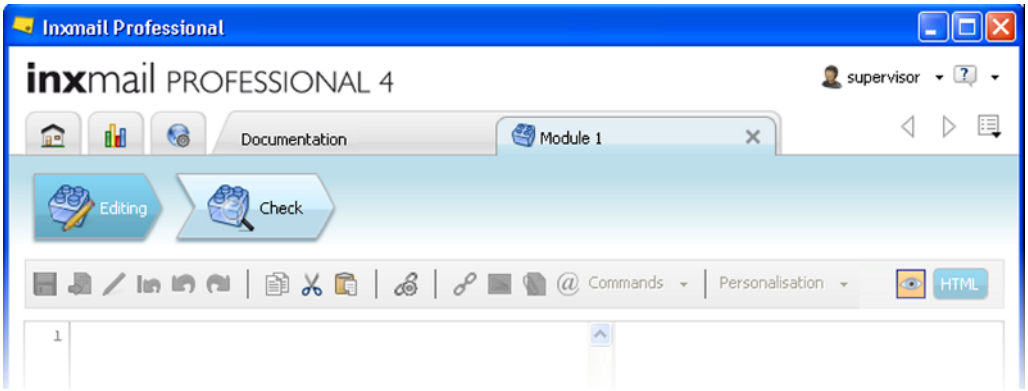


Figure 82: Tab of the module

5. In the *Editing* workflow step, click in the editor and create the contents of your module. Then save your entries.

   Module content is created in the same way as mailing content.

6. In the *Check* workflow step, you can check the contents for selected test profiles or recipients.
7. Close the tab of the module.

✓ You have created a new module that you can now use when creating mailings.

Additional information

You can edit a module that has already been created. To do this, double-click the module in the table and then make the changes on the tab of the module.

In addition, you can select an existing module in the table and then:

- make a copy using the (*Copy*) and (*Paste*) buttons.
- rename the module using the (*Rename module*) button.
- delete the module using the (*Delete module*) button.

Please note that deleting or renaming a module can cause problems if the module is used in a mailing that has already been created or one that is scheduled to be dispatched.

Related Topics

» *Adding/deleting additional agents to mailing lists* page 80

» *Mailings (editing)* page 189

» *Mailings (advanced editing)* page 364

» *Content check using test or recipient profiles* page 228

»

13.1.3 Creating a new salutation module

Step-by-step

Open the *Create new module* dialog box as follows:

1. To create a new module that will only be available for one particular mailing list, click the tab of the mailing list > *Modules* agent. Then click the (*Create new module*) button.
2. To create a global module that will be available for all mailing lists, click the (*Global settings*) tab > *Modules* agent. Then click the (*Create new module*) button.

   A dialog box appears.

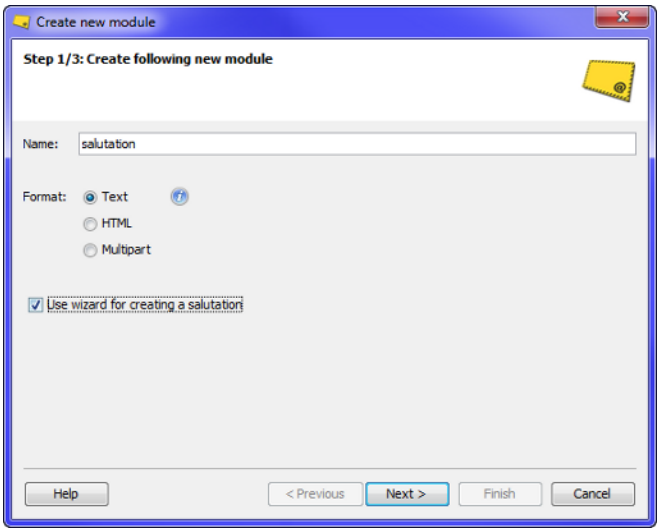


Figure 83: 'Create new salutation module – Step 1' dialog box

3. In the dialog box, enter a name for the module (for example, *Salutation*).
4. Select the format of the module in the dialog box.

   The format determines in which mailings you can later use the module:
   - Text modules can be used for text, HTML and multipart mailings.
   - HTML modules can be used in HTML and multipart mailings.
   - Multipart modules can be used for text, HTML and multipart mailings.

   Note Click the information button if you wish to see more detailed information on the individual formats.
5. Enable the *Use wizard for creating a salutation* check box.
6. Click *Next*.

A dialog box appears.

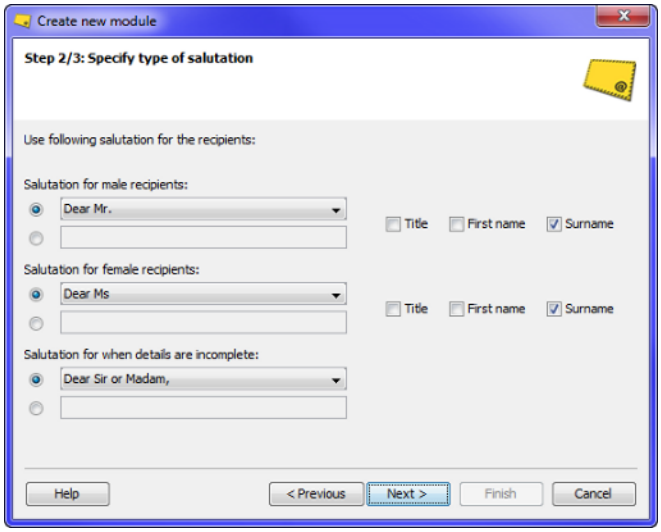


Figure 84: "Create new module - Step 2" dialog box

7. Define the type of salutation.
   a. Standard salutation

      You can select a gender-specific standard salutation from the *Salutation for male recipients* and/or *Salutation for female recipients* drop-down lists (for example, Dear Mr).

      To address cases where the recipients' details are missing, select a gender-neutral salutation from the *Salutation for when details are incomplete* drop-down list (for example, Dear Sir or Madam).

   b. Own salutation wording

      Enable the respective option buttons if you wish to create your own salutation wording (for example, for a foreign-language salutation).

   c. Specification of title, first name and/or surname

      Use the check boxes on the right-hand side of the dialog box to specify how the recipient is to be addressed. The *Surname* check box is enabled by default. You can additionally enable *Title* and/or *First name*, or disable all check boxes.
8. Click *Next*.

A dialog box appears.

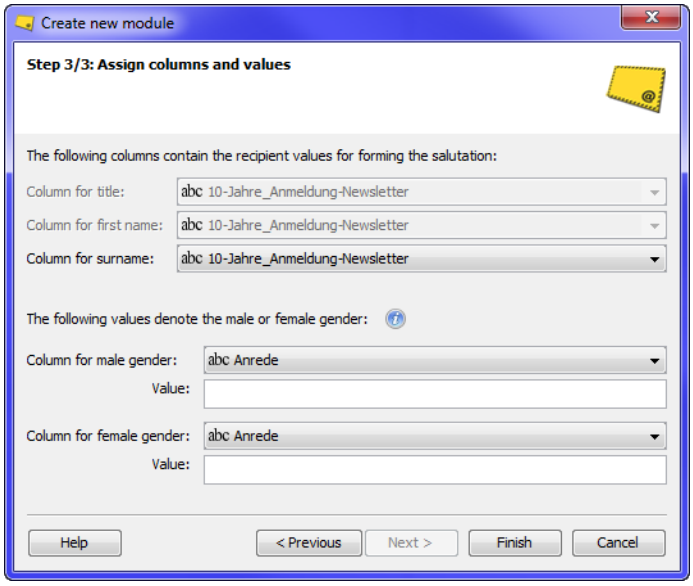


Figure 85: "Create new module - Step 3" dialog box

9. Specify which columns from the recipient table are to be used to create the salutation.
10. Depending on your previous selection, use the *Column for title*, *Column for first name* and/or *Column for surname* drop-down lists to select the columns that contain the recipient values for forming the personalised salutation.
11. Under *The following values denote the male or female gender*, specify the columns and the values that define the male and female genders.

> **Note** If gender is defined through multiple values in your recipient table (for example, based on the import of recipient data), you can enter these values separated by a semicolon (for example, for the female gender: female;f;Ms).

12. Confirm your settings by clicking *Finish*.

✓ The new salutation module is created and is opened in the *Editing* workflow step.

You can revise the module in the editor manually, if necessary.

In the *Check* workflow step, you can check the contents for selected test profiles or recipients.

Related Topics

» *Creating a new module* page 155

» *Content check using test or recipient profiles* page 228

13.2 Creating target groups

13.2.1 Overview

You can generate subsets of recipients if you choose not to send your mailings to all the recipients in your mailing lists. This is achieved by creating target groups in Inxmail Professional that limit the

recipients according to criteria you have specified (for example, according to place of residence, gender or areas of interest).

Existing target groups can be found (always on the tab where you created the target group, for example, on the mailing list tab) in the table in the *Target groups* agent.

To create a new target group, you need to perform the following steps:

- *Creating a new target group* page 161

  The first step is to create the target group from scratch. You can create a target group that can be used to send mailings for a specific mailing list only or you can create one that is used globally to send mailings for all your mailing lists.
- *Adding a condition* page 163

  When you initially create your target group, it contains all the recipients. You can then use conditions to generate a specific subset of recipients from the target group.

Related Topics

» *Mailings (recipient)* page 264

» *Creating personalised text (for target groups)* page 367

13.2.2 Creating a new target group

Prerequisites

The *Target groups* agent is displayed on the tab where you would like to create a new target group (*Adding/deleting additional agents to mailing lists* page 80).

Important Please note that this agent differs from other agents in the following respect: If you remove the *Target groups* agent from the tab of a mailing list, all the target groups created for this mailing list will be automatically **deleted**.

Step-by-step

1. Open the *Create new target group* dialog box as follows:
   - To create a new target group that will only be available for one particular mailing list, click the tab of the mailing list > *Target groups* agent. Then click the (*Create new target group*) button.
   - To create a global target group that will be available for all mailing lists, click the (*Global settings*) tab > *Target groups* agent. Then click the (*Create new target group*) button.

A dialog box appears.

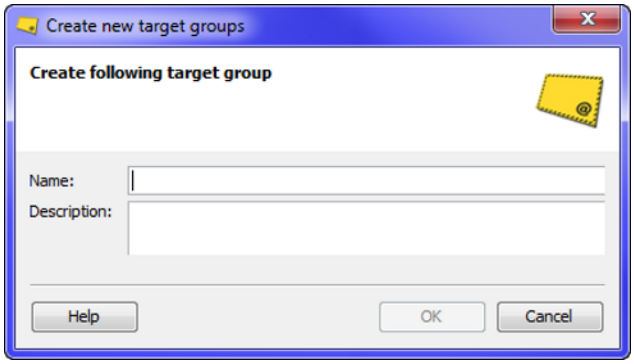


Figure 86: "Create new target group" dialog box

2. In the dialog box, enter a name for the target group (for example, 'Men with a building loan contract').
3. You have the option to enter a description of the target group. This will be displayed in the target groups overview.
4. Confirm the dialog box by clicking *OK*.

✓ You have now created a new target group.

Additional information

The target group will open in a tab for editing or checking.

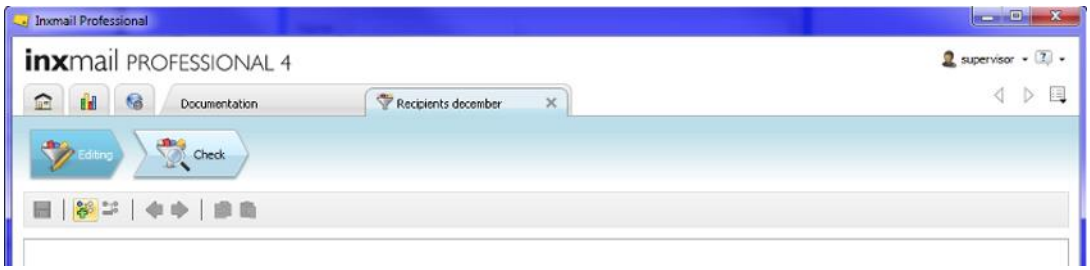


Figure 87: "Target group" tab

You now have the following possibilities:

- Create conditions in order to restrict the recipients in the *Editing* workflow step
- Check the selected recipients in the *Check* workflow step
- Close tab.

You can select an existing target group in the table and:

- make a copy using the (*Copy*) and (*Paste*) buttons.
  Please note that any existing target group conditions will also be copied and pasted.
- delete the target group by clicking the (*Delete target group*) button.
- rename the target group by clicking the (*Rename target group*) button.

Please note that deleting or renaming a target group can cause problems if the target group is used in a mailing that has already been created or one that is scheduled to be dispatched.

Related Topics

» *Adding a condition* page 163
» *Checking recipients* page 173

13.2.3 Adding a condition

In Inxmail Professional you can create conditions, supported by the system,

- that are based on column values,
- that are based on recipient reactions,
- that are based on sending mailings,
- that are based on a possible dispatch interruption or
- that are based on target groups that have already been created.

Free condition expressions can also be created.

13.2.3.1 Creating conditions based on column values

1. Open the relevant target group in the *Editing* workflow step.
2. Click the (*Add condition*) button.
   A dialog box appears.

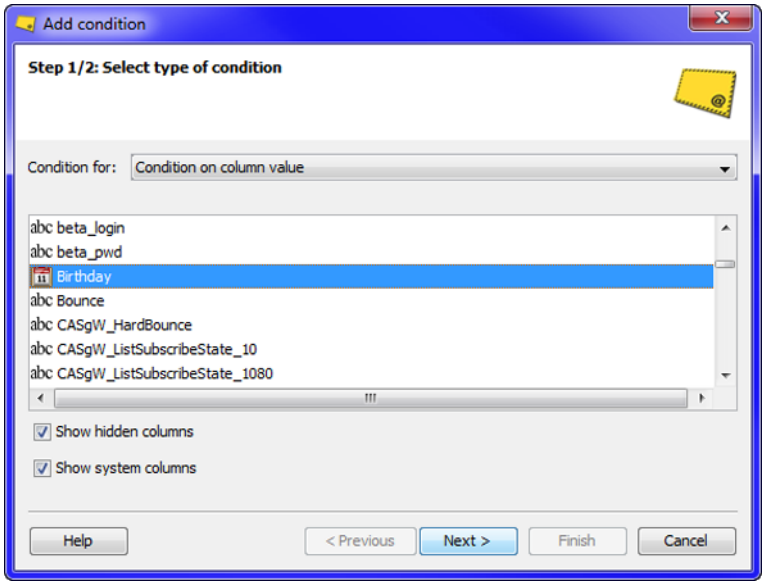


Figure 88: "Add condition" dialog box

3. Select *Column value* in the *Condition for* drop-down list.

System columns

In order to select a system column from the recipients table, activate the *Show system columns* check box.
The following columns from the recipients table are shown:
Subscription date <List name>: The column with the subscription date is shown for every list in the system.

Change date: The column with the change date is shown. The date and time of the last change to the recipient data record are recorded in this column.

4. Select the recipients table column on which the condition is to be based (for example, the *Gender* column).
5. Click *Next*.

   A dialog box appears.

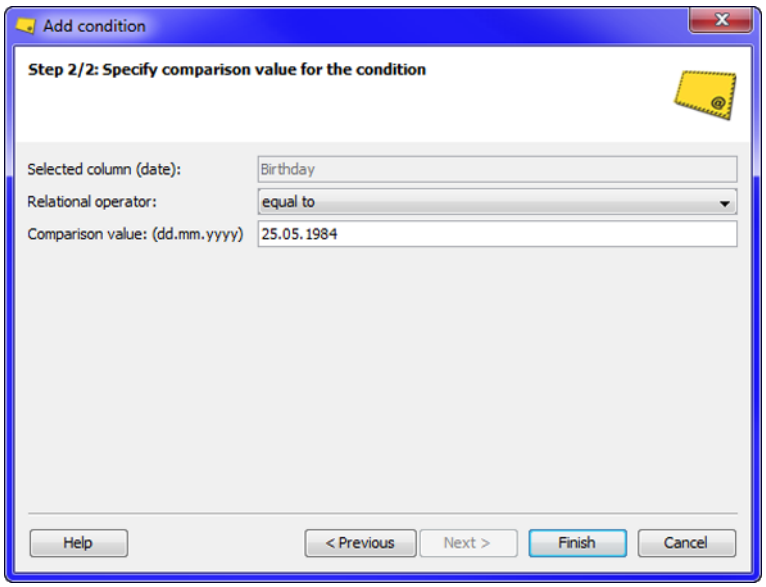


Figure 89: "Add condition" dialog box

6. Specify the relational operator and the comparison value. For example, specify the 'equal to' operator and the value '25.12.1974' to include in the target group all recipients born on 25.12.1974.
7. Confirm your settings in the dialog box by clicking *Finish*.
8. Save your settings.

✓ You have now added a condition to your target group.

13.2.3.2 Creating conditions based on recipient reactions

Conditions can be made contingent upon how a recipient reacts to mailings sent and any links included in these mailings. When creating a condition you can use the inclusion or exclusion method. This means you can choose whether the condition is based on whether or not a reaction was triggered. You can also fine-tune conditions by restricting reaction in terms of time and/or to specific lists.

The following options are available in terms of recipient reactions to mailings:

Conditions for mailings	
Recipient – has	opened a specific mailing.
	opened a particular mailing (particular sending period).

Conditions for mailings	
– does not have	opened any mailing from a particular list (particular sending period).

The following options are available in terms of recipient reactions to links:

Conditions for links	
Recipient – has – does not have	clicked any link in a specific mailing.
	clicked a specific link in a specific mailing.
	clicked any link in a particular mailing (particular sending period).
	clicked a link in a mailing from a particular list (particular sending period).

Step-by-step

1. Open the relevant target group in the *Editing* workflow step.
2. Click the (*Add condition*) button.
   The *Add condition* dialog box is displayed.

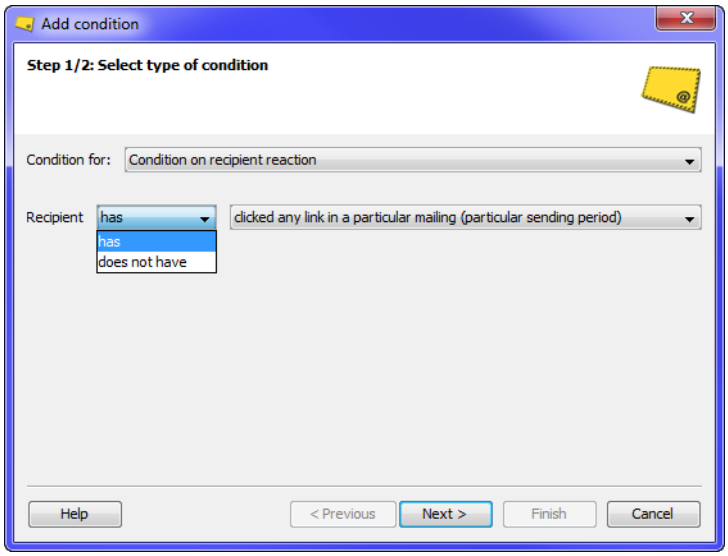


Figure 90: "Add condition" dialog box

3. Select *Recipient reaction* from the *Condition for* drop-down list.
4. Select the relevant recipient reaction, for example, clicked any link in a specific mailing within a defined period in the dialog box.
5. Click 'Next'.

A dialog box appears.

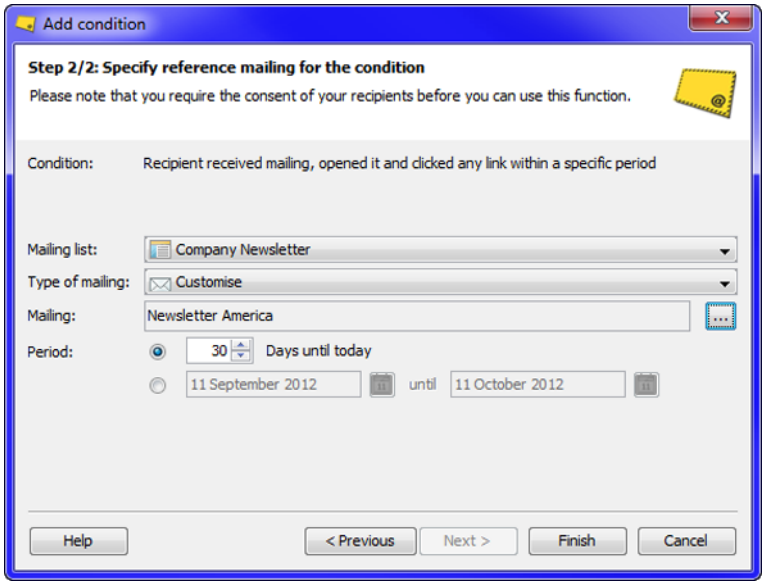


Figure 91: "Add condition" dialog box

> **Note** The fields displayed in the dialog box depend on the recipient reaction previously selected. For example, if you have selected a time-related recipient reaction, the *Period* field with the relevant options will be displayed.

6. Enter the relevant information.
7. Confirm your settings in the dialog box by clicking *Finish*.
8. Save your settings.

✓ You have now added a condition to your target group.

13.2.3.3 Creating conditions based on sending mailings

Conditions can be made dependent on whether a recipient received a mailing. When creating a condition you can use the inclusion or exclusion method. This means you can choose whether the condition is based on whether or not a mailing was received. You can also fine-tune conditions by restricting receipt or non-receipt of the mailing in terms of time and/or to specific lists.

> **Mailing receipt**
> Receipt of a mailing indicates that the mailing was sent and that neither a hard bounce nor a soft bounce occurred (*Bounces and returns* page 338).

The following options are available in terms of recipient reactions to mailings:

Conditions for mailings	
Recipient – has – has not	opened a specific mailing.
	opened a specific mailing within a defined period.
	opened any mailing on a specific list within a defined period.
	successfully received more than x mailings within a defined period.

Step-by-step

1. Open the relevant target group in the *Editing* workflow step.
2. Click the (*Add condition*) button.
3. A dialog box appears.
4. Select *Sending mailings* from the *Condition for* drop-down list.
   A dialog box appears.

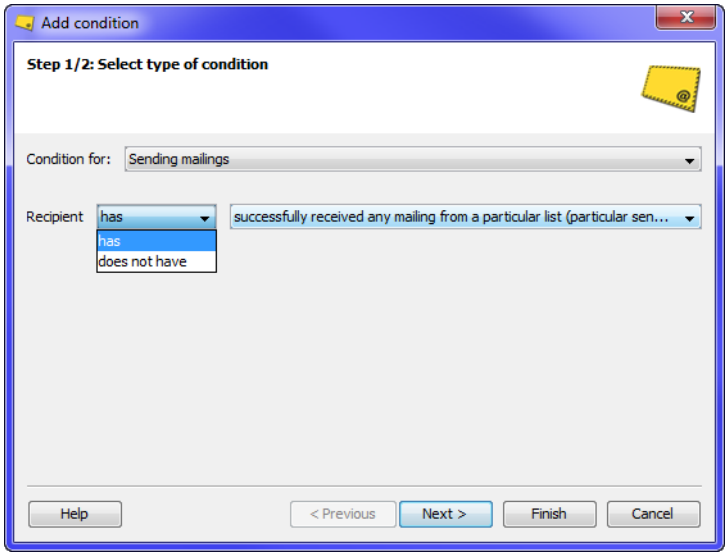


Figure 92: "Add condition" dialog box

5. Select the appropriate condition for mailing dispatch from the dialog box.
6. Click 'Next'.
   A dialog box appears.

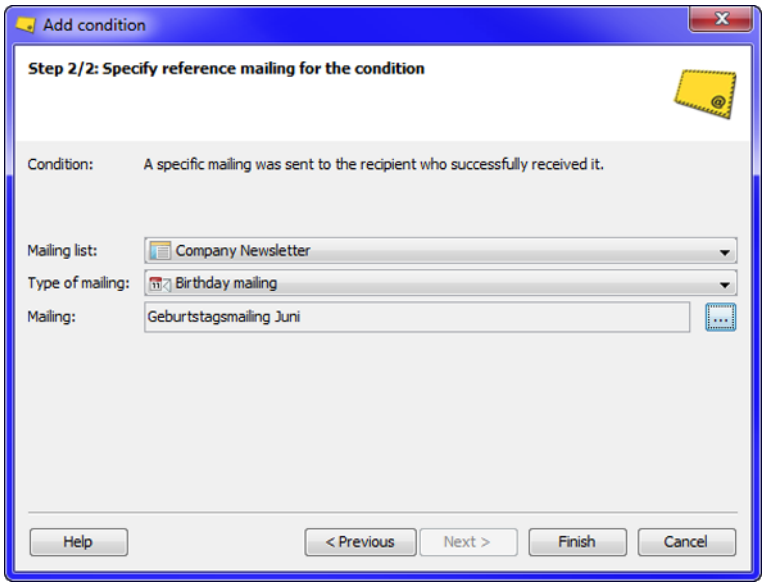


Figure 93: "Add condition" dialog box

Note The fields displayed in the dialog box depend on the recipient reaction previously selected. For example, if you have selected a time-related recipient reaction, the *Period* field with the relevant options will be displayed.

7. Enter the relevant information.
8. Confirm your settings in the dialog box by clicking *Finish*.
9. Save your settings.

✓ You have now added a condition to your target group.

Related Topics

Selecting recipients according to a particular number of received mailings page 168

13.2.3.4 Selecting recipients according to a particular number of received mailings

You can use the Recipient has/has not successfully received more than x mailings within a defined period target group condition to assign recipients to a target group who have received a particular number of mailings within a defined period.

To do so, select the target group condition under Condition for Sending mailings. This enables you, for example, to email all recipients who have received more than four mailings within a defined period.

If you want to select only recipients who have received a precise number of mailings (for example, five mailings) within a defined period, you must create two conditions and ensure they are linked with AND.

Step-by-step

To select all recipients in your mailing list who have received five mailings within the last 30 days, proceed as follows:

1. Open the relevant target group in the *Editing* workflow step.
2. Click the *Add condition* button.

   A dialog box appears.

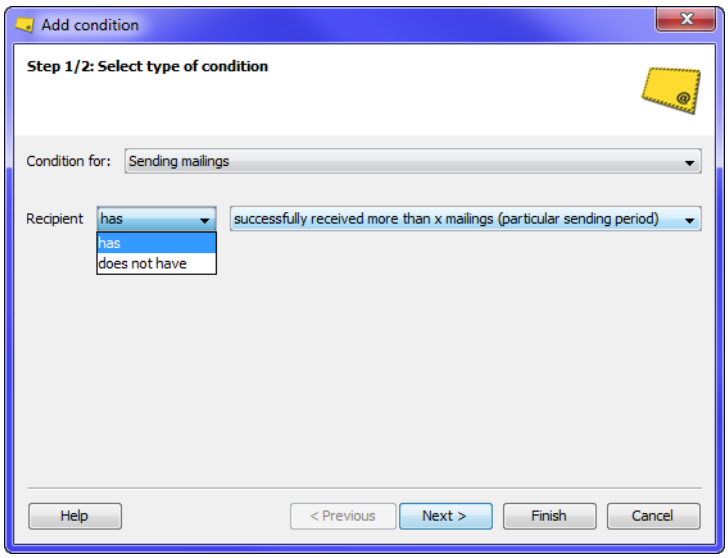


Figure 94: "Add condition" dialog box

3. Select *Sending mailings* from the Condition for drop-down list.
4. Select the *has successfully received more than x mailings within a defined period* condition next to Recipient in the dialog box.
5. Click *Next*.

   A dialog box appears.

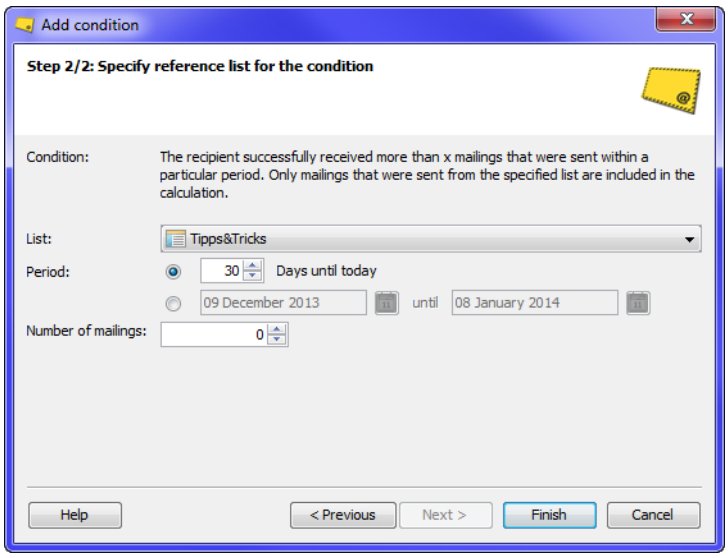


Figure 95: "Add condition" dialog box

6. Select the period of 30 days using the drop-down list.
7. Select four mailings under *Number of mailings*.
8. Confirm your settings in the dialog box by clicking *Finish*.

   All recipients who have received **more** than four mailings within the last 30 days have now been assigned to the target group.

   To select only recipients who have received five mailings exactly, you need to add a second condition.
9. Click the *Add condition* button.

   A dialog box appears.
10. Select *Sending mailings* from the Condition for drop-down list.
11. Select the *has not successfully received more than x mailings within a defined period* condition next to Recipient in the dialog box.
12. Click *Next*.

    A dialog box appears.
13. Select a specific time period (for example, 30 days) using either the drop-down list or the calendar function.
14. Select a specific number of mailings (for example, five mailings) under *Number of mailings*.
15. Confirm your settings in the dialog box by clicking *Finish*.

The conditions you have created will be displayed in the Editing workflow step.

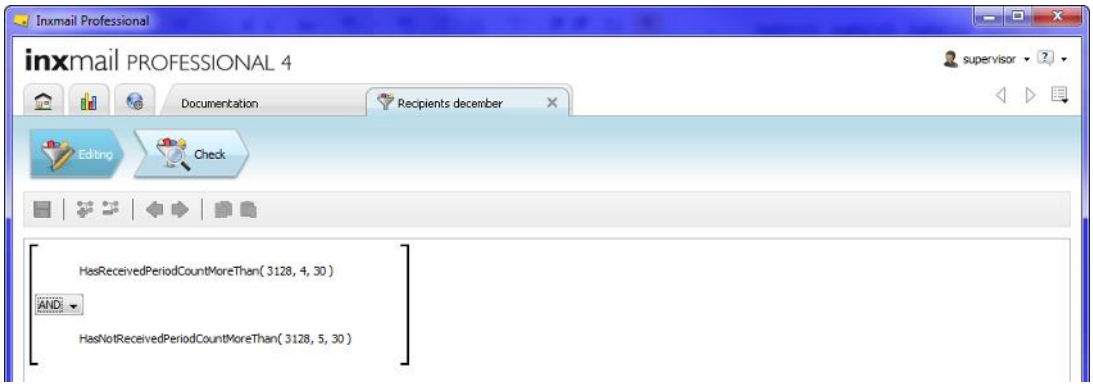


Figure 96: The target group conditions created in the "Editing" workflow step

✓ All recipients who have received exactly five mailings within the last 30 days have now been assigned to the target group.

Related Topics

Creating conditions based on sending mailings page 166

13.2.3.5 Creating conditions based on dispatch interruption

Conditions can be made dependent on whether recipients have not received a mailing because dispatch was interrupted. When creating the condition, you can refine it by restricting the dispatch interruption in terms of time.

The following options are available in terms of dispatch interruption to a mailing:

- The recipient did not receive a specific mailing due to a dispatch interruption.
- The recipient did not receive a specific mailing within a defined period due to a dispatch interruption.

Conditions based on dispatch interruption allow you to easily send mailings only to recipients to whom the mailing has not yet been sent due to a dispatch interruption.

Step-by-step

1. Open the relevant target group in the *Editing* workflow step.
2. Click the (*Add condition*) button.
3. A dialog box appears.
4. Select *Dispatch interruption* from the *Condition for* drop-down list.

A dialog box appears.

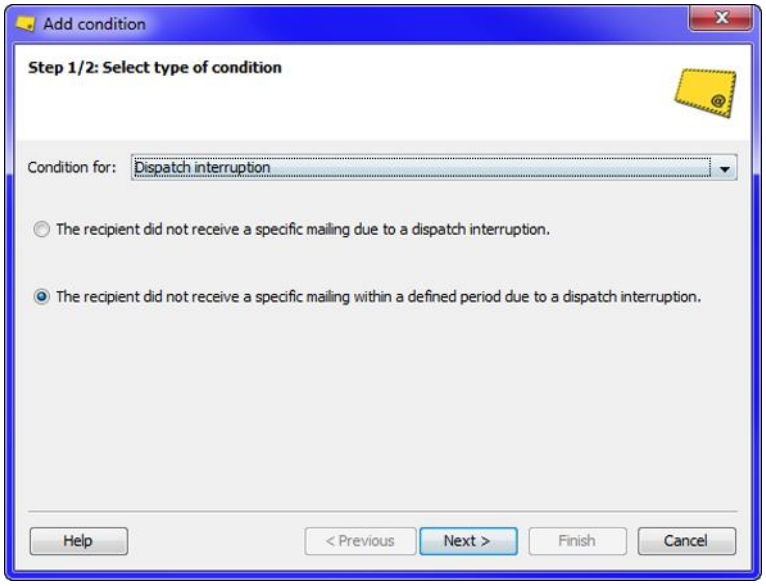


Figure 97: "Add condition" dialog box

5. Select the appropriate condition for dispatch interruption from the dialog box.
6. Click 'Next'.

   A dialog box appears.

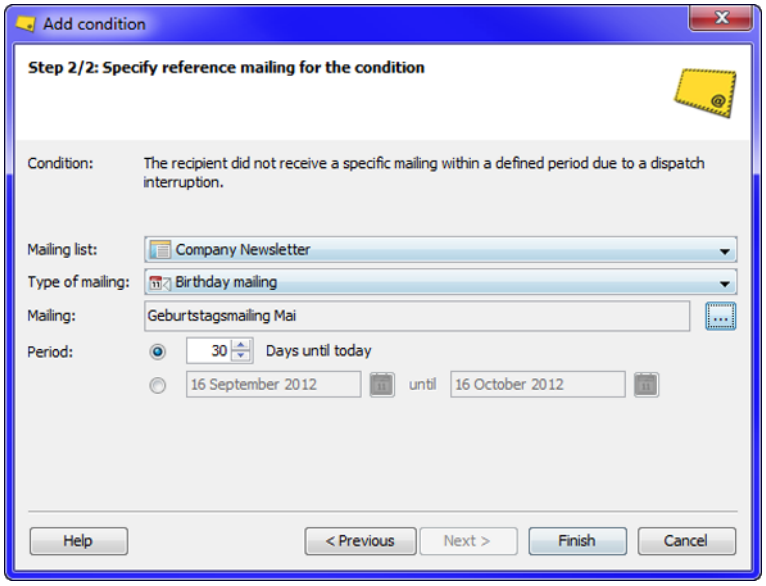


Figure 98: "Add condition" dialog box

7. Enter the relevant information.

   Only mailings whose dispatch was interrupted are available for selection in the *Mailing* field.
8. Confirm your settings in the dialog box by clicking *Finish*.
9. Save your settings.

✓ You have now added a condition to your target group.

13.2.3.6 Creating conditions based on existing target groups

Step-by-step

1. Open the relevant target group in the *Editing* workflow step.
2. Click the (*Add condition*) button.
   A dialog box appears.
3. Select *Existing target group* in the *Condition for* drop-down list.
4. Use the drop-down list to select whether the recipients must belong to all, at least one or none of the selected target groups.
5. Click the (*Add target group*) button.
   A dialog box appears.
6. Select the desired target group(s) in the dialog box.
7. Click *Add* or *Add + Close*.
8. Confirm your settings in the dialog box by clicking *Finish*.
9. Save your settings.

✓ You have now added a condition to your target group.

13.2.3.7 Creating freely formulated conditions

Step-by-step

1. Open the relevant target group in the *Editing* workflow step.
2. Click the (*Add condition*) button.
   A dialog box appears.
3. Select *Free condition expression* in the *Condition for* drop-down list.
4. Enter your condition expression.
5. Confirm your settings in the dialog box by clicking *Finish*.
6. Save your settings.

✓ You have now added a condition to your target group.

Example

- `SubscriptionDate('MyList') IS_EMPTY`

  Returns all recipients who are not currently subscribed to the 'MyList' mailing list (that is, those for whom the subscription date is empty).
- `SubscriptionDate('MyList') NOT_IS_EMPTY`

  Returns all recipients who are currently subscribed to the 'MyList' mailing list (that is, those for whom the subscription date is not empty).
- `Month(Date()) = Month(BirthDay)`

  Returns all recipients whose birthday is in the current month (that is, those for whom the current month equals the month of birth).
- `Day(Date()) = Day(BirthDay)`

  Returns all recipients whose birthday is on the current day (that is, those for whom the current day equals the birthday).

13.2.3.8 Notes

- You can view the recipients in your target group. To do so, open the target group in the *Check* workflow step.The recipients are listed in the table. The number of recipients currently included in the target group is displayed below the table.
- You can highlight (in full) an already created condition in the *Editing* workflow step and then:
  - edit the condition using the (*Edit*) button.
- You can highlight (in full) an already created condition and entire condition blocks in the *Editing* workflow step and then:
  - copy the condition or condition block using the (*Copy*) button.
  - insert the copied condition or condition block below the highlighted condition or condition block using the (*Paste*) button.
  - delete the condition or condition block using the (*Delete condition*) button.
- If you are an advanced user, you can also nest conditions. If you highlight a condition, you can:
  - move the condition one level in or out using the (*Move condition one level in*) and (*Move condition one level out*) buttons.
  - add additional conditions to the condition using the (*Add condition*) button.

    The conditions are then linked using the AND and OR operators (in the editor). (Note that AND is evaluated before OR by the system if no explicit brackets are set.)

13.2.4 Checking recipients

You can view the recipients in your target group. To do so, open the relevant target group in the *Check* workflow step.The recipients are listed in the table. The number of recipients currently included in the target group is displayed below the table.

Search recipients

You can perform a column-based search of the recipients table. To do this, select the relevant column and click the (*Search*) button. A dialog box in which you can enter the search criteria is displayed.

Rights

The *Check* workflow step is only displayed if the 'Use All recipients agent' or 'Use Recipients agent' rights are enabled for you.

13.3 Creating test profiles

13.3.1 Overview

You should test your mailings prior to dispatching them (for example, in the mailing preview, via the display or quality test, or by sending test emails; *Mailings (check)* page 228). You can perform these tests using real recipient data or using test profiles you have created yourself.

Test profiles are fictitious recipients that are created purely for test purposes. The advantage of using test profiles is that you can tailor them to suit your specific test requirements.

Existing test profiles can be found (always on the tab where you created the test profile, for example, on the mailing list tab) in the table in the *Test profiles* agent.

Example

You can create the following test profiles to test a salutation or a personalisation in a mailing:

- A test profile with the salutation missing
- A test profile with the surname missing
- A further test profile with no first name

When testing your salutation or your personalisation, you can select the various test profiles you require for the test directly, without having to spend a long time searching your recipient data for suitable recipients.

Create the following test profiles to test personalised mailing content using test profiles:

- A test profile that belongs to a particular target group
- A test profile that does not belong to this target group

In the preview, you can view your mailing with these two test profiles and see immediately whether your personalisation has worked.

Related Topics

Information on how to test mailings with (existing) test profiles can be found under *Content check using test or recipient profiles* page 228.

13.3.2 Creating test profiles

Prerequisites

The *Test profiles* agent is displayed on the tab where you would like to create a test profile (*Adding/deleting additional agents to mailing lists* page 80).

Step-by-step

1. Open the *Create new test profile* dialog box as follows:
   a. To create a test profile that will be available for only one particular mailing list, click the tab of the mailing list > *Test profiles* agent.
      To create a global test profile that will be available for all your mailing lists, click the (*Global settings*) tab > *Test profiles* agent.
      Existing test profiles are displayed in the table.
      The test profile table resembles the recipients table (*Recipients* page 90). Inxmail Professional shows only the columns that are visible in the *Recipients* agent or in the *All recipients* agent.
   b. Click the (*Create new test profile*) button.
      A new row is created for the test profile in the table.
2. In the first column, enter a name under which the test profile will be saved.
3. Enter the characteristics of the test profile in the other table columns.
   Inxmail Professional automatically specifies an invalid address as the email address for the test profile.

   Note Create test profiles that differ in as many characteristics as possible.

✓ You have created a test profile that you can now use when creating your mailings.

Additional information

You can select an existing test profile in the table and:

- edit the characteristics of the test profile by double-clicking the relevant table cells.
- make a copy using the (*Copy*) and (*Paste*) buttons.
- delete the test profile using the (*Delete test profiles*) button.
- change the position of the test profile in the table using the (*Move test profile up*), (*Move test profile right to the top*), (*Move test profile down*) and (*Move test profile right to the bottom*) buttons.

Related Topics

You can also create test profiles on the basis of existing recipient data. Further information can be found under *Creating recipients as test profiles* page 120.

Mailings In this chapter, you will learn:

- How to manage your existing mailings (for example, how to view and filter the mailings table; and how to copy, rename or delete mailings).
- How to create a new mailing and then open it so that you can process the mailing further via the workflow steps.

14 Mailings

14.1 Managing mailings

14.1.1 Overview

You create your mailings in a mailing list. You can view and manage all existing mailings for a mailing list on the tab of the mailing list > *Mailings* agent > *Mailings* tab:

- You can display all your mailings (newsletters) in a table and filter the table to get a better overview.
- You can rename, delete, copy, paste and send existing mailings (newsletters) directly from the table. You can also open a mailing and subsequently process it.

Note Newsletters are referred to as 'mailings' in Inxmail Professional.

In addition to newsletters, you can create the following 'special' mailings/emails in Inxmail Professional:

- In the *Mailings* agent > *Split test mailings* tab, you can create split test mailings. These enable you to send multiple versions of a mailing to a representative test group in order to determine the most successful mailing.
- In the *Mailings* agent > *Trigger mailings* tab, you can create trigger mailings. These are sent automatically if certain events take place that were previously set, for example if the recipient clicks a particular link.
- In the *Email sequence* agent, you can create email sequence emails. These will be sent automatically at particular intervals to one another.
- In the *Subscriptions* agent, you can create subscribe/unsubscribe mailings, for example welcome or farewell mailings. If you have this set up accordingly, these subscribe/unsubscribe mailings are sent during the subscribe or unsubscribe procedure.

These 'special' mailings/emails, however, are **not** included in the tab of the mailing list > *Mailings* agent > *Mailings* tab; **nor** are they included in the (*Cockpit*) tab.

Related Topics

» *Mailing lists* page 73
» *View and filter the mailings table* page 182
» *Managing mailings* page 186
» *Trigger mailings* page 307
» *Email sequences* page 390
» *Mailing list subscription and unsubscription* page 128

14.1.2 Identification and status of mailings

Mailings are marked by icons. The icons give you the following information:

- Type of mailing

- Target group
- Send status
- Approval status
- Overall status

The icons are made up of different components. The basic icon is always an envelope. Additional icons can be added to the envelope. These give information about the type of mailing, the mailing status and whether target groups are assigned to the mailing. For status recognition of timed trigger mailings, action mailings and subscribe/unsubscribe mailings, a colour change of the icons occurs. A mailing's 'overall icon' consists of the envelope and, if necessary, several additional icons.

14.1.2.1 Information about type of mailing

Symbol	Description
	Standard mailing A closed or open envelope without any additional symbols represents standard mailings.
	Timed trigger mailing An envelope with a calendar symbol represents timed trigger mailings.
	Action mailing An envelope with a green arrow pointing downwards represents action mailings.
	Subscribe/unsubscribe mailing An envelope with a green plus sign or a red minus sign represents subscribe/unsubscribe mailings.
	Sequential mailings One envelope in front of another represents sequential mailings.

14.1.2.2 Information about target group

Additional symbol target groups	Description
	Target group(s) The filter shows that the mailing is assigned to one or more target groups.

14.1.2.3 Information about approval status

Additional symbol approval status	Description

Additional symbol approval status	Description
	Approval has been requested The dotted grey tick shows that approval has been requested for the mailing. The dotted grey clock shows that approval has been requested for a mailing that is scheduled to be sent.
	Approval has been carried out. The green tick shows that approval has been carried out. Approval may have been granted either by 'immediate approval' or through the 'approval process'.

14.1.2.4 Information about send status – standard mailings

Standard mailings

(Additional) symbol send status	Description
	Dispatch has not yet taken place. The open envelope shows that the mailing has not yet been sent.
	Dispatch has taken place. The closed envelope shows that the mailing was sent.
	Current dispatch The green, closed envelope shows that the mailing is currently being sent.
	Dispatch is scheduled The clock indicates that the mailing is to be sent at a scheduled time.
	Dispatch was stopped The red circle with a white square shows that the dispatch of the mailing was stopped.

14.1.2.5 Information about send status – timed trigger mailings

Timed trigger mailings, action mailings, subscribe and unsubscribe mailings

Symbol for send status	Description
	Dispatch has not yet taken place. The open envelope shows that the mailing has not yet been sent.

Symbol for send status	Description
	Active The green closed envelope shows that the respective mailing is active. For timed trigger mailings this means that the dispatch was activated. For action mailings this means that they were assigned to an action sequence. For subscribe/unsubscribe mailings this means they were assigned to a list.
	Inactive The white closed envelope shows that the respective mailing is inactive. For timed trigger mailings this means that the dispatch was deactivated. For action mailings this means that the mailing had already been assigned to an action sequence, but this assignment has now been withdrawn. For subscribe/unsubscribe mailings this means they had already been assigned to a list, but this assignment has now been withdrawn.

14.1.2.6 Information about overall status

Here you will find an overview of all the symbols and how they appear in the respective mailing overviews in the Inxmail Professional Client.

The overall status of the mailings gives information about approval and send status. Additionally, this symbol also contains the additional symbols for type of mailing and target group.

14.1.2.7 Overall status of standard mailings

Standard mailings

Here you will find an overview of the symbols for standard mailings, and how they appear in the mailing overview in the *Mailings* tab.

Symbol	Description
	Draft The mailing is set to Draft status. It can be edited and then tested for quality. So far, approval has neither been requested nor given for the mailing. The mailing has not yet been sent. Dispatch is not scheduled.
	Approval requested Approval has been requested for the mailing. A response is still pending.
	Approved The mailing has been approved. Dispatch can be started, or scheduled to be started.

Symbol	Description
	Scheduled The mailing is scheduled for dispatch.
	Current dispatch The mailing is currently being sent.
	Dispatch stopped on The sending of the mailing was stopped.
	Sent The mailing was sent.

14.1.2.8 Overall status of split test mailings

Split test mailings

Here you will find an overview of the symbols for split test mailings, and how they appear in the mailing overview in the *Split test mailings* tab.

Symbol	Status	Description
	Draft	The split test mailing is set to 'Draft' status. It can be edited and then tested for quality.
	Approval requested	Approval was requested and a reply is pending. If approval is granted, the split test mailing is set to 'Approved' status. If approval is rejected, the mailing is reset to 'Draft' status.
	Approved	The split test mailing has been approved. It can be edited and selected in order to activate dispatch directly.
	Selected	The split test mailing has been selected. A split test mailing with this status can only be opened read only. It can be sent directly, or it can be scheduled for dispatch.
	Scheduled	Split test mailings of the 'Sending time test' type are set to 'Scheduled' when particular sending times have been defined for the split test versions.
	Current dispatch	The split test mailing is currently being sent.
	Stopped	The dispatch of the split test mailing was stopped (its status prior to this was either 'Current dispatch' or 'Scheduled').
	Sent	The split test mailing was sent.

14.1.2.9 Overall status – timed trigger mailings

Timed trigger mailings, action mailings, subscribe and unsubscribe mailings

Here you will find an overview of the symbols for timed trigger mailings and action mailings (and how they appear in the mailing overview in the *Trigger mailings* tab), and for subscribe and unsubscribe mailings (and how they appear in the mailing overview for subscribe and unsubscribe mailings).

Symbol (Time)	Symbol (Action)	Symbol (Subscribe/unsubscribe)	Status	Description
			Draft	The mailing is set to 'Draft' status. It can be edited and then tested for quality.
			Approval requested	Approval was requested and a reply is pending. If approval is granted, the mailing is set to 'Approved' status. If approval is rejected, the mailing is reset to 'Draft' status.
			Approved	The mailing has been approved. The dispatch can be activated, or the mailing can be selected.
			Active	The mailing is set to 'Active' status. For timed trigger mailings, this means that their dispatch has been activated. For action mailings, this means that they were assigned to an action sequence and are thus ready for dispatch. For subscribe or unsubscribe mailings this means they were assigned to a list.
			Inactive	The mailing is set to 'Inactive' status. For timed trigger mailings, this means that their dispatch has been deactivated. For action mailings, this means that they have been deleted from an action sequence and thus they will no longer be sent. For subscribe or unsubscribe mailings, this means that their assignment to a list has been withdrawn.

14.1.3 View and filter the mailings table

Step-by-step

1. On the tab of the mailing list, click the *Mailings* agent > *Mailings* tab.

   The table provides an overview of all the mailings created in this mailing list.

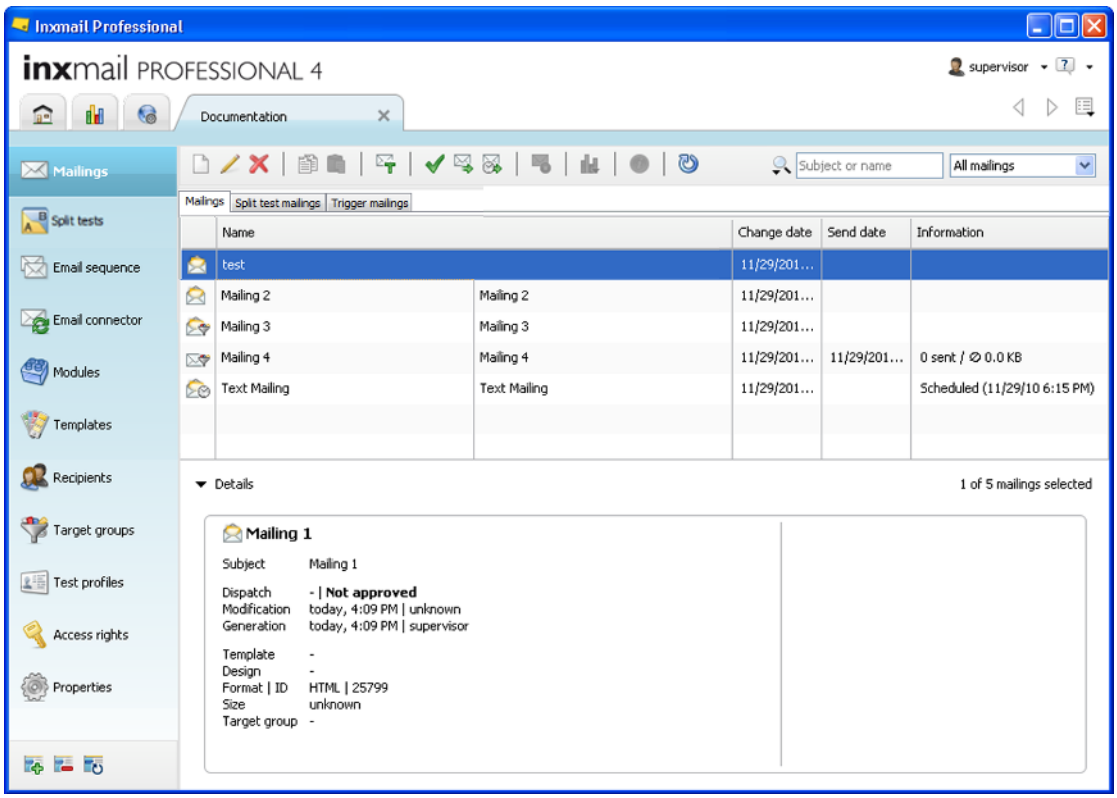


Figure 99: Mailings agent: Mailings table

The symbol in front of each mailing in the table indicates the current status of the mailing.

When you select a mailing in the table, further information on the mailing is displayed in the Details section under the table (for example, you can see which template was used (if any), the format in which the mailing was created and the mailing ID).

With dispatched mailings, you will also see the key performance indicators of the mailing in the Details section.

In addition to regular dispatch, mailings can also be sent 'post-dispatch' (for example, with the 'Send the dispatched mailing' action or via the 'Send most recently sent mailing in this list to new recipient' function upon subscription).

If a mailing was sent as post-dispatch, then you can recognise this in the *Mailings* agent > *Mailings* tab in the following places:

- In the Details section under *Dispatch*
- In the *Sending information* dialog box ((*Display sending information*) button) as information

The key performance indicators in the Details section show, where appropriate, the number of regular dispatches and post-dispatches.

2. To sort the table by columns, double-click the relevant column header, for example, *Name*.
3. You can filter the mailings using the filter input field, as follows:

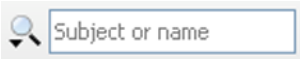


Figure 100: Filter input field

   a. Click the button, and in the drop-down list, select whether you want to filter the mailings by the *Name* table column and/or the *Subject* table column.
   b. In the input field, enter the character string for filtering the name or subject of the mailings.
   c. To apply the filter settings, click .

      To delete the filter settings, click .
4. In addition, you can filter the mailings using the filter drop-down list.

Figure 101: Filter drop-down list

If you set filters both in the filter input field and in the filter drop-down list, only mailings that fulfil the criteria of both settings are displayed.

Select one of the following entries in the drop-down list:

- *All mailings*: If you select this entry, the table displays all the mailings in the mailing list. Select this entry to remove your filter settings.
- *Draft*: If you select this entry, the table will show only the mailings for which approval has been neither requested nor given, and which have not yet been sent, and those for which dispatch has not yet been scheduled.
- *Approval requested:* If you select this entry, the table will show only the mailings for which approval has been requested.
- *Approved:* If you select this entry, the table will show only the mailings that have been approved, but whose dispatch has neither occurred nor been scheduled.
- *Scheduled*: If you select this entry, the table will show only the mailings whose dispatch has been scheduled. (For mailings to have the *Scheduled* status, they must first have been approved.)
- *Current dispatch*: If you select this entry, the table will show only mailings that are currently being sent.
- *Stopped*: If you select this entry, the table will show only the mailings whose dispatch was interrupted and that have not been subsequently resent.
- *Sent*: If you select this entry, the table will show only mailings that have been sent.

✓ The table now displays only the mailings that correspond to your filter settings. The filter settings serve only to improve the clarity of the table and do **not** influence whether mailings are sent or which mailings are sent.

Related Topics

» *Identification and status of mailings* page 176

» *Adding actions to the action sequence* page 411

» *Subscription setup* page 135

14.2 Creating a new mailing

Step-by-step

You can open the *Create new mailing* dialog box as follows:

1. To open the dialog box from the (*Cockpit*) tab, click the *New mailing* button.
2. To open the dialog box on the tab of a mailing list, go to the *Mailings* agent > *Mailings* tab and click the (*Create new mailing*) button.

   The *Create new mailing* dialog box is displayed.

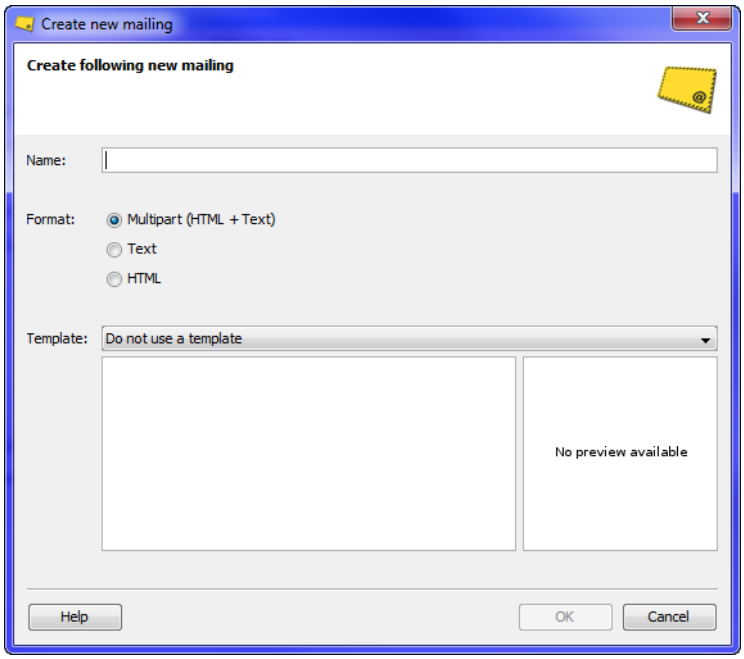


Figure 102: "Create new mailing" dialog box

3. If you opened the dialog box from the Cockpit tab, select the mailing type in the *Type* drop-down list in the dialog box, and in the *Associated list* drop-down list, select the mailing list in which you want to create your mailing.

   If you opened the dialog box from the tab of a mailing list, the *Associated list* field will not be displayed in the dialog box as the mailing will be automatically created for the current mailing list.
4. Enter a name for the mailing in the dialog box.

   Select a name that will allow you to locate the mailing quickly.
5. Select one of the following formats for the mailing:

   If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset (*Setting up the properties of mailing lists* page 82).

   - Multipart

Mailings in multipart format contain both a plain text version and an HTML version of the prepared mailing. The recipient's email program can then independently select which of the two versions to display.

- Text

  Mailings in text format can be read by every recipient without any problems, and are a preferred format for mailings. However, if you opt for text format, you can only send your images as file attachments.

- HTML

  Mailings in HTML format may contain images, different fonts and colours. You can either save your images on a Web server so that the images are loaded from the Web server and integrated into your mailing when your mailing is accessed. Or, you can embed your images in your mailing directly, so that your recipients may view the images even when offline.

  Note To create mailings in HTML format, you will need to be familiar with the HTML mark-up language. For security reasons, the following HTML elements are not allowed in mailings:

  – ActiveX
  – Audio
  – External style sheets
  – Frames and iframes
  – Java
  – The 'meta refresh' element
  – Scripts (JavaScript, VBScript, Perl etc.)
  – Tooltips
  – Video

  Please note that many email programs will not display HTML forms.

6. Select one of the following options from the *Template* drop-down list:
   - To create an empty mailing that is not based on a mailing template, select the *Do not use a template* entry.
   - To create a mailing whose layout or contents are predetermined by a user-template created in Inxmail Professional (*Setting up a user template (text, HTML, multipart)* page 402), select the *Use user-templates* entry. Then select the user template you require in the section below the drop-down list.
   - To create a mailing whose layout or contents are predetermined by a newsletter template imported into Inxmail Professional (*Importing the template library* page 396), select the relevant newsletter template and then select the required design in the section under the drop-down list.
7. Confirm your entries in the dialog box by clicking *OK*.

8. The mailing opens on a new tab where it can be edited.

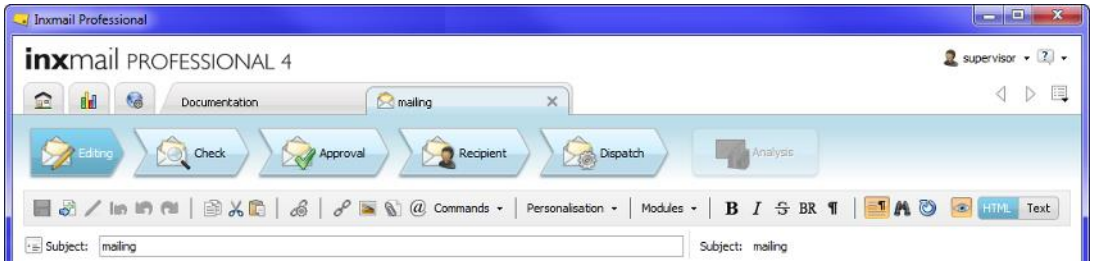


Figure 103: Tab of the mailing

The mailing is also automatically added to the table on the tab of the mailing list > *Mailings* agent > *Mailings* tab.

✓ You have now created a new mailing.

14.3 Managing mailings

On the tab of the mailing list > *Mailings* agent > *Mailings* tab, the following options are available for editing one or more mailings selected in the table:

- The (*Rename mailing*) button allows you to rename a mailing.
- The (*Delete mailing*) button allows you to delete mailings.
- The (*Copy*) and (*Paste*) buttons allow you to make copies of the mailings.
- The (*Send test emails*) button allows you to send test emails for the mailing.
- The (*Start sending now*) button allows you to send a mailing immediately.
- The (*Schedule sending*) button allows you to schedule a mailing for dispatch.
- The *Stop sending* button allows you to stop sending a mailing that is currently being sent or that is scheduled for sending.

  In the *Information* table column, you can then view the number of recipients to whom the mailing has already been sent.
- The *Create split test* button allows you to convert a standard mailing to a split test mailing.
- For sent mailings, you can click the *Display sending information* button to call up information on the dispatch.
- By double-clicking a mailing, you can open it in its own tab and edit it.

Related Topics

» *Test emails* page 249
» Versand von Mailings
» *Mailings (editing)* page 189
» *Mailings (advanced editing)* page 364
» *Mailings (check)* page 228
» *Mailings (approval)* page 253
» *Mailings (recipient)* page 264
» *Mailings (dispatch)* page 266

» *Converting a standard mailing to a split test mailing* page 187

14.4 Converting a standard mailing to a split test mailing

Step-by-step

To convert a standard mailing (in the *Mailings* agent > *Mailings* tab) to a split test mailing, proceed as follows:

1. In the table, select (highlight) one or more standard mailings for which you want to perform a split test.
2. Click the *Create split test* button in the toolbar.

   The *Convert mailing* dialog box is displayed.

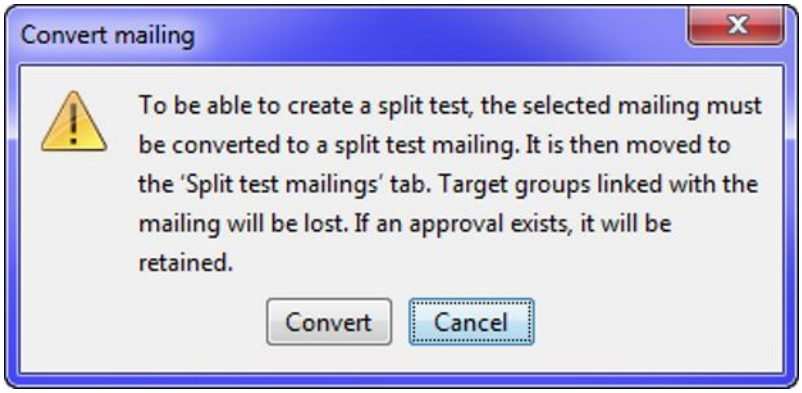


Figure 104: "Convert mailing" dialog box

> **Note** If the approval type *Simple immediate approval* is not configured, the *Immediately approve mailing* dialog box is displayed before the conversion process.

3. Click *Convert* if you would like to convert the selected standard mailing to a split test mailing.

   > **Note** Please note that target groups linked with the mailing will be lost.

   Clicking *Cancel* will take you back to the overview table of standard mailings.
4. The standard mailing is moved to the split test mailings table on the *Split test mailings* tab.

✓ You have now converted the standard mailing to a split test mailing.

Additional information

If the advanced approval process has been configured and the mailing has not yet been approved, the *Immediately approve mailing* dialog box will be displayed. This enables you to bypass the approval process and approve the mailing directly via immediate approval. For this purpose, confirm the dialog box by clicking *OK*.

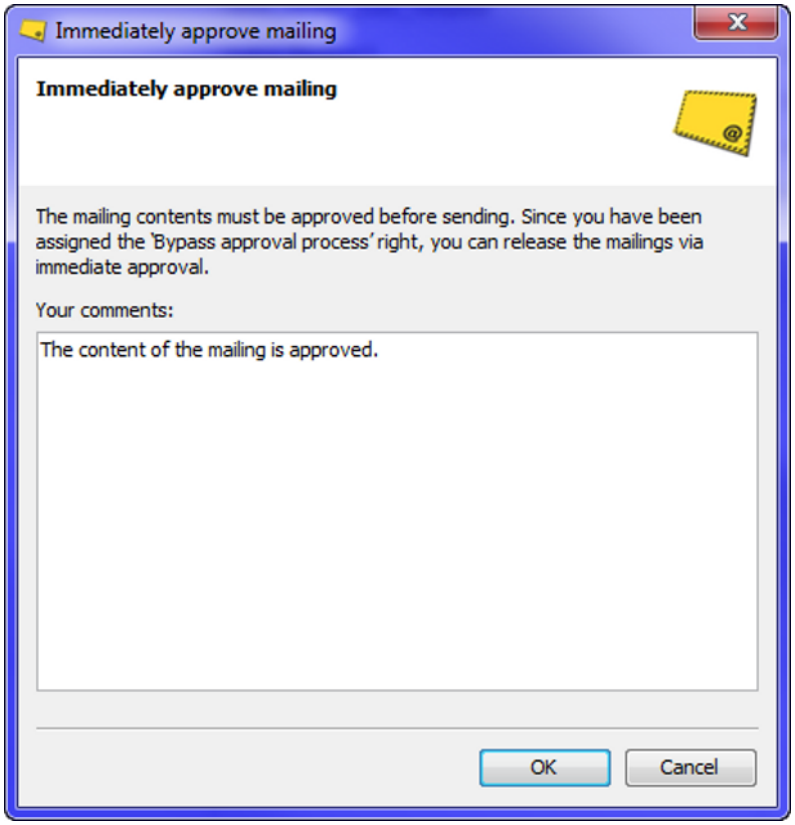


Figure 105: "Immediately approve mailing" dialog box

Related Topics

» *General* page 273

15 Mailings (editing)

In this chapter, you will learn how to create the content of your mailing in the *Editing* workflow step.

- Get an overview of the editing area.
- Learn how to change the subject of mailings.
- Learn how to create text that is personalised for each recipient (for example, you may want to address the recipients by name in the mailing).
- Learn how to create general (text) links, test them and configure them so that they can be tracked after the mailing has been sent (that is, the number of times a link is clicked is counted). You will also learn how to add parameters to links. For example, you might want your links to pass recipient data to the linked web page.
- Learn how to create special links (for example, links with personalisation parameters, unsubscribe links, links to the alternative view in the web browser or mailto links).
- Learn how to insert images as a reference or embed them directly into your mailing (and in so doing, link with a web page, for example).
- Learn how to attach files to your mailing.
- Learn how to insert created modules into your mailing.

Related Topics

» *Extending the email header* page 364
» *Creating personalised text (for target groups)* page 367
» *Login links for web pages* page 457
» *Inserting system data (commands)* page 374
» *Inserting external content (Content-Include)* page 377
» *Dynamic landing pages (newsletter templates)* page 386

15.1 Overview: Editing area

The editing area (*Editing* workflow step) is displayed as soon as you have created and opened a mailing.

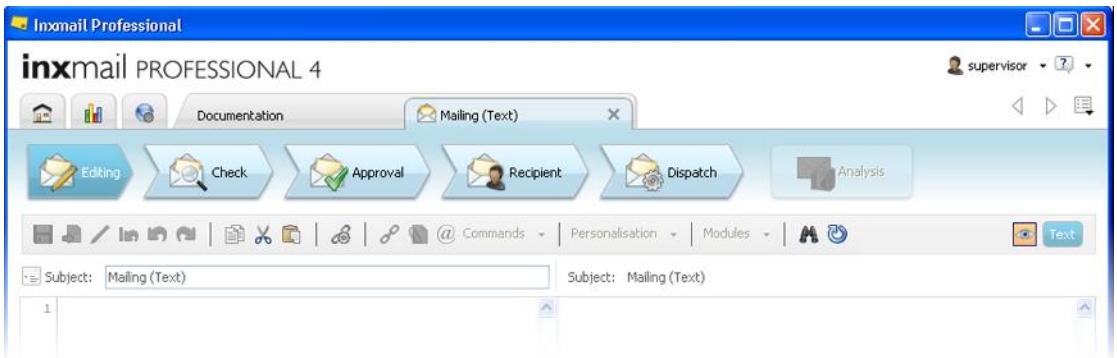


Figure 106: Editing area (text mailing)

The appearance of the editing area will depend on the mailing format of the opened mailing and on whether you have created the mailing based on a template (for example, a newsletter template):

- *Editing area: Text mailings* page 192
- *Editing area: HTML mailings* page 194
- *Editing area: Multipart mailings* page 194

Editing area: Templates (newsletter templates) page 195 This will also determine which buttons are displayed in the editing area:

Button	Description
(*Save*)	Saves all changes
(*Insert text from file...*)	(The button is not displayed for mailings created on the basis of templates.) Calls up the dialog box for inserting text from a file (unformatted)
(*Edit selection*)	(The button is not displayed for mailings created on the basis of templates.) Calls up the dialog box for editing the current selection (for example, the link dialog box if a link is selected)
(*Undo all changes*)	Undoes all changes made to the mailing content since the last save
(*Undo change*)	(The button is not displayed for mailings created on the basis of templates.) Undoes the last change made to the mailing content
(*Restore change*)	(The button is not displayed for mailings created on the basis of templates.) Restores the last change that was made to the mailing content (and then undone)
(*Add element*)	(Only displayed for mailings created on the basis of templates.) Calls up the dialog box for adding a new element
(*Copy*)	Copies the currently selected object
(*Cut*)	Cuts the currently selected object
(*Paste*)	Pastes the previously copied object
(*Link Management: Test whether links are active and check tracking*)	Calls up Link Management to check all the links inserted into your mailing (*Performing a link test in Link Management* page 210)
(*Insert link*)	Calls up the dialog box for inserting a new link (*Insert link* page 203)

Button	Description
(*Link image*)	(Only for HTML or multipart mailings) Calls up the dialog box for inserting an image as a reference (*Inserting an image as a reference (linking an image)* page 219)
(*Attach file*)	Calls up the dialog box for attaching a file(*Adding file attachments* page 225)
(*Insert mailto link*)	Calls up the dialog box for inserting a mailto link (*Inserting mailto links* page 215)
Commands	Drop-down list, for example: to insert personalised text using conditions (*Creating personalised text (for target groups)* page 367) to include external content using the `Content-Include` command (*Inserting external content (Content-Include)* page 377) to insert system data (*Inserting system data (commands)* page 374) to insert a subscribe or unsubscribe command to set up a user template (*Setting up a user template (text, HTML, multipart)* page 402)
Personalisation	Drop-down list for inserting recipient table columns; personalised text is read out for each recipient (*Creating personalised texts* page 198)
Modules	Drop-down list for inserting modules(*Inserting modules* page 227)
(*Bold*)	(Only for HTML or multipart mailings) Formats the selected text with the 'bold' font style (HTML tag '')
(*Italic*)	(Only for HTML or multipart mailings) Formats the selected text with the 'italic' font style (HTML tag '')
(*Strikethrough*)	(Only for HTML or multipart mailings) Formats the selected text with the 'strikethrough' font style (HTML tag '<s></s>')
(*Insert word wrap*)	(Only for HTML or multipart mailings) Inserts a line break (HTML tag ' ')
(*Insert paragraph*)	(Only for HTML or multipart mailings) Inserts a new paragraph (HTML tag ' ')
(*Show/hide word wrap*)	(Only for HTML or multipart mailings) Adjusts the line length to the width of the editor (Show word wrap) or does not adjust it (Hide word wrap)

Button	Description
(*Turn on/off form view*)	(Only for mailings that contain form fields) Shows or hides the form view (*Setting up a user template (text, HTML, multipart)* page 402)
(*Search*)	Calls up the dialog box to search for any chosen text in the editor
(*Refresh quick preview*)	Refreshes the quick preview if displayed ((*Show/hide quick preview*) button)
(*Show/hide structure tree*)	(Only displayed for mailings created on the basis of templates.) Shows or hides the structure tree (positioned to the left of the mailing content)
(*Show/hide quick preview*)	Shows or hides the browser preview of the mailing (positioned to the right of the mailing content)
HTML	(Only for HTML or multipart mailings) Opens the HTML editor
TEXT	(Only for text or multipart mailings) Opens the text editor

Related Topics

» *Creating a new mailing* page 184

15.1.1 Editing area: Text mailings

The editor in the editing area for text mailings is initially empty after mailings have been created.

You can insert texts and links in the editor. Images and files can be added as a mailing attachment.

To do this, use the buttons on the toolbar (for example, the button for adding file attachments).

You can also copy text over from other word processing programs using Copy (CTRL+C) and Paste (CTRL+V).

As some office applications can contain characters that are not allowed in text mailings (for example, lower inverted commas), Inxmail Professional converts them accordingly when inserting them (for example, the euro symbol is converted to 'EUR').

Very few text formatting options are available in text mailings:

- Paragraphs
- Horizontal lines (allow you to separate your mailing contents)
- Line breaks

The standard character set and the position where a line break is automatically inserted in the editor can be individually configured for each mailing list (*Setting up the properties of mailing lists* page 82).

15.1.1.1 Paragraph

Paragraphs in text mailings can be formatted using the 'p' parameter:

- Use `[%p]` for a normal paragraph.
- Use `[%p(<number1>,<number2>)]` for an indented paragraph
  - The text in the first line is indented by the number of characters specified using 'number1'.
  - The text from the second line onwards is indented by the number of characters specified using 'number2'. In other words, the text in all subsequent lines is also indented.

    As soon as the `[%p]` command or the `[%p(<number1>,<number2>)]` command occurs again, this indentation of the text is reset and is not applied to the lines that then follow.

15.1.1.2 Horizontal line

For clarity, you can insert a horizontal line in text mailings.

Horizontal lines are inserted using the 'hr' parameter: `[%hr]`

These horizontal lines begin on a new line and reach to the configured line break.

The default character is the hyphen '-'. You can also use other characters to display the horizontal lines. To use the '+' sign, you specify `[%hr(+)]`. You may also use text or recipient data as a horizontal line.

Example

- You specify `[%hr]` to insert a dashed horizontal line (up to the line break) into your mailing, for example:

  Kind regards,

  First name, surname

  Company XYZ

  Street X

  City Y

  Email address: xyz@test.com
- You specify `[%hr(**Advert)]` to insert the following text (up to the line break) into your mailing content:

  AdvertAdvert**Advert**Advert**Advert**Advert***Adv

15.1.1.3 Line break

You can use the [%br] command to force a line break. A double [%br] will force a line break and a subsequent blank line.

Example

Enter the following in the editing area:

This is a[%br]test sentence.

The following mailing content will be generated:

This is a

test sentence.

15.1.2 Editing area: HTML mailings

The editor in the editing area for HTML mailings contains the following HTML tags after mailings have been created:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html;charset=[%listcharset]"/>
<meta http-equiv="Content-Style-Type" content="text/css;charset=[%listcharset]"/>
<title></title>
</head>
<body>
</body>
</html>
```

You can insert text, links and images between the HTML tag `<body>` and the HTML tag `</body>`.

Use the buttons on the toolbar to do this. You can also specify corresponding HTML tags manually.

You can also copy text over from other word processing programs using Copy (CTRL+C) and Paste (CTRL+V).

15.1.3 Editing area: Multipart mailings

When creating multipart mailings, you create a text and an HTML version of the mailing in parallel.

To switch between the two versions, you click the *TEXT* or the *HTML* button on the toolbar.

The editing area for text mailings is available for you to create the mailing content of the text version (*Editing area: Text mailings* page 192).

The editing area for HTML mailings is available for you to create the mailing content of the HTML version (*Editing area: HTML mailings* page 194).

The recipient's email program can then independently select which of the two versions to display.

15.1.4 Editing area: Templates (newsletter templates)

If you have created mailings based on a template (such as a newsletter template), the editing area may contain form fields etc., which make it easier for you to create the mailing content. This will depend on the selected template.

If you selected the demo version of the universal template installed as standard to create a mailing, elements such as the *header*, the *salutation* or the *imprint* are displayed in the template editor.

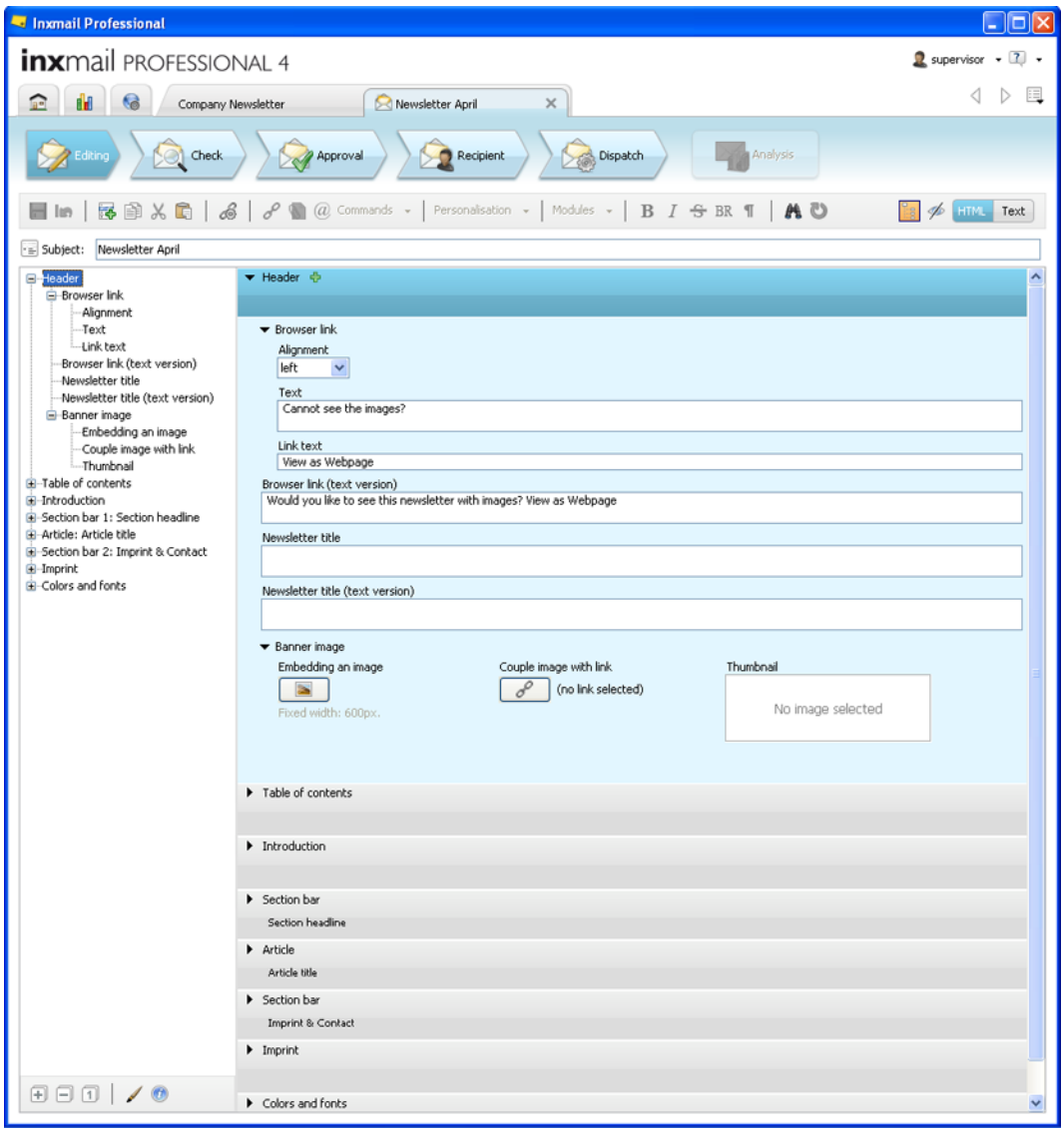


Figure 107: Editing area for the basic template

The demo version of the universal template is intended for demonstration purposes.

The demo version is labelled accordingly. However, it still offers all the functions of the universal template, showing you the benefits of using templates to create mailings:

- You do not require any HTML and CSS knowledge to create HTML mailings.
- The template is optimised for all current email clients.
- The layout for your mailing is already provided when you use the template, meaning you can concentrate fully on the content.

- The template was created in multipart format and allows you to generate the text and HTML formats simultaneously from a single source.

Further information on the universal template can be found in the Universal Template Handbook, which is available in the *Inxmail Community http://community.inxmail.de/wdefault/wlogin/index.php\n* under *Marketing and Distribution*.

You can develop your own templates and integrate them in Inxmail Professional (*Templates* page 395).

You can also order custom templates (newsletter templates) individually tailored to your company's needs. Contact us at customer-care@inxmail.de for more information.

The following possibilities are available in the editing area displayed for templates:

- You can select, open or close the individual elements and subordinate elements using the structure tree located to the left of the editor.

  If you cannot see the structure tree, click the (*Show/hide structure tree*).
- Use the (*Expand all elements*) and (*Collapse all elements*) buttons to expand and collapse the structure tree.
- The (*Always show only one element expanded*) button lets you specify that only the currently selected element is expanded in the structure tree (and all other elements are automatically collapsed).
- Depending on the template, you can use the (*Change design of the template*) button to change the design of the template you selected to create the mailing.

  The quick preview ((*Show/hide quick preview*) button) shows you the current design.
- The (*Display information for template*) button will provide information about the selected template (for example, about the manufacturer of the template or the template's structure).
- You can add content to the elements of the template in the usual way (for example, you can use the toolbar buttons to insert links or images). Some of the elements have already been entered using the mailing content.
- At some points, you can copy ((*Copy*) button), cut ((*Cut*) button) and paste ((*Paste*) button) elements, which are market in the structure tree.
- At some points, you can add further elements or delete added elements, depending on the template. If you can add further elements or delete elements for a selected element, the (*Add element*) button or (*Delete element*) button will appear in the editor directly next to the element name.
- At some points, you can move elements, depending on the template. If you can move a selected element, then the (*Move element up*) button or the (*Move element down*) button will appear in the Editor directly next to the name of the element
- At some points, you can fill elements with content from external data sources (for example, with articles from your online shop), depending on the template.

This function is only supported by newsletter templates that have been individually created for you. Each external data source from which you can transfer content must have been created in Inxmail Professional (*Templates* page 395).

If you can fill a selected element with external content, then the (*Fill in element*) button will appear in the Editor directly next to the name of the element.

Step-by-step

To fill the element with external content, proceed as follows:

1. Click the (*Fill in element*) button.

   A dialog box appears.

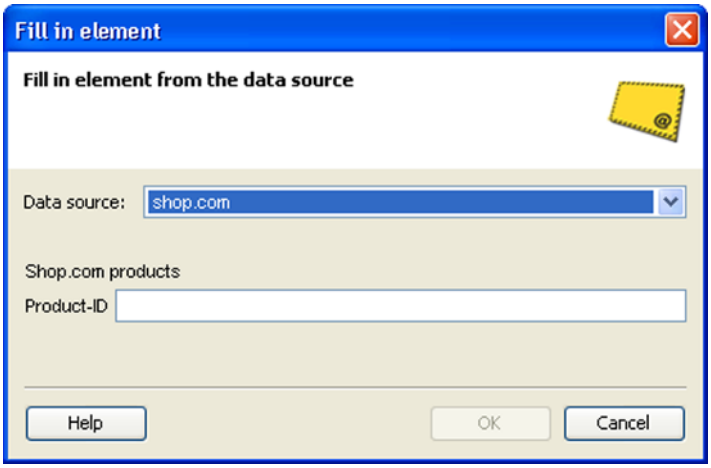


Figure 108: "Fill in element" dialog box

2. Select the external data source from which you wish to transfer content.
3. Enter any further information in the dialog box, if required (for example, the product ID of the online shop article to be inserted into the mailing).
4. To transfer the content, click *OK*.

   The external content is inserted into the element.
5. If necessary, you can adjust the transferred content in the mailing.

   The transferred content will no longer be updated before the mailing is sent.

   To update the content, insert it again using the (*Fill in element*) button. Note that any adjustments made to this content in the mailing will be overwritten.
6. Save your settings.

Note Alternatively, you can use the Content-Include command to insert content into your mailing (*Inserting external content (Content-Include)* page 377). You do not need a newsletter template to do this.
If you use the Content-Include command, the content is updated at the time of sending. Therefore, with this function you cannot adjust external content in the mailing prior to sending.

15.2 Editing the subject

Note Information on how to add further information (besides the subject) to the email header (in order to send your mailing to recipients as CC or BCC, for example) can be found under *Extending the email header* page 364.

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. You have the following options for changing the subject text:

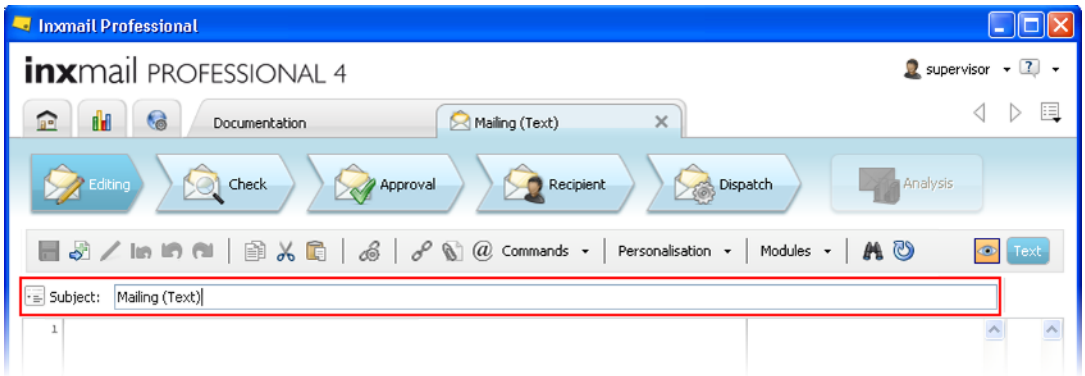


Figure 109: Field for editing the subject

Initially, the mailing name is automatically inserted as the subject when a new mailing is created. Subsequent renaming of the mailing will not, however, overwrite the subject.

- Click in the *Subject* field and overwrite the subject text.
- You can insert the current mailing name as the subject if the subject and mailing name differ. To do this, right-click in the *Subject* field and select *Replace subject with name*.

3. Save your settings.

✓ You have modified the subject of the mailing.

15.3 Creating personalised texts

Inxmail Professional allows you to integrate in your mailings texts that are displayed personalised for each recipient (for example, the recipient's first name or surname is inserted).

- *Insert personalised text* page 199
  You can integrate personalised texts by inserting corresponding fields into your mailing. When the mailing is sent, these fields are then replaced by the texts stored in a recipient table column (for the current recipient).
- *Examples: Inserting a predefined personalised salutation* page 200
  These examples show how to quickly integrate a personalised salutation (for example, 'Dear Mr Smith' or 'Dear Ms Miller') in your mailing.
- *Useful parameters for the creation of individualised salutation texts* page 201
  You can add parameters to your personalised salutation (for example, parameters that determine whether upper or lower case is used for salutation texts).

15.3.1 Insert personalised text

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the personalised text.
3. Click the *Personalisation* button.
4. You may select the *Activate Field dialog* check box in the drop-down list. Then select the recipient table column containing the relevant texts for the recipients (for example, to insert the first names of the recipients, select the recipient table column that contains the recipients' first names).
5. If you selected the *Activate Field dialog* check box in the drop-down list, a dialog box appears.

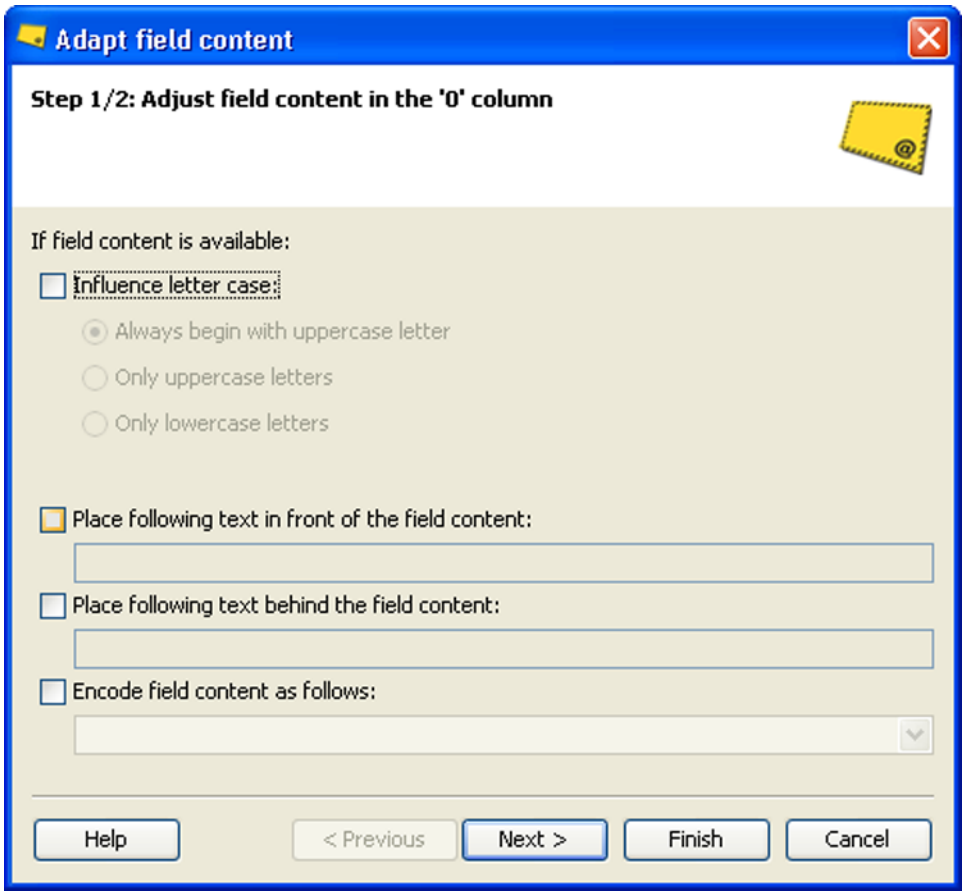


Figure 110: "Adapt field conten" dialog box

6. In the dialog box, you can specify whether Inxmail Professional should automatically transfer the text read out of the selected recipient table column one-to-one into the field, or whether it should adapt it (for example, change the text to upper or lower case).
7. Click *Next*.
8. You can specify in the dialog box what should happen if no text is available for a recipient in the selected recipient table column. Inxmail Professional could then, for example, either not insert a text into the field, insert a particular predefined text into the field or exclude the recipient from the sending of the mailing.

9. Confirm the dialog box by clicking *OK*.

   If you did not select the *Activate Field dialog* check box in the drop-down list, the field is immediately inserted into your mailing. In this case, if no text is later available for a recipient in the selected recipient table column, Inxmail Professional will not insert a text into the field.

   The field is inserted into your mailing in the `[`Column name`]` format (for example, `[First name]`).

   If the column name contains special characters (for example, the column '2nd Account Number'), then the `Column("`<column name>`")` function is inserted for the field instead of the `[`<column name>`]` format.

10. Save your settings.

✓ You have inserted a personalised text. The quick preview ((*Show/hide quick preview*) button) shows the personalised text for the recipient (or the test profile) currently selected in the *Check* workflow step using the *Check content* button.

Related Topics

» *Content check using test or recipient profiles* page 228

15.3.2 Examples: Inserting a predefined personalised salutation

Note We recommend storing the personalised salutation centrally as a module. You can then use the salutation module in your future mailings.

Step-by-step

1. Create the following columns in your recipient table:
   - A column with the name 'Gender' and the column type 'Text' which contains information on the gender of the recipients (the value 'f' for female recipients, the value 'm' for male recipients)
   - A column with the name 'First name' and the column type 'Text' which contains the first names of the recipients
   - A column with the name 'Surname' and the column type 'Text' which contains the surnames of the recipients

     If your recipient table already contains corresponding columns, but the columns are named differently or contain different values, then you must adjust the examples below accordingly.
2. Open the mailing in the *Editing* workflow step.
3. Click the position in your mailing where you would like to insert the personalised salutation.
4. Copy the commands from one of the following examples and insert them as text into your mailing:

Example

```
[%if surname IS_EMPTY]Dear Sir or Madam,
[%elseif Column("Gender") = "m"]Dear Mr
[first name,postfix()][surname],
[%elseif Column("Gender") = "f"]Dear Ms
[first name, postfix()][surname],
[%else]Dear Sir or Madam,[%endif]
```

Example

```
[%if Column("first name") IS_EMPTY) AND Column("surname")
IS_EMPTY]Hello
[%elseif Column("first name") NOT_IS_EMPTY AND
Column("surname") IS_EMPTY]Hello [first name]
[%elseif Column("first name") NOT_IS_EMPTY AND
Column("surname") NOT_IS_EMPTY]
Hello [first name] [surname] [%endif]
```

These examples contain individualised text for addressing women and men differently ('Dear Mr', 'Dear Ms') as well as the field for the recipient's first name and surname.

5. Save your settings.

✓ You have inserted a personalised salutation into your mailing. The quick preview ((*Show/hide quick preview*) button) shows the personalised salutation for the recipient currently selected in the *Check* workflow step using the *Check content* button.

Related Topics

» *Creating modules* page 155
» *Inserting modules* page 227
» *Creating a new column* page 123
» *Creating personalised text (for target groups)* page 367
» *Content check using test or recipient profiles* page 228

15.3.3 Useful parameters for the creation of individualised salutation texts

You can use the following Inxmail Professional parameters when creating salutation texts:

Parameter name	Parameter examples	Description
postfix parameter	[First name,postfix( )]	If the 'First name' recipient table column contains a value, the content of the brackets will be placed after this value. If the 'First name' recipient table column does not contain a value, the first name will be omitted without leaving a visible gap.

Parameter name	Parameter examples	Description
prefix parameter	[First name,prefix( )]	If the 'First name' recipient table column contains a value, the content of the brackets will be placed in front of the value. If the 'First name' recipient table column does not contain a value, the first name will be omitted without leaving a visible gap.
default parameter	[Salutation,default(Mr/Ms)]	If the 'Salutation' recipient table column does not contain a value (for example, 'Mr' or 'Ms'), the value 'Mr/Ms' will be inserted by default.
MUST parameter	[Surname,MUST]	The 'Surname' recipient table column must contain a surname, otherwise the mailing will not be sent to the recipient.
firstcap parameter	[Surname,firstcap]	The first letter of the surname will be written in upper case, the remaining letters in lower case.
upper parameter	[Surname,upper]	All letters of the surname will be written in upper case.
lower parameter	[Surname,lower]	All letters of the surname will be written in lower case.
encode parameter	[Surname, encode(ISO-8859-1)]	The surname will be encoded in ISO-8859-1. Special characters will now be displayed correctly in every email client. (Application: links)

Tab. 1: Parameters for salutation texts

Illustrative example (using 'Name' recipient table column):

Parameter used	Display for Name = mike milleR	Display for Name = (no name specified)
[Name,firstcap]	Mike Miller	No entry
[Name,upper]	MIKE MILLER	No entry
[Name,lower]	mike miller	No entry
[Name,default(TEXT)]	mike milleR	TEXT
[Name,MUST]	mike milleR	(No email!)

Tab. 2: Example: Various parameters in the salutation text

You can also combine parameters.

Enter the following expression, for example:

```
[First name,prefix(Hello ),postfix(,), default(Dear Reader,),firstcap]
```

In the case of a complete recipient record with the first name 'paul', the following will appear in the mailing preview: 'Hello Paul,'. If no first name is present in the recipient record, 'Dear Reader,' will appear in the preview.

15.4 Inserting, tracking, personalising and testing links (general)

15.4.1 Insert link

Step-by-step

Open the *Insert link* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the (text) link.
3. Click the (*Edit link*) button.

   A dialog box appears.

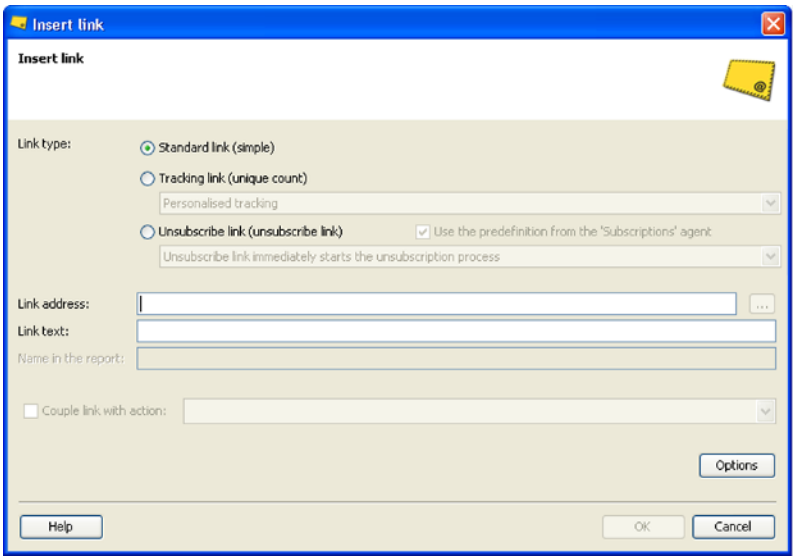


Figure 111: "Insert link" dialog box

> **Note** Please note that the link dialog may vary if you use a newsletter template that has been created prior to Version 4.1 and has not been updated to conform with Version 4.1.

4. Select one of the following link types:
   - *Standard link*: Select this link type for a link that is not to be tracked (that is, a link for which you do not want to count the number of clicks).
   - *Tracking link*: Select this link type if you want to track the link (that is, count how many times the link is clicked). Then select whether to perform anonymous or personalised tracking for the link.

You should define a subdomain to prevent the tracking link being displayed with IP address in text mailings.

- *Unsubscribe link*: Select this link type for a link that allows recipients to unsubscribe from the mailing list.

  You can only select this type of link if you have added the *Subscriptions* agent.

5. In the *Link address* field, specify the URL (**Fehler! Hyperlink-Referenz ungültig.**...) of the web page to which the link is to point.
6. If, instead of the link address, a text is to be displayed in HTML mailings, enter this text in the *Link text* field.

   In text mailings, this link text will be displayed in front of the link address.
7. Tracking and unsubscribe links are always tracked, i.e. the system counts how often the link has been clicked. You can see the result as standard in the reports under the corresponding link address. If you would like the link to appear under a special name in the report, you can enter this name in the *Name in the report* field.

   Give your link a name by which you will be able to identify it. If two or more links are given the same name, they will be combined in the reports.
8. If you would like the tracking link to trigger an action sequence, enable the *Couple link with action* check box and select the action sequence in the drop-down list.

   The *Couple link with action* check box is only available for tracking links with personalised tracking.

   A link can be coupled with no more than one action sequence. By doing this, you can select only the action sequences that are triggered for the 'Click on a certain link' event.
9. If you would like to add additional HTML parameters to the link (for example, in order to format the link), click the *Options* button, specify the HTML parameters and confirm by clicking *OK*.
10. Confirm your entries by clicking *OK*.

    The Inxmail Professional code for the link is inserted into your mailing.

    Example: `[%url:unique-count(action!1); "http://www.test.de"; "This is a test link"; ; "Report names"]`
11. Save your settings.

✓ You have inserted a link. The quick preview ((*Show/hide quick preview*) button) shows you the link. You can open the link there (for HTML mailings).

To edit a link that has already been inserted, highlight the link in the Mailing Editor and then click the (*Edit selection*) button.

You can also insert a link manually:

- In text mailings, enter the link manually as follows:
  `http://www.inxmail.de`
- In HTML mailings, enter the link enclosed in HTML commands:
  `<a href="http://www.inxmail.de">Inxmail Homepage</a>`

Related Topics

» Inxmail Community (http://community.inxmail.de)

» *Overview: Link tracking* page 207

» *Adding/deleting additional agents to mailing lists* page 80
» *Inserting an unsubscribe link* page 212
» *Overview: Link tracking* page 207
» *Actions* page 405
» *Specify options (HTML parameters) for a link (optional)* page 205
» *Overview: Commands for link specifications* page 208

15.4.2 Specify options (HTML parameters) for a link (optional)

If you do not specify any HTML parameters for the link, the following will apply for the link:

- The linked web page will be opened in a new window.
- The link will be formatted as a blue underscored link (link example).

Step-by-step

Open the *Options* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. To open the *Link editing* dialog box for a link that has already been created, click the Inxmail Professional code for the link. Then click the (*Edit selection*) button.
3. In the *Link editing* dialog box, click the *Options* button.
   A dialog box appears.

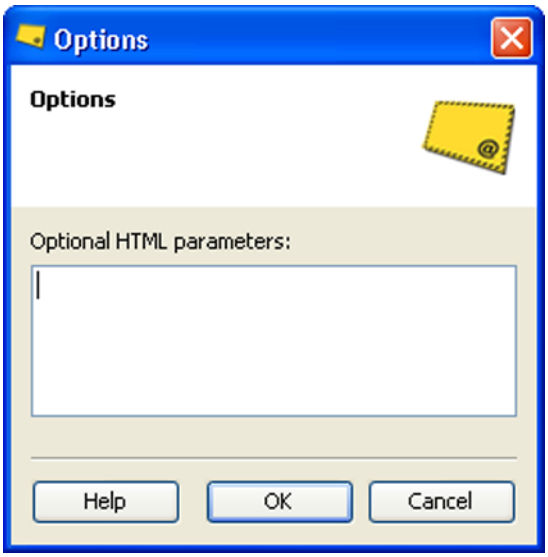


Figure 112: "Options" dialog box

4. You can now specify the HTML parameters manually in the input area (for example, `style="font-style:italic; color:green" target="_blank"`). Use the 'target' HTML parameter, for example, to specify the window in which the linked web page is to open. This HTML parameter can hold any of the following values:

Value	Description
_blank	The linked web page will be opened in a new window.

Value	Description
_self	The linked web page will be opened in the current window.
_parent	The linked web page will be opened in the parent frameset.
_top	The linked web page will be opened in the full browser window.

Example

If you want the linked web page to open in a new window, enter the following in the *Options* dialog box: `target="_blank"`

Use the 'style' HTML parameter, for example, to format the link using CSS properties. This HTML parameter can hold any of the following CSS properties:

CSS property	Description	Example
font-family	Font	font-family:Verdana
font-style	Font style	font-style:italic
font-variant	Font variant	font-variant:normal
font-size	Font size	font-size:1.2em
font-weight	Font weight	font-weight:bold
font	General font settings	font:bold .9em Times
word-spacing	Word spacing	word-spacing:0.5em
letter-spacing	Character spacing	letter-spacing:0.3em
text-decoration	Text decoration	text-decoration:none
text-transform	Text transformation	text-transform:capitalize
color	Text colour	color:blue
text-shadow	Text shadow	text-shadow:black 3px 2px
font-stretch	Font stretch	font-stretch:200%

To define a link with a green text colour, for example, enter the following in the *Options* dialog box: `style="color:green"`

If you would like to specify several CSS properties, separate the individual CSS properties with a semicolon, for example, `style="font-style:italic; color:green"`.

5. Confirm you entries in the *Options* dialog box by clicking *OK*.
6. To apply the settings for the link, confirm the *Link editing* dialog box by clicking *OK*.
   The Inxmail Professional code for the inserted link appears in your mailing.

Example

If you have inserted a link to the Inxmail web page and have formatted the link with a coloured font and italics, the following Inxmail Professional code appears in your mailing:

```
[%url;"http://www.inxmail.de";"Inxmail";
"style=\"font-style:italic; color:#AAAAFF;\"";]
```

7. Save your settings.

✓ You have specified HTML parameters for a link. The quick preview (*Show/hide quick preview*) button) shows you the link. There you will see the format of the link and can open it (for HTML mailings).

Related Topics

» *Insert link* page 203

15.4.3 Overview: Link tracking

Link tracking is the counting of clicks of a link. It lets you find out how many people are interested in the topic to which the link leads. You can then better plan your next mailing.

You specify whether a link is to be tracked when you create the link (for example, *Insert link* page 203).

There are two different ways of tracking a link:

- Anonymous link tracking
- Personalised link tracking

15.4.3.1 Anonymous link tracking (count)

If this type of tracking was selected for a link, the following is counted:

- All clicks of this link (that is, every click is counted regardless of whether a person has previously already clicked this link)

No personal data is stored when you use anonymous link tracking.

After sending the mailing, you will be able to see in the reports how many times, in total, the link was clicked (all clicks) (*Reports on mailings* page 345).

Anonymous link tracking is implemented using the 'count' command.

Example

Inxmail Professional code for a tracking link where anonymous tracking is used:

```
[%url:count; "http://www.inxmail.de"]
```

15.4.3.2 Personalised link tracking (unique-count)

If this type of tracking was selected for a link, the following is counted:

- All clicks (that is, every click is counted regardless of whether a person has previously already clicked this link)

- Unique clicks (that is, a maximum of one click (initial reaction) is counted per person)

After sending the mailing, you will be able to see in the reports how many times, in total, the link was clicked (all clicks) and how many people have clicked the link (unique clicks).

You can also store data on which people have actually clicked a link:

If you store person-related information, make sure you let your recipients know about this at the subscription stage. Explain, if necessary, that you store the recipients' areas of interest in order to better address their needs.

- You can couple the link with a click action. Then, when a recipient clicks the link, a value is automatically entered for this recipient in a recipient table column. In this way, you can supplement your profile data.

  Note We recommend using actions only if you are an advanced Inxmail Professional user.

- Based on this recipient reaction (that is, the recipient has clicked this link), you can create the following:
  - A target group that contains only the recipients who have clicked the link
  - A dynamic list that contains only the recipients who have clicked the link

    Note You require your recipients' consent in order to use recipient reactions for defining target groups or dynamic lists.

    This means you can only use this type of condition if the appropriate property rights have been activated in your system (that is, in the Inxmail Professional administration section). If necessary, consult your Inxmail Professional administrator.

Personalised link tracking is implemented using the 'unique count' command.

Example

Inxmail Professional code for a tracking link where personalised tracking is used:

```
[%url:unique-count; "http://www.inxmail.de"]
```

Related Topics

Reports on mailings page 345

Actions page 405

Creating target groups page 160

Overview: Mailing lists page 73

Information in the recipient table page 92

15.4.4 Overview: Commands for link specifications

If you have inserted a link into your mailing in the *Editing* workflow step, the link may contain the following commands:

```
[%url:<Link type>(action!<ID>); <Link address>; <Link text>; <HTML parameter>;
<Name in the report>]
```

Example

```
[%url:unique-count(action!1); "http://www.testurl.com"; "This is a test link";
"target=\"_blank\""; "Test Link"]
```

- Link type: The link type specifies whether the link is a simple link, an unsubscribe link or a tracking link.
- (action!<ID>): This command is inserted if you have coupled the link with an action. The ID stands for the internal number of the action to be triggered.
- Link address: The link address specifies the URL of the web page to which the link points.
- Link text: The link text is displayed instead of the link address when an HTML mailing is viewed in the recipients" email program; in text mailings, the link text is displayed in front of the link address.
- HTML parameter: This command is inserted if you have added an HTML parameter to a link (for example, in order to format the link). You can add several HTML parameters.
- Name in the report: This command is inserted if you have specified a name under which the link will be listed in the reports.

  The link can additionally contain personalisation parameters. For this, the link must have been inserted in HTML code.

Related Topics

» *Insert link* page 203

» *Specify options (HTML parameters) for a link (optional)* page 205

» *Adding personalisation parameters to the link (optional)* page 209

15.4.5 Adding personalisation parameters to the link (optional)

Add personalisation parameters to a link if you want the following to occur: When the recipient clicks the link, the recipient's data is read out of the recipient table and passed to the web page.

This may be necessary in order to pass the email address or the name of the user to an online shop, for example.

1. Open the mailing in the *Editing* workflow step.
2. Insert a link that points to the web page (*Insert link* page 203). The link is inserted in the Inxmail Professional code (for example, `[%url:unique-count(action!1); "http://www.testurl.com"; "This is a test link";"Test link"]`).
3. Manually change the link to an HTML link (for example, a href="`[%url:unique-count(action!1); "http://www.testurl.com"; "This is a test link";"Test link"]`">This is a test link).
4. To do so, proceed as follows:
   a. Add the HTML tags `<a href=...>` and `</a>` around the already inserted link. Please note that you must put the previously inserted Inxmail Professional code in quotation marks.
   b. Insert the link text (once again) between the HTML tags `<a href=...>` and `</a>` (for example, This is a test link.

5. Add the personalisation parameters in the following format after the square brackets ([...]):
```
&<Any parameter name>=[<Name of the recipient table column from which the recipient data is to be read>]
```

Example

• When the recipient clicks a link, the recipient's customer number (read out of the 'CustomerNo.' recipient table column) is to be passed to a web page. For this, you use the following link:
```
<a href="[%url:unique-count; "http://www.inxmail.de"]&id=[KundenNr]">Inxmail Homepage</a>
```

• When the recipient clicks on a link, the recipient's customer number (from the 'CustomerNo.' recipient table column) and email address (from the 'Email' recipient table column) are to be passed to a web page. For this, you use the following link:
```
<a href="[%url:unique-count; "http://www.inxmail.de"]&id=[KundenNr]&email=[email]">Inxmail Homepage</a>
```

6. Save your settings.

✓ You have added personalisation parameters to a link.

15.4.6 Performing a link test in Link Management

The link test allows you to check whether all links inserted into your mailing work (that is, are active). You can do this directly when creating your mailing. (The (*Link Management: Test whether links are active and check tracking*) is also active in mailings that have already been sent.) You can also use Link Management to ensure that link tracking has been appropriately configured for all links.

Note that if you have created multipart mailings, you need to perform the link test twice (once for the text version and once for the HTML version), as the link test is performed only for the version that is currently open.

You cannot use the link test to check links that contain additional personalisation parameters.

Step-by-step

Open the *Link Management* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the button (*Link Management: Test whether links are active and check tracking*).

A dialog box appears.

The link test is performed automatically.

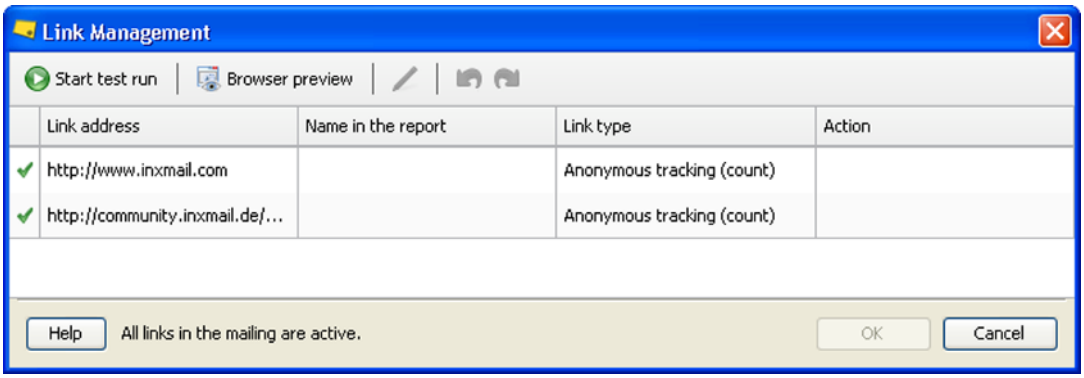


Figure 113: "Link Management" dialog box with result of the link test

Note If the link test does not work, it may be because the Internet connection must be made through a proxy server other than the configured login proxy server.

In this case, make the settings for the Internet proxy server. This will not affect your login proxy server settings.

The dialog box contains the sections *Links* and *Linked images*.

All link addresses that can be clicked and opened in the mailing are listed in the *Links* section. These also include link addresses that are linked to images (that is, are displayed if you click the relevant image in the mailing).

The link addresses, which guide you to the storage location of the respective image, are displayed in the *Linked images* section.

You will see a test result for each link in a table in both sections:

Symbol	Description
✔	Link is active
●	Link contains parameters and cannot be checked This symbol appears only for manually specified links with personalisation parameters, that is, links that were **not** specified in the Inxmail Professional code. Note: Links that have parameters and were specified in the Inxmail Professional code likewise cannot be checked. In this case, however, Inxmail Professional ignores the appended parameter and delivers the link test result for the link without parameters.
●	Link is inactive

Symbols used for tested links in Link Management

You can sort the entries in the table by double-clicking the header of the relevant table column.

The *Link type* table column shows whether the link is being tracked (as a tracking link with the *Anonymous tracking (count)* or *Personalised tracking (unique-count)* setting).

3. If the symbol ✔ is **not** displayed for all links, select the link in the *Link Management* dialog box.

4. Click the (*Edit link*) button.
5. Edit the settings for the link and confirm your changes by clicking *OK*.
6. You can also use the *Browser preview* button to test whether the linked web page opens in a selected web browser (for example, your standard web browser).
7. Repeat the link test using the *Start link test* button.

   Note To change the link type for several tested links, select the links in the table (with the CTRL key held down), right-click and then select the *Edit links* entry in the drop-down list. You can now make your settings and then apply them for all selected links.

8. If the symbol is displayed for all links, you may click *OK* to close Link Management.

✓ You have performed the link test.

Related Topics

» *Adding personalisation parameters to the link (optional)* page 209
» *Configuring an Internet proxy* page 41
» *Configuring a proxy server* page 11

15.4.6.1 Change the link target of an image

Step-by-step

You can change the link target of an image in Link Management.

1. Open the mailing in the *Editing* workflow step.
2. Click the button (*Link Management: Test whether links are active and check tracking*).
3. The dialog box appears and the link test is performed automatically.
4. Select the link address that serves as the link target for the relevant graphic in the *Links* section.
5. Click the (*Edit link*) button.
6. The *Link editing* dialog box will appear.
7. Change the link address in the *Link address* field.
8. Confirm the *Link editing* dialog box by clicking *OK*.
9. Confirm the *Link Management* dialog box by clicking *OK*.

✓ You have now changed the link target of an image.

15.5 Inserting special links

15.5.1 Inserting an unsubscribe link

Add an unsubscribe link to every mailing to give your recipients the option to unsubscribe from your mailing list. This builds trust and is important for legal reasons.

How you insert an unsubscribe link depends on the unsubscribe procedure that you use (*Unsubscribe procedures* page 131):

- Single opt-out unsubscription: When the user clicks the link, the user is automatically unsubscribed from the mailing list and is taken to a web page that confirms their unsubscription.
- Unsubscription in several steps (for example, confirmed opt-out unsubscription): When the user clicks the unsubscribe link, user data is passed (via parameters) to an unsubscribe confirmation page. The unsubscribe confirmation page prompts the user to confirm their unsubscription.

15.5.1.1 Insert an unsubscribe link

Note To insert an unsubscribe link into a mailing, you must add the *Subscriptions* agent on the mailing list tab.

Step-by-step

Open the *Insert link* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the link.
3. Click the (*Edit link*) button.

   A dialog box appears.
4. Select the *Unsubscribe link* link type.
5. If you would like to paste your predefined unsubscribe link in the *Subscriptions* agent, activate the *Use the predefinition from the 'Subscriptions' agent* check box. The settings for the predefined unsubscribe link are automatically transferred from *Subscriptions* agent.

   Note Note that predefined unsubscribe links are inserted statically into mailings. If you change your predefined unsubscribe link in the *Subscriptions* agent, these changes will **not** be applied to unsubscribe links already inserted into mailings.
6. If you would like to create an individual unsubscribe link, deactivate the *Use the predefinition from the 'Subscriptions' agent* check box. Then select one of the following entries in the drop-down list:
   - *Unsubscribe link immediately starts the unsubscription process*: Select this entry to create an individual unsubscribe link that directly starts the unsubscribe procedure set up in the *Subscriptions* agent > *Cancel subscription* tab.
   - *Unsubscribe link first accesses an unsubscription confirmation web page*: Select this entry to create an individual unsubscribe link that takes the recipient first to a (JSP) unsubscription confirmation web page (for example, for the confirmed opt-out unsubscribe procedure). The unsubscribe procedure set up in the *Subscriptions* agent > *Cancel subscription* tab is not started until the recipient has confirmed their unsubscription on the (JSP) unsubscription confirmation web page.

     Note Only select this option if your unsubscribe pages contain a (JSP) unsubscription confirmation web page (including a 'confirm unsubscribe' link).
7. You must also enter the following:
   - In the *Link address* field, specify the URL (**Fehler! Hyperlink-Referenz ungültig.**...) of the landing page to which the unsubscribe link is to point.

If you selected *Unsubscribe link first accesses an unsubscription confirmation web page*, then you must specify the unsubscription confirmation web page here. To specify a JSP web page created in Inxmail Professional as the unsubscription confirmation web page, select it using the ... (*Select JSP web page*) button.

- If, instead of the link address, a text is to be displayed in HTML mailings, enter this text in the *Link text* field.

  In text mailings, this link text is displayed in front of the link address.
- Unsubscribe links are always tracked. You can see the result as standard in the reports under the corresponding link address. If you would like the unsubscribe link to appear under a special name in the report, you can enter this name in the *Name in the report* field.
- If you would like to add additional HTML parameters to the unsubscribe link (for example, in order to format the link), click the *Options* button, specify the HTML parameters and confirm by clicking *OK*.

8. Insert the unsubscribe link into your mailing by clicking the *OK* button.

   The unsubscribe link is displayed in your mailing in the following Inxmail Professional code:

   - (Individual or predefined) unsubscribe link that directly starts the unsubscribe procedure:

     `[%url:unsubscribe-link; "`**Fehler! Hyperlink-Referenz ungültig.**`"; "Link text"; ; "Name in the report"]`
   - (Individual or predefined) unsubscribe link that first calls up an unsubscription confirmation web page:

     If you have specified an unsubscribe confirmation in an unsubscription confirmation web page created in Inxmail Professional:

     `[%url:unsubscribe-jsp; "`**Fehler! Hyperlink-Referenz ungültig.**`"; "Link text"; ; "Name in the report"]`

     If you have specified another confirmation web page:

     `[%url:unsubscribe-page; "`**Fehler! Hyperlink-Referenz ungültig.**`"; "Link text"; ; "Name in the report"]`

✓ You have now inserted an unsubscribe link into your mailing.

Additional information

If necessary, you can expand the unsubscribe link to cover parameters, to transfer authentication data to the web page. This is necessary for individual or predefined unsubscribe links that contain the `unsubscribe-page` command (i.e., commands that first redirect the recipient to an unsubscribe confirmation website that was not created in Inxmail Professional).

Note If these unsubscribe links have no parameters, the unsubscribe confirmation web page cannot be accessed.

Insert the corresponding parameters at the end of the unsubscribe link. Finally, enclose the expanded unsubscribe link in an `<a href>` command. Please note that the link text specified for the `<a href>` command will always be the link text used here, for example, `<a href>`Link text.

Example

- An unsubscribe link containing the `unsubscribe-page` command and which was manually expanded to cover the 'mailref' and 'email' parameters:

  ```
  <a href="[%url:unsubscribe-page; "Fehler! Hyperlink-Referenz ungültig.";"Link text"; ;"Name in the report"]&mailref=[%mailref]&email=[email]">Link to unsubscribe</a>
  ```

- An unsubscribe link containing the `unsubscribe-page` command and which was manually expanded to cover the 'online_params' parameter:

  ```
  <a href="[%url:unsubscribe-page; "Fehler! Hyperlink-Referenz ungültig.";"Link text"; ;"Name in the report"]&params=[%online_params]">Link to unsubscribe</a>
  ```

You must **not** expand the following unsubscribe links to cover parameters when transmitting authentication data to the unsubscribe web page:

- Unsubscribe links containing the `unsubscribe-link` command (i.e. a command which starts the unsubscribe procedure directly)
- Unsubscribe links that contain the `unsubscribe-jsp` command (i.e., commands that first redirect the recipient to an unsubscribe confirmation website that was created in Inxmail Professional)

  Inxmail Professional supplements these unsubscribe links **automatically upon dispatch** to cover `online_params` parameters, since the internally created unsubscribe confirmation web page requires this.

Related Topics

» *Adding/deleting additional agents to mailing lists* page 80

» *Unsubscribe procedures* page 131

» *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418

» *Specify options (HTML parameters) for a link (optional)* page 205

15.5.2 Inserting mailto links

You can link to any email address of your choice using a mail-to link. If the recipient clicks this link, a new email to be sent opens automatically in their email program. The email address, subject and email contents may already be entered depending on your mailto link.

Step-by-step

Open the *Insert mailto link* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the link.
3. Click the @ (*Insert mailto link*) button.

The dialog box will appear.

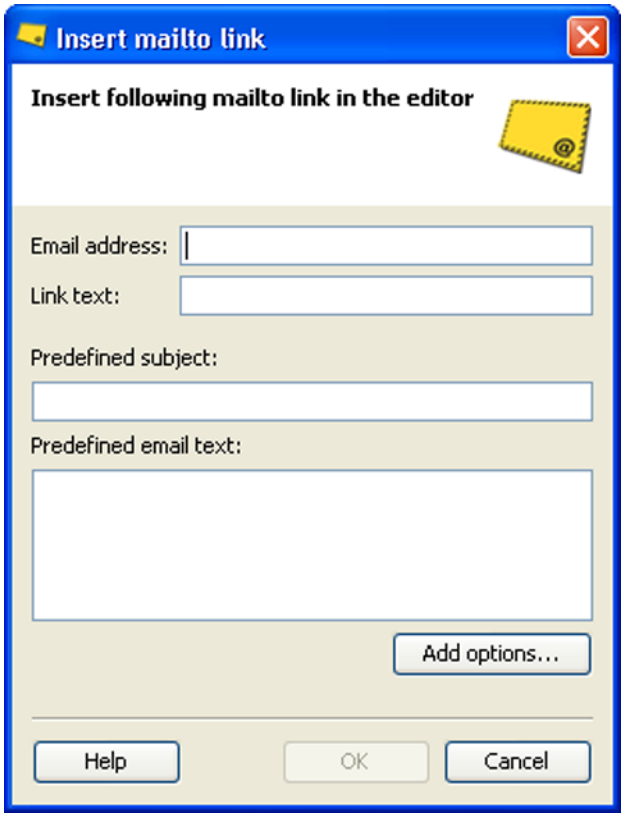


Figure 114: "Insert mailto link" dialog box

4. In the dialog box, specify the link text that in HTML mailings will be displayed instead of the link address.

   In text mailings, this link text will be displayed in front of the link address.
5. Specify the contents with which the email to be sent will open in the recipient's email program:
   a. Specify the email address to which the email is to be sent.

      If you want to specify several recipients, separate them with a comma.
   b. Optionally, you may preset the subject of the email to be sent.
   c. Optionally, you may preset the contents of the email to be sent.
6. If you would like to add additional HTML parameters to the link (for example, in order to format the link), click the *Options* button, specify the HTML parameters and confirm by clicking *OK*.
7. Confirm your entries by clicking *OK*.

   The Inxmail Professional code for the link is inserted into your mailing.

   Example

   ```
   <a
   href="mailto:test@inxmail.de?subject=predefined%20Betreff&amp;body=predefi
   ned%20E-Mail-Text">Link text</a>
   ```
8. Save your settings.

✓ You have inserted a mailto link. The quick preview ((*Show/hide quick preview*) button) shows you the link. There you can click the link to open the email (for HTML mailings).

You can also insert a mail-to link manually into your mailing.

Example

- If you would like to specify a main recipient:
  - `[%url; "mailto:email address@any-domain.biz"; "Email to Mr Smith"]`
  - `<a href="mailto:emailadresse@any-domain.biz">Email to Mr Smith</a>`
- If you would like to specify several main recipients:
  - `<a href="mailto:emailaddress1@any-domain.biz, %20emailaddress2@any-domain.biz">Email to Mr Smith and Ms Brown</a>`
- Email to a main recipient and a visible Cc recipient:
  - `<a href="mailto:emailaddress1@any-domain.biz ?cc=emailaddress2@any-domain.biz”>Email to Mr Smith with copy to Ms Brown</a>`
- Email to a main recipient and an invisible Cc recipient:
  - `<a href=”mailto:emailaddress1@any-domain.biz ?bcc=emailaddress2@any-domain.biz”>Email to Mr Smith with blind copy to Ms Brown</a>`
- Email with predefined subject:
  - `<a href=”mailto:emailaddress@any-domain.biz ?subject=Hello%20Mr%20Smith”>Email to Mr Smith with Hello Mr Smith as subject</a>`
- Email with predefined body:
  - `<a href=”mailto:emailaddress@any-domain-biz?body= Hello%20Mr%20Smith,%0D%0A%0D%0AI%20just%20wanted%to,%20say%20”>Email to Mr Smith with body</a>`

Related Topics

» *Specify options (HTML parameters) for a link (optional)* page 205

15.5.3 Inserting links to the alternative view in the web browser (HTML mailings only)

Due to limited HTML and CSS support in some email programs, your recipients might only be able to display HTML mailings in a very simple layout and with few multimedia elements.

By inserting a relevant link into your mailing, you can give recipients the option to switch directly from their email program to the alternative view in the web browser.

Use the following link, for example:

```
<a href="[%application-url]/html_mail.jsp?params=[%online_params]">
```

This link consists of the following commands:

Command	Description
[%application-url]	Command for inserting the web address of the Inxmail Professional Server,

Command	Description
	for example, http://news.inxmail.abc/inxmail2
[%online_params]	Command 'containing' all parameters that are required for personalisation when links to the alternative web view are called up

Tab. 3: Commands in the link for alternative view in the web browser

If you are an advanced Inxmail Professional user, you can use the following functions to obtain information on the display environment in which your mailing is currently displayed:

- The 'InInboxView()' function informs you whether a mailing is displayed in the inbox view in the email program.
- The 'InAlternativeView()' function informs you whether a mailing is displayed in the alternative view in the web browser.

Example

The link to the alternative view in the web browser should only be displayed in your mailing when the recipient has opened the mailing in the email program. Once the recipient has opened the alternative view in the web browser, the link should no longer be displayed.

For this, insert the following link:

```
[%if InInboxView()]<a
href="[%application-url]/html_mail.jsp?params=[%online_params]">  No  images
visible or problems with display? To the web page view</a>[%endif]
```

To track the link to the alternative view in the web browser (i.e. to count how often the alternative link has been clicked on), you must specified the URL with the 'unique-count' link type instead of `[%application-url]`.

Example

Tracked link to the alternative view in the web browser:

```
[%if InInboxView()]<a href="[%url:unique-count;
"http://news.inxmail.abc/inxmail/html_mail.jsp"]&params=
[%online_params]"> No images visible or problems with display? To the web page
view</a>[%endif]
```

Related Topics

» *Other functions* page 548

15.6 Inserting images (HTML mailings only)

Inxmail Professional provides the following options for sending images with your HTML mailings:

Mailings in text format may not contain images in the content. In this case, you can only send the images as a file attachment (*Adding file attachments* page 225). You can, of course, also send images as a file attachment for HTML mailings.

Note Note that Inxmail Professional only supports the RGB colour model.

- *Inserting an image as a reference (linking an image)* page 219
  You can insert images as a reference into the mailing content. The images are stored on your webspace and are loaded only when the mailing is called up. The advantage here is that the size of the mailing is unaffected. Images inserted as a reference are only visible to users who are currently online and whose email client does not suppress images.
- *Embedding an image* page 222
  You can embed images directly into your mailing content. Embedded images are visible to all users (that is, also to offline users) providing their email client does not suppress images.

  You can both embed images and link them into your mailing. For example, you can embed your company logo and link all other images you wish to use into your mailing content.
- *Specify options (HTML parameters) for a link (optional)* page 205
  You can specify additional options (HTML parameters) for images inserted as a reference or images embedded directly (for example, to specify an image border) or change the size of the images.

15.6.1 Inserting an image as a reference (linking an image)

Step-by-step

Open the *Link image* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the image.
3. Click the (*Link image*) button.
   A dialog box appears.

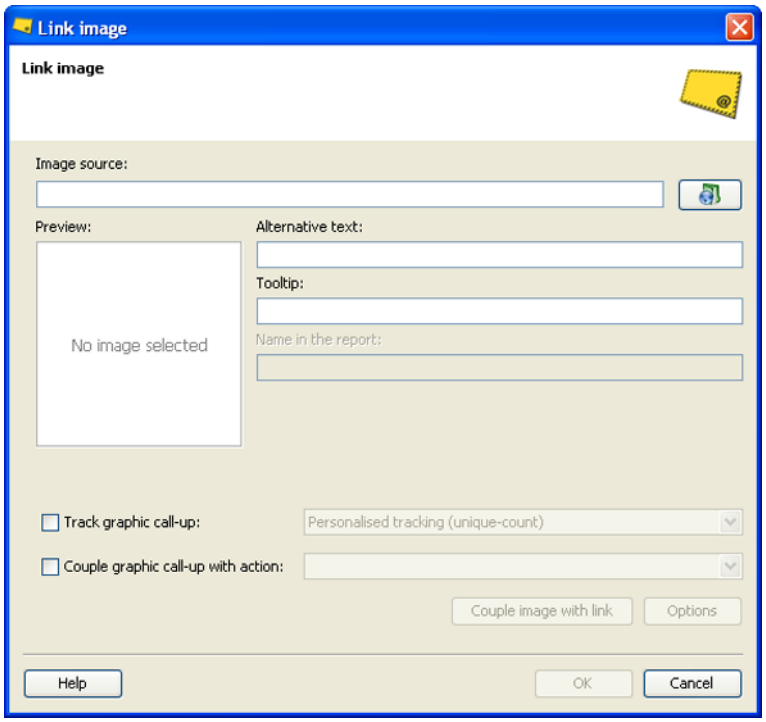


Figure 115: "Link image" dialog box

4. In the dialog box, click the (*Link image from webspace*) button to select the storage location of the image file on your webspace.

   Alternatively, you can insert the relevant Internet address of the image file directly into the *Link address of the image* field (for example, http://www.internetaddress.de/image.gif).

   The dialog box displays a preview of the image.

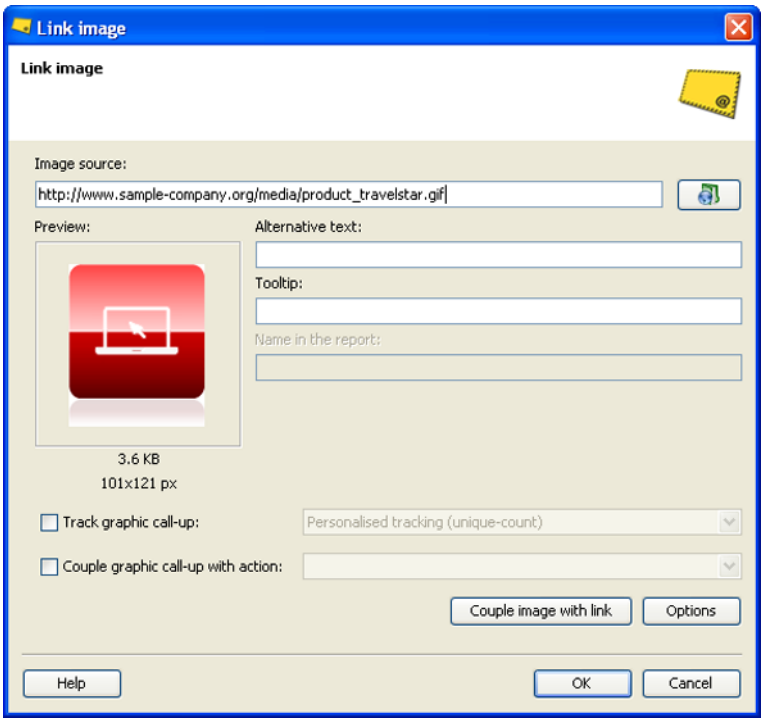


Figure 116: Dialog box with preview of the image

5. Enter an alternative text in the *Alternative text* field. This will appear in the mailing in place of the image if the image is blocked by the recipient's email client.
6. Enter a tooltip in the *Tooltip* field. This will appear if the recipient hovers the mouse pointer over the image in the mailing.
7. The *Name in the report* field is only enabled if you have selected the *Track graphic call-up* check box.

   Tracked images appear as standard under the file path of the image in the reports (e.g., in the 'Clicks relating to individual links'). If you would like the image to appear under a special name in the report, you can enter this name in the *Name in the report* field.

   Note Give the image a name by which you will be able to identify it. If two or more images are given the same name, they will be combined in the reports.

8. To count the number of times the image is opened (for example, automatically through the mailing being opened), select the *Track graphic call-up* check box. Then select whether to perform anonymous or personalised tracking for the link.
9. If you would like Inxmail Professional to start an action sequence as soon as the mailing is opened by the recipient and the image has loaded, enable the *Couple graphic call-up with action* check box. Then select the desired action sequence from the drop-down list.

If the recipient's email client suppresses images, the images will not be loaded and the action sequence correspondingly will **not** be started.

You can specify a maximum of one action sequence to be activated by the images being loaded. You can therefore select only the action sequences which are triggered when you select 'Click on a certain link'.

10. If you want recipients to be forwarded to a particular web page when they click this image, click the *Couple image with link* button. You can now configure an appropriate link in the *Link editing* dialog box.

> **Note** If you created this link as a tracking link, you can combine it with an action sequence. In this case, the action section is executed as soon as the recipient clicks on the linked image.

11. To configure additional options for the image (for example, to specify additional HTML parameters or to change the image size), click the *Options* button. You can now specify relevant options in the dialog box.
12. Confirm your entries in the *Link image* dialog box by clicking *OK*.

    The corresponding Inxmail Professional code for the image is inserted into your mailing (for example, `img src="[%url; ""http://www.inxmail.de/newsletter/NeuerOrdner/Logo.png"]" alt="" width="407" height="55" border="0" /`).
13. Save your settings.

✓ You have linked an image into your mailing. The quick preview (*Show/hide quick preview*) button) shows you the image.

Related Topics

» *Reports on mailings* page 345

» *Overview: Link tracking* page 207

» *Actions* page 405

» *Insert link* page 203

Specify options (HTML parameters) for an image (optional) page 224 Edit settings of an inserted image Step-by-step You can edit the settings for an image that has already been inserted:

1. Click in the Inxmail Professional code for the inserted image in the editing area.
2. Click the (*Edit selection*) button.

✓ The *Link image* dialog box appears with the settings for the image. You can now make your changes.

15.6.2 Edit settings of an inserted image

Step-by-step

You can edit the settings for an image that has already been inserted:

1. Click in the Inxmail Professional code for the inserted image in the editing area.
2. Click the (*Edit selection*) button.

✓ The *Link image* dialog box appears with the settings for the image. You can now make your changes.

15.6.3 Embedding an image

Step-by-step

Open the *Embedding an image* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the image.
3. Click the *Commands* button and then select *Embedding an image* option.
   A dialog box appears.

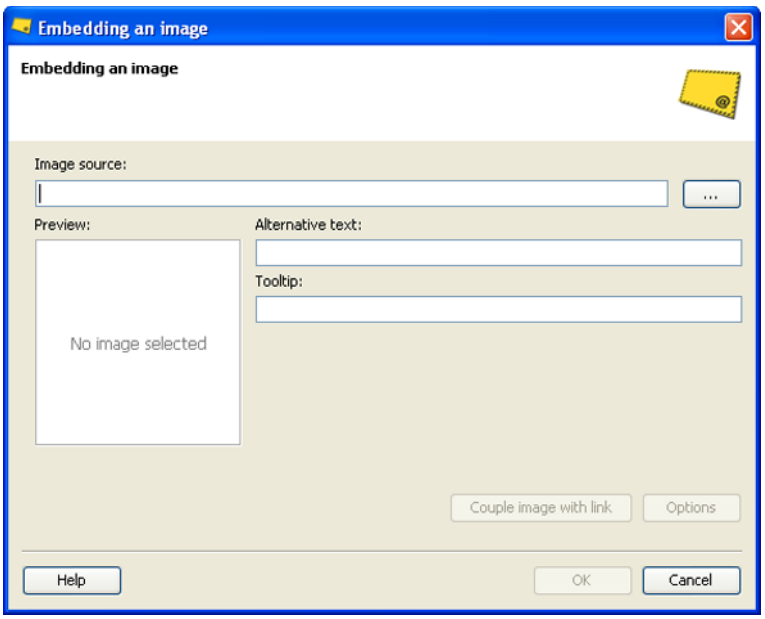


Figure 117: "Embedding an image" dialog box

4. In the dialog box, click the button to select the location where the image file is stored.

5. A dialog box appears.

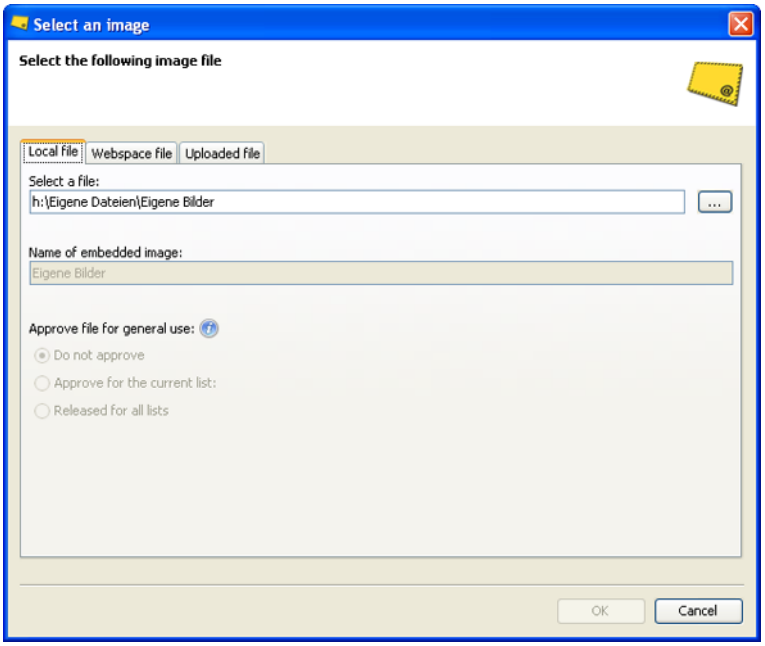


Figure 118: Dialog box for selecting the file

6. In the corresponding tab, select whether the image file is to be stored locally on your computer, on your webspace or on the Inxmail Professional Server, and then select the image file.
7. If necessary, change the file name under which the image file is stored in the *Name of the embedded image* field in the *Files & web pages* agent > *Uploaded files* tab.
8. If you have selected an image file stored on your local computer or your webspace, then additionally select one of the following settings for the file:
   - *Do not release*: The image file is embedded once and is not stored internally.
   - *Approve for the current list*: The image file can, in future, be embedded in all mailings on the current mailing list. For this purpose, the file is stored in the *Files & web pages* agent > *Uploaded files* tab.
   - *Release for all lists*: The image file can, in future, be embedded in all mailings on every mailing list. For this purpose, the file is stored in the *Files & web pages* agent > *Uploaded files* tab.
9. Confirm the dialog box by clicking *OK*.
10. You return to the *Embedding an image* dialog box. The dialog box displays a preview of the image.
11. Enter an alternative text in the *Alternative text* field. This will appear in the mailing in place of the image if the image is blocked by the recipient's email client.
12. Enter a tooltip in the *Tooltip* field. This will appear if the recipient hovers the mouse pointer over the image in the mailing.
13. If you want recipients to be forwarded to a particular web page when they click this image, click the *Couple image with link* button. You can now configure an appropriate link in the *Link editing* dialog box.

14. To configure additional options for the image (for example, to specify additional HTML parameters or to change the image size), click the *Options* button. You can now specify relevant options in the dialog box.
15. Confirm your entries in the dialog box by clicking *OK*.
16. The corresponding Inxmail Professional code for the image is inserted into your mailing (for example, `<img src="[%embedded-image(4227);Logo.png]" alt="" width="500" height="201" border="0" />`).
17. Save your settings.

✓ You have embedded an image. The quick preview ((*Show/hide quick preview*) button) shows you the image.

Related Topics

» *Using webspaces* page 460

» *Managing uploaded files* page 466

» *Insert link* page 203

» *Specify options (HTML parameters) for an image (optional)* page 224

15.6.4 Specify options (HTML parameters) for an image (optional)

Step-by-step

Open the *Options* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. To open the *Link image* dialog box for an image inserted as a reference or the *Embedding an image* dialog box for an image embedded directly, click the Inxmail Professional code for the image. Then click the (*Edit selection*) button.
3. Click the *Options* button in the dialog box.

A further dialog box appears.

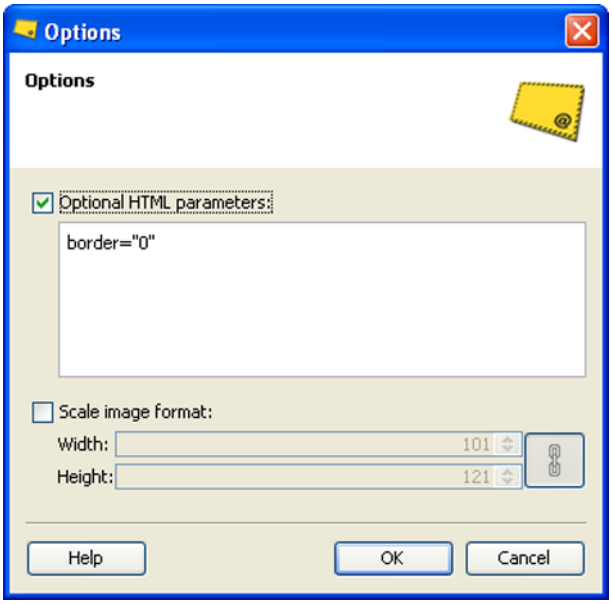


Figure 119: "Options" dialog box

4. To add a border to an image, select the *Optional HTML parameters* check box in the dialog box and then specify the appropriate HTML parameters (for example, border="5" bordercolor="#ff3300").
5. To change the displayed size of the image, select the *Scale image format* check box and then specify the size (for example, width="200" height="200").

   The button allows you to keep the proportions of the image (that is, keep the ratio of width and height the same to prevent distortion).

   The image is scaled only for the mailing. The original image remains unchanged.
6. Confirm your entries by clicking *OK*.
7. To apply the settings for the image, confirm the *Link image* or *Embedding an image* dialog box by clicking *OK*.
8. The Inxmail Professional code for the inserted link appears in your mailing.
9. Save your settings.

✓ You have specified options for an image. The quick preview ((*Show/hide quick preview*) button) shows you the image.

Related Topics

» *Inserting an image as a reference (linking an image)* page 219

» *Embedding an image* page 222

15.7 Adding file attachments

Overview

You can add files to your mailing as attachments. These may be images, videos, audio files, text files, etc. in all possible formats.

The following instructions explain how to attach a file.

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Click the *Attach file* button.

   A dialog box appears.

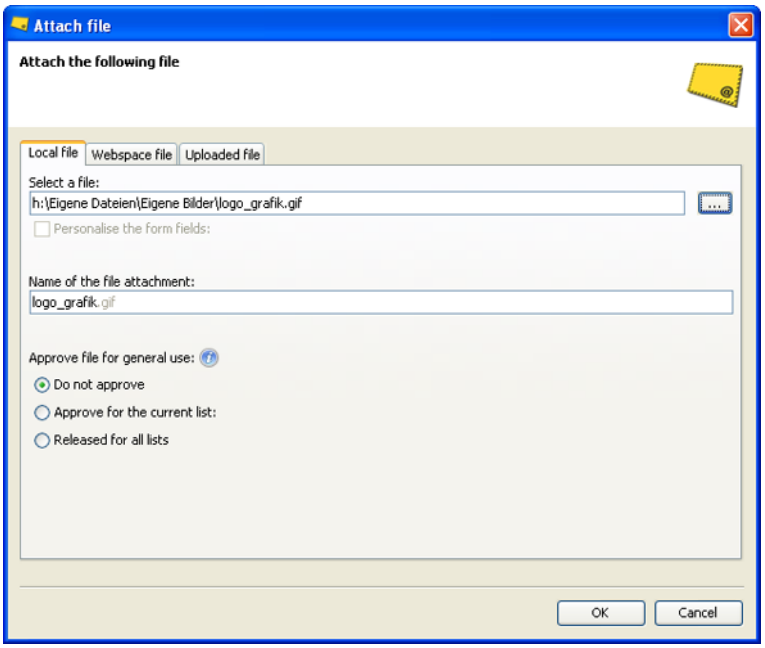


Figure 120: "Attach file" dialog box

3. In the corresponding tab, select whether the image file is to be stored locally on your computer, on your webspace or on the Inxmail Professional Server, and then select the image file.
4. If necessary, change the file name under which the file is stored in the *Name* field of the file attachment in the *Files & web pages* agent > *Uploaded files* tab.
5. If you have selected a file stored on your local computer or your webspace, then additionally select one of the following settings for the file:
   - *Do not release*: The file is attached once and is not stored internally.
   - *Approve for the current list*: The file can, in future, be attached in all mailings on the current mailing list. For this purpose, the file is stored in the *Files & web pages* agent > *Uploaded files* tab.
   - *Release for all lists*: The file can, in future, be attached in all mailings on every mailing list. For this purpose, the file is stored in the *Files & web pages* agent > *Uploaded files* tab.
6. If necessary, change the file name under which the file is stored in the *Files & web pages* agent > *Uploaded files* tab.
7. Confirm the dialog box by clicking *OK*.

   The Inxmail Professional code for attaching the file is inserted into your mailing (for example, [%attach(4226);Logo.png).

✓ You have attached a file. The quick preview ((Show/hide quick preview) button) shows you the file attachment.

15.8 Inserting modules

Overview

If you would like to use mailing content (for example, the overview, legal notice or the salutation in mailings) in several mailings, you can create these mailing contents as modules and store them centrally (*Creating modules* page 155). Then, when you create your mailings, you simply have to insert the relevant modules.

The following instructions explain how to insert a module in your mailing.

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Click the *Modules* button and select the relevant module in the drop-down list.

   The Inxmail Professional code for inserting the module is inserted into your mailing (for example, [@Salutation]).
3. Save your settings.

✓ You have inserted a module. The quick preview ((Show/hide quick preview) button) shows you the contents of the module.

Additional information

You will only be offered the modules which correspond to the format of your mailing:

- Text modules can be used for text, HTML and multipart mailings.
- HTML modules can be used in HTML and multipart mailings.
- Multipart modules can be used for text, HTML and multipart mailings.

16 Mailings (check)

In this chapter, you will learn how to test a mailing before sending it:

- You will learn how to launch the content of the mailing for selected test or recipient profiles.
- You will learn how to check your mailing for spam and phishing characteristics using the quality test. You can also test the links contained in the mailing, as well as its opening rate, size, the existence of unsubscribe links, and deliverability.
- If you have integrated the display test, you can test how your mailing is displayed in various email clients before sending it. You will learn which steps are required to do this.
- If you have integrated the eye tracking test then, before sending, you can find out which parts of your mailing are the most eye-catching. You will learn which steps are required in order to implement the eye tracking test.
- You will learn how to open your mailing in the browser using preview features and to display it with the image blocking function.
- You will learn how to use various test and recipient profiles to send your mailing to yourself or to a test mailing list before it is officially sent.

16.1 Content check using test or recipient profiles

16.1.1 Overview

You can launch your mailing for various recipient or test profiles before sending it. For example, you can see if and how personalised text (for example, forms of address) or customised text (for example, text that is only displayed to recipients in a specific target group) is displayed for the individual recipients.

Related Topics

The test profiles must first be created in order for you to be able to launch your mailing in them (*Creating test profiles* page 174).

16.1.2 Check content

Step-by-step

1. Open the mailing in the *Check* workflow step.
2. Click the *Content* button.

   The button is marked blue.
3. To launch your mailing for a created test profile, click the *Test profiles* button (in the navigation bar to the left).

The button expands into a list of the test profiles that have already been created.

If you have assigned target groups to your mailing, then only the test profiles that correspond to these target groups are displayed.

If you have not yet created a test profile, an error message appears to this effect.

4. Select the relevant test profile.
5. To launch your mailing for a recipient profile in the mailing list, click the *Recipients* button (in the navigation bar to the left).

   The button expands into a list of recipient profiles.

   Select the relevant recipient profile.

   The preview of the mailing is displayed for the selected profile.

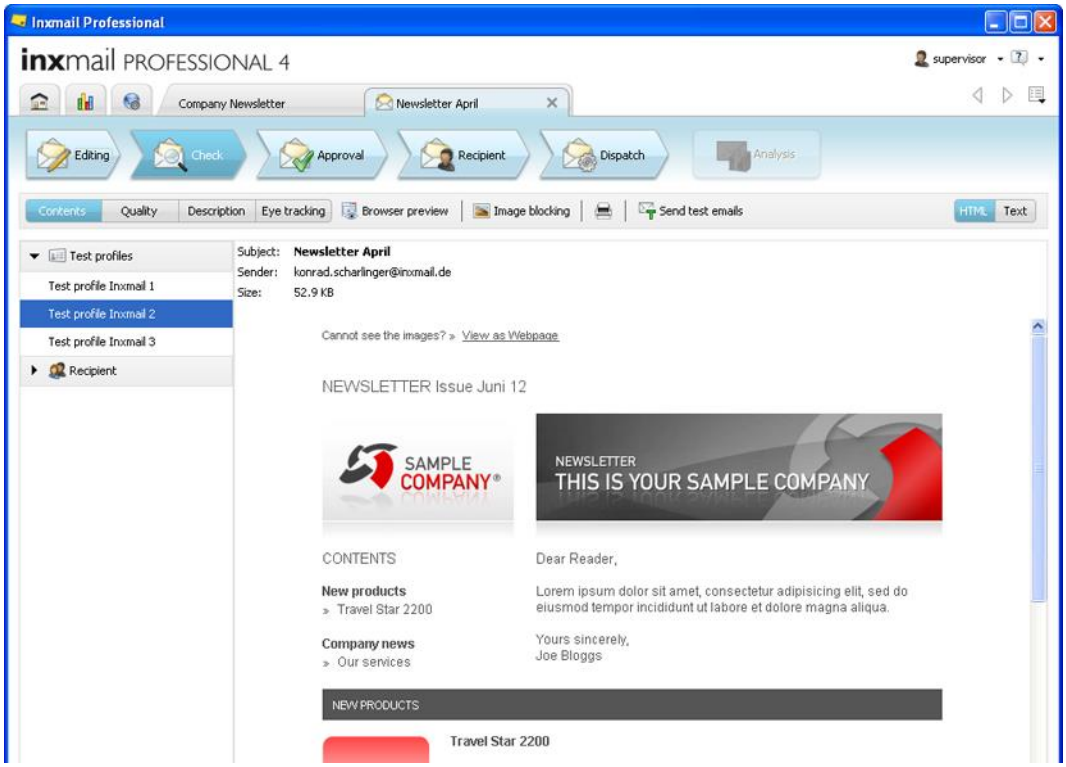


Figure 121: Mailing preview for a selected test profile

The following elements are displayed to you in this preview:

- If you move the cursor over a link, you will see information (in the tooltip) on the link type and the link address.
- Links for link tracking are active in the preview, but do not execute any actions.
- You can check personalised PDF attachments using the preview function.
- You will see additional information in the header:
  - The size that the mailing will have in the selected text profile or in the recipient's inbox
  - The subject and sender of the mailing for the selected test profile or recipient

You can print the current mailing preview directly by clicking the (*Print*) button.

✓ You launched the content of your mailing for a particular profile.

Related Topics

» *Mailings (recipient)* page 264

16.2 Quality test

Always perform the Inxmail Professional quality test as a final check before sending the mailing.

You can test the following issues in your mailing using the quality test:

- Anti-spam test

  This section of the quality test examines whether your mailing has spam characteristics in its subject and content. Spam characteristics could result in your mailing being sent to the recipient's spam folder and therefore not being read.
- Link test

  This section of the quality test examines whether all links in your mailing are active and that the recipient is forwarded to the linked page.
- Anti-phishing test

  This section of the quality test explores whether the links in your mailing present any phishing characteristics (the process of phishing attempts to conceal the actual address of the linked page).
- Opening rates test

  This section of the quality test examines whether the opening rate of your mailing can be determined (for example, by means of tracked links or linked and tracked images).
- Email size test

  This section of the quality test determines the size of the mailing in the inbox of the recipient (selected for the quality test).
- Unsubscription test

  This section of the quality test checks whether your mailing contains an unsubscribe link to allow recipients to unsubscribe from the mailing list.

  You can also specify that the unsubscription test should check whether a list-unsubscribe header is set.
- Deliverability test

  This section of the quality test checks the probability that the mailing will be delivered.

16.2.1 Performing the quality test

Step-by-step

Open the *Start check* dialog box as follows:

1. Open the mailing in the *Check* workflow step.
2. Click the *Quality* button.

   The button is marked blue.
3. Click the *Start check* button.

A dialog box appears.

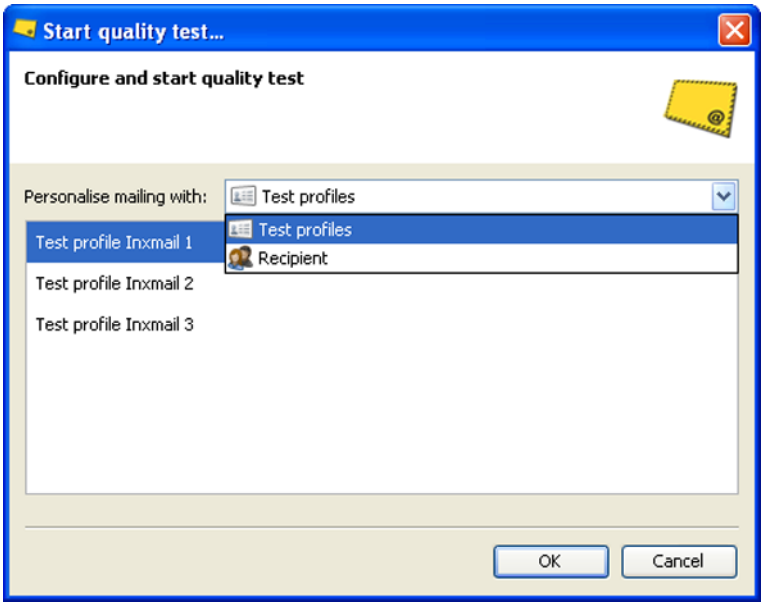


Figure 122: "Start check" dialog box

4. Select *Test profiles* in the drop-down list to perform the quality test for a fictional test profile from your list of test profiles.

   A list of already created test profiles is displayed below the drop-down list.

   If you have not yet created a test profile, an error message is displayed to this effect.
5. Select the relevant test profile.
6. Select *Recipients* in the drop-down list to perform the quality test for an actual recipient profile from your recipient table.

   The button expands into a list of recipient profiles.
7. Select the relevant recipient profile.
8. To start the quality test, confirm by clicking *OK*.

The test result will be shown.

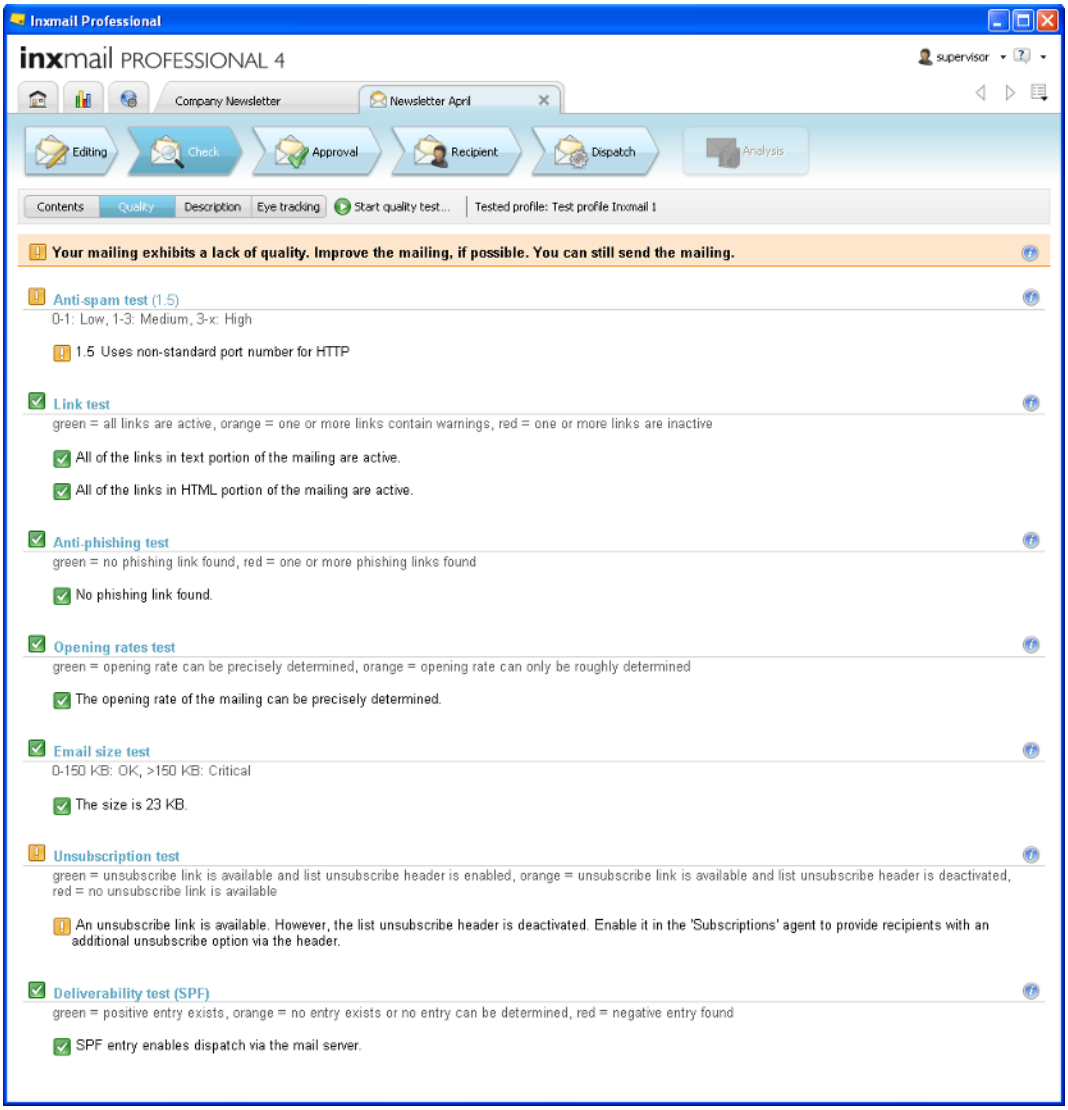


Figure 123: Total test results

✓ You have performed the quality test for your mailing.

Related Topics

» *Result of the quality test* page 233

» *Creating test profiles* page 174

» *Recipients* page 90

16.2.2 Result of the quality test

16.2.2.1 Total test result

You will see the total test result at the beginning of the test result. It may be marked as follows:

Figure 124: Total test result

- green: The quality of your mailing is impeccable. You can send the mailing without any concerns.
- orange: Your mailing exhibits a lack of quality. Improve the mailing, if possible. You can still send the mailing.
- red: The quality of your mailing is questionable. Revise your mailing at all costs before sending it!

The total test result is always based on the section of the test that scored worst (the results of each test section are displayed below under *Anti-spam test*, *Link test*, *Anti-phishing test*, *Opening rates test*, *Size test* and *Deliverability test*).

For more information on the individual tests, move the cursor over the (relevant) button .

In order for the anti-spam test to function correctly, your Inxmail Professional administrator must configure the settings accordingly (*Global properties (Administration)* page 587).

16.2.2.2 Anti-spam test

To protect your recipients from junk mail, spam filters check the content and the subject line of emails for content that exhibits spam characteristics.

Attend to the results of the anti-spam test to prevent your mailing from ending up in the spam folder. The anti-spam test in Inxmail Professional identifies typical spam characteristics and returns messages categorised as ‘green’, ‘orange’ and ‘red’.

This categorisation is based on the evaluation of the spam characteristics of the widely distributed spam filter, ‘SpamAssassin’. The overall test rating is calculated from the total number of individual spam features:

- green = 0
- orange = 0.1 to 3.0
- red = over 3.1

A result categorised as ‘green’ may be tolerated.

If the result is categorised as ‘orange’ and ‘red’, you should resolve the causes. Do not send mailings that have been categorised as ‘red’.

In addition to the colour coding of the test result, a description of the result is provided and, if necessary, specific instructions on how to act. The instructions tell you how to prevent your mailing from being classified as spam.

In addition, comply with the following tips in the mailing text and in the subject line to eliminate spam characteristics:

- Always specify a full sender address (real name).
- Do not use the domains '.biz' and '.dotinfo'.
- Do not create mailings that consist almost entirely of images. The text part of a mailing should always be larger than the image section.
- Avoid using a font that is too small or too big.
- Avoid using sentences in all caps.
- Avoid exclamation marks, dollar and euro signs.
- Avoid having too little contrast between the font and the background colour.
- Avoid using words that exhibit spam characteristics (your family, your job, ...)

16.2.2.3 Link test

The link test checks all links in the HTML and text mailing for activity.

In contrast to the link test in link management in the *Editing* workflow step (*Performing a link test in Link Management* page 210), the links are tested in a real customer mailing here. In the case of multipart mailings, the links in both variants (HTML and the text variants) are tested. If required, links from newsletter templates, which the user does not see, may also be tested.

Repair a link if it is not active. The link test may contain the following colour coding:

- green = All links are active.
- orange = Link cannot be tested (certificates, https, etc.).
- red = One or more links are inactive.

16.2.2.4 Anti-phishing test

The process of phishing attempts to access an Internet user's personal data using a bogus WWW address. The actual address of a page is concealed ('URL spoofing').

In the Inxmail Professional anti-phishing test, mailings are tested for phishing characteristics. The following results are displayed:

- green = No links with phishing characteristics exist.
- red = One or more phishing links have been found.

Follow these tips to prevent links from being suspected of phishing:

- Never enter a Web address as the link description. Use a descriptive link test instead.
  Not:`<a href= http://www.company.com> companyhomepage.de</a>`

  Instead, enter: `<a href=` **Fehler! Hyperlink-Referenz ungültig.** `of our company</a>`
- Always enter a link description; otherwise, the Web address is automatically entered as the description.

16.2.2.5 Opening rates test

The opening rates test is only performed on mailings in HTML format.

This test determines whether your mailing contains a tracked link or a linked and tracked image, using which the opening rate can be precisely calculated.

- green = Opening rate can be precisely calculated, that is, there is at least one linked, tracked image in a HTML mailing.
- orange = Opening rate cannot be precisely calculated, that is, the opening rate can only be determined by means of the click rates of tracked links and will therefore turn out to be lower.

16.2.2.6 Email size test

Notice for ASP-customers Note that a mailing must not exceed 10 MB.

If the mailing size exceeds 150 KB, a warning is displayed in the 'Email size test' section of the quality test. You should try not to exceed this size.

ImportantAs an ASP customer, remember that mailings that are larger than 150 KB are subject to additional charges. Contact us at customer-care@inxmail.de for more information.

The smaller the mailing, the shorter the loading times will be, that is, the mailing is displayed immediately after the recipient opens it and does not have to be loaded bit by bit. The following results are displayed:

- green = up to 150 KB
- orange = up to 300 KB
- red = over 300 KB

16.2.2.7 Unsubscription test

Prerequisites

The unsubscription test will only be performed if performance of the unsubscription test is activated in the list properties (*Setting up the properties of mailing lists* page 82).

The unsubscription test does **not** appear in the quality test of the following subscription and unsubscription emails:

- Subscription: timeout emails
- Subscription: confirmation emails
- Unsubscription: confirmation emails
- Unsubscription: farewell emails

The unsubscription test appears in the quality test for all other emails.

Unsubscribe links are required by law. This test therefore checks whether your mailing contains an unsubscribe link to allow recipients to unsubscribe from the mailing list. The following results are displayed:

NoteIf your mailing list does not contain the *Subscriptions* agent, no result appears for the unsubscription test. In this case, a message is displayed to the effect that all unsubscribe options for this mailing list are currently deactivated.

- green = Unsubscribe link exists

- orange = **No** unsubscribe link exists

Inxmail Professional administrators can also configure the global setting (*Global properties (Administration)* page 587) that this section of the quality test also checks whether a list unsubscribe header is set. The following results are also displayed if the list unsubscribe check is activated:

- green = List unsubscribe header exists
- orange = **No** list unsubscribe header exists

Related Topics

Further information on inserting unsubscribe links can be found under *Inserting an unsubscribe link* page 212.

Further information on enabling the list-unsubscribe header for all mailings of a mailing list can be found under *Unsubscription setup* page 141.

16.2.2.8 Deliverability test (SPF)

SPF stands for Sender Policy Framework and is a technology designed to make falsifying sender addresses of an email more difficult. The server receiving the mailing checks whether an SPF record for the mail server is available in the DNS server for a specific domain. The following results are displayed:

- green = There is a positive SPF record for the mail server, which means that the mail server is authorised to send mailings from this domain. The mailing is sent.
- orange = There is no SPF record or it cannot be determined. If the mail server is not listed in the SPF record at all, sending of the mailing is not prevented. However, some providers issue a negative spam rating or reject the mailing. Or: If there is no SPF record for the domain, the sender must be accepted. The mailing is sent. Some providers give bonus points for a correct and existing SPF record.
- red = There is a negative SPF record for the mail server. It prohibits the sending of the mailing via this mail server.

Ask your Inxmail Professional administrator if you do not have an SPF record for your domain. This record increases the deliverability of your mailings.

16.3 Display test (optional)

NoteThe display test is not integrated into Inxmail Professional by default. For more information on the display test and how to order it, contact us at: customer-care@inxmail.de.

The display test allows you to test how your mailing is displayed in many different email clients (that is, email programs, Web mailers and smartphones) before sending it. You can use the resulting screenshots to determine whether your mailing will be displayed to your customer as you intended.

16.3.1 Overview: Email clients supported by the display test

The display test can create screenshots for the following email clients:

Desktop clients

- Lotus Notes 6.5.4

- Lotus Notes 7.0
- Lotus Notes 8.0
- Outlook Express 6
- Outlook 2003
- Outlook 2007
- Outlook 2010
- Thunderbird 6.0
- Apple Mail 4

International Web clients

- Google Mail
- Windows Live Hotmail
- Yahoo! Mail
- AOL

German Web clients

- T-Online
- GMX
- WEB.DE

Swiss Web clients

- Bluewin

Italian Web clients

- Libero

French Web clients

- Orange

Polish Web clients

- Wirtualna Polska

Mobile Web clients

- iPhone
- iPad
- Windows Mobile 6
- Windows Mobile 6.5
- Android

16.3.2 Performing display tests

Note You must purchase the display test separately in order to be able to carry it out. If you have not yet integrated the display test, a message will appear indicating that you do not have a quota to perform the display test.

Step-by-step

Open the *Start check* dialog box as follows:

1. Open the mailing in the *Check* workflow step.
2. Click the *Display* button.

   The button is marked blue. On the right beside the buttons, you will see how often (that is, for how many email clients) you can perform the display test with the quota that you have bought.
3. Click the *Start check* button.

   A dialog box appears.

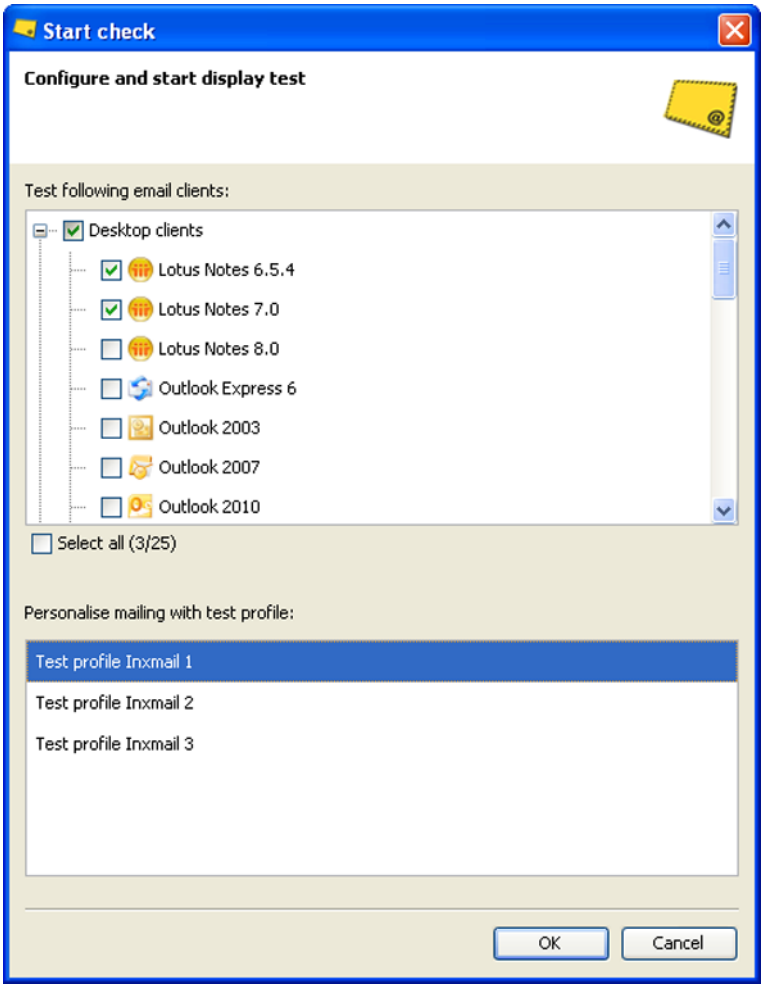


Figure 125: "Start check" dialog box

4. In the dialog box, activate the email clients for which you want to perform the display test.

   The counter of your current display test quota is reduced by 1 for every selected email client.
5. In the dialog box, select the required test profile.
6. Confirm the message box with *OK* to start the display test.

It may take several minutes for the result to be displayed.

If a screenshot cannot be created, a message is displayed informing you that you may have to wait longer.

An overview is displayed with the desired screenshots.

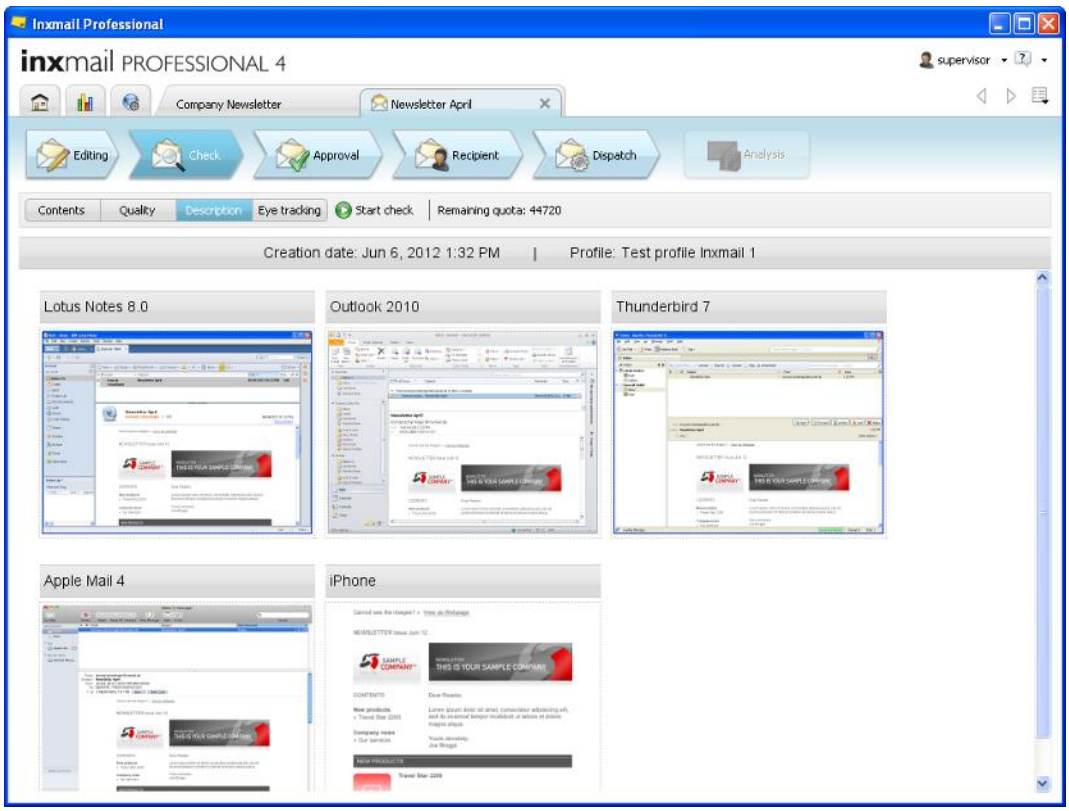


Figure 126: Result of the display test

✓ You have performed the display test for your mailing.

Related Topics

» *Displaying the result of the display test* page 240

» *Creating test profiles* page 174

16.3.3 Displaying the result of the display test

Step-by-step

1. To display the result (screenshot) of the display test for an email client in an enlarged view, click the screenshot in the overview.
   The full-size screenshot will appear in a new window.

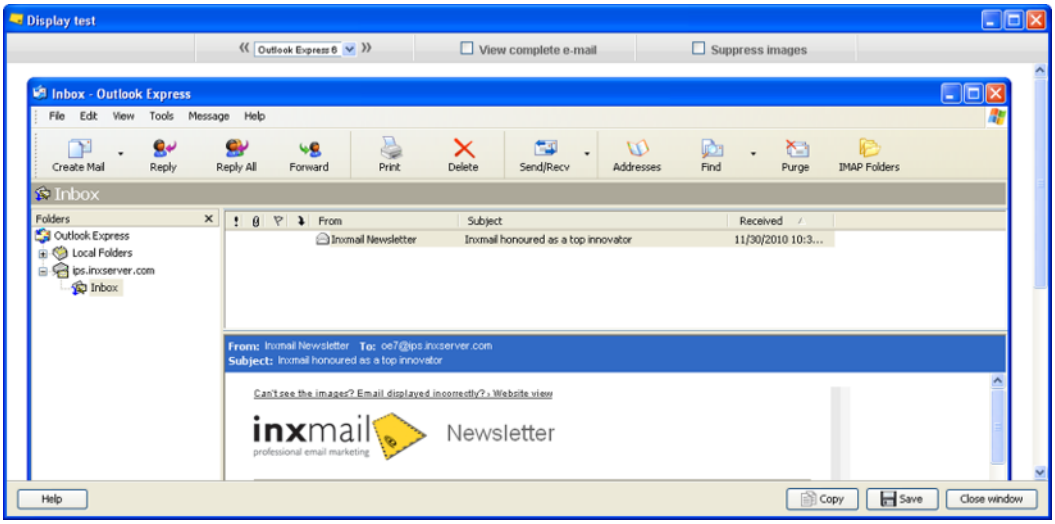


Figure 127: Enlarged screenshot of the display test for the email client Outlook Express.

2. In order to remove the environment of the email client, enable the *View complete email* check box.

   The email appears in full and without the email client interface.
3. To display the email with the external images blocked, enable the *Suppress images* check box.

Note Since the 'Suppress images' feature does not exist in Lotus Notes, images are always displayed for Lotus Notes screenshots (even if the *Suppress images* check box has been enabled).

4. If you have performed the display test for several email clients, you can quickly switch between screenshots of the various email clients (when screenshot is enlarged). To do so, select a different email client in the selection list that contains the other email clients.
5. You can also take the following actions for the display test of an email client (with enlarged screenshot):
   - store locally on your computer using the *Save* button
   - copy the content of the dialog box to the clipboard using the *Copy* button
6. Close the enlarged screenshot of the display test of an email client.

Additional information

You can then, for example, optimise your mailing as required and perform the display test again.

If you have performed several display tests for the mailing, the *Next* and *Prev* buttons are displayed to you in the screenshot overview (in the header). You can use these buttons to compare old and current versions of the display test.

16.4 Eye tracking test (optional)

Note The eye tracking test is not integrated into Inxmail Professional by default. For more information on the eye tracking test and how to order it, contact us at: customer-care@inxmail.de.

The eye tracking check allows you, before sending, to find out which parts of your mailing are the most eye-catching. In particular, the eye tracking test consists of three different graphical analyses:

- *Perception analysis:* This shows you which sections of your mailings are viewed by your recipients in the first few seconds.
- *Level of interest analysis:* This shows you which elements of your mailing generate the highest level of interest.
- *Hot spots:* This analysis combines the perception and attention analyses.
- The eye tracking check analyses in HTML or multipart mailings the HTML version; with a text mailing the text versions are analysed.

16.4.1 Performing the eye tracking test

Note You must purchase the eye tracking test separately in order to be able to carry it out. If you have not yet integrated the eye tracking test, a message will appear indicating that you do not have a quota to perform the eye tracking test.

Step-by-step

Open the *Start check* dialog box as follows:

1. Open the mailing in the *Check* workflow step.
2. Click the *Eye tracking* button.

   The button is marked blue. On the right beside the buttons, you will see how often you can perform the eye tracking test with the quota that you have bought.
3. Click the *Start check* button.

A dialog box appears.

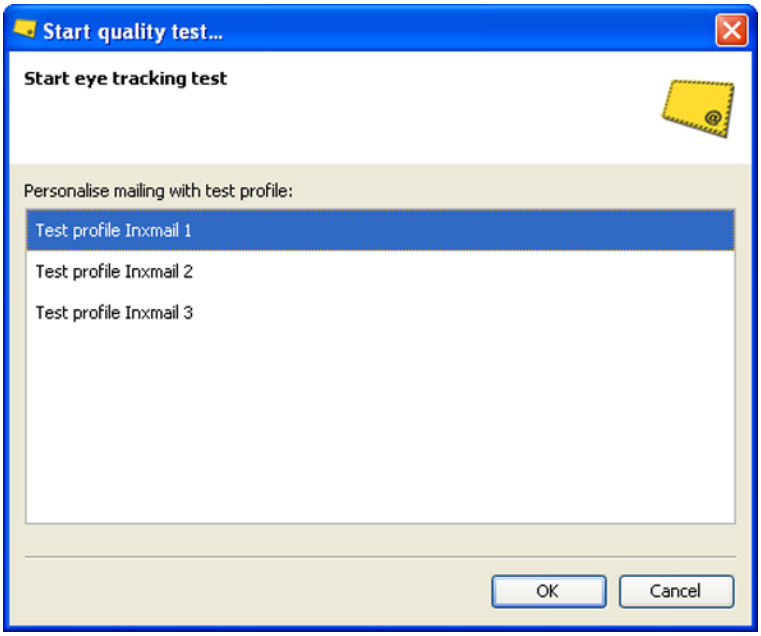


Figure 128: "Start check" dialog box

4. In the dialog box, select a test profile with which you want to perform the eye tracking test.
5. To start the eye tracking test, confirm by clicking *OK*.

   The counter of your current display test quota is reduced by 1 for every test performed.

> **Note** It may take several minutes for the result to appear. If an analysis screenshot cannot be created at that moment, a message will appear informing you that you may have to wait longer. The results will be shown as soon as they are available. You do not need to initiate the eye tracking test again.

An overview is displayed with the analysis screenshots.

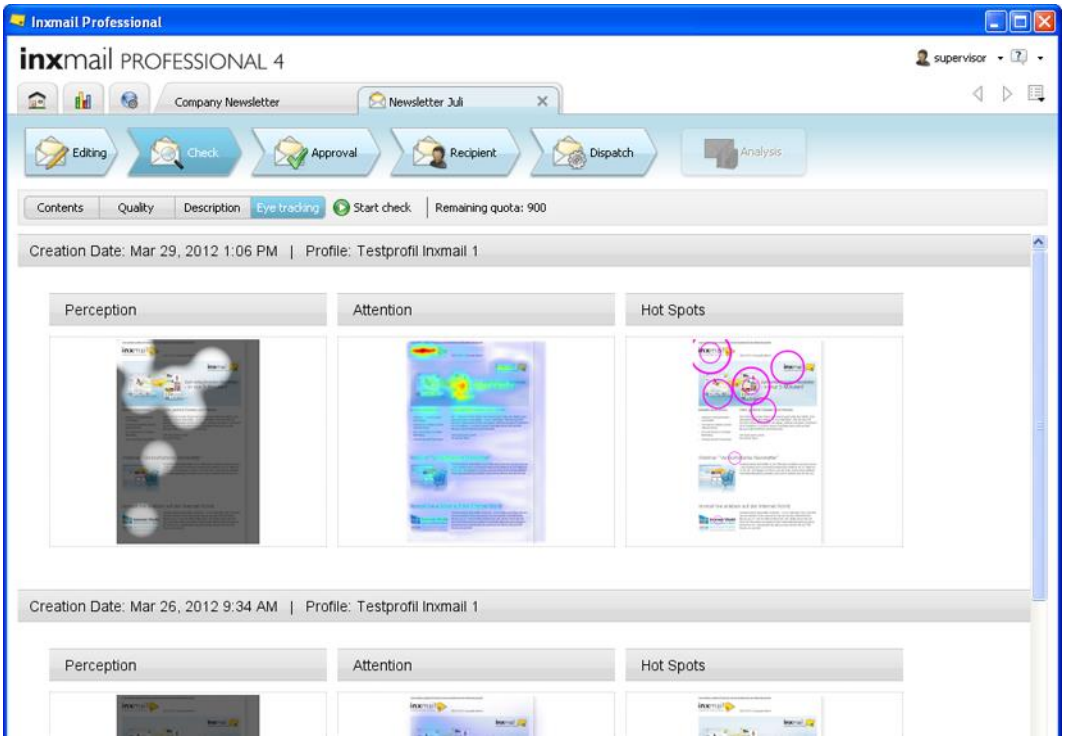


Figure 129: Result of the eye tracking test

✓ You have performed the eye tracking test for your mailing.

Related Topics

» *Show results of the eye tracking test* page 243

» *Creating test profiles* page 174

16.4.2 Show results of the eye tracking test

Step-by-step

1. To display the result (analysis screenshot) of the eye tracking test in an enlarged view, click the respective screenshot in the overview.

   The perception analysis screenshot appears in its own dialog box.

   2. Click the button *Level of interest* or *Hot spots*, in order to change the respective analysis.

3. You can (in enlarged view):
   - Use the *Save* button to save a single analysis screenshot in PNG format locally on your computer.
   - Use the *Save* button to save all three analyses screenshots as a zip folder locally on your computer. In doing so, the single analysis screenshots will be saved as PNG files.

   File names By saving analysis screenshots, file names will be suggested to you by the system in which among other things, the type of analysis, the date and the mailing name are included.

- Use the *Copy* button to copy the content of the dialog box to the clipboard.

4. Close the dialog box with the analysis screenshot.

Additional information

You can then, for example, optimise your mailing as required and perform the eye tracking test again.

If you have performed several eye tracking tests for the mailing, the current tests are displayed to you in the analysis screenshot overview, in the header. The older tests are shown in descending chronological order.

16.5 Preview functions (only HTML mailings)

In addition to the mailing preview for various test or recipient profiles (*Content check using test or recipient profiles* page 228), you can still check your HTML mailings using the following preview functions:

- *Launch browser preview* page 244
  The browser preview allows you to display your HTML mailings in all web browsers installed on your PC.
- *Launch image blocking* page 247
  The image blocking preview suppresses all images inserted as references in HTML mailings (*Inserting an image as a reference (linking an image)* page 219). Images that are directly embedded are not suppressed. This will enable you to see how your mailings are displayed in email clients that automatically suppress images that are inserted as references.
- These preview functions are not required for mailings in text format and are therefore not provided in Inxmail Professional.

16.5.1 Launch browser preview

Step-by-step

Open the *View web browser preview* dialog box as follows:

1. Open the mailing in the *Check* workflow step.
2. Click *Check content* and choose the test or recipient profile that requires the browser preview.
3. Click the *Browser preview* button.

A dialog box appears.

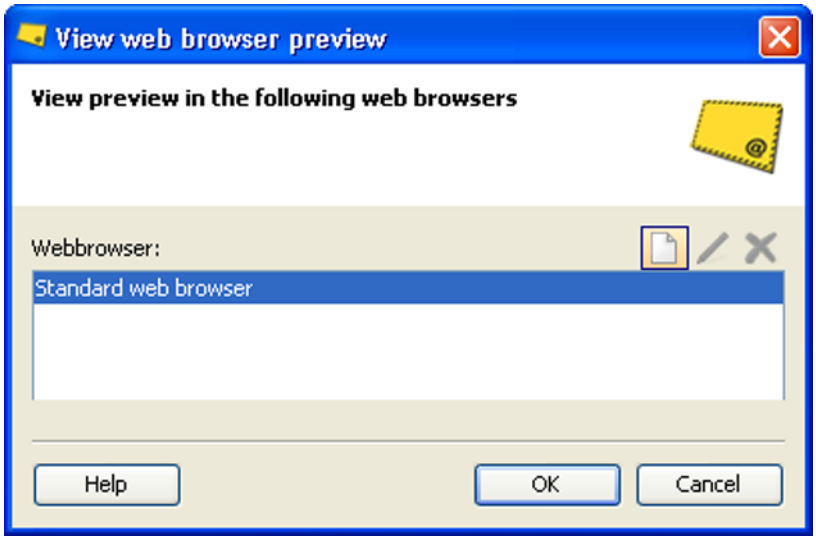


Figure 130: Dialog box "View web browser preview"

You system web browser is automatically identified as the standard web browser and is listed first in the dialog box.

Alternatively, you can create a new web browser using the (*Create new web browser*) button.

4. From the list in the *View web browser preview* dialog box, select the web browser for which you want to launch the preview.
5. Confirm the dialog box by clicking *OK*.

✓ The browser preview of your mailing appears for the selected test or recipient profile.

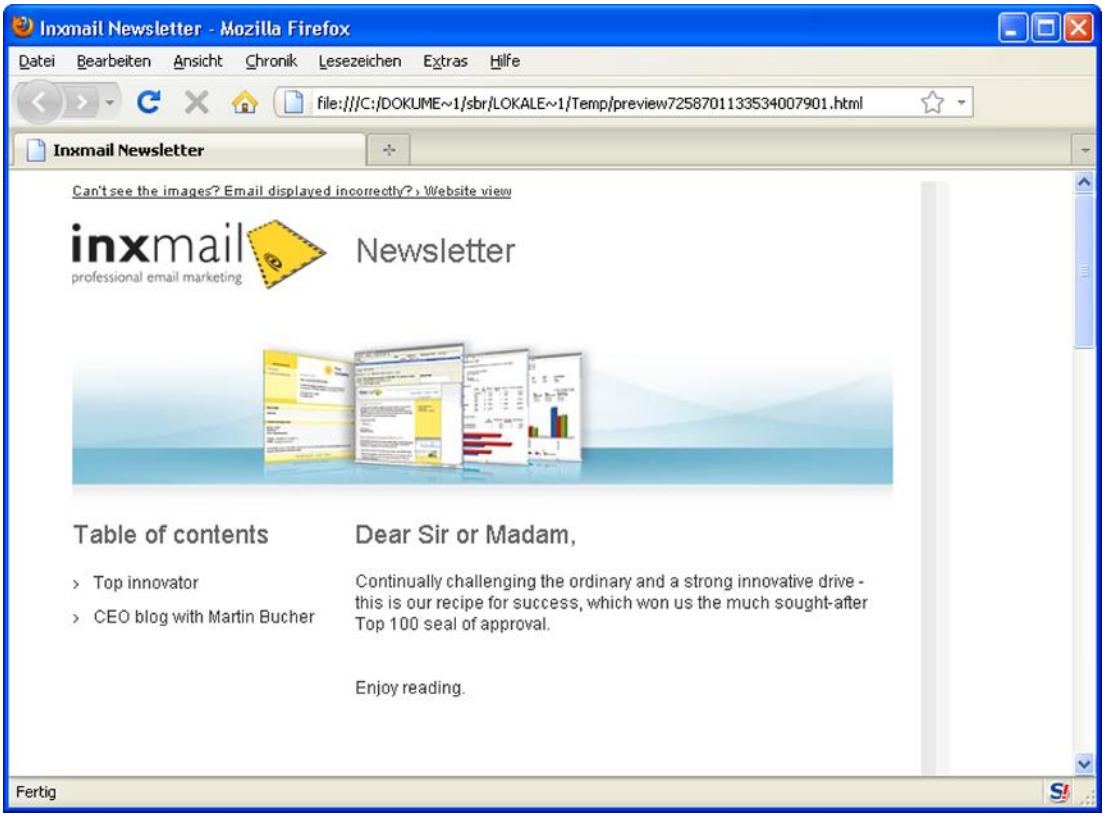


Figure 131: Browser preview

Additional information

You can select a web browser that has already been added in the *View web browser preview* and then:

- edit it using the (*Edit web browser*) button
- delete it from the dialog box using the (*Delete web browser*) button

Related Topics

» *Content check using test or recipient profiles* page 228

16.5.2 Create new web browser

Step-by-step

Follow the steps below to launch the preview for a web browser that has not yet been displayed in the dialog box (but is installed on your computer):

1. In the dialog box, click the (*Create new web browser*) button.

The *Create new web browser* dialog box appears.

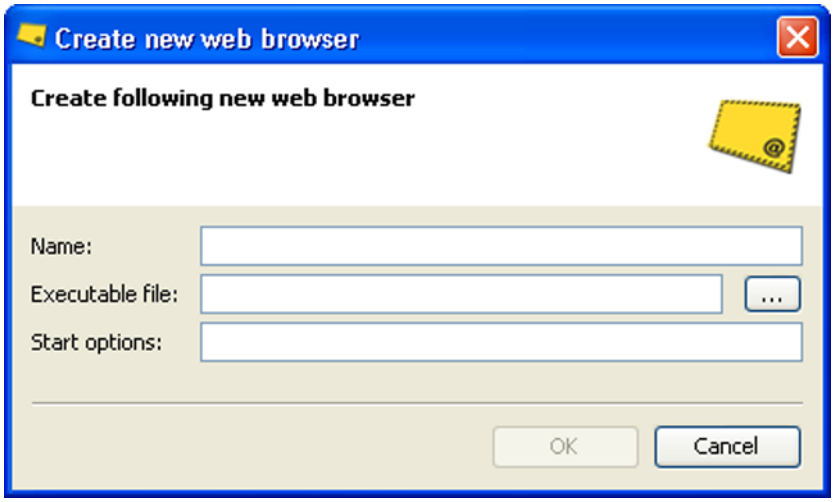


Figure 132: "Create new web browser" dialog box

2. Specify a name for this web browser.
3. Enter the path to the *.exe file.
4. In the case of some web browsers, you may have to enter specific parameters for the start options. In such cases, ask your Inxmail Professional administrator.
5. Confirm your entries by clicking *OK*.

✓ The web browser is added to the list in the *View web browser preview* dialog box. It is then immediately available for all mailing lists.

16.5.3 Launch image blocking

Step-by-step

1. Open the mailing in the *Check* workflow step.
2. Click *Check content* and choose the test or recipient profile that requires the browser preview.
3. Click the *Image blocking* button.

4. All images inserted as references are suppressed in the mailing preview. Embedded images will remain visible.

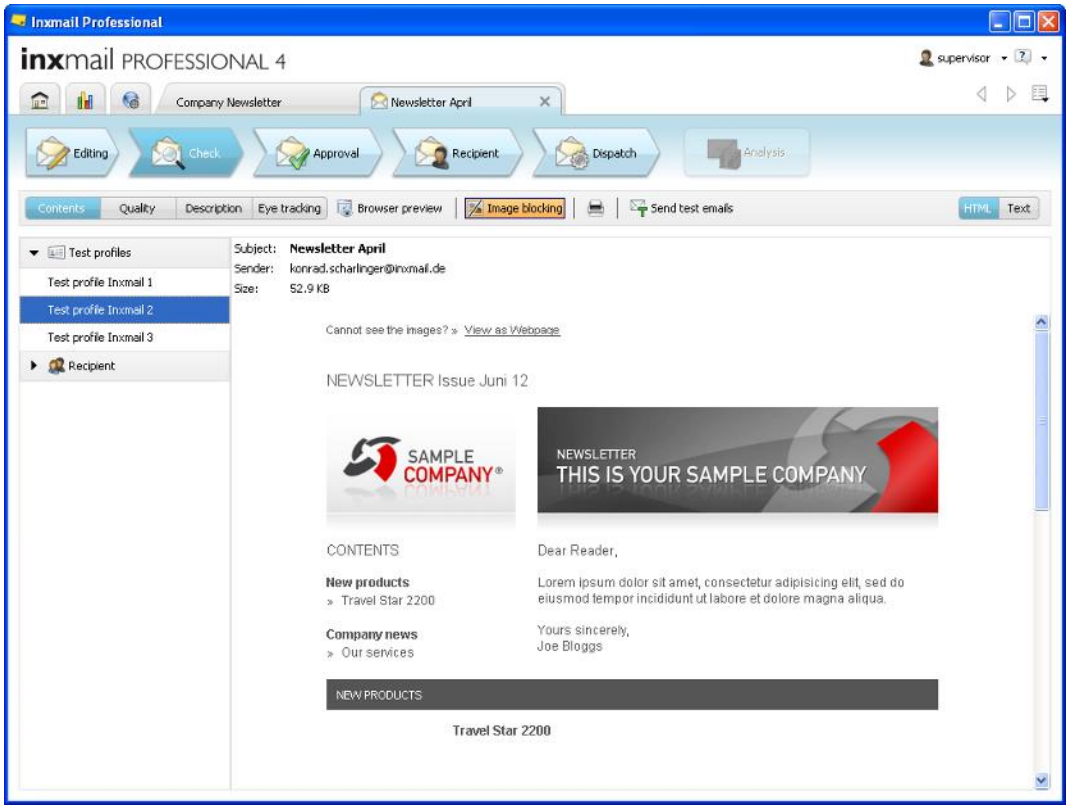


Figure 133: Preview with image blocking

✓ You launched the preview of your mailing with configured image blocking function.

Additional information

To deactivate the image blocking function, click the *Image blocking* button.

The layout of the mailing may often appear incorrect when images are disabled. To avoid this problem, try the following tips:

- To ensure that your overall design remains intact even when images are blocked, specify the 'alt', 'height' and 'width' attributes for external images. The email client will then display alternative empty graphics in the defined dimensions. The layout will be retained.
- You can then use embedded images instead of inserted images as references. Most email clients will not block these images. Please note that embedded graphics significantly increase the size of a mailing. Do not send a mailing over 150 KB in size.

Related Topics

» *Content check using test or recipient profiles* page 228

» *Embedding an image* page 222

16.6 Test emails

16.6.1 Overview

Before actually sending the mailing, you should always send one or more test emails to test email addresses. It is best to send these emails to different email clients, so as to be able to check the appearance of the mailing in popular email programs (Outlook, Mozilla, Google Mail, Thunderbird, Lotus Notes, etc.).

All links can be clicked in sent test emails. All actions, such as link tracking, are deactivated.

16.6.2 Send test emails

Step-by-step

Open the *Send test emails* dialog box for example as follows:

1. Open the mailing in the *Check* workflow step.
2. Click *Content* and then the *Send test emails*.

   A dialog box appears.

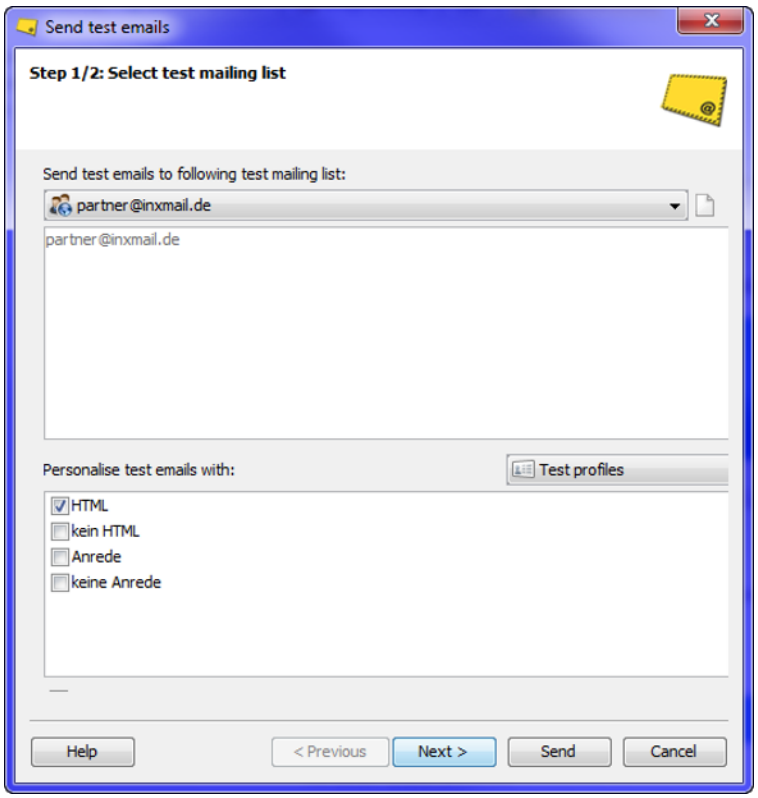


Figure 134: "Send test emails – Select test mailing list" dialog box

> **Number of test mailing lists** You can create a maximum of 50 test mailing lists.

3. In the drop-down list under *Send test emails to following test mailing list:*, select the email address or the email mailing list to which the test emails are to be sent.

If you want to send the test email to a (test) email mailing list that is not displayed in the drop-down list, then set up this email mailing list as follows:

Example

Example of a new mailing list:

- You can create a mailing list to send your test emails to several colleagues. The colleagues can then read through your mailing and look for any errors.
- You can create a mailing list to send your test emails to several email programs. You can then check whether any layout problems arise in your mailing.

4. In the dialog box, click the (*Create test mailing list*) button.

   A dialog box appears.

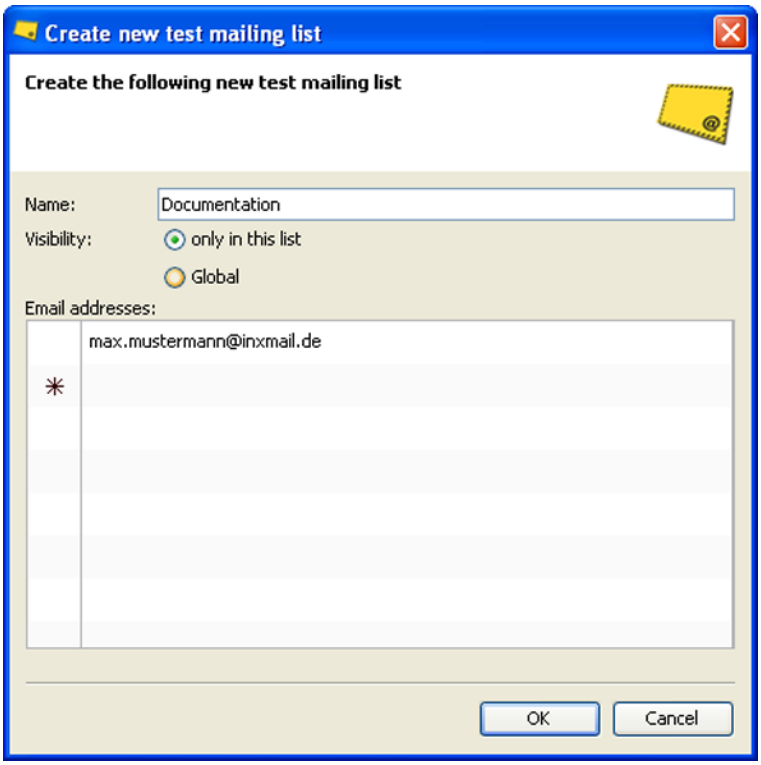


Figure 135: "Create new test mailing list" dialog box

5. Enter a name for the new e-mail mailing list
6. Select whether you want to create this mailing list for the entire system or just for this list.
7. In the *Email addresses* table, double-click in the rows marked with an asterisk and enter the email address of the new recipient you are creating.
8. To enter further recipients, double-click in the next row and enter the data.
9. Confirm the dialog box by clicking *OK*.
10. You can select a (test) mailing list that has already been added in the dialog box from the drop-down list.
11. You can edit the names and availability of the e-mail mailing list, create new email addresses or edit existing email addresses using the (*Rename test mailing list and edit email addresses*) button.
12. Use the (*Delete test mailing list*) button to delete the mailing list.

13. To perform the test emails for a test profile, choose *Test profile* from the drop-down list.

    A list of test profiles is displayed.
14. Activate the corresponding test profile under *Personalise test emails with*.

    The test profiles must first be created in order for you to be able to launch your mailing in them.

    The first 100 test profiles are always displayed in the dialog box by default.

    If you have assigned target groups to your mailing, then only the test profiles that correspond to the target group are displayed.

    If you have not yet created a test profile, an error message appears to this effect.

    To perform the test emails for recipient files, choose *Recipient* from the drop-down list.

    A list of recipients is displayed.
15. Activate the corresponding recipient profile under *Personalise test emails with*.

    The first 100 recipients are always displayed in the dialog box. If you have assigned target groups to your mailing, then only the recipients that correspond to the target group are displayed.
16. In order for the email program to be able to quickly determine that the sent email is a test email (and was created with a certain test profile), you can mark the test email.
17. To do so, click the *Next* button to access the dialog box with settings for marking.

    A dialog box appears.

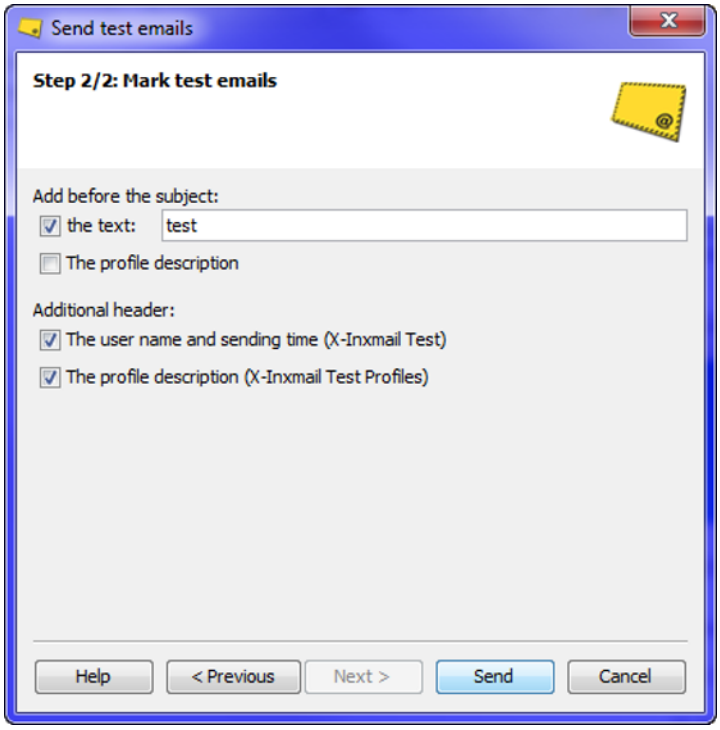


Figure 136: "Send test emails" dialog box

18. Activate the check boxes that are relevant for marking the test email.

By default, Test is entered in the text field. However, you can also select another label as an add-on before the subject, e.g., test mailing.

Note An entered text is automatically saved when sending a test email for every user and is displayed when the dialog box is next displayed.

19. The selected settings for marking the test email are displayed in the email header.

    If you insert an additional word (for example, the word 'Test' or the profile description) before the subject, then the subject may be displayed as follows:

    - 'Test: Subject'
    - 'Profile description: Subject'
    - 'Test (profile description): Subject'

20. To send the test emails in accordance with your settings, click the *Send* button.

✓ You have sent test emails. If you have sent the test emails to your own email address, you can now open and check them in your email program.

Header commands No header commands are triggered when sending a test email, which means that no test emails are sent to CC and BCC recipients included in the header.

Related Topics

» *Creating test profiles* page 174

» *Mailings (recipient)* page 264

17 Mailings (approval)

In Inxmail Professional, mailings must generally be approved before they can be sent.

17.1 Overview of approval types

Two types of approval are available for mailings: immediate approval and the approval process.

17.1.1 Immediate approval

With immediate approval, you, as the editor, can create mailings and directly approve them in Inxmail Professional. Editing and approval can therefore be carried out by a single person. Immediate approval can also be used as a tool for teams that work together on mailings or mailing campaigns and have access to the same lists.

17.1.2 Approval process

With the approval process, you create a mailing and request for it to be 'externally' approved. This means that one or two approvers are requested via an external web page to grant or, if necessary, deny approval for the mailing. Depending on the reaction of the approver(s), you can then send the mailing or make any necessary changes.

17.1.3 Variants in the approval process

The approval process can proceed in two ways: Escalating or Equivalent.

- Escalating: A primary approver must approve the mailing. If this approver declines, the mailing is rejected; if approval is granted, the mailing may be sent. If the primary approver does not respond before the set escalation date, the approval is sent to an alternative approver who then has the sole right of approval.
- Equivalent: With this option, two approvers must approve the mailing. If one of the two approvers declines the mailing, the mailing is rejected. If both approvers approve the mailing, or if it is only approved by one approver before the deadline and the other does not respond, the mailing is approved and can be sent.

17.2 Start immediate approval

You can start immediate approval at four places:

- In the mailing overview using the *(Request approval*)
- In the mailing overview using the (*Start sending now)* or *(Start sending at the scheduled time)* buttons
- In the *Approval* workflow step via the *Request approval* button
- In the *Dispatch* workflow step via the *Start sending now* or *Start sending at the scheduled time* buttons

Clicking the relevant button always takes you to the same dialog box, namely *Approve immediately*.

Step-by-step

Start immediate approval by clicking the *Request approval* button in the *Approval* workflow step as follows:

1. Open the mailing in the *Approval* workflow step.
2. Click the *Approve immediately* button.

   A dialog box appears.

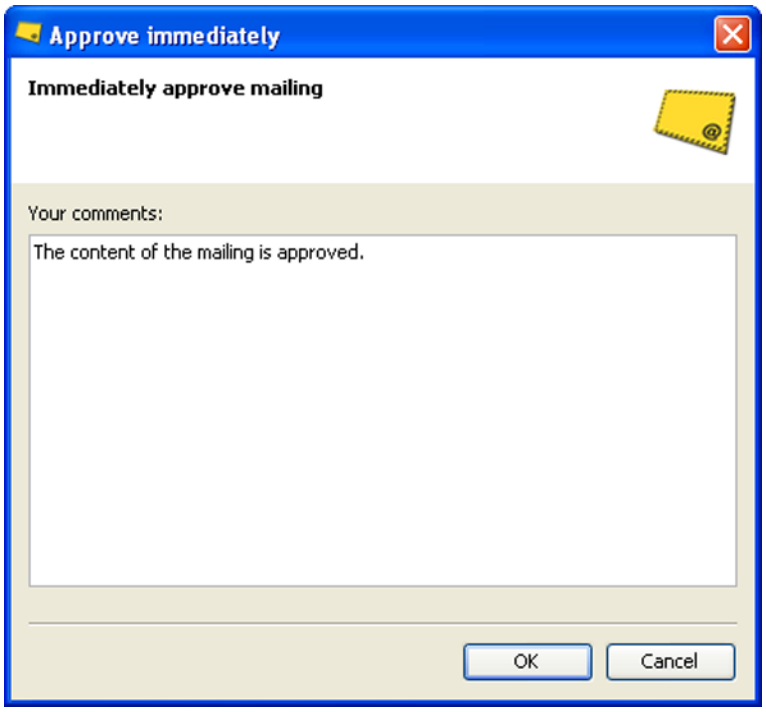


Figure 137: "Approve immediately" dialog box

3. Enter a comment if desired.
4. Confirm your entries by clicking *OK*.
5. The approval you have performed is displayed in the *Approval* workflow step.

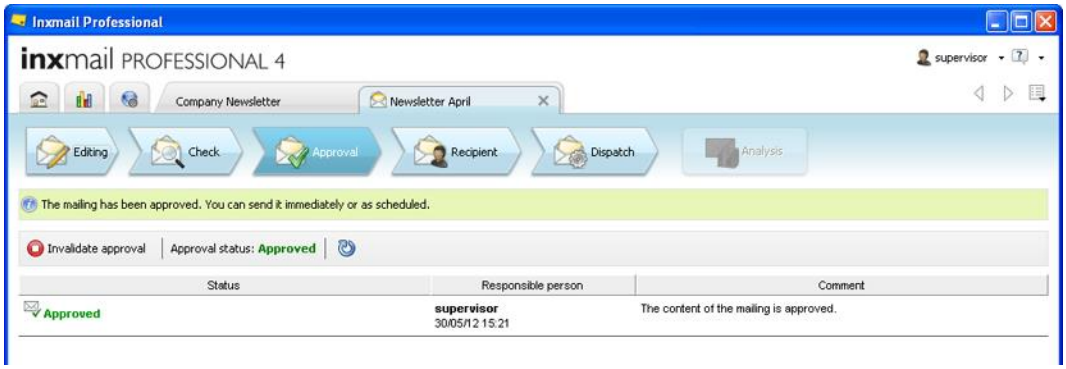


Figure 138: Display of the performed approval

✓ The mailing is ready for sending.

Additional information

If you need to make last-minute changes to the content after performing the approval, you can revoke the approval. Now click the *Revoke approval* button. You can enter a comment.

17.3 Creating new approvers

Before you can perform the approval process, you must first create approvers in the system. You can create them as a list on the (*Global settings* tab > *Properties* agent or in relation to a specific list on the mailing list tab > *Properties* agent.

Below is a step-by-step description of how to create approvers globally for all lists.

Step-by-step

1. On the (*Global settings*) tab > *Properties* agent, click *Mailing approval* under Advanced properties.

   The button is displayed at the end of the row.

2. Click the button.

   A dialog box appears.

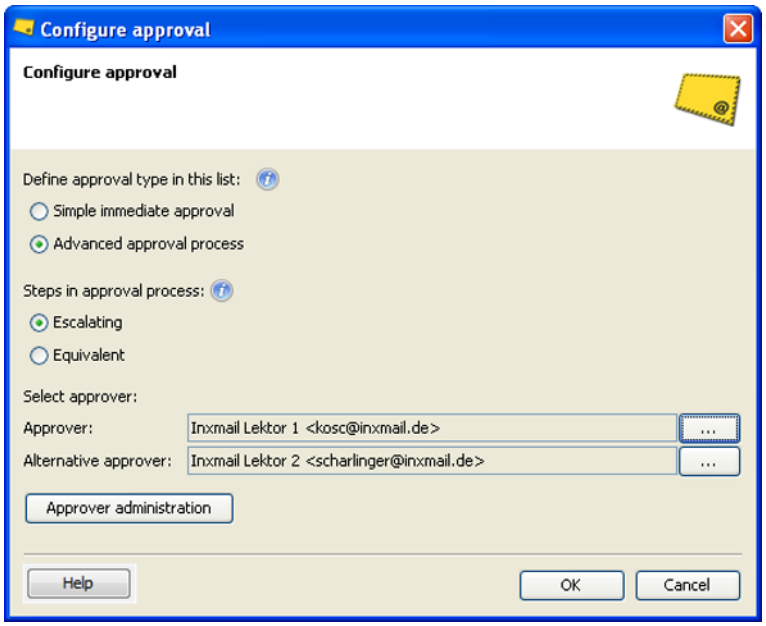


Figure 139: "Configure approval" dialog box

3. Click the *Approver administration* button.

A dialog box appears.

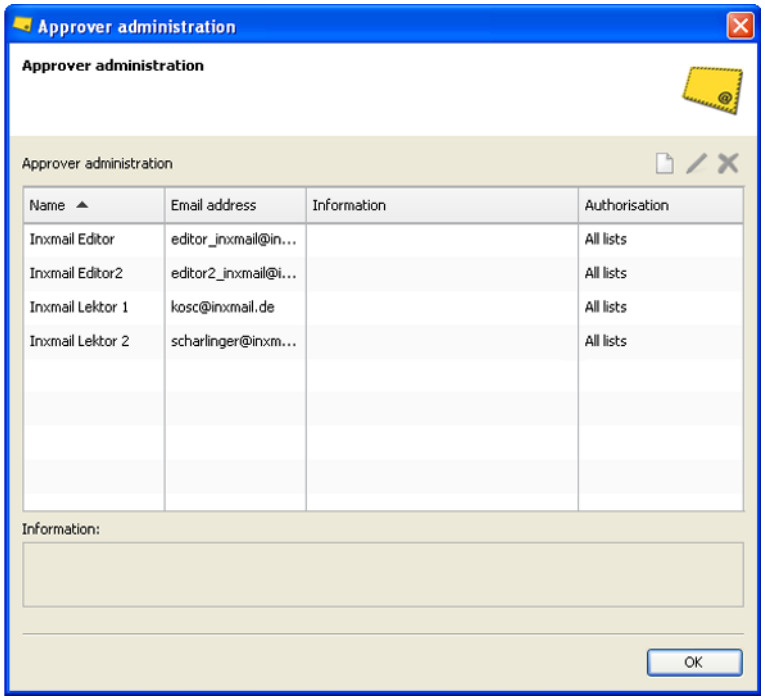


Figure 140: "Approver administration" dialog box

4. To do this, click the (*Create new approver*) button.
   A dialog box appears.

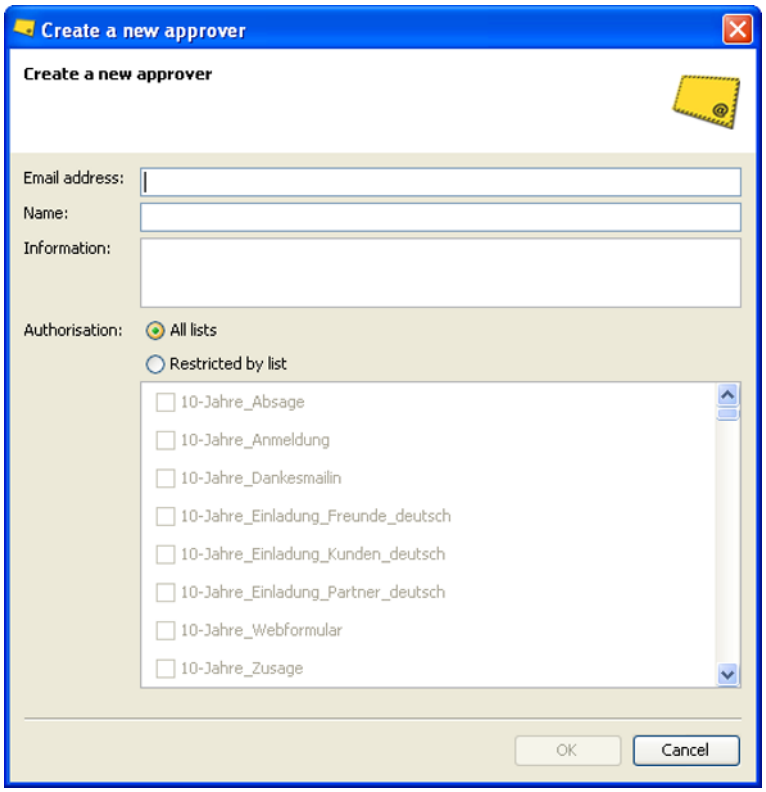


Figure 141: "Create new approver" dialog box

5. Enter an email address.

   You can, if you want, enter the name of the approver and further information.
6. Define the authorisation. Select the *All lists* option if the newly created approver is to act as an approver for all lists.

   Select the *Restricted by list* option if the approver is to act as an approver only for selected lists. Enable the check box in front of the respective list.
7. Confirm the dialog box by clicking *OK*.
8. You have finished creating a new approver.

17.4 Performing the approval process

You can initiate and perform the approval process at two places:

- In the mailing overview using the *Request approval* button.
- In the *Approval* workflow step via the *Request approval* button

Clicking the relevant button always takes you to the same dialog box, namely *Request approval Step 1/2*.

Step-by-step

Start the approval process by clicking the *Request approval* button in the *Approval* workflow step as follows:

1. Open the mailing in the *Approval* workflow step.
2. Click the *Request approval* button.

   A dialog box appears.

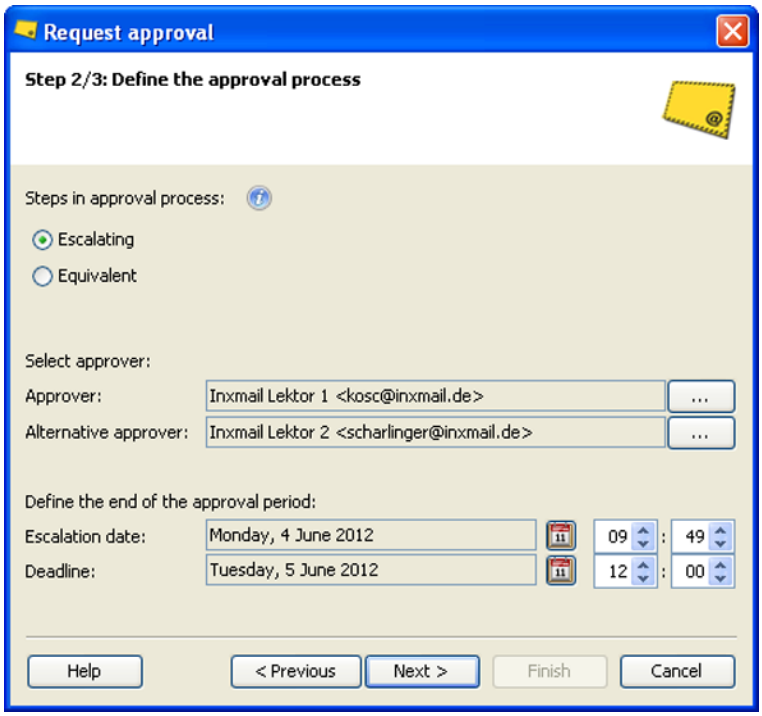


Figure 142: "Request approval – Step 1/2" dialog box

Bypass approval process

If you have the *Bypass approval* right, the *Immediately approve mailing* dialog box will be displayed to you before the *Request approval* dialog box (*Overview: Rights* page 566).

The fields in the dialog box may be pre-filled with values, if these approval settings have been preconfigured system-wide or for this particular mailing list (*Setting up the properties of mailing lists* page 82). You can, however, change the preconfigured settings if necessary.

3. Select the approval type: *Escalating* or *Equivalent*.
4. Depending on the approval type, select either two approvers or a primary approver and an alternative approver.

   One reason for changing a preconfigured approver could be if, for example, you know that the preconfigured approver is currently on holiday.

   However, you cannot create a new approver from this point. These must be created in the *Properties* agent (*Creating new approvers* page 255).
5. If you selected the 'Escalating' approval type, you must specify an escalation date. If the (primary) approver does not react by this date, approval is forwarded to the alternative approver.
6. Enter the deadline by which the approvers must react to the approval request.

   If none of the selected approvers respond before this deadline, the approval request is void and the mailing status is set to 'Not approved'. You must then request approval again.
7. Click *Next*.

   A dialog box appears.

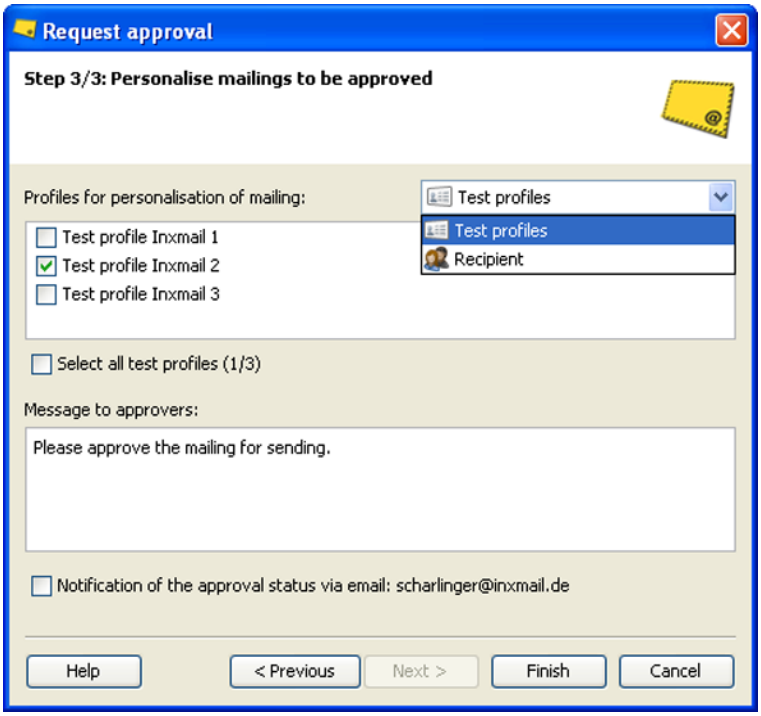


Figure 143: "Request approval – Step 2/2" dialog box

8. You can select profiles to be applied when the approvers view the mailing (for example, if the mailing contains personalised or customised text). To do so, proceed as follows:

- To select created test profiles, select *Test profiles* in the drop-down list.
  A list of already created test profiles is displayed below the drop-down list.
  Select the relevant test profile.

  If you have not yet created a test profile, an error message appears to this effect.
- To select recipient profiles, select *Recipients* in the drop-down list.
  A list of already created recipient profiles is displayed below the drop-down list.
  Select the relevant recipient profile.

9. You can add notes for the approvers under *Message to approvers*.
10. If you wish to be informed by email of the status of the approval request, select *Receive email notification of approval status*.

    The email will be sent to your Inxmail Professional email address (specified on the (*Global settings*) tab > *Users* agent).
11. To send the approval request, confirm your entries by clicking *Finish*.

✓ The approval request has been sent. The mailing is assigned 'Approval requested' status and can no longer be edited.

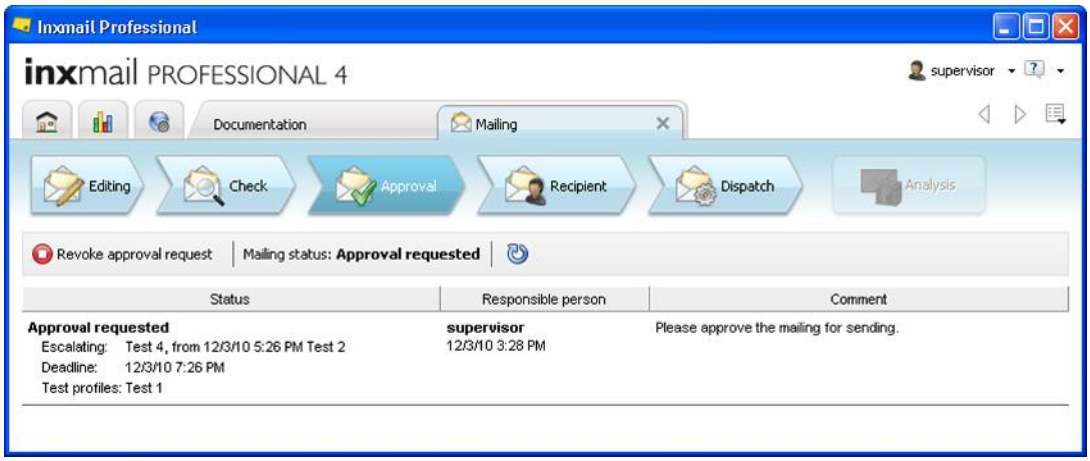


Figure 144: Mailing with a sent approval request

Additional information

If you need to make last-minute changes to the content after sending the approval request, you may revoke the approval request. Now click the *Revoke approval request* button. You may enter a comment that will be visible to the approver on the approval web page.

17.5 Bypass approval process

Users can be assigned the *Bypass approval process* right in Inxmail Professional (*Overview: Rights* page 566). Users with this right can approve mailings using immediate approval even if the approval process has been defined for these mailings.

If you have the *Bypass approval* right, the *Immediately approve mailing* dialog box will be displayed to you before the *Request approval* dialog box.

17.6 Overview of the approval process

The approval process includes the following main steps:

1. Create mailing (editor)
2. Request approval (editor)
3. Approve or reject mailing (approver)
4. Send mailing (editor)

If the approver has denied approval, the editor must make any necessary changes to the mailing and start the approval process again.

The approval process can be illustrated graphically as follows:

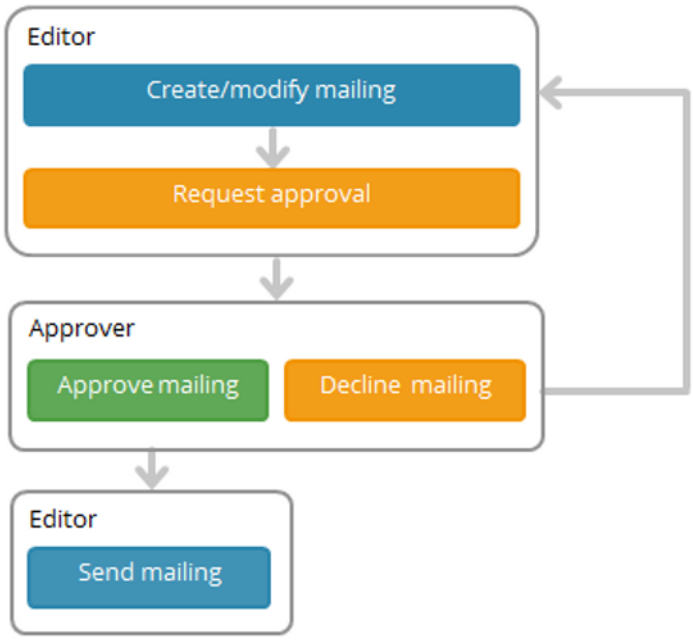


Figure 145: Overview of approval process

Below is a detailed explanation of the individual approval steps:

- **Create and check mailing content**

  The editor creates and checks the mailing in Inxmail Professional.

  The editor can also schedule the mailing for dispatch. The mailing will, however, not be sent until approval is granted.

- **Request approval**

  When the mailing is ready to be sent, the editor can request approval in Inxmail Professional. Either the preconfigured values or individually specified values may be used for the following settings:

  - Approval type
  - Approver
  - Approval time period

The editor may optionally also select profiles through which the approvers can later, for example, view a personalised version of the mailing. Notes may also be left for the approvers. After the approval request has been sent, the editor waits for a reaction from the approvers.

Email addresses entered in Inxmail Professional are used to send emails during the approval process, that is:

- the editor email addresses entered on the (*Global settings*) tab > *Users* agent
- the approver email addresses entered in the *Properties* agent

- **Approve or reject mailing**

  The approvers receive an email with a link to the approval web page. The approvers can then view the mailing and any comments left by the editor. The approvers can either reject or approve the mailing. They may also leave notes for the editor.

  If none of the selected approvers respond before this deadline, the approval request is void and the mailing status is set to 'Not approved'. The editor must then request approval again.

  The editor receives an email regarding the decision made by the approver. The approver's decision may also be viewed in the approval history in Inxmail Professional.

- **Send mailing**

  If the mailing was approved, the editor may then send it. If the mailing was not approved, the editor must make any necessary changes and then restart the approval process.

Related Topics

» *Setting up the properties of mailing lists* page 82

17.7 Approving mailings (using the web page)

The approver receives an email after the editor has sent an approval request. In this email, the approver is asked to approve the mailing. It includes a link to a clearly structured approval web page.

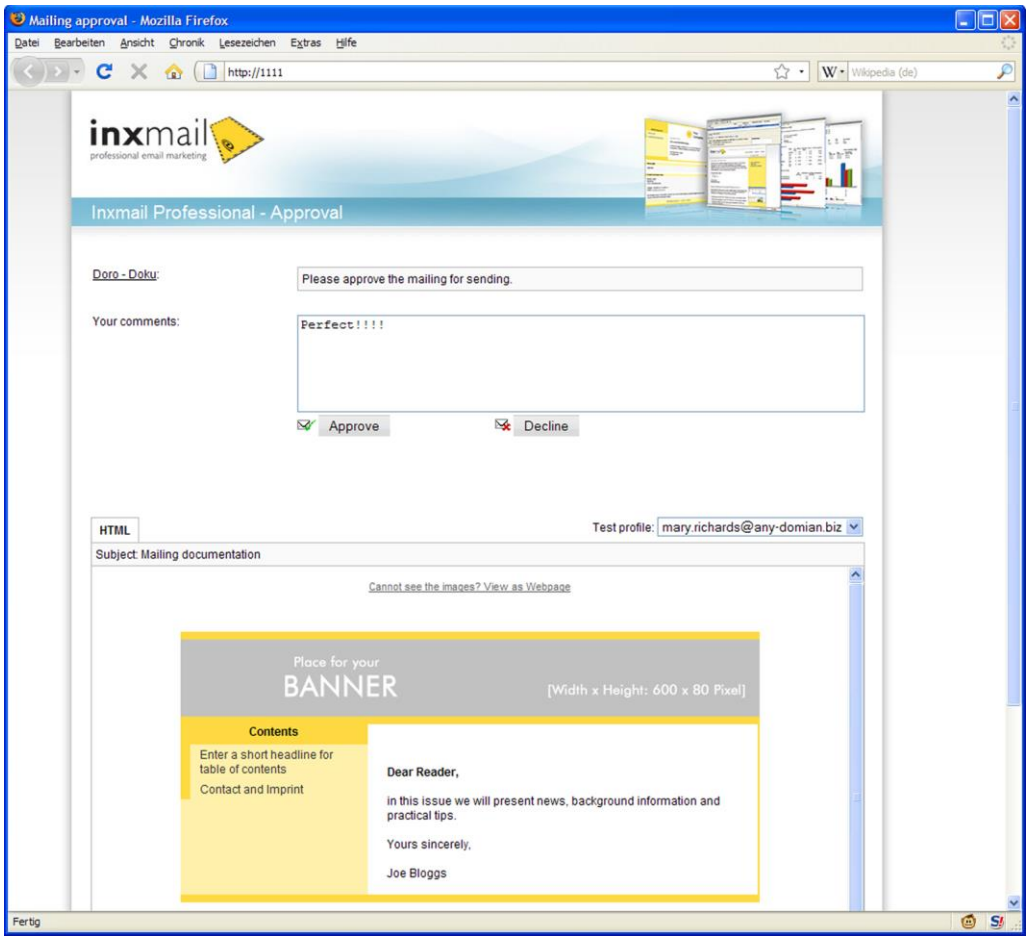


Figure 146: Mailing approval web page

The approver can view the mailing to be approved in HTML and text format (depending on the original mailing format). It is also possible, if necessary, to switch between the test profiles specified in the approval request. If the editor has left notes for the approver, these will also appear on the web page.

If the editor has withdrawn the approval request, a corresponding message will appear on the web page.

The approver can approve or reject the mailing using one of the two buttons. In doing so, it is possible to leave a comment regarding the approval or rejection.

17.7.1 Declining approval

If one of the approvers declines to approve the mailing, the mailing status is reset to 'Not approved'.

If the editor has configured the approval request so that she will be informed of the approver's reaction, a corresponding email message will automatically be sent when approval is declined.

The editor can revise the mailing and then request approval again.

17.7.2 Mailing approval

If the approvers approve the mailing, the mailing status is set to ‘Approved’.

If the editor has configured the approval request so that she will be informed of the approver's reaction, a corresponding email message will automatically be sent when approval is granted.

The editor can then send the mailing.

17.8 History of approval steps

All interaction between the editor and approver are recorded in the approval history in the mailing’s *Approval* workflow step.

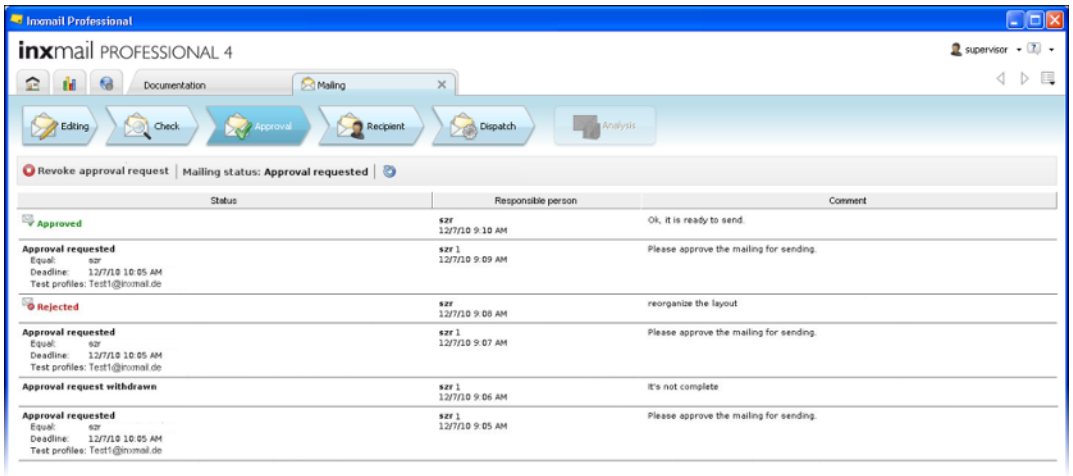


Figure 147: History

The top entry is always the most recent entry.

Each entry in the history provides the following information:

- the type of reaction
- the responsible person
- the date
- any comments
- any further information such as the test profile in use, the approval type and the deadline

You can view the approval status in the history and see if, for example, a user has sent the mailing with the special 'Bypass approval process' right (*Overview: Rights* page 566). You can also see if a user had previously deactivated approval of the mailing.

On the mailing list tab > *Mailings* agent > *Mailings* tab, you are able to directly see in the *Information* column of the mailing table which mailings currently have the ‘Approval requested’ or ‘Approved’ status.

You can also filter the mailing table by this status (*View and filter the mailings table* page 182).

18 Mailings (recipient)

18.1 Assigning all recipients from the list

Step-by-step

1. Open the mailing in the *Recipients*.

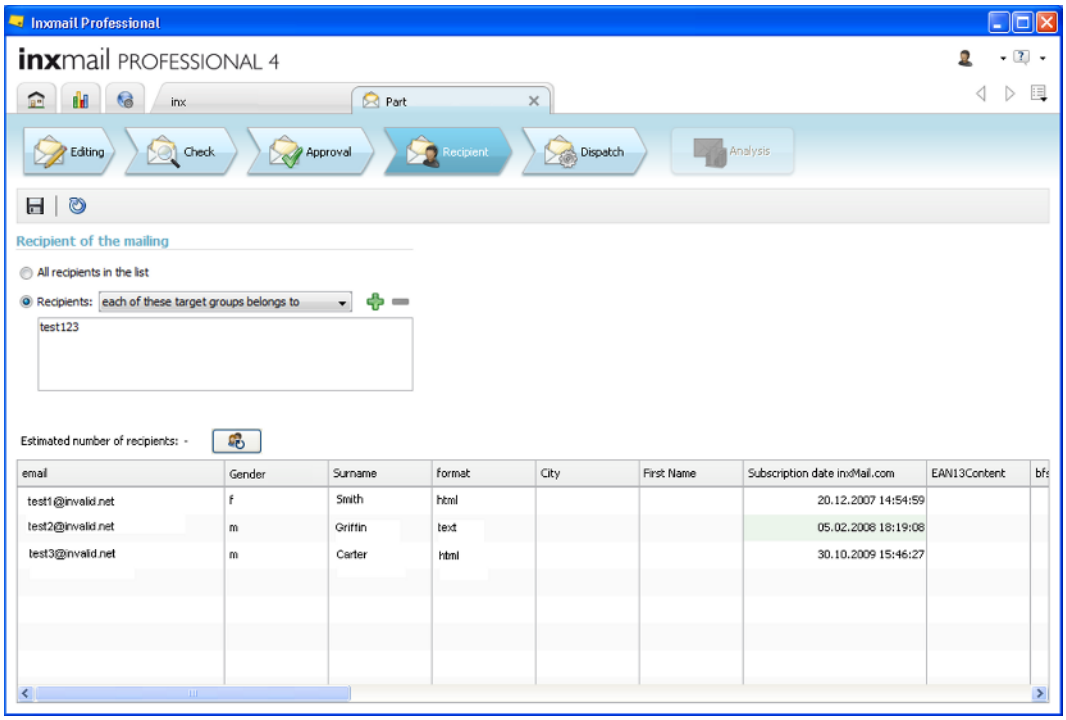


Figure 148: "Recipients" workflow step

2. Select the *All recipients in the list* option button.
3. Save your settings.

✓ You have now assigned the recipients to your mailing. This assignment may be revised at any time, as long as you have not yet sent the mailing.

18.2 Assigning recipients using target groups

Step-by-step

1. Open the mailing in the *Recipients*.
2. Select the *Recipients:* option button.
3. Use the drop-down list to select whether the recipients must belong to all, at least one or none of the selected target groups.
4. Click the (*Add target group*) button.

A dialog box appears.

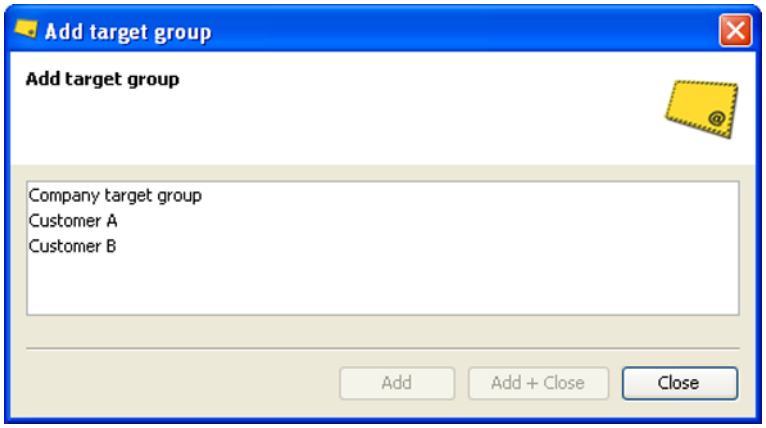


Figure 149: "Add target group" dialog box

5. Select the desired target group(s).

Multiple selection You can also select multiple target groups all at once. To do this, press and hold down the CTRL key as you click each target group.

6. Click *Add* or *Add + Close*.
7. Save your settings.

✓ You have now assigned the recipients to your mailing. This assignment may be revised at any time, as long as you have not yet sent the mailing.

Additional information

The table below the fields will display all recipients to whom (according to your settings) the mailing will be sent. The table contains the same columns as are currently visible in the recipient table of the mailing list.

You can sort the table by columns by double-clicking the column header.

Use the (*Refresh*) button to refresh the displayed recipients.

Use the (*Recalculate number of recipients*) button to recalculate the number of recipients to whom the mailing will be sent.

Related Topics

» *Showing/hiding columns* page 122

19 Mailings (dispatch)

19.1 Send mailing

Note Before sending your mailing, be sure to test it thoroughly and assign recipients to the mailing. If a mailing has to be approved before it is dispatched, you will not be able to send the mailing or schedule it for dispatch until it has the 'Approved' status. Exception: You have the Inxmail Professional 'Send mailing without approval' right.

Step-by-step

1. Open the mailing (that is ready for sending) in the *Dispatch* workflow step.

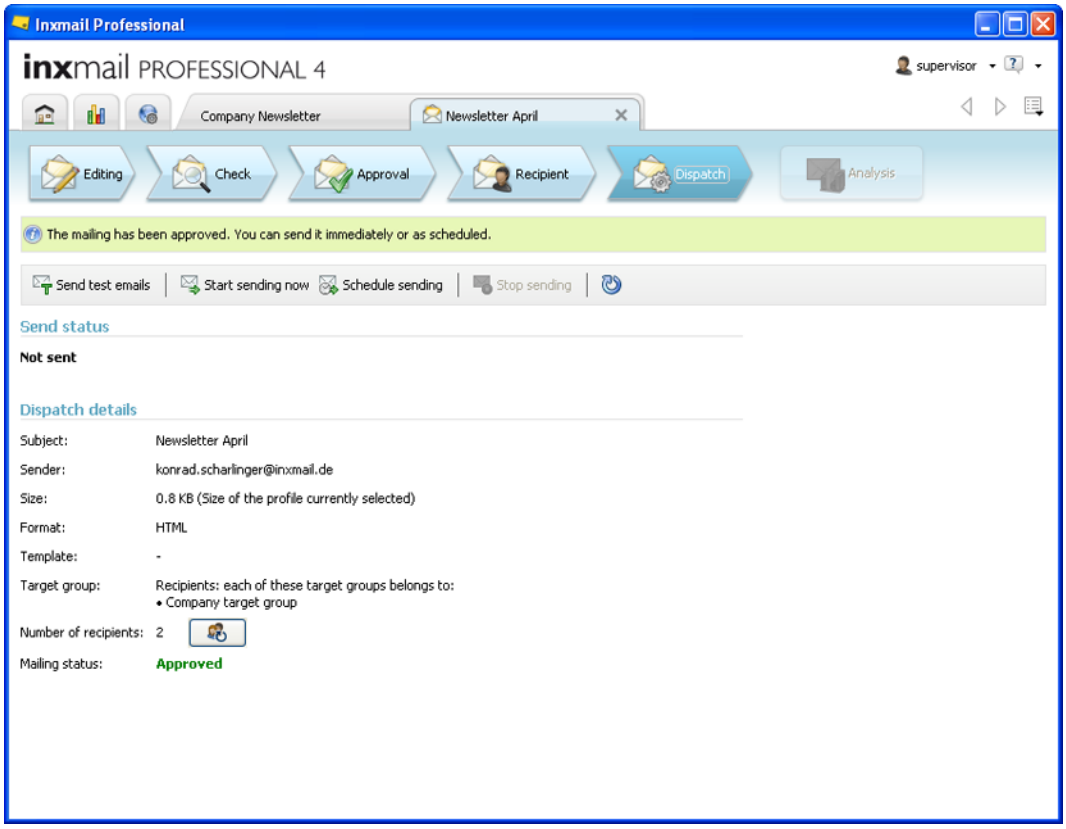


Figure 150: "Dispatch" workflow step

2. To send test emails for checking once again before actual dispatch begins, click the *Send test emails* button.
3. To schedule the mailing for (later) dispatch, so that the mailing will automatically be sent at a particular point in time, click the *Start sending at the scheduled time* button.

A dialog box appears.

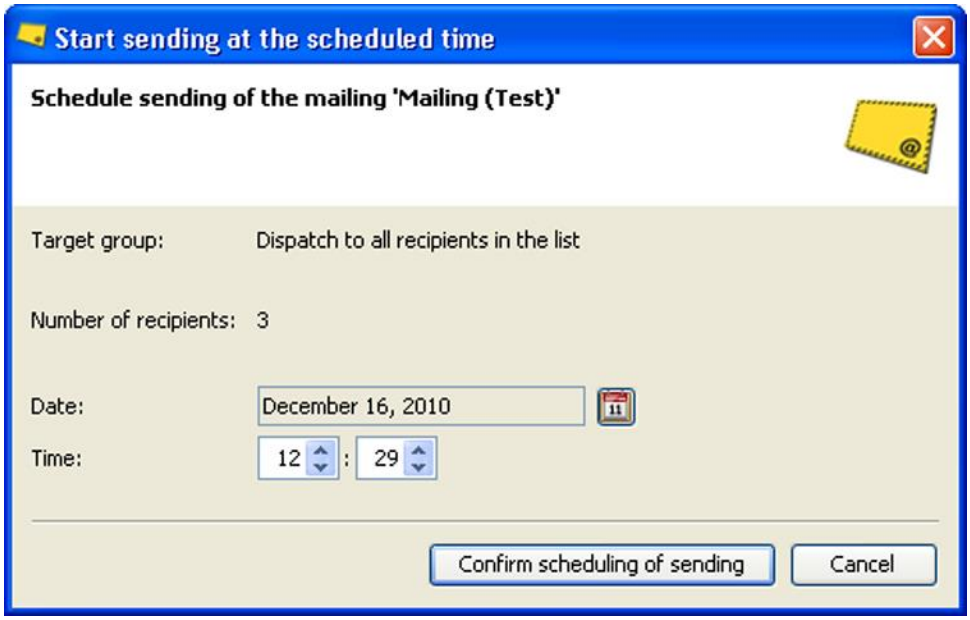


Figure 151: "Schedule sending" dialog box

In the dialog box, enter the date and time when dispatch should automatically begin and confirm by clicking the *Confirm scheduling of sending* button.

A message box in which you must confirm the configuration of automatic dispatch by clicking *Yes* will appear.

The mailing will be closed. On the mailing list tab > *Mailings* agent > *Mailings* tab, you will be able to see in the *Information* column of the table that the mailing was scheduled for dispatch. The mailing will also receive the symbol .

4. Click the *Start sending now* button to send the mailing immediately.

   A dialog box appears.

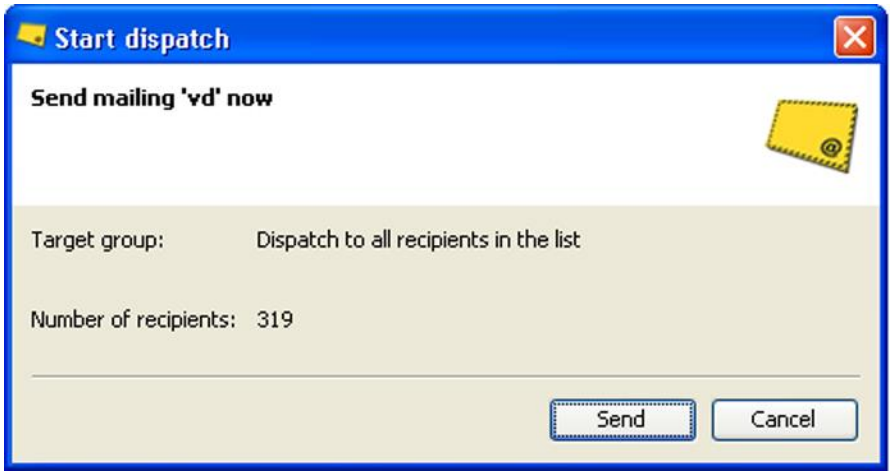


Figure 152: "Start sending" dialog box

5. Click the *Send* button in the dialog box.

A message window in which you need to confirm the dispatch by clicking *Yes* is displayed.

The mailing will be closed. On the mailing list tab > *Mailings* agent > *Mailings* tab, you will be able to see in the *Information* column of the mailing table that the mailing is currently being sent. The mailing will also receive the symbol . Once the mailing has been sent, information on the send status will be updated in the *Information* column, and the mailing will receive the symbol .

✓ You have successfully made your dispatch settings and/or sent your mailing.

Related Topics

» *Mailings (check)* page 228

» *Mailings (recipient)* page 264

» *Mailings (approval)* page 253

» *Overview: Rights* page 566

» *Test emails* page 249

19.2 Stopping or resuming sending

Step-by-step

1. To stop sending for a mailing with a sending time still in the future or which is currently being sent, select the mailing in the table on the mailing list tab > *Mailings* agent > *Mailings* tab. Then click the *Stop sending* button.

   Alternatively, you can also stop sending on the (*Cockpit*) tab. To do this, double-click the relevant mailing in the Cockpit. The *Stop sending* dialog box appears. Click the *Stop sending* button.

   Mailings for which sending has already started and is then interrupted are marked with the symbol.

   If you interrupt dispatch of an approved mailing when sending has **not** yet started, the approval will be deleted. In this case, the mailing must be approved again before it can be planned in or sent again.

2. To resume sending, select the mailing in the table on the mailing list tab > *Mailings* agent > *Mailings* tab and then select one of the following buttons again (*Send mailing* page 266):

   - If mailing dispatch had not yet started when it was interrupted, you can click the *Start sending at the scheduled time* button to schedule the mailing again for (later) dispatch.
   - Regardless of whether mailing sending had already started or not when it was interrupted, you can click the *Start sending now* button to send the mailing immediately. Sending will be resumed at the exact recipient where it was interrupted.

✓ You have successfully stopped or resumed dispatch.

19.3 Displaying sending information

Note To view general information on the sending of the mailing, select the mailing in the table on the mailing list tab > *Mailings* agent > *Mailings* tab. Below the table, in the *Details* area, you can view, for example, the send status, the target group, the mailing ID and when the mailing was last modified.

Step-by-step

1. Select the mailing in the table on the mailing list tab > *Mailings* agent > *Mailings* tab.
2. Click the *Display sending information* button.

   The sending information appears in a dialog box.

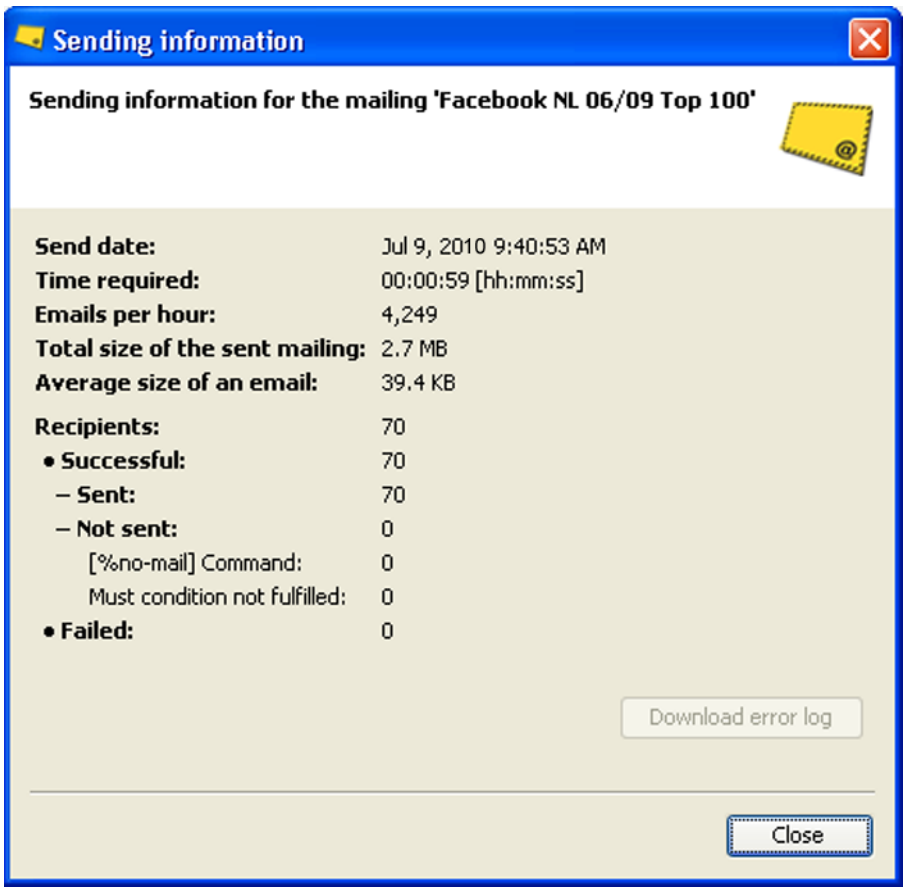


Figure 153: "Sending information" dialog box

The dialog box displays information on sending such as the send date, send duration, emails sent per hour, average send volume, average size of a mail and number of recipients. The following additional information is available on the recipients:

- *Successful*: Number of emails successfully sent or held back, according to your settings
- *Sent*: Number of recipients the mailing was successfully sent to
- *Not sent*: Number of recipients the mailing was not sent to due to the [%no-mail] command or the Must condition (as requested)

- *[%no-mail] Command*: Number of recipients the mailing was successfully not sent to due to the [%no-mail] command
- *Must condition not fulfilled*: Number of recipients the mailing was not sent to (as requested) due to the Must condition
- *Failed*: Number of failed processings (for example, number of emails which could not successfully be delivered)

3. If the dialog box indicates that failed processings have occurred, you can view the error log by clicking the *Download error log* button in the dialog box.

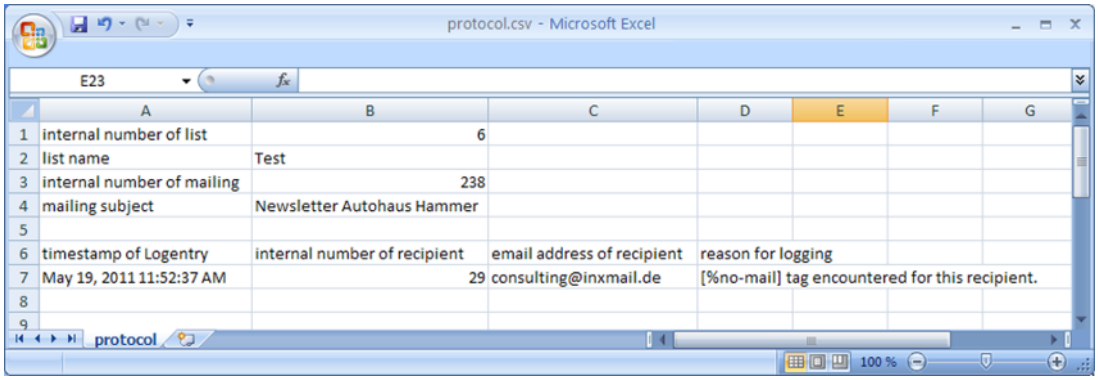


Figure 154: Error log

The upper section of the log file contains general details on the mailing list and the mailing:

- *internal number of list*: Identification number of the mailing list
- *list name*: Name of the mailing list
- *internal number of mailing*: Identification number of the mailing

mailing subject: Subject of the mailing A list of all recipients the mailing could not be sent to follows:

- *timestamp of log entry*: Date of the log entry
- *internal number of recipient*: Identification number of the recipient
- *email address of recipient*: Email address of the recipient
- *reason for logging*: Reason for the log entry ("[xxx,MUST] condition not satisfied by this recipient", "[%no-mail] tag encountered for this recipient."; "Mail could not be built correctly"; "Mail has been delivered, but the address has been rejected by mailserver"; "Sending of mail to this recipient has failed"; "Recipient could not be found (perhaps deleted while sending?)"; "Sending of mailing has been interrupted. Mails have not been sent to following recipient-ids")

4. Close the dialog box.

✓ You have successfully viewed the sending information.

20 Mailing (dispatch analysis)

Step-by-step

1. Open the sent mailing in the *Analysis* workflow step.
   The visual link analysis for the mailing will be generated.

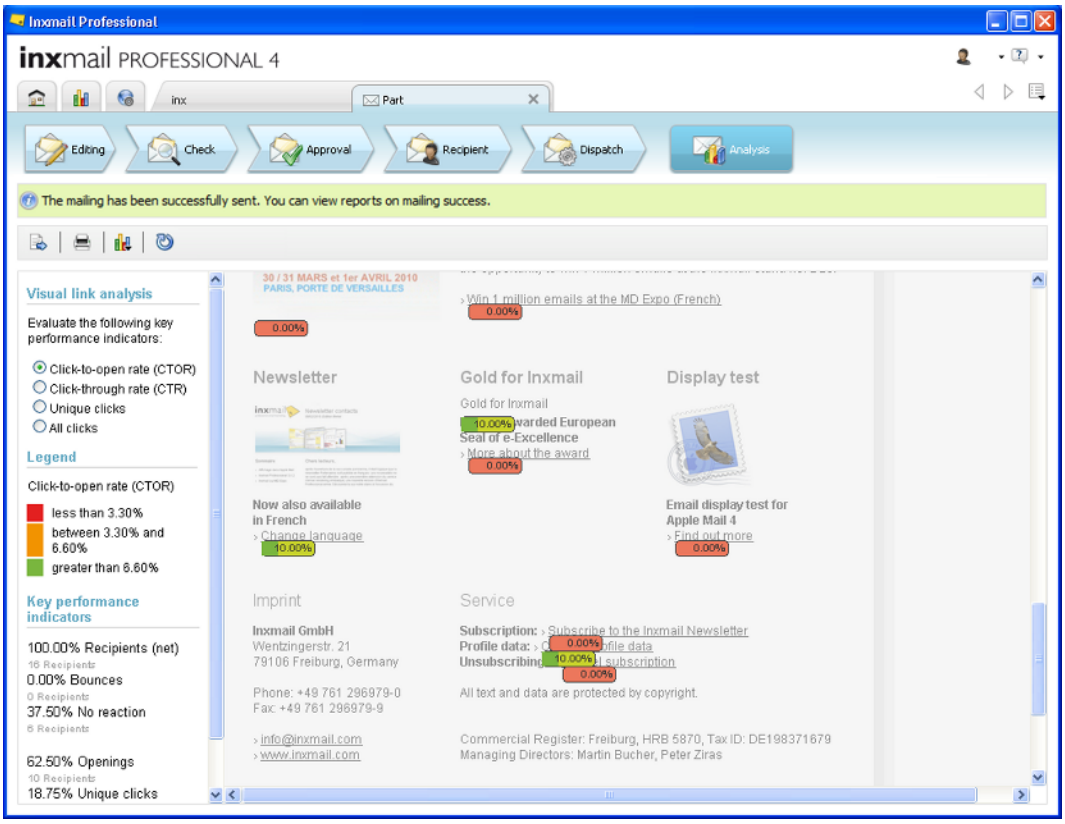


Figure 155: "Analysis" workflow step

This report graphically displays the links that recipients clicked (how often) The analysis will be generated for the recipient currently selected in the *Check* workflow step using the *Check content* button. In the area on the left, you can configure the key performance indicators for which the visual link evaluation should be generated.

Key figure for report	Description
Click-to-open-rate (CTOR) (%)	Unique clicks/number of times opened
Click-through-rate (CTR) (%) related to graphic call-ups	Unique graphic call-ups/number of net recipients
Unique clicks	Number of recipients who clicked the tracked link at least once
All clicks	Number of all clicks of the tracked link, including multiple clicks

Key figure for report	Description
Recipients (net)	Number of recipients who actually received the mailing (without delivery errors such as hard bounces)
Bounces	Number of hard and soft bounces for a mailing dispatch
Openings (%)	Number of opening recipients/number of net recipients
Unsubscriptions (%)	Number of unsubscribe clicks/number of net recipients

The legend will be generated in real time to match the performance indicators you select. During this process, Inxmail Professional determines the classification into links marked green, orange and red based on the click values of the current **mailing** (for example, how often a single link in this mailing was most frequently clicked; how often the links in this mailing were clicked on average). This allows you to recognise which links in your mailing were clicked frequently and which links infrequently.

2. You can use the following buttons:
   - The *(Display selected reports)* button allows you to open other reports on the mailing.
   - The (*Export report*) button allows you to export the report as a PDF, HTML or text file.
   - Use the (*Print*) button to print the report.
   - The (*Refresh*) button refreshes your report data in real time.

✓ You have successfully viewed the mailing analysis.

Related Topics

» *Content check using test or recipient profiles* page 228
» *Important key figures for reports* page 353
» *Reports on mailings* page 345
» *Reports on trigger mailings or welcome mailings* page 347
» *Exporting reports* page 362

21 Split tests

21.1 General

Split tests enable you to achieve higher open and click rates, and thereby optimise the success of your newsletters. In a split test, you can test various elements of your newsletter, such as different subject lines or differences in content and structure. The following types of split test are available in Inxmail Professional:

- Subject line test

  Test different subject lines and find out which one is the most successful for your mailing. Vary the length and wording of your subject line, or use a personalised subject line.
- Sender address test

  Test different sender addresses and find out which one generates the highest open rate for your mailings. A trustworthy and descriptive sender address will work best for you.
- Multi-variable test

  A multi-variable test allows you to test the content or structure of your mailing, for example, you can test different banners or call-to-action elements.
- Sending time test

  The sending time test enables you to find out – depending on target group – when is the best time to send your mailing, that is, when you can expect to obtain the highest click or open rates.

The following describes how to create split test mailings and split test objects, how to manage and send them, and how to analyse the results of split tests.

21.1.1 Overview

There are various ways to perform a split test. A suitable procedure can be seen in the following diagram.

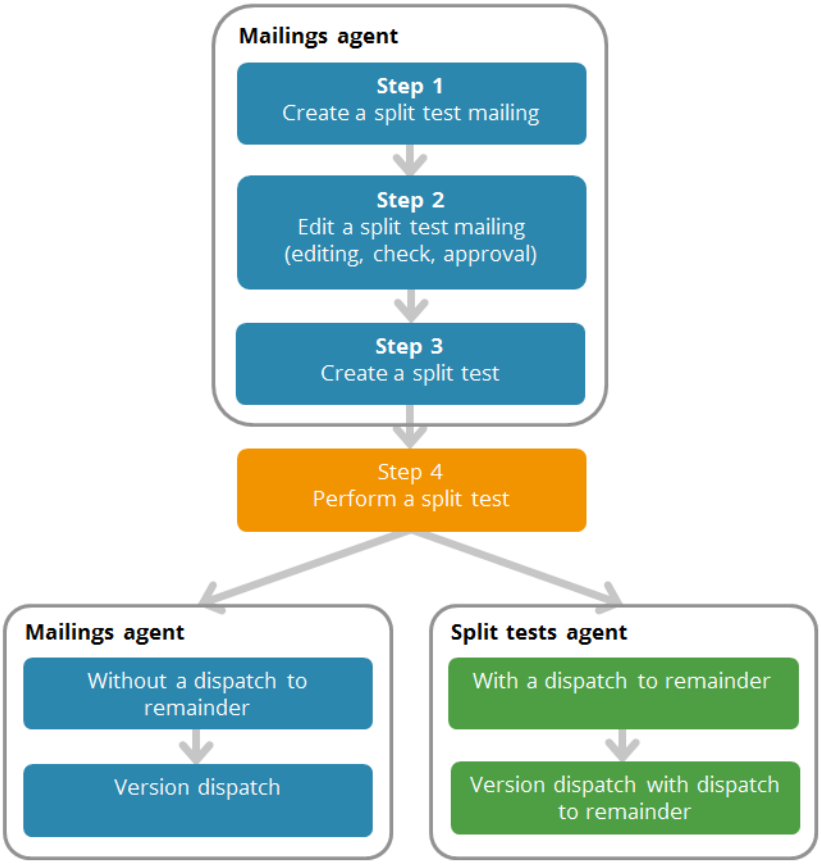


Figure 156: Split test generation procedure

1. Create a new mailing in the *Mailings* agent > *Split test mailings* tab.
2. Fill your mailing with content and check your mailing before sending (*Mailings (editing)* page 189, *Mailings (check)* page 228, *Mailings (approval)* page 253).
3. Click the *Create split test* button in the *Split test* workflow step to open the *Create split test* wizard.

   In the *Create split test* wizard, decide whether you want to send a split test with or without a dispatch to the remainder.
4. Depending on which option you choose, perform the split test in the *Mailings* agent > *Create split test* wizard, or create a split test with dispatch to the remainder in the *Split tests* agent.

21.1.2 Interaction of the 'Mailings' agent and the 'Split tests' agent

When performing a split test, you use two agents: the *Mailings* agent and the *Split tests* agent.

Mailings agent

In the *Mailings* agent, you create a split test mailing on the *Split test mailings* tab. As soon as you create a split test, this split test mailing becomes mailing version A and acts as the basis for each additional version.

You can use the *Create split test* wizard to perform a split test **with no** dispatch to the remainder (to open the wizard, you use the split test mailings toolbar or the *Split test* workflow step of a mailing), or you create a split test object in the *Split tests* agent.

Split tests agent

In the *Split tests* agent, you create new split test objects with or without a dispatch to the remainder. You make the required settings in the *Versions* and *Dispatch* workflow steps.

Note A split test object is always generated automatically if you are in the *Mailings* agent and initiate a split test via the *Create split test* wizard.

21.2 Split test mailings

21.2.1 Creating a split test mailing

Step-by-step

To create a new split test mailing, proceed as follows:

1. Click the tab of the mailing list > *Mailings* agent > *Split test mailings* tab and then click the (*Create new split test mailing*) button.

   The *Create new mailing* dialog box is displayed.

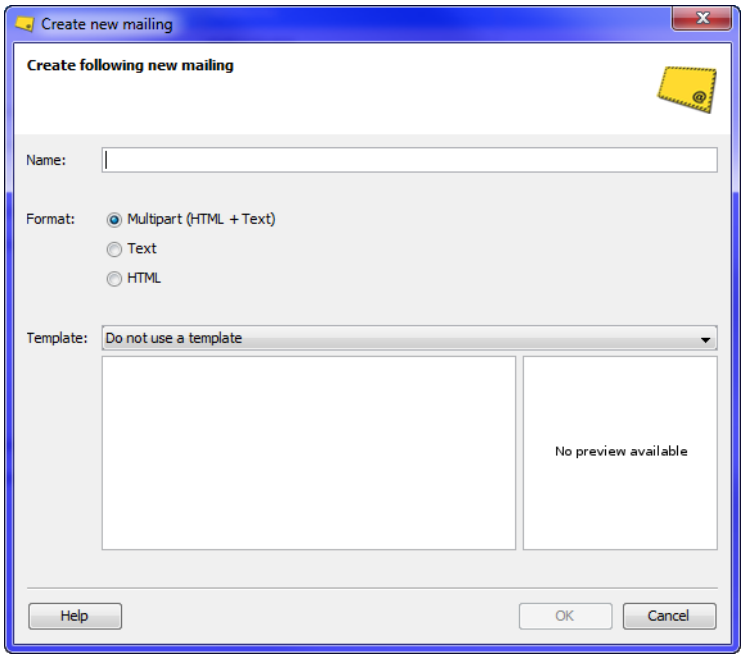


Figure 157: "Create new mailing" dialog box

Field	Description	
Name	Enter a name for the split test. Select a name that will allow you to quickly locate the split test mailing.	
Format	Select one of the following formats: **Note** If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all split test mailings of this mailing list is preset.	
	Multipart (HTML + Text)	Split test mailings in multipart format contain both a plain text version and an HTML version of the prepared split test mailing. The recipient's email program can then independently select which of the two versions to display.
	Text	Split test mailings in text format can be read by every recipient without any problems, and are a preferred format for split test mailings. However, if you opt for text format, you can only send your images as file attachments.
	HTML	Split test mailings in HTML format may contain images, different fonts and colours. You can save your images on a Web server and then integrate them in the split test mailing in such a way that they are loaded from the Web server when your split test mailing is accessed. Or, you can embed your images directly in your split test mailing, so that your recipients may view the images even when offline.
Template	Select an entry from the drop-down list.	
	Do not use a template	To create an empty split test mailing that is not based on any template
	Use user template	To create a split test mailing whose layout or contents are predetermined by a user template created in Inxmail Professional. Select the user template you require in the section below the drop-down list.
	Newsletter template	To create a split test mailing whose layout or contents are predetermined by a newsletter template imported to Inxmail Professional. Select the design you require in the section below the drop-down list.

2. Specify your settings in the fields.
3. Confirm the dialog box by clicking *OK*.

4. The split test mailing opens in a new tab where it can be edited.

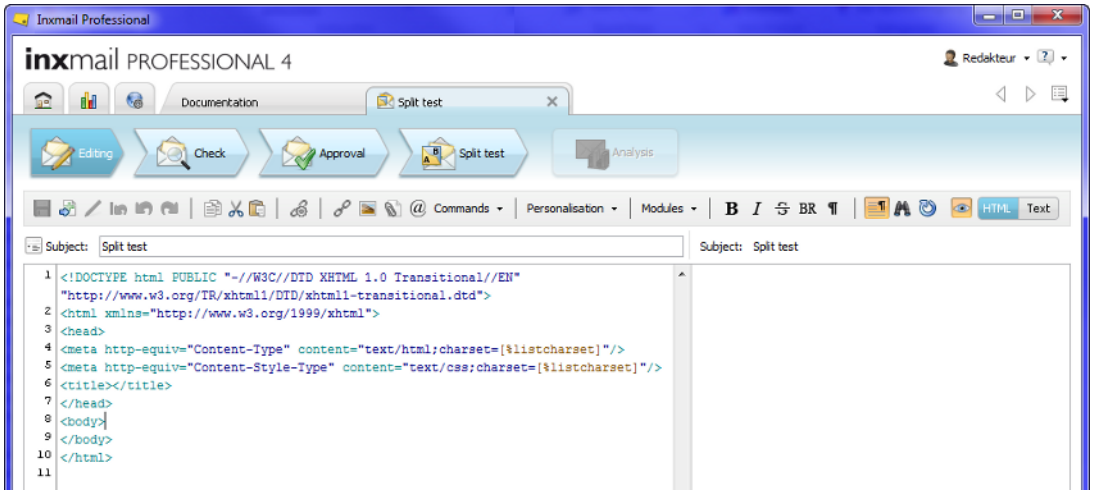


Figure 158: Split test mailing in the 'Editing' workflow step

The split test mailing is also automatically added to the table on the tab of the mailing list > *Mailings* agent > *Split test mailings* tab.

✓ You have now created a new split test mailing.

Additional information

To create split test mailings in HTML format, you will need to be familiar with the HTML mark-up language. For security reasons, the following HTML elements are not allowed in a split test mailing: ActiveX, audio, external stylesheets, frames and iframes, Java, the 'meta refresh' element, scripts (JavaScript, VBScript, Perl,...), tooltips and video.

Note Many email programs do not display HTML forms.

You can convert an existing standard mailing to a split test mailing. To do so, you use the Create split test button in the toolbar. More detailed information can be found under *Converting a standard mailing to a split test mailing* page 187.

Related Topics

» *Setting up the properties of mailing lists* page 82

» *Setting up a user template (text, HTML, multipart)* page 402

» *Importing the template library* page 396

21.2.2 Creating, checking and approving a split test mailing

The procedure for creating, checking and approving split test mailings is the same as that for standard mailings.

Related Topics

» *Mailings (editing)* page 189

» *Mailings (check)* page 228

» *Mailings (approval)* page 253

21.2.3 Linking a split test mailing with a split test

You link the split test mailing with a new split test in the *Split test* workflow step of the *Mailings* agent > *Split test mailings* tab (*Performing a split test* page 286).

When the split test mailing has been linked with a split test, the following information is displayed in the content area of the *Split test* workflow step:

Section	Description
Linked with the following split test	The name of the linked split test, the selected split test type and the current status of the split test (for example, 'Draft') are displayed in this section.
Send date	Here you can see the selected sending time for your split test.

Related Topics

» *Performing a split test with no dispatch to remainder* page 287

» *Managing split test mailings* page 278

21.2.4 Managing split test mailings

On the tab of the mailing list > *Mailings* agent > *Split test mailings* tab, the following options are available for editing one or more *split test mailings* selected in the table:

Button	Description
(*Rename split test mailing*)	To rename a selected split test mailing
(*Delete split test mailing*)	To delete a selected split test mailing **Note** Split test mailings whose status is set to *Draft*, *Approved* or *Approval requested* can be deleted as long as they are not linked to a split test. If a split test has the *Completed* status, the split test mailings associated with this split test can only be deleted if their status is *Selected*, *Stopped* or *Sent*. Split test mailings can be removed without problems if the split test they are associated with has already been deleted.
(*Copy*)	To make one or more copies of a split test mailing
(*Paste*)	To paste a copy of a split test mailing into the mailing list table **Note** Standard mailings, trigger mailings and welcome mailings can also be copied and pasted into the *Split test mailings* tab. The pasted mailing is thereby converted into a split test mailing.
(*Send test emails*)	To send a test email for the selected split test mailing
(*Request approval*)	To start immediate approval or initiate the approval process (depending on the setting)

(Stop sending)	To stop the dispatch of split test versions that are currently being sent or are scheduled for dispatch
(Create split test)	To create and perform a split test from a split test mailing
(Show associated split test)	To show a created split test object for a split test mailing
(Display selected reports)	To view important key figures for the split test analysis after the split test versions have been sent
(Display sending information)	To open important information for split test mailings that have been sent

By double-clicking a split test mailing, you can open it in its own tab and edit it.

Related Topics

» *Test emails* page 249
» *Performing a split test* page 286
» *Scheduling, stopping or resuming dispatch* page 298
» *Analysing split test mailings* page 304

21.2.5 Displaying, sorting and filtering the split test mailings table

The *Split test mailings* tab of a mailing list shows an overview of all existing split test mailings. The split test mailings have different symbols depending on status. The following symbols are used to indicate the current status of a split test mailing:

Symbol	Status	Description
	Draft	The split test mailing is set to 'Draft' status. It can be edited and then tested for quality.
	Approval requested	Approval was requested and a reply is pending. If approval is granted, the split test mailing is set to 'Approved' status. If approval is rejected, the mailing is reset to 'Draft' status.
	Approved	The split test mailing has been approved. It can be edited and selected in order to activate dispatch directly.
	Selected	The split test mailing has been selected. A split test mailing with this status can only be opened read only. It can be sent directly, or it can be scheduled for dispatch.
	Scheduled	Split test mailings of the 'Sending time test' type are set to 'Scheduled' when particular sending times have been defined for the split test versions.
	Current dispatch	The split test mailing is currently being sent.

	Stopped	The dispatch of the split test mailing was stopped (its status prior to this was either 'Current dispatch' or 'Scheduled').
	Sent	The split test mailing was sent.

Sorting columns

You can sort the individual column entries in the table. To do so, double-click the relevant column header, for example, Name. All existing split test mailings are shown sorted (alphabetically).

Searching split test mailings

You can search split test mailings using the filter input field. For this purpose, click the *Filter by subject and/or name* button to restrict the search to one of the following columns: *Subject/name*, *Subject*, *Name* or *Associated split test*.

Enter a term in the filter input field and click the button. The table now displays all split test mailings that contain the search term in their name. To remove the filter, click the button. All existing split test mailings are displayed.

Filtering split test mailings

You can filter the split test mailings using the filter drop-down list.

Filter settings If you set filters both in the filter input field and in the filter drop-down list, only split test mailings that fulfil the criteria of both settings are displayed.

You can select from the following filter settings:

Filter setting	Description
All split test mailings	Shows all split test mailings that have been created
Draft	Shows all split test mailings with 'Draft' status
Approval requested	Shows all split test mailings whose status is set to 'Approval requested'
Approved	Shows all split test mailings for which approval has been granted
Selected	Shows all split test mailings whose status is set to 'Selected'
Scheduled	Shows all split test mailings whose dispatch has been scheduled
Current dispatch	Shows all split test mailings that are currently being sent
Stopped	Shows all split test mailings whose dispatch was stopped
Sent	Shows all split test mailings that have already been sent

Details section of split test mailings

The Details section is located below the split test mailings table. It is expanded by default and shows important information for a selected split test mailing, such as which split test type is being performed, or how many recipients the split test mailing was sent to and when it was sent.

If a split test with dispatch to the remainder was created, this information is additionally shown in brackets under *Split test type*.

The key performance indicators for sent split test mailings can be seen in the Details section on the right.

21.3 Split test objects

All split test objects are displayed in the *Split tests* agent of a mailing list. They are either generated automatically when a split test is performed directly using the *Create split test* wizard on the *Split test mailings* tab, or they can be created manually in the *Split tests* agent using the *Create new split test* button.

Related Topics

» *Specifying split test versions, strategy and recipient distribution* page 282
» *Starting split test dispatch* page 282
» *Performing a split test* page 286
» *Performing a split test with dispatch to remainder* page 293

21.3.1 Creating a split test object

Step-by-step

To create a new split test object in the *Split tests* agent, proceed as follows:

1. Click the *Create new split test* button in the toolbar in the *Split tests* agent.
   The *Create new split test* dialog box is displayed.

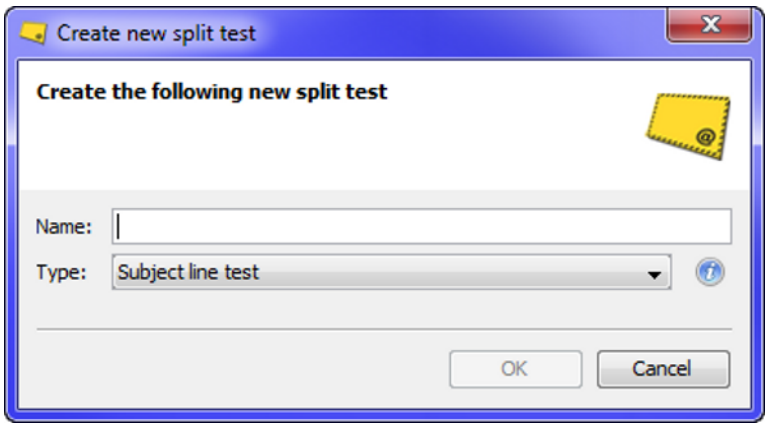


Figure 159: "Create new split test" dialog box

Field	Description	
Name	Enter a name for the split test. The split test is stored under this name in the *Split tests* agent.	
Type	Select a split test type from the drop-down list.	
	Subject line test	Tests different subject lines and reveals which one is the most successful for your mailing

	Sender address test	Tests different sender addresses and determines which one generates the highest open rate for your mailings
	Multi-variable test	Determines which is your best split test mailing as regards content or structure
	Sending time test	Determines when is the best time to send your mailing (that is, when you can expect to obtain the highest click or open rates)

2. Specify your settings in the fields.
3. Confirm your entries by clicking *OK*.

✓ You have now created a new split test object.

The split test object is added to the table and is opened in a new tab in the *Versions* workflow step.

Related Topics

» *Performing a split test with dispatch to remainder* page 293

21.3.2 Specifying split test versions, strategy and recipient distribution

You define the basic data for your split test in the *Versions* workflow step.

Section	Description
Execute split test type with the following mailing	Here you select the mailing for the split test. In addition, you create the split test versions.
Strategy and recipient distribution	Here you define whether a split test is to be performed with or without a dispatch to the remainder, and how the recipients are to be distributed to the versions.
Determine most successful version for dispatch to remainder	Here you define how the most successful version is selected for dispatch to the remainder.

Related Topics

» *Performing a split test with dispatch to remainder* page 293

» *Versions workflow step* page 293

21.3.3 Starting split test dispatch

You start the dispatch of the split test versions – and, if applicable, the dispatch of the winning mailing to the remaining set of recipients – in the *Dispatch* workflow step.

Section	Description
Send status of the split test	The overview provides full information on the prepared split test mailings with the name of the split test mailing, all split test versions, the send status (for example, 'Not sent') and the recipient distribution.
Recipients for the split test	Here you select the recipients for your split test.
Send notifications about status changes	Here you can enable the sending of one or more notifications about possible status changes to an email address of your choice.

Related Topics

» *Performing a split test* page 286

» *Performing a split test with dispatch to remainder* page 293

» *Dispatch workflow step* page 296

21.3.4 Managing split test objects

The following options for editing one or more split test objects selected in the table are available in the *Split tests* agent:

Button	Description
(*Create new split-test*)	To create a new split-test object.
(*Rename split-test*)	To rename the selected split-test object.
(*Delete split-test*)	To irreversibly delete a selected split-test object. **Note** If you delete a split-test object, all split-test dispatches are aborted and can no longer be continued. The associated split-test mailings are retained on the *Split-test mailings* tab of the *Mailings* agent.
(*Copy*)	To make a copy of one or several split-test objects. A pasted copy of a split-test object is stored with the 'Draft' status.
(*Paste*)	To paste a copy of one or several split-test objects into a list of split-test objects.
(*Stop sending*)	To stop sending a split-test.
(*Open associated split-test mailings*)	Displays the associated split-test mailings on the *Split-test mailings* tab.
(*Display selected reports*)	To display important key figures for the split-test analysis after the split-test has been sent.
(*Refresh*)	To refresh the split-test objects table.

21.3.5 Displaying, sorting and filtering the split test objects table

All existing split test objects are displayed in the Split tests agent. The split test objects have different symbols depending on status. The following symbols are used to indicate the current status of a split test object:

Symbol	Status	Description
	Draft	The split test is set to 'Draft'. The version dispatch can be started immediately or at a scheduled time. **Note** If a dispatch to the remainder is to take place and the winning version is to be determined automatically, you must also define the determination of the winning version, the send date and the performance indicator before the version dispatch can be performed immediately or at a scheduled time.
	Version dispatch scheduled	The split test versions have been scheduled for dispatch. The split test can be reset to 'Draft' status as long as no dispatch has taken place.
	Current version dispatch	The split test versions are currently being sent.
	Version dispatch stopped	The dispatch of the split test versions was stopped. You can resume the version dispatch later; however, you cannot reschedule it. **Note** An exception is the sending time test. In this case, you can redefine the sending time of scheduled and unsent versions.
	Completed	The split test is completed. All split test versions and the dispatch to the remainder (if applicable) have been sent.

If a split test with dispatch to the remainder is performed, the following statuses are additionally possible:

Symbol	Status	Description
	Dispatch to remainder pending	Following successful version dispatch, the dispatch to the remainder in the split test has not yet been sent. A split test is assigned the 'Dispatch to remainder pending' status if the winning version is to be determined manually and sent.

	Dispatch to remainder scheduled	Following successful version dispatch, the dispatch to the remainder has been scheduled to be sent at a particular time. A split test is assigned the 'Dispatch to remainder scheduled' status if the winning version is to be determined automatically and sent at a scheduled time.
	Current dispatch to remainder	The dispatch to the remainder in the split test is currently being sent.
	Dispatch to remainder stopped	The dispatch to the remainder was stopped. You can start the dispatch to the remainder directly at a later time.

Sorting columns

You can sort the individual column entries in the table. To do so, double-click the relevant column header, for example, Name. All existing split test objects are shown sorted (alphabetically).

Searching split test objects

You can search split test objects using the filter input field. For this purpose, click the *Filter by name* button to restrict the search to a particular name. Enter a term in the filter input field and click the button. The table now displays all split test objects that contain the search term in their name. To remove the filter, click the button. All existing split test objects are displayed.

Filtering split test objects

You can filter the split test objects using the filter drop-down list.

Filter settings If you set filters both in the filter input field and in the filter drop-down list, only split test objects that fulfil the criteria of both settings are displayed.

You can select from the following filter settings:

Filter setting	Description
All split tests	Shows all split test objects that have been created
Draft	Shows all split test objects with 'Draft' status
Version dispatch scheduled	Shows all split test objects for which a version dispatch has been scheduled
Current version dispatch	Shows all split test objects for which versions are currently being sent
Version dispatch stopped	Shows all split test objects for which a version dispatch has been stopped
Dispatch to remainder pending	Shows all split test objects for which a dispatch to the remainder is pending
Dispatch to remainder scheduled	Shows all split test objects for which a dispatch to the remainder has been scheduled

Current dispatch to remainder	Shows all split test objects for which a dispatch to the remainder is currently being performed
Dispatch to remainder stopped	Shows all split test objects for which a dispatch to the remainder has been stopped
Completed	Shows all split test objects that are completed
Subject line tests	Shows all split test objects of the 'Subject line test' type
Sender address tests	Shows all split test objects of the 'Sender address test' type
Multi-variable tests	Shows all split test objects of the 'Multi-variable test' type
Sending time tests	Shows all split test objects of the 'Sending time test' type
Split tests without remaining recipients	Shows all split test objects for which a dispatch to the remainder is not being performed
Split tests with remaining recipients	Shows all split test objects for which a dispatch to the remainder is being performed
Split tests with manual dispatch to remaining recipients	Shows all split test objects for which the winning version is determined manually and sent
Split tests with automatic dispatch to remaining recipients	Shows all split test objects for which the winning version is determined automatically and sent at a particular time

Details section of split test objects

The Details section is located below the split test objects table. It is expanded by default and shows important information for a selected split test object, such as which split test type is being performed, or how many mailing versions were sent and when they were sent.

Furthermore, the number of mailing versions and, if applicable, the dispatch to the remainder with the respective recipient allocation (as a percentage) are represented graphically in the Details section on the right.

21.4 Performing a split test

You can perform a split test with or without a dispatch to the remainder.

The possible ways to perform a split test are as follows:

Agent	Split test with no dispatch to remainder	Split test with dispatch to remainder
Mailings agent	The *Create split test* wizard for performing the split test can be opened directly from the *Mailings* agent > *Split test mailings* tab.	A split test with dispatch to the remainder is **not** possible in the *Mailings* agent.

Split tests agent	Create a new split test object in the *Split tests* agent and link it with a basis mailing. Select the *Execute version dispatch with no dispatch to remainder* option. You can also create a new split test object using the *Create split test* wizard in the *Mailings* agent > *Split test mailings* tab and switch to the *Split tests* agent.	Create a new split test object in the *Split tests* agent and link it with a basis mailing. Select the *Execute version dispatch with dispatch to remainder* option. You can also create a new split test object using the *Create split test* wizard in the *Mailings* agent > *Split test mailings* tab and switch to the *Split tests* agent.

Related Topics

» *Performing a split test with no dispatch to remainder* page 287

» *Performing a split test with dispatch to remainder* page 293

21.4.1 Performing a split test with no dispatch to remainder

This section demonstrates how to create and perform a subject line test **with no** dispatch to the remainder.

The subject line test is performed in the *Mailings* agent using the *Create split test* wizard. The other three types of split test (sender address test, multi-variable test and sending time test) are carried out in the same or a similar way.

Step-by-step

To perform a subject line test with no dispatch to the remainder in the *Create split test* wizard, proceed as follows:

1. Select a split test mailing and click the *Create split test* button in the mailing list toolbar or in the *Split test* workflow step of the opened split test mailing.

   Note If you select two to five split test mailings at the same time and click the *Create split test* button, the multi-variable test will be preset.

Step 1/3 of the *Create split test* wizard is displayed.

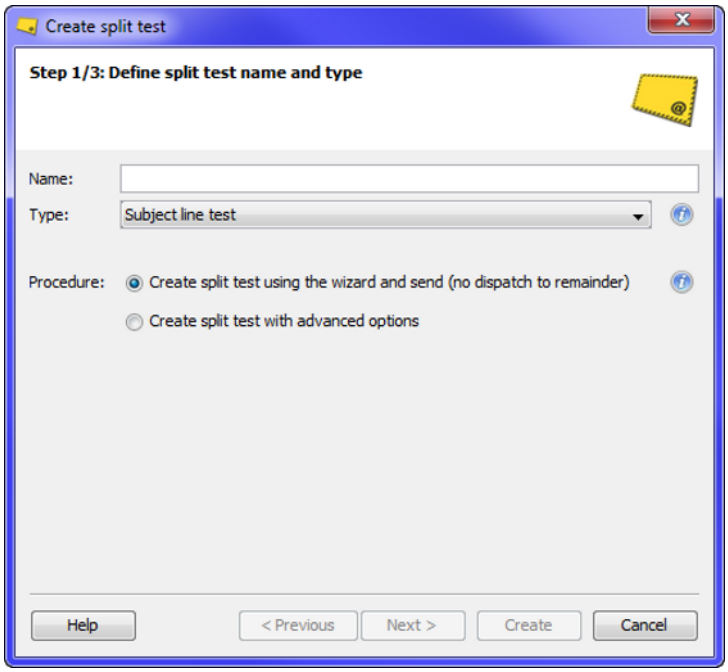


Figure 160: "Create split test" dialog box

Field	Description	
Name	Enter a name for the split test. The split test is stored under this name in the *Split tests* agent.	
Type	Select a split test type from the drop-down list.	
	Subject line test	Tests different subject lines and reveals which one is the most successful for your mailing
	Sender address test	Tests different sender addresses and determines which one generates the highest open rate for your mailings
	Multi-variable test	Determines which is your best split test mailing as regards content or structure
	Sending time test	Determines when is the best time to send your mailing (that is, when you can expect to obtain the highest click or open rates)
Procedure	Select a procedure.	
	Create split test using the wizard and send (no dispatch to remainder)	Enables you to create a split test (with no dispatch to the remainder) in the wizard and send it directly (*Performing a split test with no dispatch to remainder* page 287)

	Create split test with advanced options	Enables you to create a split test in the *Split tests* agent and send it with or without a dispatch to the remainder (*Performing a split test with dispatch to remainder* page 293)

Approve split test mailing If the split test mailing has not yet been approved, the *Immediately approve mailing* dialog box will be displayed. Follow the instructions to be able to continue with the execution of the split test.

2. Specify your settings in the fields.
3. Click *Next* if you have selected the *Create split test using the wizard and send (no dispatch to remainder)* option button.

   Step 2/3 of the *Create split test* wizard is displayed.

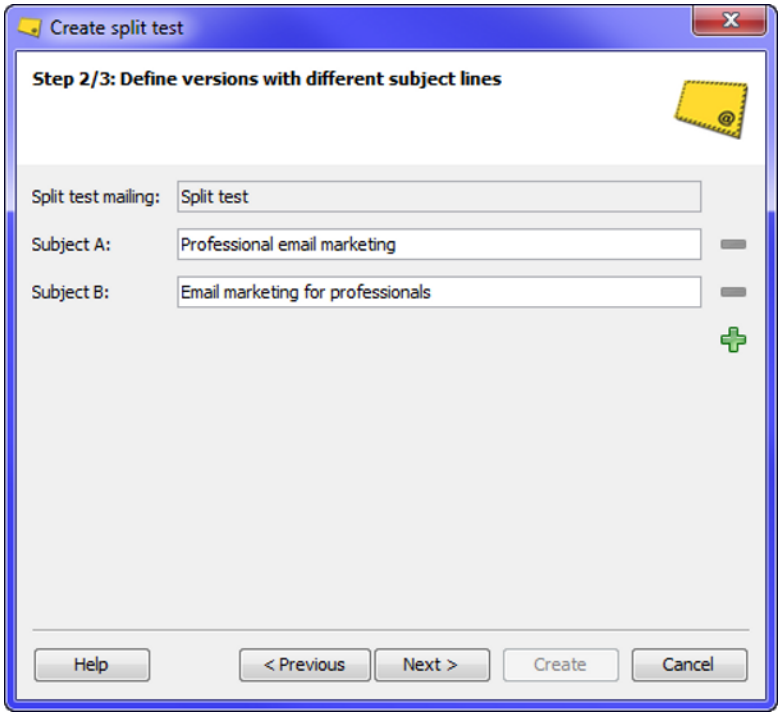


Figure 161: "Create split test" dialog box

Field	Description
Split test mailing	The name of the split test mailing for which a split test is being created is displayed here. The created split test mailing becomes mailing version A and acts as the basis for each additional version.
Subject A	Here you enter various subject lines.
Subject B	The name of the selected split test mailing is preset for all subject line versions.

4. Specify your settings in the fields.
5. Click the *Add version* button to add up to five additional versions.

Split test	Number of versions
with no dispatch to remainder	The *Add version* button allows you to add up to five additional versions. You can use the *Remove version* button to remove versions. **Note** The default number of versions is two. Fewer than two versions is not allowed.
with dispatch to remainder	The *Add version* button allows you to add up to 52 additional versions. You can use the *Remove version* button to remove versions. **Note** The default number of versions is two. Fewer than two versions is not allowed.

6. Click *Next*.

   Step 3/3 of the *Create split test* wizard is displayed.

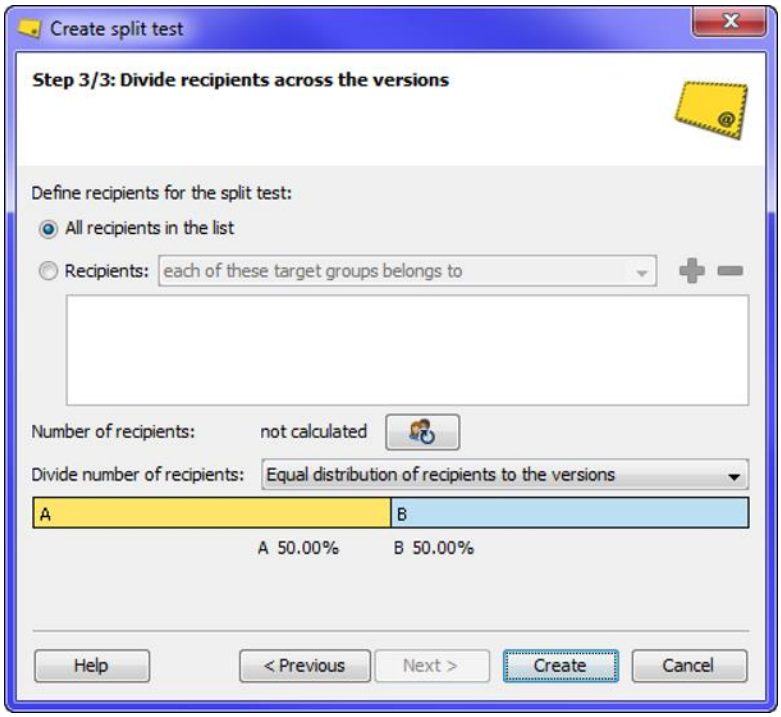


Figure 162: "Create split test" dialog box

Field	Description	
Define recipients for the split test	Here you select which recipients are to receive a split test mailing.	
	All recipients in the list	The split test is sent to all recipients in your mailing list.

	Recipients who	Select a condition from the drop-down list if the split test is to be sent only to a particular target group.
Number of recipients	Click the *Recalculate number of recipients* button to view the current number of recipients.	
Divide number of recipients	Select a recipient distribution from the drop-down list. **Recipient allocation** The percentage allocation of the recipients to the individual mailing versions is based on the current recipient set, that is, the individual recipient set per version can also change after the start of the split test if, for example, new recipients are added.	
	Equal distribution of recipients to the versions	Use version A to define equal distribution of recipients to the versions.
	User-defined distribution of recipients to the versions	Use the input fields to allocate a percentage of the recipient set to each version.

7. Specify your settings in the fields.
8. If you would like to send the split test to a particular group of recipients, select the *Recipients who* option button under *Define recipients for the split test*.
   a. Select an entry from the drop-down list.
   b. Then click the *Add target group* button.

The *Add target group* dialog box is displayed.

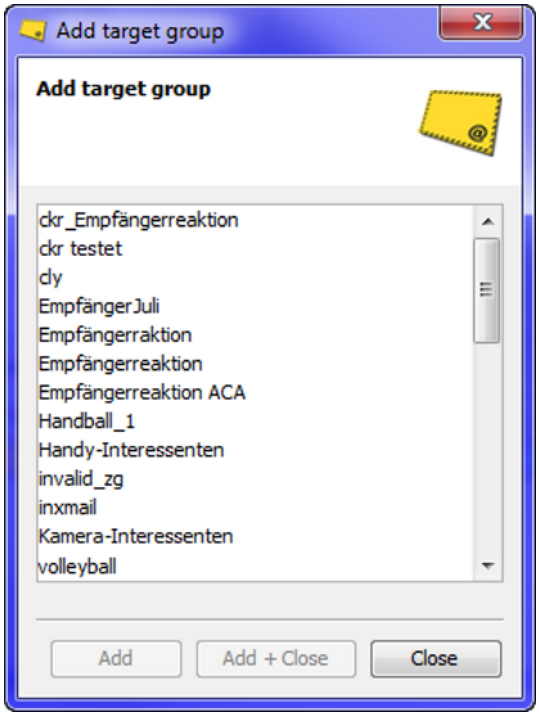


Figure 163: "Add target group" dialog box

c. Select a target group.

   All target groups that were created globally and in the active mailing list are displayed.

d. Click the *Add + Close* button.

   You return to Step 3/3 of the *Create split test* wizard.

9. Click *Finish*.

   The *Start dispatch* dialog box is displayed.

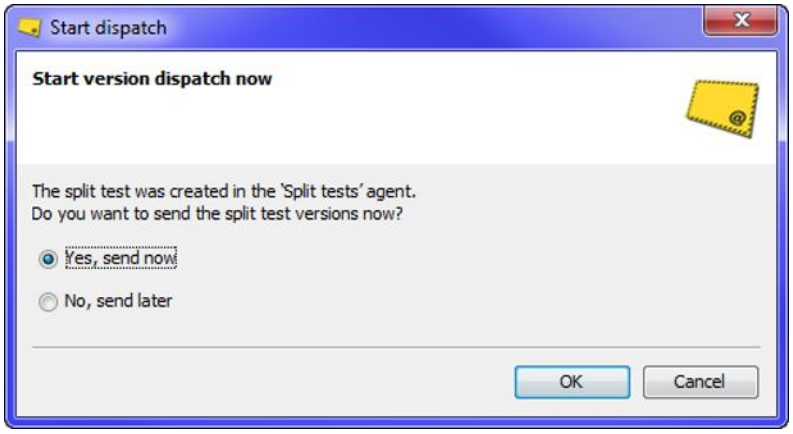


Figure 164: "Start dispatch" dialog box

10. If you would like to send the split test versions directly, click *OK* to confirm.

The split test versions are automatically sent to all specified recipients, and the split test is stored in the *Split tests* agent.

11. If you would like to send the split test versions at a later point in time, enable the No, send later option button.

    The split test is created in the *Split tests* agent where you can make further settings.

✓ All split test versions that are sent are listed on the *Split test mailings* tab in the mailing list.

Related Topics

» *Creating a split test mailing* page 275

» *Mailings (approval)* page 253

» *Creating target groups* page 160

21.4.2 Performing a split test with dispatch to remainder

You can use the *Split tests* agent to perform a version dispatch with or without a dispatch to the remainder.

This section demonstrates how to create a subject line test **with** dispatch to the remainder. The other three types of split test (sender address test, multi-variable test and sending time test) are carried out in the same or a similar way.

21.4.2.1 Versions workflow step

Step-by-step

To perform a subject line test with dispatch to the remainder, you need to make the following settings in the *Versions* workflow step:

1. In the table in the *Split tests* agent, double-click a split test object to open it.

   The split test object is opened in a new tab in the *Versions* workflow step.

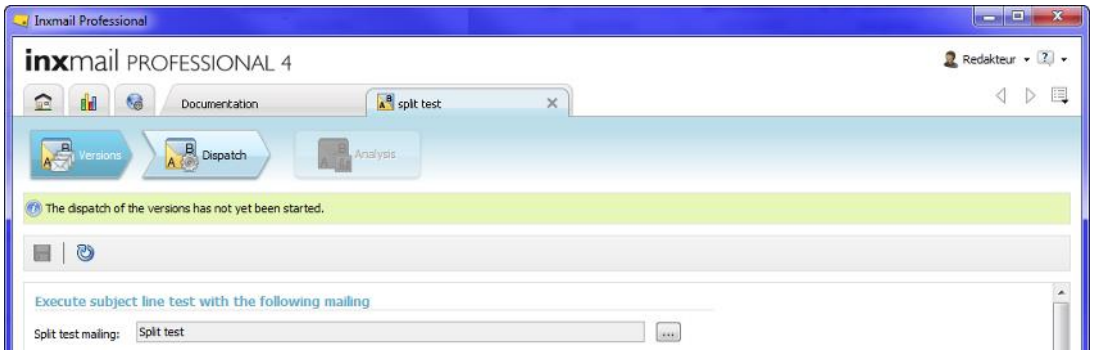


Figure 165: Split test object opened in the 'Versions' workflow step

> **Note** If you select the *Create split test with advanced options* option button in the *Create split test* wizard, the split test object is automatically opened in the *Versions* workflow step.

Section	Description	
Split test mailing	Click the button to select a split test mailing. All split test mailings that have been created and approved ('Approved' status) are displayed. The selected split test mailing becomes mailing version A and serves as the basis for each additional version.	
Subject A	Here you enter various subject lines. The name of the selected split test mailing is preset for all subject line versions.	
Subject B		
Strategy	Select a strategy from the drop-down list.	
	Execute version dispatch with dispatch to remainder	Select this entry if you would like to perform a split test with dispatch to the remainder.
	Execute version dispatch with no dispatch to remainder	Select this entry if you would like to perform a split test with no dispatch to the remainder.
Recipient distribution	Select a recipient distribution from the drop-down list. **Recipient allocation** The percentage allocation of the recipients to the individual mailing versions is based on the current recipient set, that is, the individual recipient set per version can also change after the start of the split test if, for example, new recipients are added.	
	Equal distribution of recipients to the versions	Use version A to define equal distribution of recipients to the versions.
	User-defined distribution of recipients to the versions	Use the input fields to allocate a percentage of the recipient set to each version.
Determine most successful version for dispatch to remainder	Select how the most successful mailing is to be determined for dispatch to the remainder.	
	Determine most successful version manually and start dispatch to remainder	You yourself determine the winning mailing and start the dispatch to the remainder at a particular time.

	Automatically determine and send the most successful version	*Determination and dispatch on* Click the calendar icon to select a date for the automatic determination and dispatch of the winning mailing. Use the two spin boxes to set a time. *Key performance indicator* Specify which key figure should be used to determine the most successful mailing version. *Link* The drop-down list is enabled if you selected 'Click rate for particular link' as the key performance indicator. Select the inserted link that exists in all mailing versions in the split test. The alias (Name in the report) of the inserted link is output. The 'Link' drop-down list displays all personalised tracking links.

2. Specify your settings in the fields.

Split test	Number of versions
with no dispatch to remainder	The *Add version* button allows you to add up to five additional versions. You can use the *Remove version* button to remove versions. **Note** The default number of versions is two. Fewer than two versions is not allowed.
with dispatch to remainder	The *Add version* button allows you to add up to 52 additional versions. You can use the *Remove version* button to remove versions. **Note** The default number of versions is two. Fewer than two versions is not allowed.

Note The *Determine most successful version for dispatch to remainder* section is only enabled if you have selected to perform a version dispatch **with** dispatch to the remainder in the *Versions* workflow step.

3. Save your settings.
4. Click *Dispatch* in the workflow bar to switch to the *Dispatch* workflow step.

Related Topics

» *Creating a split test mailing* page 275
» *Creating a split test object* page 281
» *Mailings (approval)* page 253
» *Creating a new target group* page 161

21.4.2.2 Dispatch workflow step

Step-by-step

To perform a subject line test with dispatch to the remainder, you need to make the following settings in the *Dispatch* workflow step:

1. Click *Dispatch* in the workflow bar of a split test object to open the *Dispatch* workflow step.

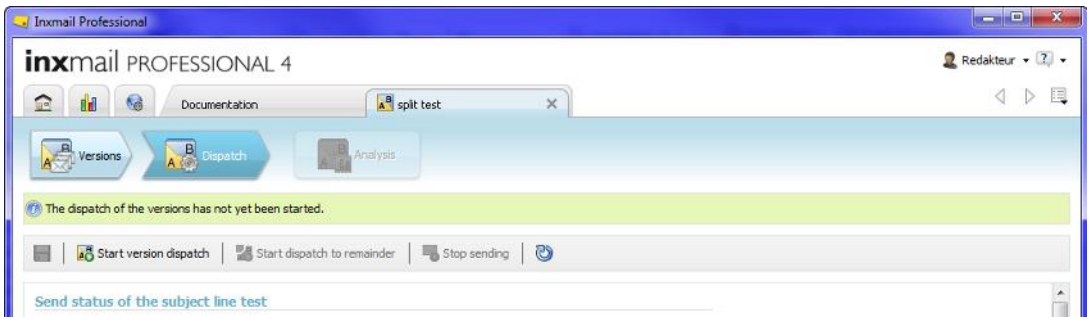


Figure 166: 'Dispatch' workflow step

2. Under *Send status of the subject line test*, you will see an overview of your mailing versions with the name of the split test mailing as the basis mailing, the split test versions, the send status and the selected recipient distribution.

Field	Description	
Recipients for the split test	Here you select which recipients are to receive a split test mailing.	
	All recipients in the list	The split test is sent to all recipients in your mailing list.
	Recipients who	Select a condition from the drop-down list if the split test is to be sent only to a particular target group.
	Number of recipients	Click the *Recalculate number of recipients* button to view the current number of recipients.

Send notifications about status changes	Here you can enable one or more check boxes if you want to receive notification emails about possible status changes. Click the button to specify the email address to which the notifications are to be sent. Enable the *Use this/these email address(es) as the default for the next split test* check box if you would like the notification emails to be sent to this/these email address(es) in future.

3. Specify your settings in the fields.
4. If you want to restrict your recipients to a target group, select the second option button *Recipients who* under *Recipients for the split test*.
   a. Select a condition in the drop-down list.
   b. Then click the *Add target group* button.
      The *Add target group* dialog box is displayed.

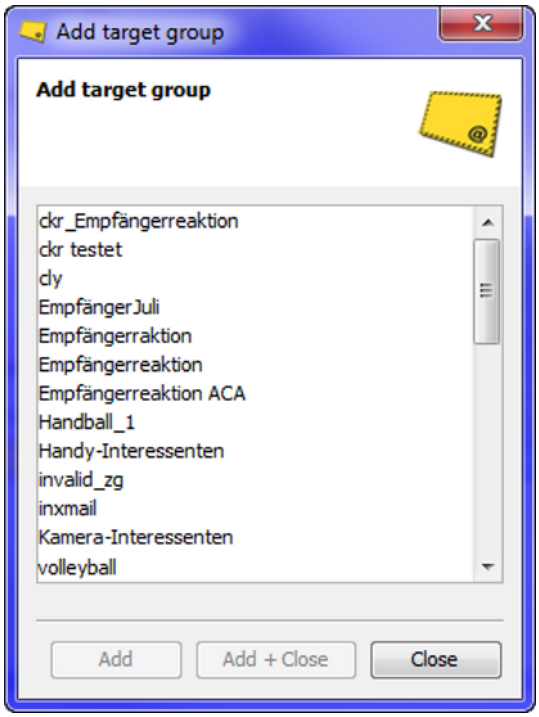


Figure 167: "Add target group" dialog box

   c. Select a target group.
      All target groups that were created globally and in the active mailing list are displayed.
   d. Confirm your selection by clicking *Add + Close*.
      You return to the *Dispatch* workflow step.
5. Save your settings.
6. Click the *Start version dispatch* button in the toolbar.

The *Start version dispatch* dialog box is displayed.

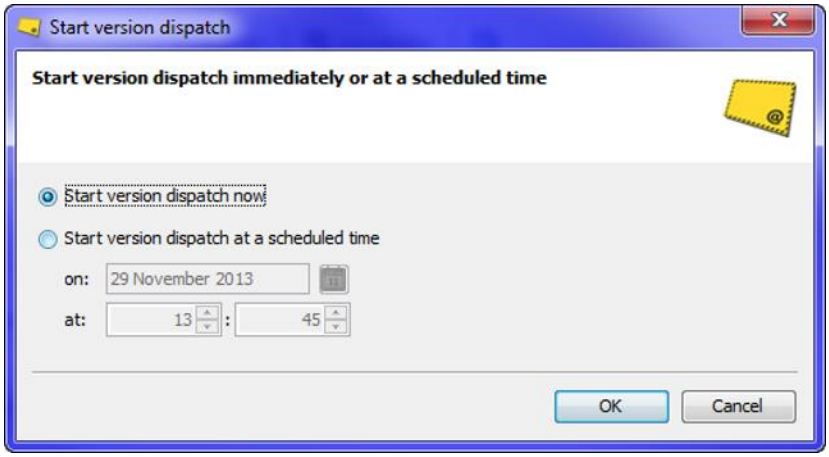


Figure 168: "Start version dispatch" dialog box

You can start the version dispatch immediately or at a scheduled time.

7. Enable the *Start version dispatch at a scheduled time* option button if you would like to send the split test automatically at a particular time.

> **Note** The *Start version dispatch at a scheduled time* option button is not available if you are performing a sending time test, since a time has already been scheduled for the individual mailing versions. In this case, select the *Start version dispatch now* option button.

8. Confirm the dialog box by clicking *OK*.

✓ The split test is sent either directly or at a later time.

Additional information

Please note that once the mailing versions have been sent, they can no longer be edited and can only be opened read only.

Related Topics

» *Overview: Link tracking* page 207

» *Scheduling, stopping or resuming dispatch* page 298

21.4.3 Scheduling, stopping or resuming dispatch

21.4.3.1 Scheduling version dispatch

Step-by-step

To schedule the dispatch of the mailing versions to start at a particular time, proceed as follows:

1. Click the *Start version dispatch* button in the *Dispatch* workflow step.

The *Start version dispatch* dialog box is displayed.

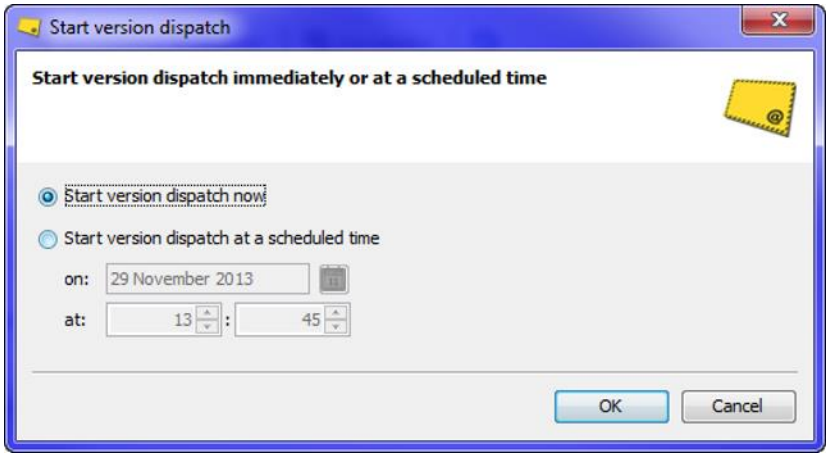


Figure 169: "Start version dispatch" dialog box

2. Enable the *Start version dispatch at a scheduled time* option button.

> **Note** This option button is not available if you are performing a sending time test, since a time has already been scheduled for the individual mailing versions. In this case, select the *Start version dispatch now* option button and click *OK* to confirm.

3. Use the calendar icon to select a dispatch date and additionally enter a time when the versions are to be sent.
4. Confirm the dialog box by clicking *OK*.

✓ You have scheduled a date for the version dispatch.

Additional information

If a scheduled version dispatch cannot take place, a second attempt will be made at a later time. If the dispatch remains unsuccessful and a dispatch to the remainder is pending, the recipients of the mailing version that could not be sent will be allotted to the set of remaining recipients.

If a version dispatch with no dispatch to the remainder is being performed, the dispatch is complete even if one or more mailing versions could not be sent.

21.4.3.2 Scheduling dispatch to the remainder and determining the winning version manually

In the *Dispatch* workflow step, you can determine the most successful version manually and then have the dispatch to the remainder sent immediately or at a scheduled time.

Step-by-step

To determine the most successful mailing version and then schedule a particular date for the dispatch to the remainder, proceed as follows:

1. Click the *Start dispatch to remainder* button in the *Dispatch* workflow step of a split test object.

The *Start dispatch to remainder* dialog box is displayed.

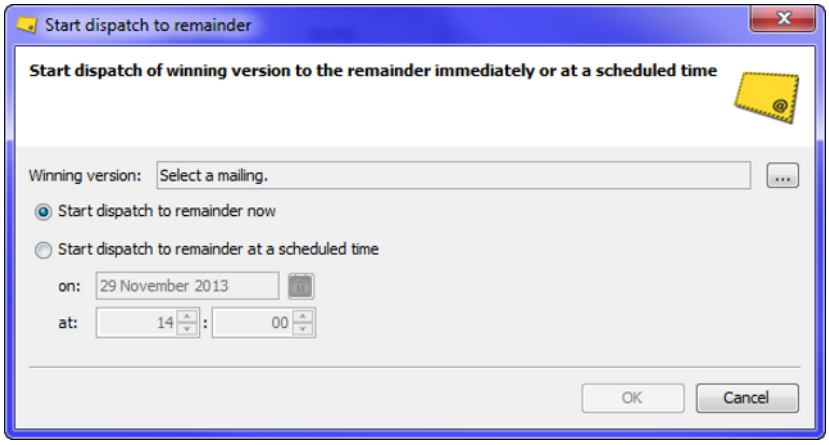


Figure 170: "Start dispatch to remainder" dialog box

Field	Description
Winning version	Here you select the split test mailing that is to be sent as the winning version to your remaining set of recipients. To do this, click the ... *Select split test mailing* button. **Note** The winning version must always be respecified/specified if you have stopped a dispatch to the remainder or have selected the *Determine most successful version manually and start dispatch to remainder* option in the *Dispatch* workflow step.
Start dispatch to remainder now	Enable this option button if you would like to send the winning mailing directly.
Start dispatch to remainder at a scheduled time	Enable this option button if you would like to send the winning mailing at a particular time. Click *Select date* to select a send date. You can specify a precise time using the spin boxes.

2. Specify your settings in the fields.
3. Confirm the dialog box by clicking *OK*.

✓ The dispatch to the remainder is sent immediately or will be sent at a scheduled time.

21.4.3.3 Stopping dispatch

You can stop the dispatch of the mailing versions and the winning mailing. The following options are available:

Button	Mailings agent	Split tests agent
Stop split test	The *Stop split test* button in the toolbar of the *Split test mailings* tab allows you to stop the version dispatch and resume it later. **Note** The *Stop split test* button is only enabled as long as the dispatch is not yet complete.	The *Stop split test* button is not available in the toolbar of the *Split tests* agent.
Stop sending	The *Stop sending* button is not available in the toolbar of the *Mailings* agent.	The *Stop sending* button in the toolbar of the *Split tests* agent allows you to stop the version dispatch or dispatch to the remainder, and resume it later. You can also use the *Stop sending* button in the *Dispatch* workflow step to stop the version dispatch or dispatch to the remainder, and resume it later.

21.4.3.3.1 Stopping version dispatch

This section demonstrates how to stop a version dispatch in the *Dispatch* workflow step of the *Split tests* agent.

Step-by-step

To stop a version dispatch in the *Dispatch* workflow step of the *Split tests* agent, proceed as follows:

1. Click the *Stop sending* button in the *Dispatch* workflow step of a split test object.

   Note The *Stop sending* button is only enabled as long as the version dispatch is not yet complete.

   The *Stop version dispatch* dialog box is displayed.

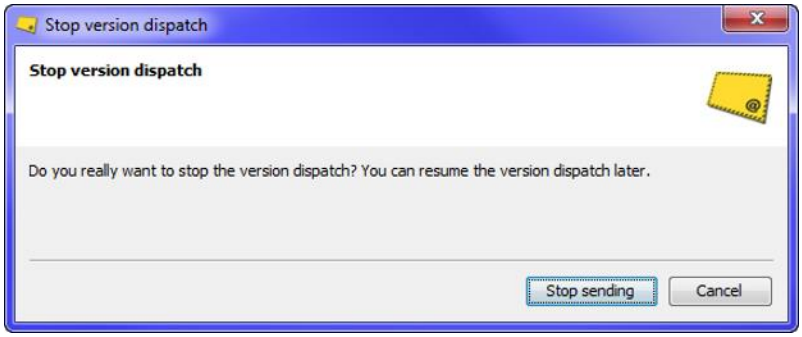


Figure 171: "Stop version dispatch" dialog box

2. Click *Stop sending* if you want to stop the scheduled version dispatch.

✓ The version dispatch is stopped.

21.4.3.3.2 Stopping dispatch to remainder

When all mailing versions have been sent, you can stop a current or scheduled dispatch to the remainder if need be.

Step-by-step

To stop a current/scheduled dispatch to the remainder, proceed as follows:

1. Click the *Stop sending* button in the *Dispatch* workflow step of the *Split tests* agent.

   Note The *Stop sending* button is only enabled as long as the dispatch to the remainder is not yet complete.

   The *Stop dispatch to remainder* dialog box is displayed.

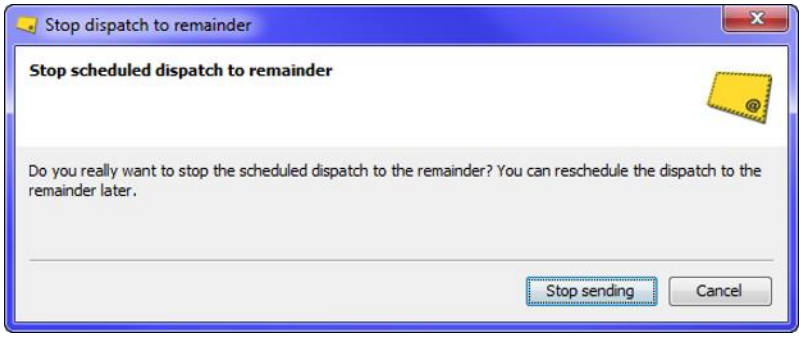


Figure 172: "Stop dispatch to remainder" dialog box

2. Click the *Stop sending* button if you want to stop the current or scheduled dispatch to the remainder.

✓ The dispatch to the remainder is stopped.

21.4.3.4 Resuming dispatch

21.4.3.4.1 Resuming version dispatch

Step-by-step

To resume a version dispatch, proceed as follows:

1. Click the *Start version dispatch* button in the *Dispatch* workflow step of the *Split tests* agent.

   The *Resume version dispatch* dialog box is displayed.

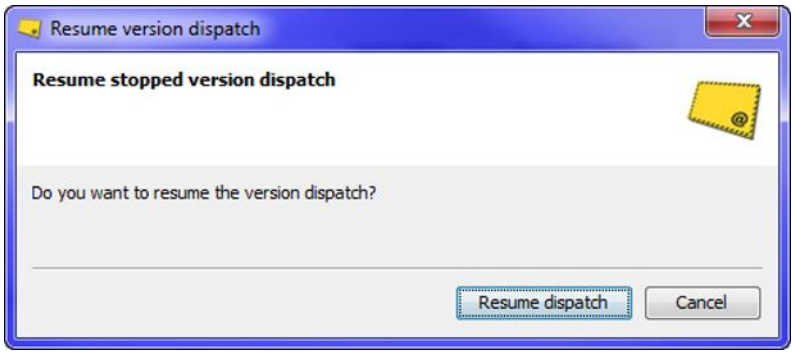


Figure 173: "Resume version dispatch" dialog box

2. Click the *Resume dispatch* button.

✓ The dispatch of the mailing versions is resumed.

21.4.3.4.2 Resuming dispatch to remainder

You can resume a stopped dispatch to the remainder in the *Dispatch* workflow step of a split test object.

Step-by-step

To resume a dispatch to the remainder, proceed as follows:

1. Click the *Start dispatch to remainder* button in the *Dispatch* workflow step of a split test object.

   The *Start dispatch to remainder* dialog box is displayed.

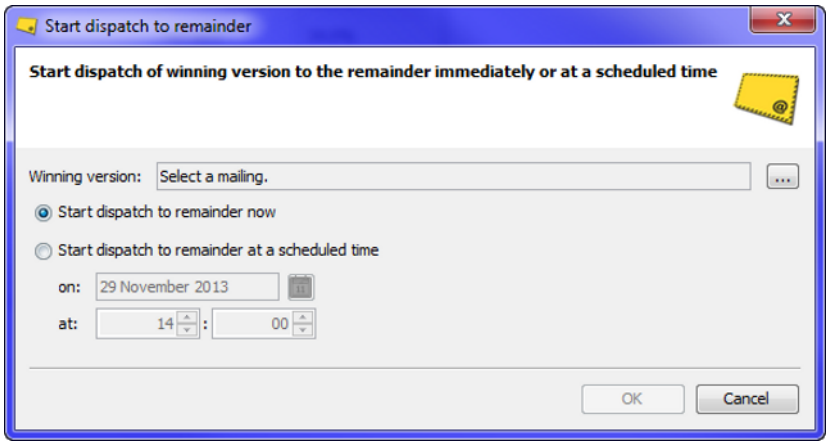


Figure 174: "Start dispatch to remainder" dialog box

Field	Description
Winning version	Here you select the split test mailing that is to be sent as the winning version to your remaining set of recipients. To do this, click the ... *Select split test mailing* button. **Note** The winning version must always be respecified/specified if you have stopped a dispatch to the remainder or have selected the *Determine most successful version manually and start dispatch to remainder* option in the *Dispatch* workflow step.
Start dispatch to remainder now	Enable this option button if you would like to send the winning mailing directly.
Start dispatch to remainder at a scheduled time	Enable this option button if you would like to send the winning mailing at a particular time. Click *Select date* to select a send date. You can specify a precise time using the spin boxes.

2. Specify your settings in the fields.
3. Confirm the dialog box by clicking *OK*.

✓ The dispatch to the remainder is sent immediately or will be sent at a scheduled time.

21.5 Analysing split test mailings

21.5.1 General

Split test mailings can be analysed at the following places after dispatch:

- A brief overview of the key performance indicators can be found in the Details section for the individual split test mailings (*Split test mailings* tab).
- An analysis overview for the sent split test versions and the dispatch to the remainder can be viewed in the *Analysis* workflow step of the *Mailings* agent > *Split test mailings* and of the *Split tests* agent > Split test object.
- Detailed analysis information for split test mailings can be found under *Reports* tab > *Mailing reports* > *Reports on split test mailings*.
- The analysis for a split test can also be opened using the *Display selected reports* button in the toolbar of a mailing list or in the *Split tests* agent.

Related Topics

» *Reports on split test mailings* page 346

» *Mailing (dispatch analysis)* page 271

21.5.2 Analysis workflow step

The *Analysis* workflow step within a split test mailing or split test object is only enabled when the split test has the *Current version dispatch* status.

Mailings agent

In the *Mailings* agent > *Split test mailings*, a visual link analysis is generated in the *Analysis* workflow step.

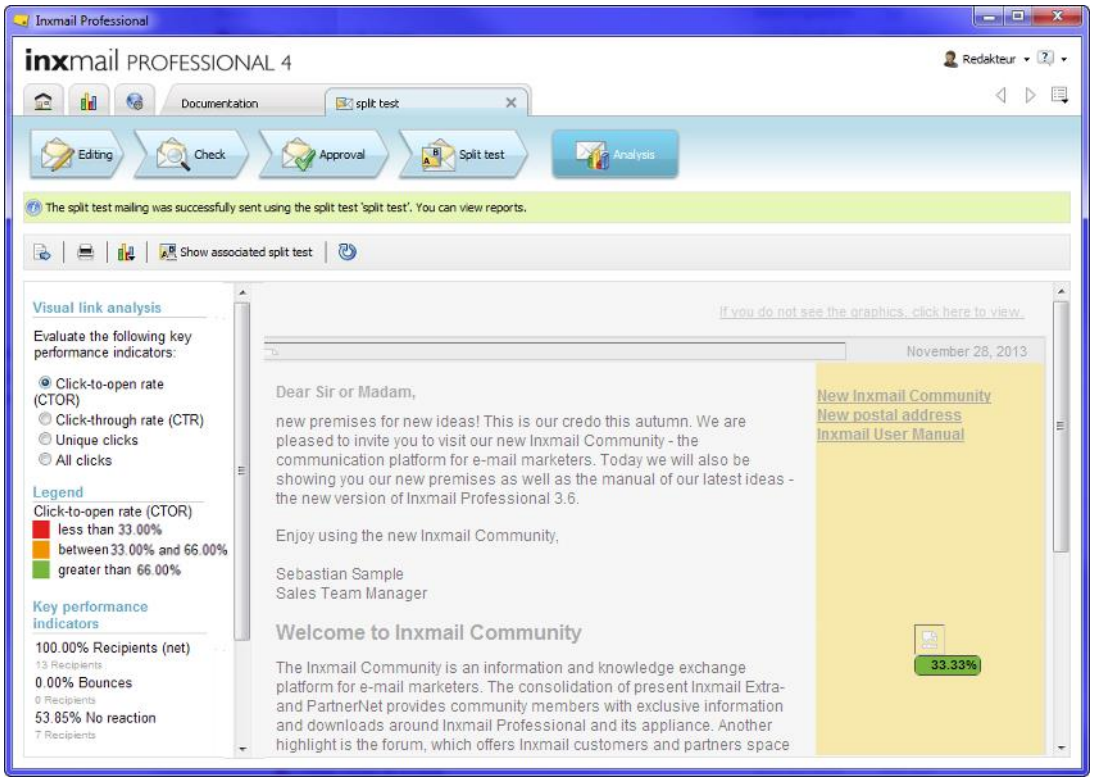


Figure 175: "Analysis" workflow step

This report graphically displays the links that recipients clicked (how often). The analysis is generated for the recipient currently selected in the *Check* workflow step using the *Contents* button. In the area on the left, you can configure the key performance indicators for which the visual link evaluation should be generated.

Key figure for report	Description
Click-to-open-rate (CTOR) (%)	Unique clicks/number of times opened
Click-through-rate (CTR) (%) related to graphic call-ups	Unique graphic call-ups/number of net recipients
Unique clicks	Number of recipients who clicked the tracked link at least once
All clicks	Number of all clicks of the tracked link, including multiple clicks
Recipients (net)	Number of recipients who actually received the mailing (without delivery errors such as hard bounces)
Bounces	Number of hard and soft bounces for a mailing dispatch

Key figure for report	Description
Openings (%)	Number of opening recipients/number of net recipients
Unsubscriptions (%)	Number of unsubscribe clicks/number of net recipients

The legend will be generated in real time to match the performance indicators you select. During this process, Inxmail Professional determines the classification into links marked green, orange and red based on the click values of the current mailing (for example, how often a single link in this mailing was most frequently clicked; how often the links in this mailing were clicked on average). This allows you to recognise which links in your mailing were clicked frequently and which links infrequently.

Split tests agent

In the *Split tests* agent, a report is generated in the *Analysis* workflow step of a selected mailing. This report uses key performance indicators to show how well the individual mailing versions were received.

The report header contains the basic data of the split test (list name, name of the split test, split test type, etc.); all mailing versions and, if applicable, the winning version are displayed under *Associated mailings*.

All important key figures for the sent mailing versions and, if applicable, the winning version appear in the *Key performance indicators* table.

22 Trigger mailings

In this chapter, you will learn:

22.1 Overview

Trigger mailings are mailings which are sent automatically by the system. Sending is thereby triggered by way of pre-determined events. There are two different types of events: time events and events that are related to the recipient of the mailing or the recipient’s email account.

22.2 Time events

A time event could be the birthday of a recipient already recorded in the system or time intervals, such as meetings taking place on a weekly basis. Mailings that have been triggered through time events are referred to as timed trigger mailings.

22.3 Recipient-controlled events

Recipient-controlled events are executed by recipients or readers of mailings. For example, clicking a link in the mailing can trigger the sending of a further mailing with additional information.

The email account can also act as a trigger for sending mailings. Therefore, amongst other things, bounces can occur due to the recipient's inbox being full. An overview of all recipient-controlled events can be found under *Defining an event for the action sequence* page 408.

Mailings that are triggered by the events described here are referred to as action mailings.

22.4 Actions and action sequences

Along with the automatic sending of mailings, further actions can be specified in the system which can be carried out automatically one after the other if necessary. These actions may include setting specific values or sending additional mailings. Action sequences arise in this way (*Actions* page 405).

The following diagram illustrates the relationships described.

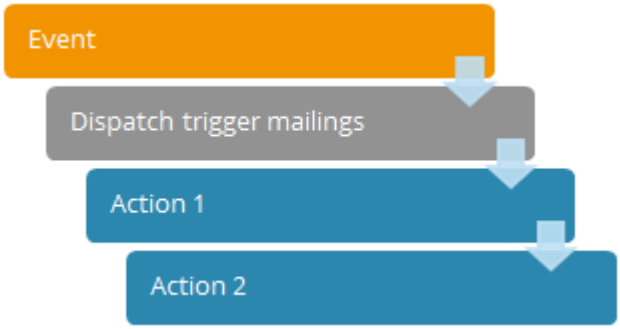


Figure 176: Action sequences

22.5 Display, sort and filter trigger mailings table

Step-by-step

1. On the tab of the mailing list, click the *Mailings* agent > *Trigger mailings* tab.

   The table provides an overview of all the trigger mailings created in this mailing list (timed trigger mailings and action mailings).

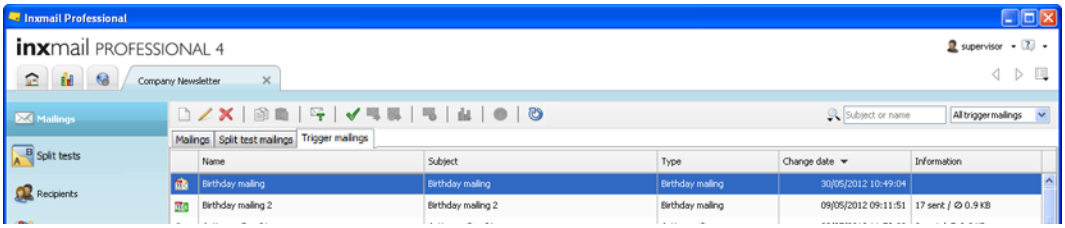


Figure 177: "Mailings" agent: Table of trigger mailings

The symbol in front of the trigger mailing in the table shows which type of trigger mailing it is (timed trigger mailing or action mailing) and the current status of the trigger mailing.

Symbol	Mailing type	Description
11	Timed trigger mailing	Timed trigger mailings are identified by the calendar add-on symbol.
	Action mailing	Action mailings are represented by the green arrow pointing downwards.

Symbol (Time)	Symbol (Action)	Status	Description
		Draft	The trigger mailing is set to 'Draft' status. It can be edited and then tested for quality.
		Approval requested	Approval was requested and a reply is pending. If approval is granted, the trigger mailing is set to 'Approved' status. If approval is rejected, the mailing is reset to 'Draft' status.
		Approved	The trigger mailing has been approved. The dispatch can be activated and/or the trigger mailing can be selected.
		Active	The status of the trigger mailing is set to 'Active'. For timed trigger mailings, this means that their dispatch has been activated. For action mailings, this means that they were assigned to an action sequence and are thus ready for dispatch.
		Inactive	The trigger mailing is set to 'Inactive' status. For timed trigger mailings, this means that their dispatch has been deactivated. For action mailings, this means that they have been deleted from an action sequence and thus they will no longer be sent.

For active or inactive trigger mailings, the *Information* table column shows whether and how often the trigger mailing was sent.

2. To sort the table by columns, double-click the relevant column header, for example, *Name*.
3. You can filter the trigger mailings using the filter input field (*View and filter the mailings table* page 182).

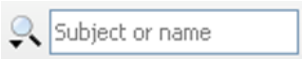


Figure 178: Filter input field

4. In addition, you can filter the trigger mailings using the filter drop-down list.

Figure 179: Filter drop-down list

> **Note** If you set filters both in the filter input field and in the 'Filter' drop-down list, only trigger mailings that fulfil the criteria of both filter settings are displayed.

Select one of the following entries in the drop-down list:

- *All trigger mailings:* Does not filter the trigger mailings.
- *Draft:* Shows all trigger mailings with *Draft* status.
- *Approval requested:* Shows all trigger mailings whose status is set to *Approval requested*.
- *Approved:* Shows all trigger mailings whose status is set to *Approved*.

- *Active:* Shows all trigger mailings whose status is set to *Active*. For timed trigger mailings, this means that their dispatch has been activated. For action mailings, this means that they were assigned to an action sequence and are thus ready for dispatch.
- *Inactive:* Shows all trigger mailings whose status is set to *Inactive*. For timed trigger mailings, this means that their dispatch has been deactivated. For action mailings, this means that they have been deleted from an action sequence and thus they will no longer be sent.
- *Birthday mailing, anniversary mailing, reminder mailing, follow-up mailing, interval mailing:* Displays the respective timed trigger mailing types. All statuses are displayed.
- *Action mailing:* Displays all action mailings. All statuses are displayed.

Status of trigger mailings An overview of the statuses of timed trigger mailings and action mailings can be found in Table – Status of trigger mailings.

✓ The table now displays only the trigger mailings that correspond to your filter settings. The filter settings serve only to improve the clarity of the table and do **not** influence whether trigger mailings are sent or which trigger mailings are sent.

22.6 Details section of the trigger mailings table

When you select a trigger mailing in the table, further information on the trigger mailing is displayed in the 'Details' section under the table (for example, you can see which template was used (if any), the format in which the trigger mailing was created and the trigger mailing ID).

With active or inactive action mailings, you will also see the key performance indicators of the action mailing in the 'Details' section. Furthermore, you will see under *Type* that the mailing is an action mailing.

Display use and sending time of action mailings

The Details section of action mailings allows you to see when an action mailing was sent for the first time and the last time it was sent. You can also see the action sequences to which the action mailing is assigned. Click the icon (Show information) under *Dispatch*. The relevant information will be displayed in the information box.

22.7 Managing trigger mailings

On the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab, the following options are available for editing one or more *trigger mailings* selected in the table:

- The (*Rename trigger mailing*) button allows you to rename a *trigger mailing*.
- The (*Delete trigger mailing*) button allows you to delete the *trigger mailing*.

  Note Activated trigger mailings cannot be deleted.

- The (*Copy*) and (*Paste*) buttons allow you to make copies of the *trigger mailings*.

  Converting trigger mailings You can also copy mailings on the tab of the mailing list > *Mailings* agent > *Mailings* tab and then insert them as copies on the *Trigger mailings* tab (and vice versa) (*Converting standard mailings to trigger mailings* page 335).

The (*Send test emails*) button allows you to send test emails for the mailing.

- The ✔ (*Request approval*) button allows you to start immediate approval or to initiate the approval process (depending on the setting).

By double-clicking a trigger mailing, you can open it in its own tab and edit it.

Related Topics

» *Test emails* page 249
» *Creating, checking and approving a timed trigger mailing* page 325
» *Creating, checking and approving an action mailing* page 332

22.8 Overview of timed trigger mailings and action mailings

22.8.1 Overview of timed trigger mailings

General procedure

With timed trigger mailings, you select the desired time event, for example birthday, in the startup dialog. This determines the type of timed trigger mailing.

In the second dialog box, you make the desired time settings. This affects, for example, the time cycle in which you would like the trigger mailing to be sent. Afterwards you can create and check the trigger mailing in the same way as a standard mailing. You must then activate dispatch (Activating dispatch of timed trigger mailings). Approval is then granted in the same way as for standard mailings.

You can optionally combine the sending of the trigger mailing with one or more value setting actions, thereby setting or changing values in the columns of the recipients table.

The key steps described in the overview are shown in the diagram:

Figure 180: Key steps of trigger mailing

Overview of trigger mailing types

You can see an overview of the types of trigger mailings in the startup dialog. Click the *(Show information)* icon. An information window with an overview of the trigger mailing types is displayed.

Figure 181: Information window trigger mailings

Timed trigger mailings and target groups

With timed trigger mailings, the range and number of recipients is first established using the defined time event. This can, for example, result in a defined number of recipients who have birthdays on a particular day. You can further restrict the potential recipients using the target group in the *Recipients* workflow step. For example, you can send a birthday mailing to all recipients who belong to the 'Priority customers' target group **and** who have their birthday on a particular day.

Step-by-step

» *Mailings (editing)* page 189
» *Mailings (check)* page 228
» *Mailings (approval)* page 253
» *Mailings (recipient)* page 264
» *Mailings (dispatch)* page 266
» *Mailing (dispatch analysis)* page 271

22.8.1.1 Creating a new timed trigger mailing

Below is a description of how to create the five types of timed trigger mailings.

Related Topics

» *Creating a birthday mailing* page 313

» *Creating an anniversary mailing* page 316
» *Creating a reminder mailing* page 318
» *Creating a follow-up mailing* page 320
» *Creating an interval mailing* page 322
» *Creating a new action mailing* page 330

22.8.1.2 Creating a birthday mailing

Step-by-step

1. To create a new birthday mailing, click the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab and then click the (*Create new trigger mailing*) button.
   A dialog box appears.

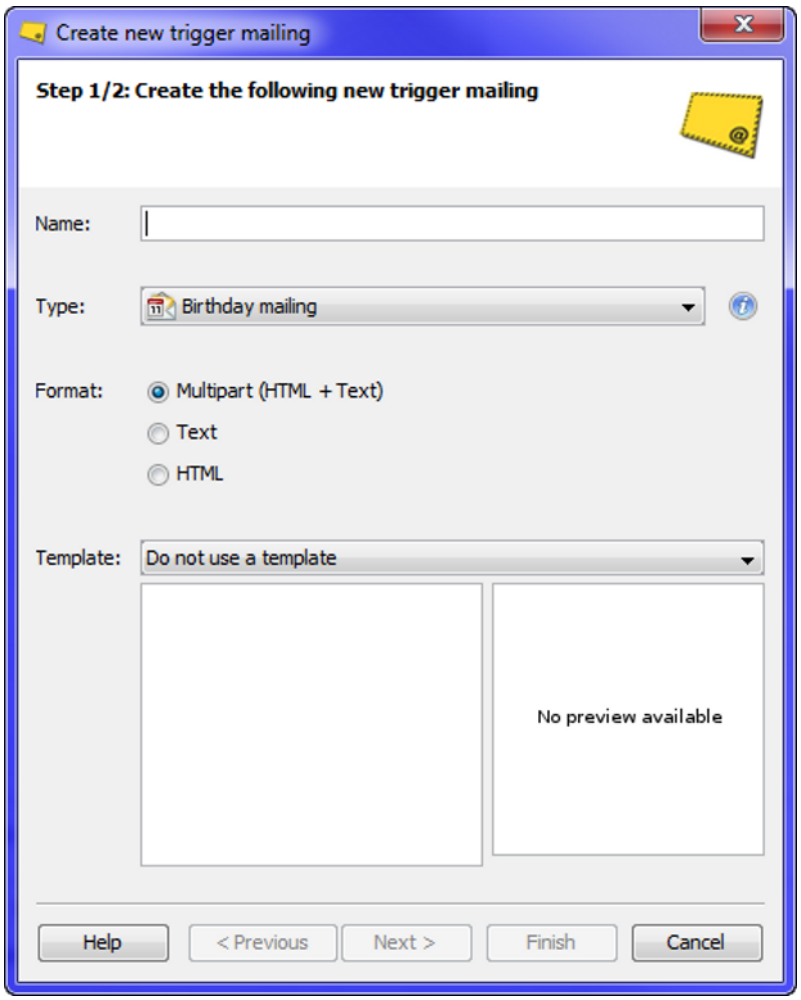


Figure 182: "Create new trigger mailing - Step 1" dialog box

2. Enter a name for the trigger mailing in the dialog box.
3. Select *Birthday mailing* in the *Type* drop-down list.
4. Select a format for the trigger mailing.

Note If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

5. Select whether you wish to use a template to create the trigger mailing.
6. Click *Next*.

   A dialog box appears.

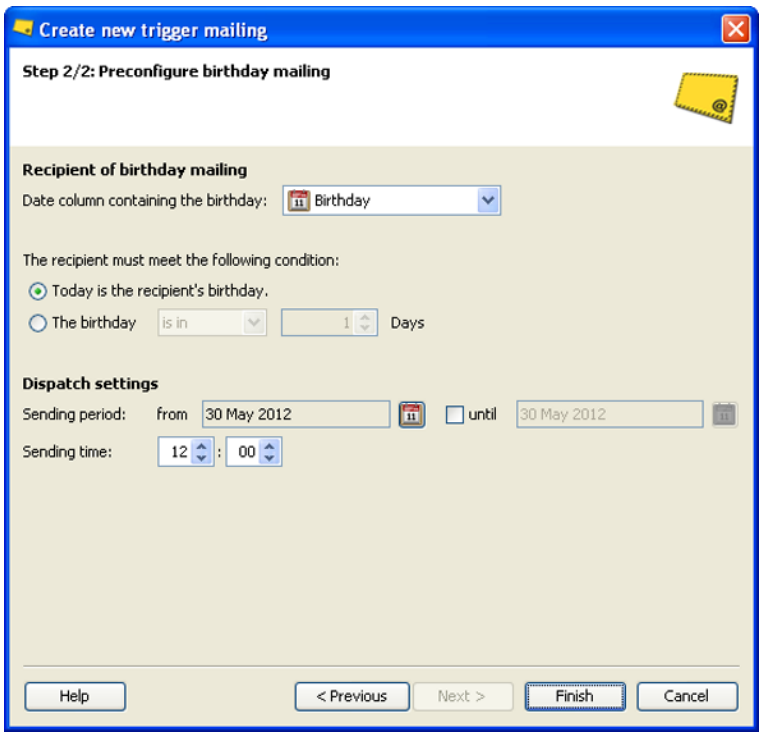


Figure 183: "Create new trigger mailing - Step 2 - Birthday mailing" dialog box

7. Under *Recipient of birthday mailing*, select the date column containing the birthday.
8. Under *The recipient must meet the following condition*, select *Today is the recipient's birthday* if you would like the birthday mailing to be sent on the birthday itself.
9. Select *The birthday is in* or *The birthday was ... ago* if you would like the birthday mailing to be sent before or after the birthday respectively.
10. In the *Days* field, specify how many days before or after the birthday the mailing should be sent.
11. In the *Sending period* field under *Dispatch settings*, specify on which date you would like the birthday mailing to be sent.

    If the send date is 29 February If the send date is set to 29 February and it is not a leap year, the mailing will be sent on 1 March.

12. If the birthday mailing is to be sent over a defined time span, then activate the *to* check box and specify the end date of the time span.
13. In the *Sending time* field, specify the time when you would like the birthday mailing to be sent.

    Note If you would like to change the time settings at a later date, you can do this in the *Dispatch* workflow step.

14. Click the *Finish* button.

15. The trigger mailing is opened for editing in the *Editing* workflow step.

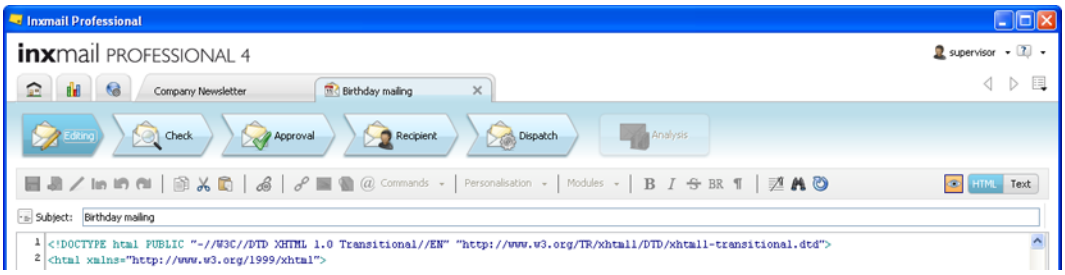


Figure 184: Trigger mailing tab

The trigger mailing is also automatically added to the table on the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab.

✓ You have now created a new birthday mailing.

Related Topics

» *Creating a new mailing* page 184

» *Setting up the properties of mailing lists* page 82

22.8.1.3 Adding age information in a birthday mailing

You can integrate the age of the recipient into the content of the mailing. The system calculates the corresponding age information from the difference between the current year and the year saved in the date of birth column.

Step-by-step

1. Open the birthday mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the age information.
3. Click the *Commands* button and select *Add age on birthday*.
4. The `[%=Age()]` command is added in the mailing text.
5. Save your settings.

✓ You have now inserted age information into a birthday mailing.

Additional information

Entering the age as an ordinal number

If you would like the birthday to be stated as an ordinal number, that is, with ‘th’ (or ‘st’, ‘nd’ or ‘rd’ as the case may be) after the number stating the age, you must enter this after the square brackets.

Entry in the editing area: *Happy [%=Age()]th Birthday!*

Display in mailing: *Happy 40th Birthday!*

22.8.1.4 Creating an anniversary mailing

Step-by-step

1. To create a new anniversary mailing, click the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab and then click the (*Create new mailing*) button.
   A dialog box appears.

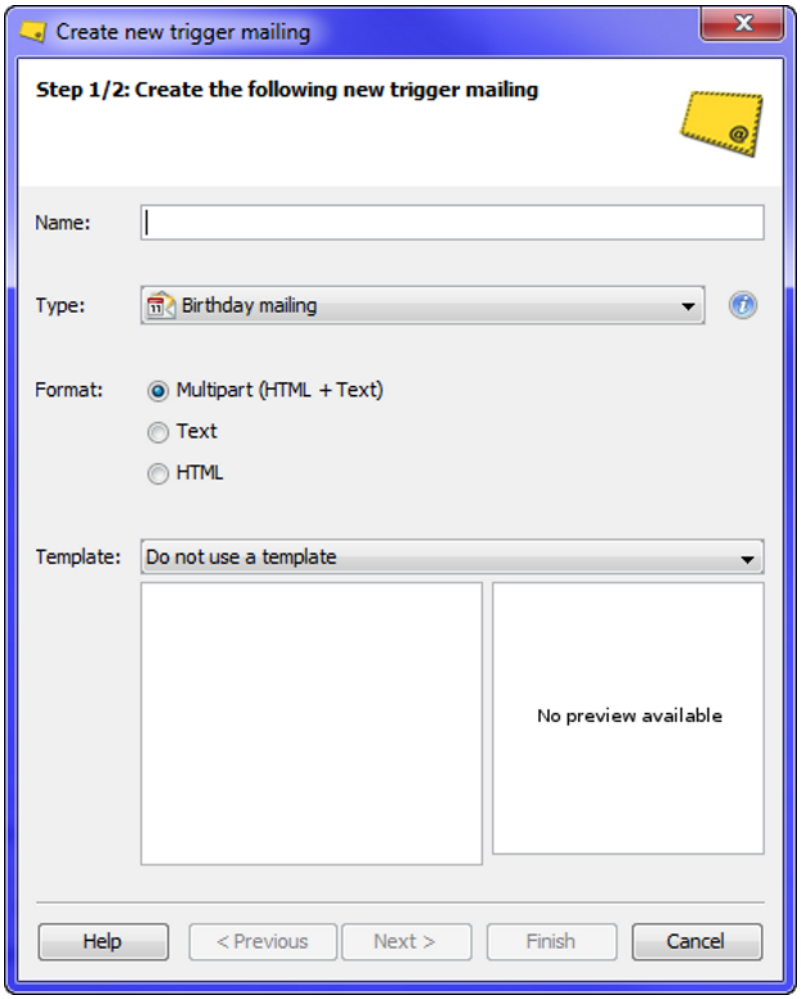


Figure 185: "Create new trigger mailing - Step 1" dialog box

2. Enter the following in the dialog box (*Creating a new mailing* page 184):
   a. Enter a name for the trigger mailing.
   b. Select *Anniversary mailing* in the *Type* drop-down list.
   c. Select a format for the trigger mailing.

      Note If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

   d. Select whether you wish to use a template to create the trigger mailing.
3. Click the *Next* button.

A dialog box appears.

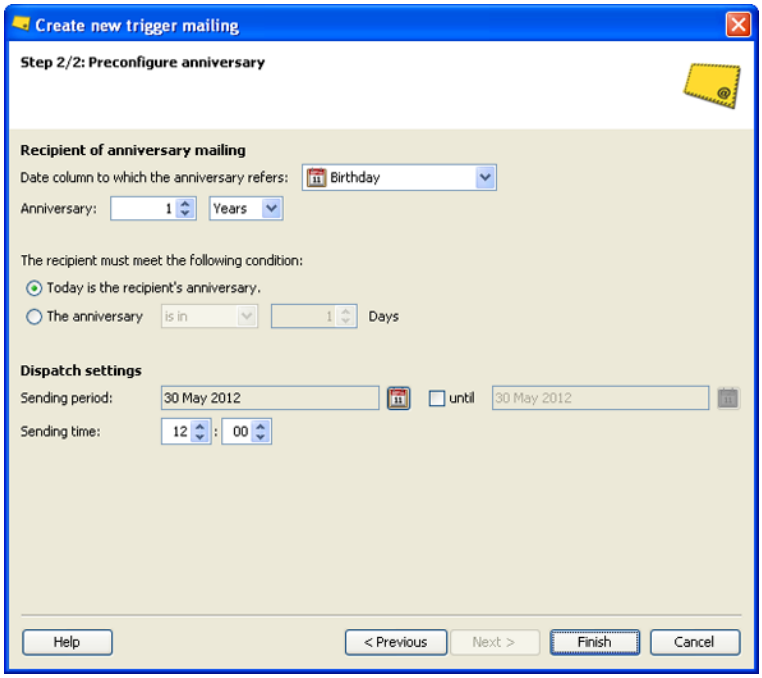


Figure 186: "Create new trigger mailing - Step 2 - Anniversary mailing" dialog box

4. Enter the following in the dialog box:
   a. Make the following entries under *Recipient of anniversary mailing*:
      Select the date column containing the date of the anniversary.

      In the *Anniversary* field, select how often the anniversary recurs.
   b. Make the following entries under *The recipient must meet the following condition*:

      Select *Today is the recipient's anniversary* if you would like the anniversary mailing to be sent on the day of the anniversary itself.

      Select *The anniversary is in [...] days*, if you would like the anniversary mailing to be sent a specific number of days before or after the anniversary.
   c. Make the following entries under *Dispatch settings*:

      In the *Sending period* field, specify on which date you would like the anniversary mailing to be sent.

      If the anniversary mailing is to be sent over a defined time span, then activate the *to* check box and specify the end date of the time span in the *to* field.

      In the *Sending time* field, specify the time when you would like the anniversary mailing to be sent.

      Note If you would like to change the time settings at a later date, you can do this in the *Dispatch* workflow step.
   d. Click the *Finish* button.
      The trigger mailing is opened for editing in the *Editing* workflow step.

✓ You have now created a new anniversary mailing.

22.8.1.5 Creating a reminder mailing

Step-by-step

1. To create a new reminder mailing, click the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab and then click the (*Create new mailing*) button.

   A dialog box appears.

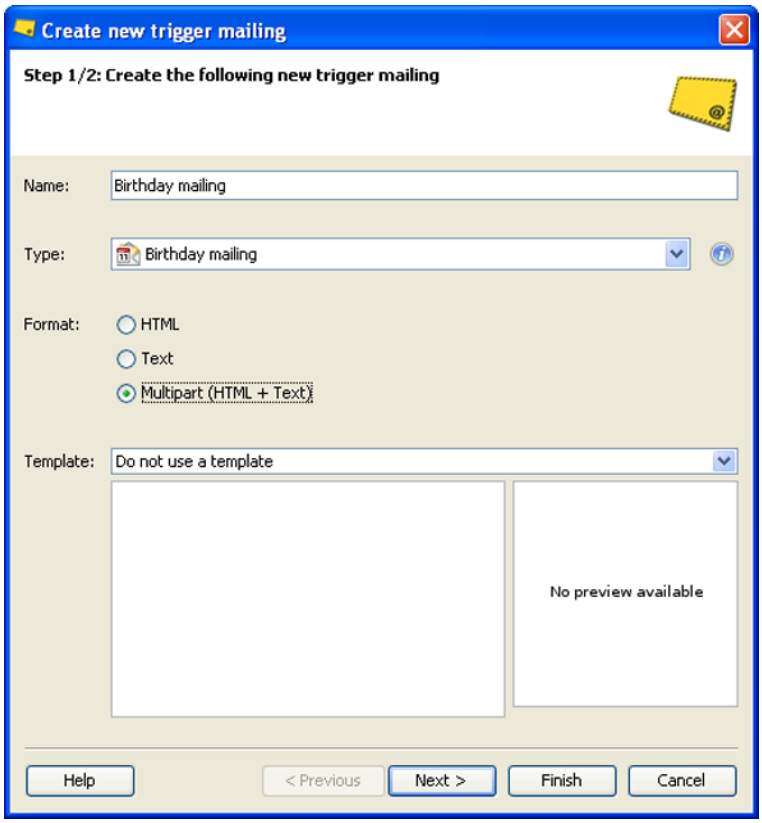


Figure 187: "Create new trigger mailing - Step 1" dialog box

2. Enter a name for the trigger mailing in the dialog box.
3. Select *Reminder mailing* in the *Type* drop-down list.
4. Select a format for the trigger mailing.

   Note If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

5. Select whether you wish to use a template to create the trigger mailing.
6. Click *Next*.

A dialog box appears.

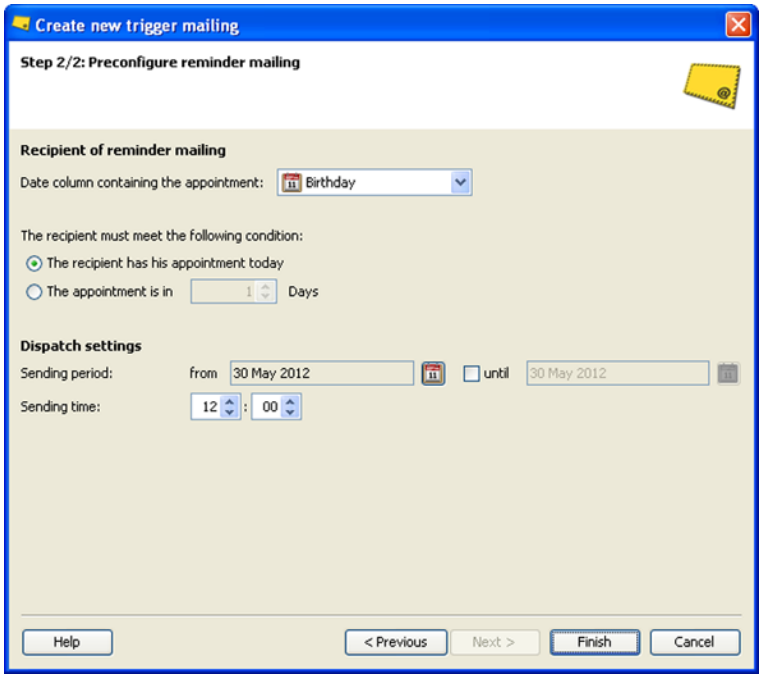


Figure 188: "Create new trigger mailing - Step 2 - Reminder mailing" dialog box

7. Under *Recipient of reminder mailing*, select the date column relating to the reminder.
8. Under *The recipient must meet the following condition*, select *The recipient has his appointment today* if you would like the reminder mailing to be sent on the day of the appointment itself.
9. Select *The appointment is in [...] days* if you would like the reminder mailing to be sent a specific number of days before the appointment.
10. In the *Sending period* field under *Dispatch settings*, specify on which date you would like the reminder mailing to be sent.
11. If the reminder mailing is to be sent over a defined time span, then activate the *to* check box and specify the end date of the time span in the *to* field.

> **Sending period** Specifying a sending period is useful in relation to reminder mailings if, for example, you would like to limit the time span in which the reminder mailing is to be sent for internal company reasons. For example, you may want the reminder mailing to be sent at the start of a new quarter with amended information.

12. In the *Sending time* field, specify the time when you would like the reminder mailing to be sent.

> **Note** If you would like to change the time settings at a later date, you can do this in the *Dispatch* workflow step.

13. Click the *Finish* button.

    The trigger mailing is opened for editing in the *Editing* workflow step.

✓ You have now created a new reminder mailing.

Related Topics

» *Creating a new mailing* page 184

» *Setting up the properties of mailing lists* page 82

22.8.1.6 Creating a follow-up mailing

Step-by-step

1. To create a new follow-up mailing, click the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab and then click the (*Create new mailing*) button.
   A dialog box appears.

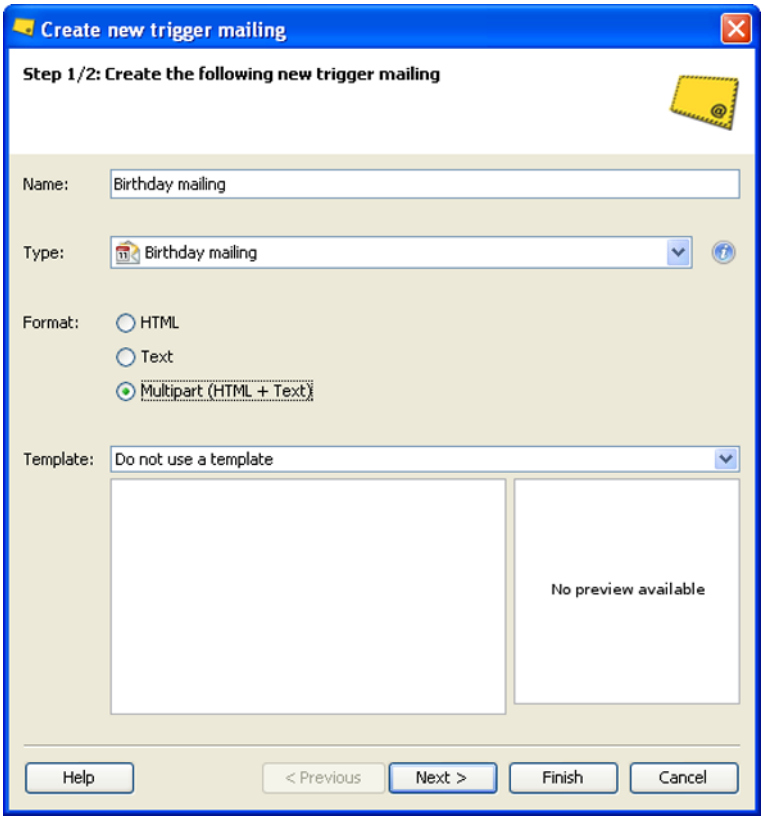


Figure 189: "Create new trigger mailing - Step 1" dialog box

2. Enter a name for the trigger mailing in the dialog box.
3. Select *Follow-up mailing* in the *Type* drop-down list.
4. Select a format for the trigger mailing.

Note If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

5. Select whether you wish to use a template to create the trigger mailing.
6. Click the *Next* button.

A dialog box appears.

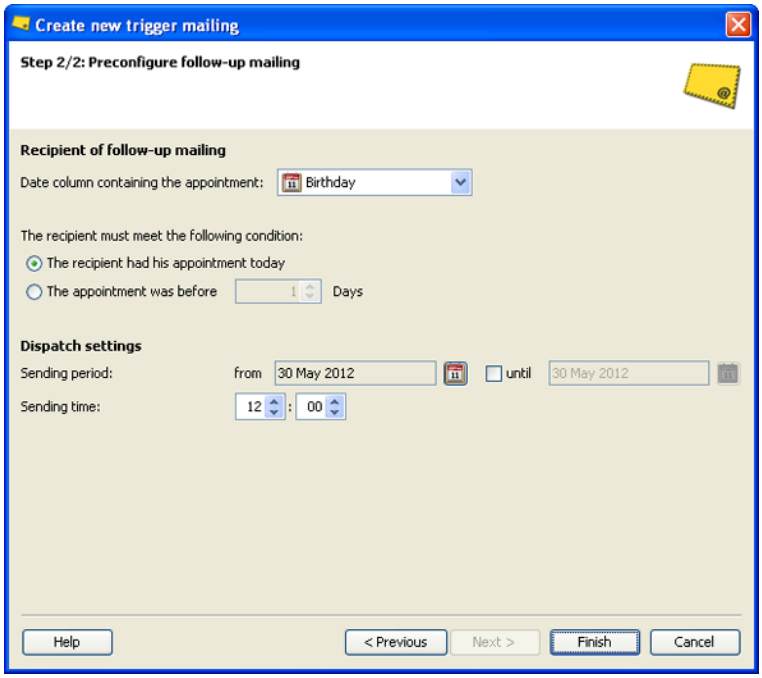


Figure 190: "Create new trigger mailing - Step 2 - Follow-up mailing" dialog box

7. Under *Recipient of follow-up mailing*, select the date column relating to the follow-up appointment.
8. Under *The recipient must meet the following condition*, select *The recipient has his appointment today* if you would like the follow-up mailing to be sent on the day of the appointment itself.
9. Select *The appointment was [...] days ago* if you would like the follow-up mailing to be sent a specific number of days after the appointment.

Example for follow-up appointment

- Initial situation

  You are holding a workshop on the 10th day of a month, and would like to send the workshop documents to the participants two days later.
- Settings

  Date column containing the appointment: The date column in your system in which you are storing the workshop date.

  The appointment was [...] days ago: 2.

  Sending period: 01/04/2012 to 01/04/2020

  Sending time: 10:00
- Result

  A follow-up mailing is sent at 10:00 am on the 12th day of every month from 01/04/2012 until 01/04/2020.

10. In the *Sending period* field under *Dispatch settings*, specify on which date you would like the follow-up mailing to be sent.

11. If the follow-up mailing is to be sent over a defined time span, then activate the *to* check box and specify the end date of the time span in the *to* field.
12. In the *Sending time* field, specify the time when you would like the follow-up mailing to be sent.

Note If you would like to change the time settings at a later date, you can do this in the *Dispatch* workflow step.

13. Click the *Finish* button.

    The trigger mailing is opened for editing in the *Editing* workflow step.

✓ You have now created a new follow-up mailing.

Related Topics

» *Creating a new mailing* page 184

» *Setting up the properties of mailing lists* page 82

22.8.1.7 Creating an interval mailing

The key feature of interval mailings is that they are not triggered by a time event. Instead, the condition for the dispatch of an interval mailing is specified in relation to the target group in the *Recipients* workflow step. In other words, the interval mailing is sent to all members of the target group according to the specified time cycle.

Step-by-step

1. To create a new interval mailing, click the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab and then click the (*Create new mailing*) button.

A dialog box appears.

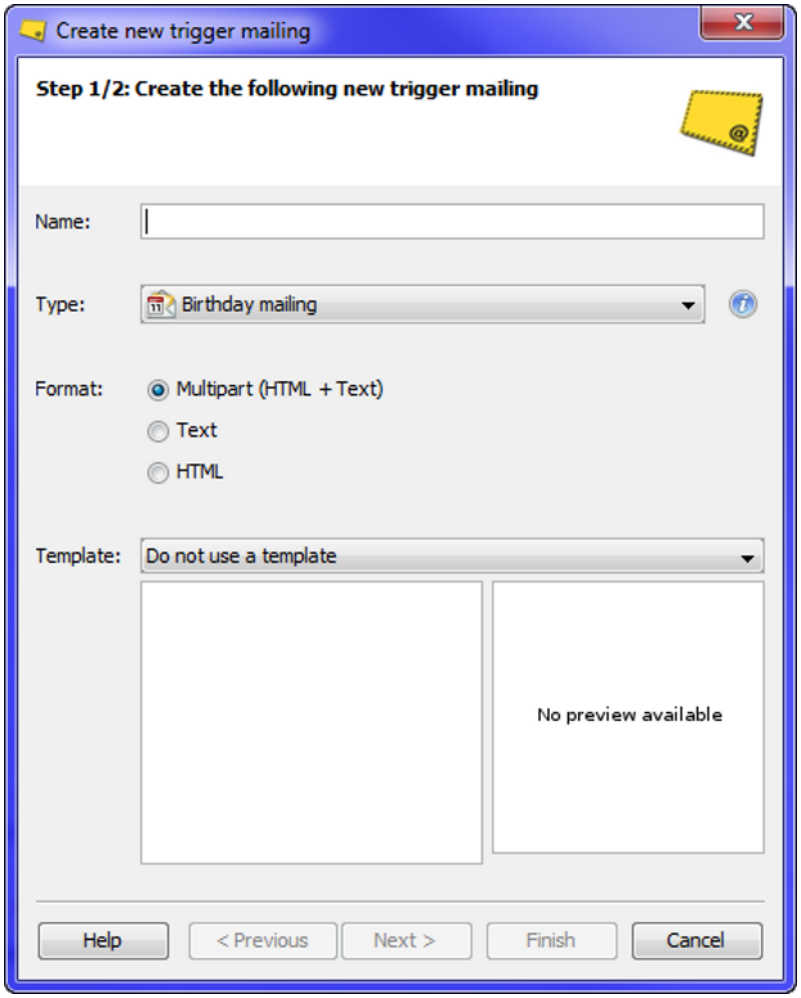


Figure 191: "Create new trigger mailing - Step 1" dialog box

2. Enter the following in the dialog box (*Creating a new mailing* page 184):
   a. Enter a name for the trigger mailing.
   b. Select *Interval mailing* in the *Type* drop-down list.
   c. Select a format for the trigger mailing.

   Note If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

   d. Select whether you wish to use a template to create the trigger mailing.
3. Click *Next*.

A dialog box appears.

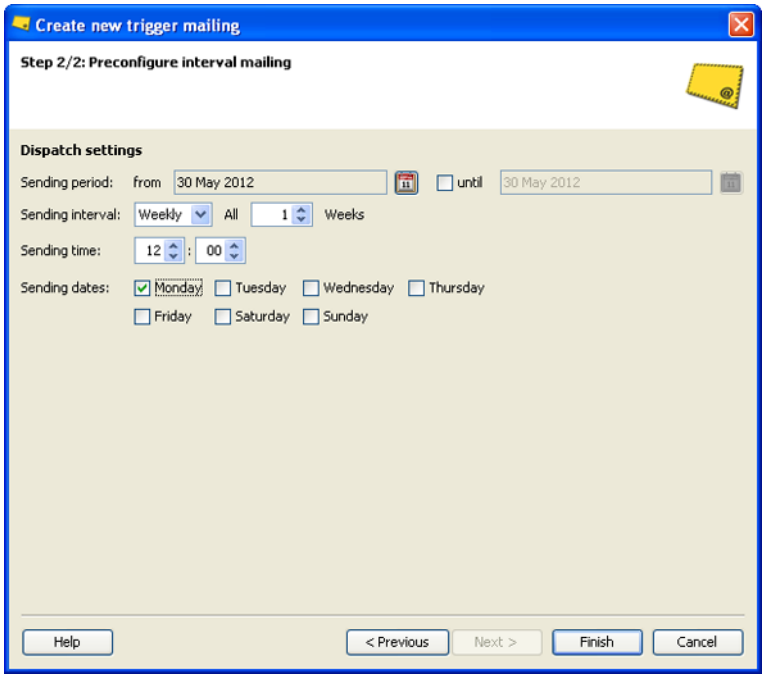


Figure 192: "Create new trigger mailing - Step 2 - Interval mailing" dialog box

4. Enter the following in the dialog box:
   a. In the *Sending period* field, specify on which date you would like the interval mailing to be sent.
      If the interval mailing is to be sent over a defined time span, then activate the *to* check box and specify the end date of the time span.

      Variable dialog box Please note that the information used for dispatch depends on the information entered for the sending interval. The dialog box will show the appropriate fields for the selected sending interval. For example, if you set the sending interval to *Weekly*, the weekdays will be displayed as possible sending dates.

   b. **Sending interval: Monthly**
      Select *Monthly* from the drop-down list.
      In the *Every [...] months* field, specify the monthly cycle for the dispatch of the interval mailing.
      In the *Sending time* field, specify the time when you would like the interval mailing to be sent.
      Under *Sending date*, select on which day of the month you would like the interval mailing to be sent.

Sending interval: Weekly

Select *Weekly* from the drop-down list.

In the *Every [...] weeks* field, specify the weekly cycle for the dispatch of the interval mailing.

In the *Sending time* field, specify the time when you would like the interval mailing to be sent.

Under *Sending dates*, select on which days of the week you would like the interval mailing to be sent.

Sending interval: Daily

Select *Daily* from the drop-down list.

In the *Every [...] days* field, specify how many days after the previous interval mailing you would like the interval mailing to be resent.

In the *Sending time* field, specify the time when you would like the interval mailing to be sent.

Sending interval: Hourly

Select *Hourly* from the drop-down list.
In the *Every [...] hours* field, specify how many hours after the previous interval mailing you would like the interval mailing to be resent.
In the *Start time* field, specify the time when you would like the interval mailing to be sent.

> **Note** If you would like to change the time settings at a later date, you can do this in the *Dispatch* workflow step.

c. Click the *Finish* button.
The trigger mailing is opened for editing in the *Editing* workflow step.

✓ You have now created a new interval mailing.

22.8.1.8 Creating, checking and approving a timed trigger mailing

The procedure for creating, checking and approving timed trigger mailings is the same as the procedure for standard mailings.

Related Topics

Mailings (editing) page 189

Mailings (check) page 228

Mailings (approval) page 253

22.8.1.9 Assigning recipients to trigger mailings

The procedure for assigning recipients to timed trigger mailings is the same as the procedure for standard mailings.

Timed trigger mailings and target groups

With timed trigger mailings, the range and number of recipients is first established using the defined time event. This can, for example, result in a defined number of recipients who have birthdays on a particular day. You can further restrict the potential recipients using the target group in the *Recipients* workflow step. For example, you can send a birthday mailing to all recipients who belong to the 'Priority customers' target group **and** who have their birthday on a particular day.

Related Topics

» *Mailings (recipient)* page 264

22.8.1.10 Activating dispatch of timed trigger mailings

Step-by-step

1. Open the trigger mailing in the *Dispatch* workflow step.

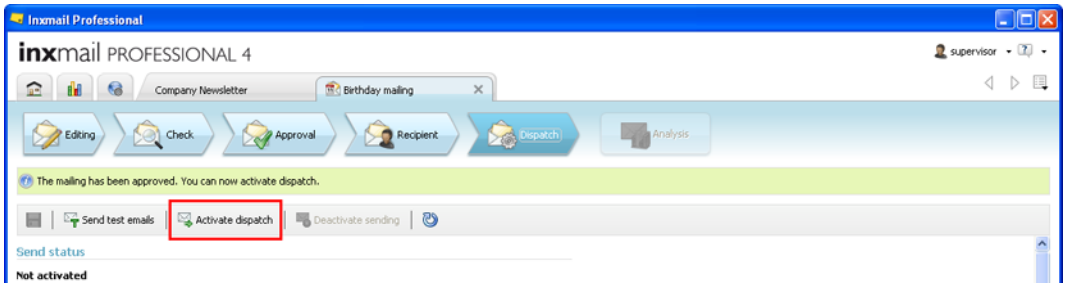


Figure 193: "Activate dispatch" for the trigger mailing

2. Click the *Activate dispatch* button.

   A dialog box appears.

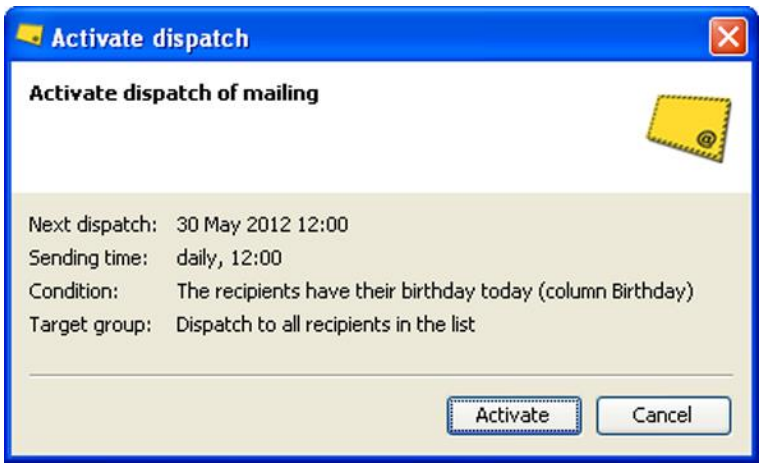


Figure 194: "Activate dispatch" dialog box

   Information on the next dispatch date, the sending time, the condition you have specified and the target group is displayed in the dialog box.

3. Click the *Activate* button.

   A message box appears.

4. Click the *Yes* button.

You will be directed to the mailing overview.

✓ You have now activated a timed trigger mailing for dispatch.

22.8.1.11 Combining value setting actions with timed trigger mailings

Step-by-step

1. Open the trigger mailing in the *Dispatch* workflow step.

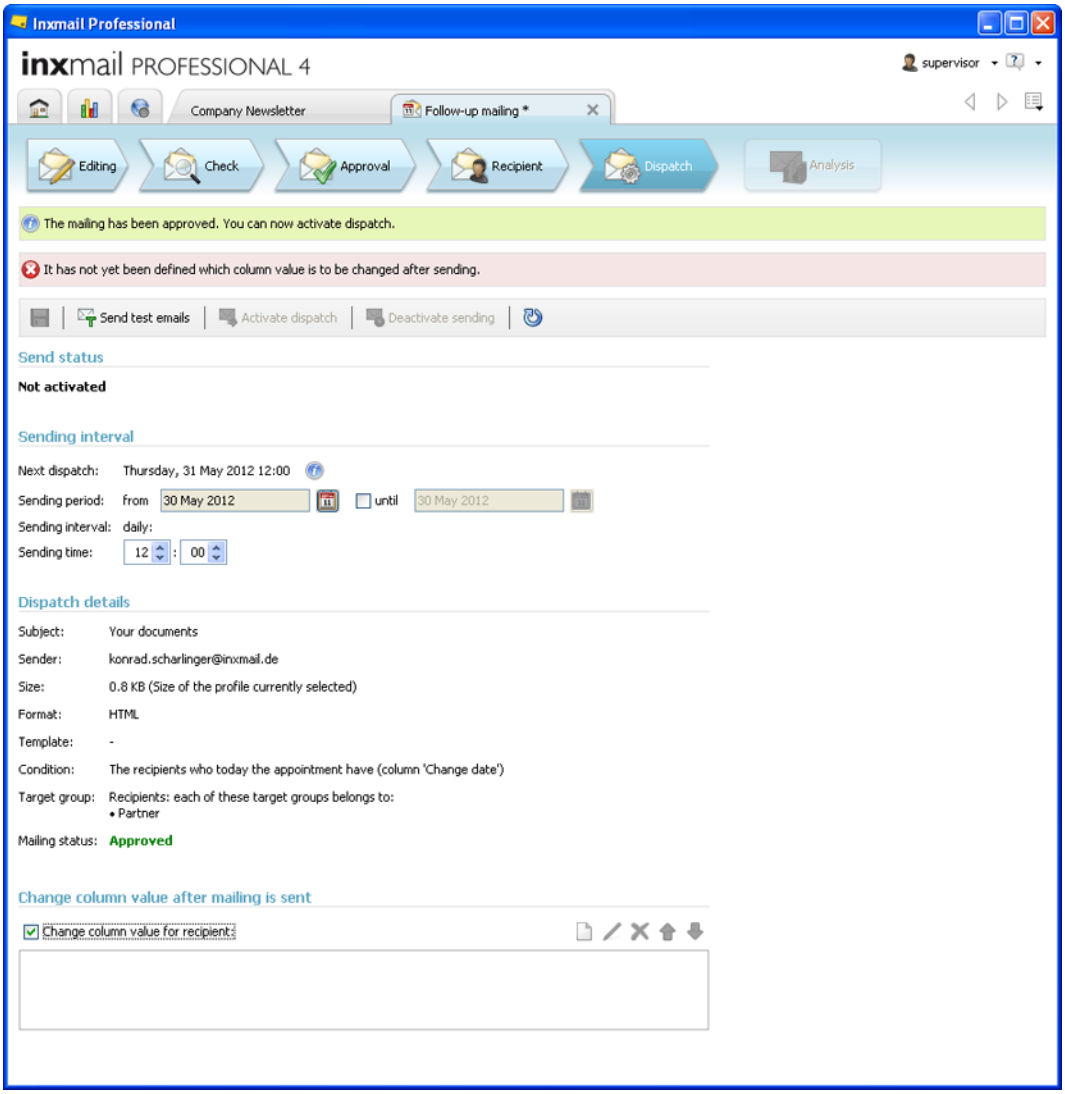


Figure 195: "Dispatch" workflow step - Further actions

2. Activate the *Change column value for recipient* check box.
3. Click the *(New value setting action)* icon.

A dialog box appears.

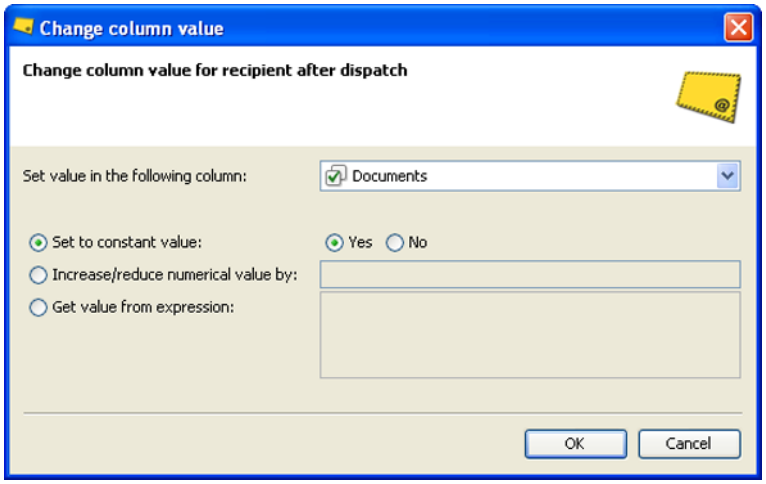


Figure 196: "Change column value" dialog box

4. In *Set value in the following column*, select the column in which you wish to set or change a value.
5. Specify how the value is to be determined:
   - *Set to constant value*

     Select this option to enter a constant value in the column. The type of value that can be definitively entered depends on the column type.

     Example

     Values for column types – example

     If you have selected a column with the 'Yes/No' column type, you will be offered the choice between the options *Yes* and *No*.

     If you have selected a column with the 'Text' column type, you must enter the desired text manually into the *Set to constant value* field.

     An overview of the column types can be found in *Creating a new column* page 123.

   - *Increase/reduce numerical value by*

     Select this value if you would like a value that has already been determined in the column to be increased or reduced by a particular amount.

     Change numerical values If you would like the numerical value to be reduced by 1, enter '-1' into the *Increase/reduce numerical value* field.

   - *Get value from expression*

Select this option to enter a value that is determined beforehand using a particular expression.
Begin the expression with an equals sign '='.

Example

Determining values – example

Initial situation: After a trigger mailing has been sent, you would like the current day to be specified in the 'Send date' column.

Conditional expression: `=Format(Date(), "dd.MM.yy HH:mm")`

Detailed information on creating expressions and on determining values can be found under *Operator, command and function reference* page 515.

6. Confirm the dialog box by clicking *OK*.
7. The action that you have specified is now displayed under *Change column value after mailing is sent*.

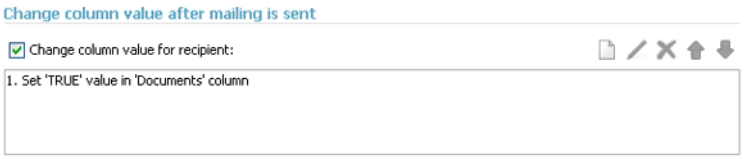


Figure 197: Change column value after mailing is sent

✓ You have now combined a value setting action with a timed trigger mailing.

Additional information

Editing value setting actions

You can change and delete value settings actions using the toolbar under *Change column value after mailing is sent*. You can also change their order. The value setting actions are processed by the system in the order displayed.

22.8.2 Overview of action mailings

As with timed trigger mailings, action mailings are sent by the system automatically. However, the event leading to the dispatch of the action mailing is not time-determined. Instead, the sending of action mailings is triggered by the recipient or their email account.

General procedure

For action mailings, you select the *Action mailing* mailing type in the startup dialog. You can then create, check and approve the action mailing in the same way as for standard mailings (*Mailings (editing)* page 189, *Mailings (check)* page 228, and *Mailings (approval)* page 253).

You must activate the action mailing before it can be sent. In other words, you must either combine the action mailing with an event, whereby a new action sequence is created (*Overview of action mailings* page 329), or you must integrate the action mailing into an already existing action sequence (*Overview of action mailings* page 329).

Option 1

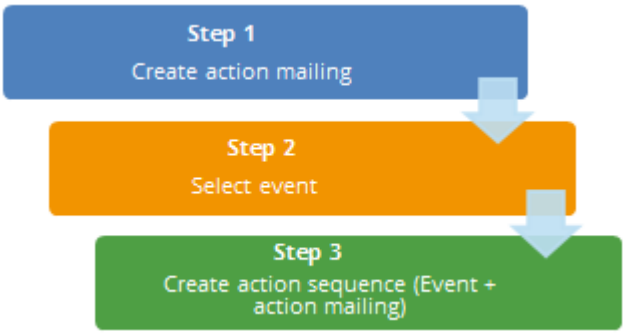


Figure 198: Option 1: Creating an action sequence with an action mailing

Option 2

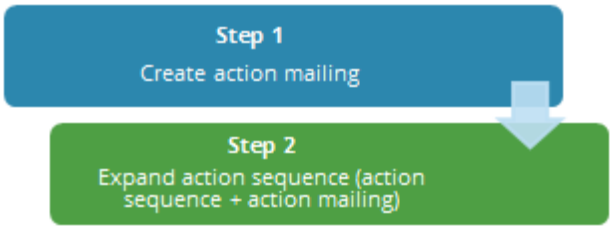


Figure 199: Integrating an action mailing into an action sequence

Example

An **action sequence** might then look like this:

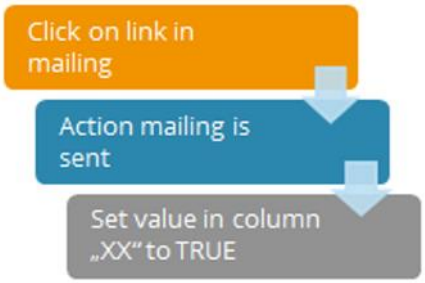


Figure 200: Example of an action sequence – action mailing

22.8.2.1 Creating a new action mailing

Step-by-step

1. To create a new action mailing, click the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab and then click the (*Create new trigger mailing*) button.

A dialog box appears.

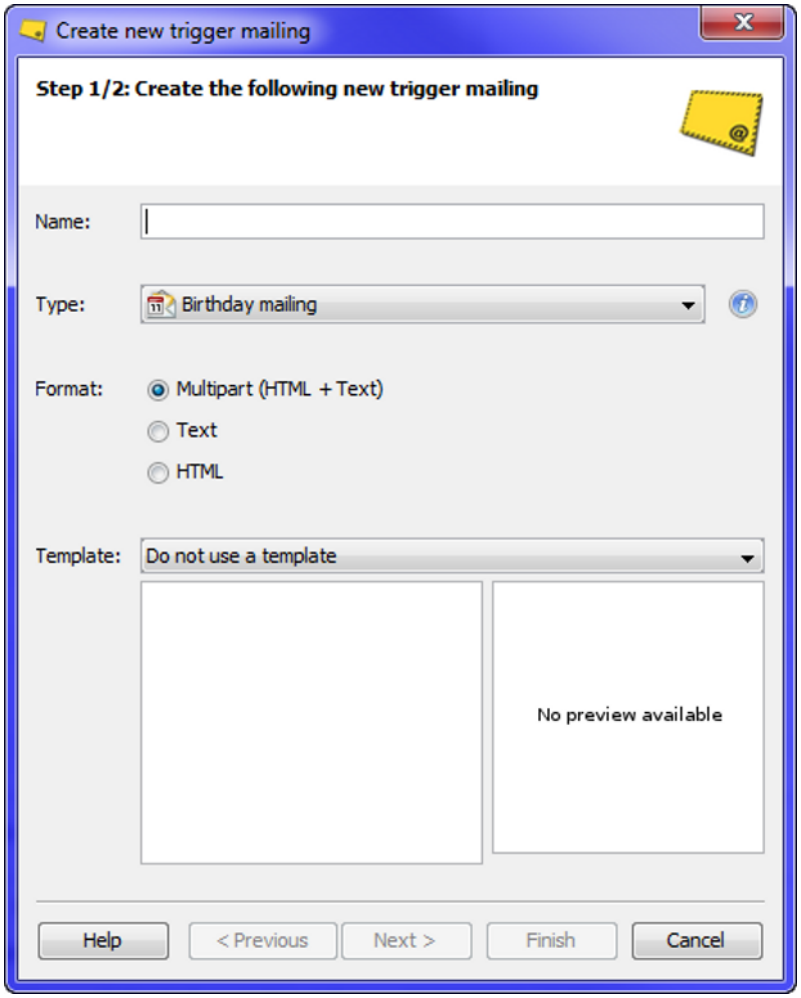


Figure 201: "Create new trigger mailing - Step 1" dialog box

2. Enter the following in the dialog box (*Creating a new mailing* page 184):
   a. Enter a name for the action mailing.
   b. Select *Action mailing* in the *Type* drop-down list.
   c. Select a format for the action mailing.

   Note If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

   d. Select whether you wish to use a template to create the action mailing.
3. Click *Next*.

A dialog box appears.

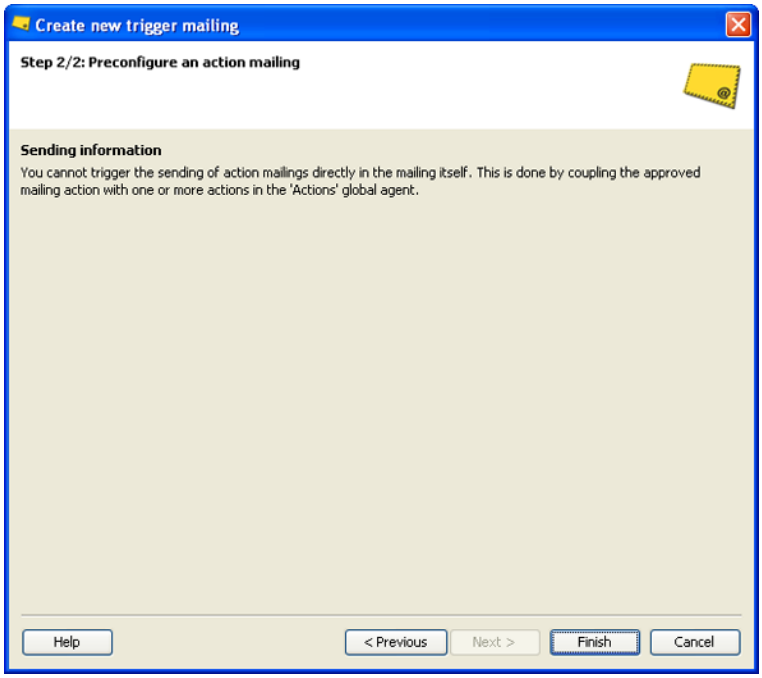


Figure 202: "Create new action mailing - Step 2" dialog box

4. Click *Finish*.
5. The action mailing opens in a new tab where it can be edited.

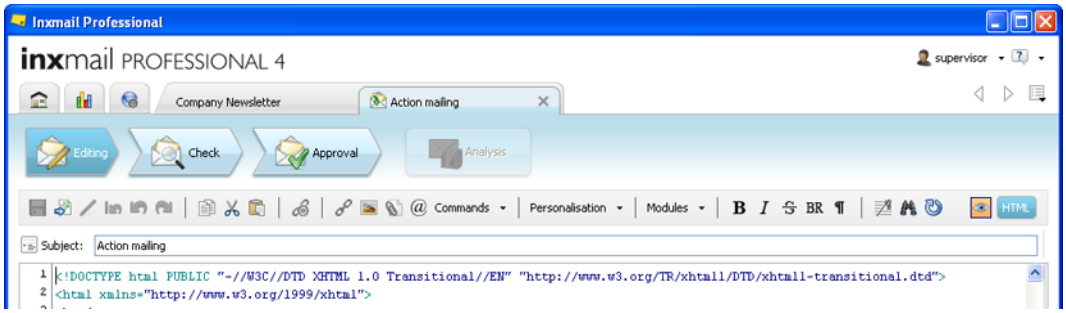


Figure 203: Action mailing tab

The action mailing is also automatically added to the table on the tab of the mailing list > *Mailings* agent > *Trigger mailings* tab.

✓ You have now created a new action mailing.

22.8.2.2 Creating, checking and approving an action mailing

Step-by-step

1. Open the action mailing in the *Editing* workflow step.
2. Create the contents of the action mailing.
3. Check your action mailing in the *Check* workflow step, for example, using the quality test.
4. Approve your checked action mailing in order to be able to use it in action sequences.
5. To do so, click the *Request approval* button in the *Approval* workflow step.

6. Carry out the further approval steps if they are configured for you in the system.

   Detailed information on approving mailings can be found under

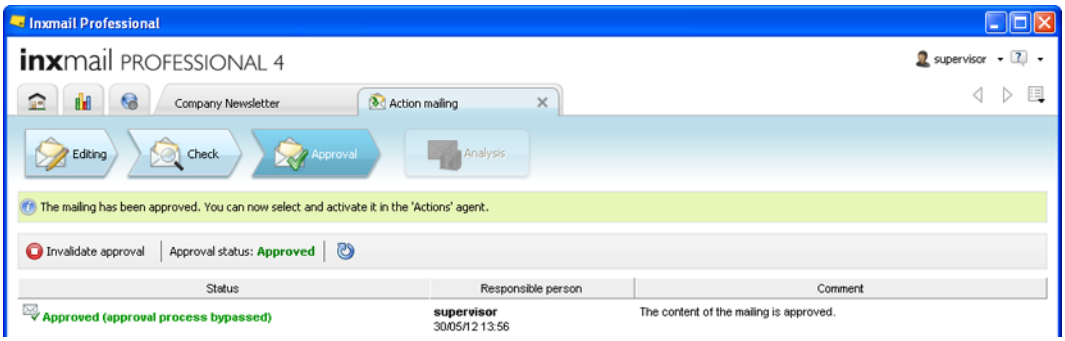


Figure 204: Approved action mailing

✓ You have now created, checked and approved an action mailing.

Additional information

- Please note when creating unsubscribe links that recipients may use these links to unsubscribe from the mailing list. In doing so, the recipients will (as the case may be) not receive any more (regular) mailings from this mailing list.
- Please note that only approved action mailings can be used in action sequences.
- Approved action mailings can, for example, be copied, renamed or deleted. However, they can **no** longer be edited.
- If you need to edit an approved action mailing, you can revoke the approval in the *Approval* workflow step using the *Revoke approval* button.

Related Topics

» *Mailings (editing)* page 189

» *Mailings (advanced editing)* page 364

» *Mailings (check)* page 228

» *Mailings (approval)* page 253

» *Inserting an unsubscribe link* page 212

22.8.2.3 Activating action mailings

You must activate an action mailing before it can be sent. In other words, you must either combine the action mailing with an event, whereby an action sequence is created, or you must integrate the action mailing into an already existing action sequence.

Below, you will find a description of how to add an action mailing to an already existing action sequence.

Step-by-step

Add an action mailing to an already existing action sequence as follows:

1. Open the relevant action sequence in the Actions workflow step.
2. Click the (Add new action) button.

A dialog box appears.

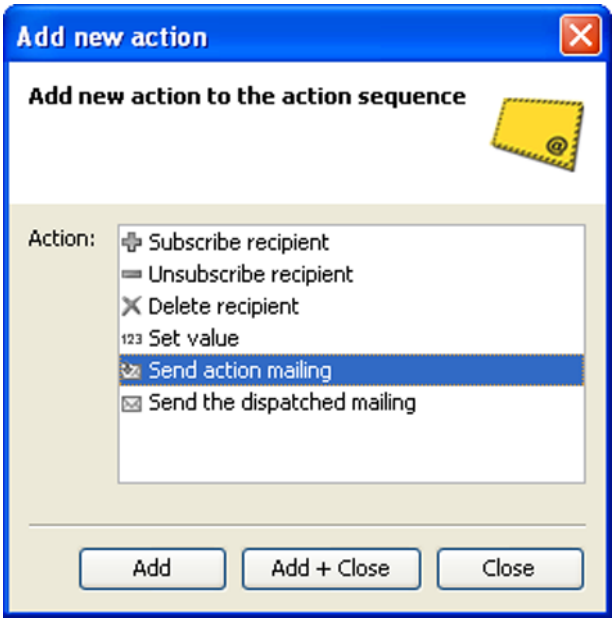


Figure 205: "Add new action" dialog box

3. Select Send action mailing.
4. Click the Add + Close button.
5. Select the desired mailing list from the List drop-down list.
6. Use the (Select campaign mailing) button to select the action mailing you wish to send.

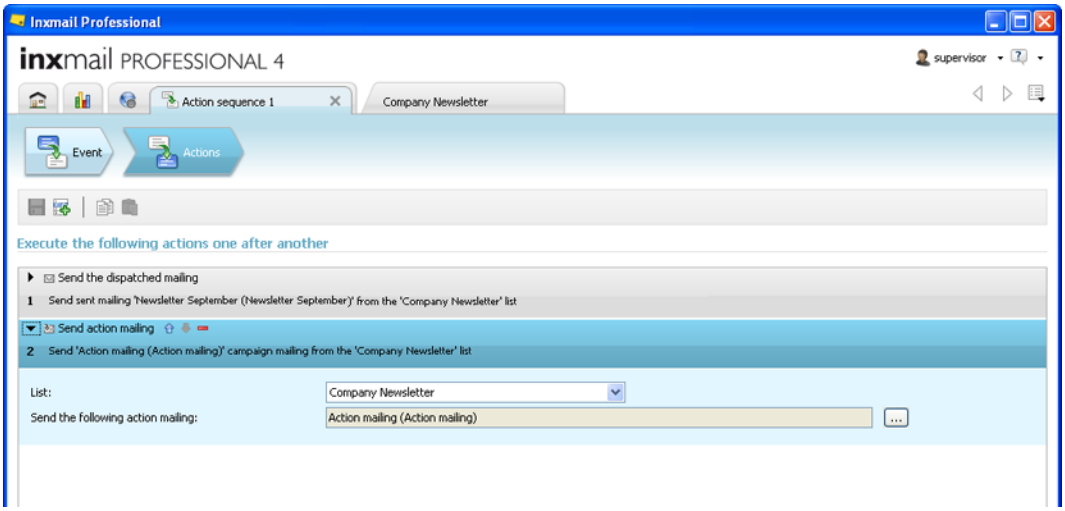


Figure 206: Select action mailing

> **Note** Please note that you can only select approved action mailings with the *(Select campaign mailing)* button.

7. Save the action sequence.

✓ You have now added an action mailing to an action sequence, and have thereby activated the action mailing.

Additional information

As soon as you have assigned an approved action mailing to an action sequence, you can **never** again revoke the approval for this action mailing (and therefore you can **never** again edit the action mailing; however, you can create and then edit a copy of the action mailing at any time). At the same time, the action mailing is assigned the 'Active' status. Action mailings with this status cannot be deleted.

If the action mailing is removed from the action sequence and is not assigned to another action sequence, the status of the action mailing will be set to 'Inactive'. The action mailing can now be deleted.

Related Topics

Overview of action mailings page 329

Creating a new action sequence page 407

22.9 Evaluating trigger mailings

Timed trigger mailings can be evaluated after their dispatch has been activated (*Activating dispatch of timed trigger mailings* page 326). Action mailings can be evaluated after they have been activated (*Activating action mailings* page 333).

Detailed information on evaluating trigger mailings can be found under *Reports on trigger mailings or welcome mailings* page 347.

22.10 Converting mailings

22.10.1 Converting standard mailings to trigger mailings

Step-by-step

1. On the tab of the mailing list, click the *Mailings* agent > *Mailings* tab.
   The mailing overview is displayed.
2. Highlight the standard mailing that you would like to convert to a trigger mailing.
3. Click the (*Copy*) button.
4. Click the *Trigger mailings* tab.
5. Click the (*Paste*) button.

A dialog box appears.

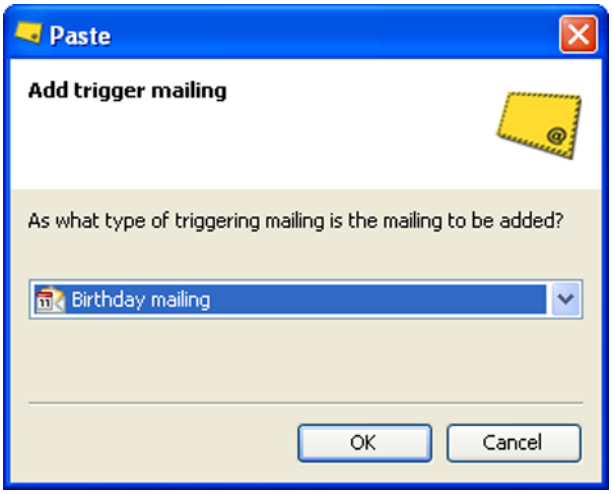


Figure 207: "Add trigger mailing" dialog box

6. Use the drop-down list to select the type of trigger mailing into which you would like to convert the standard mailing.

✓ The mailing that you have converted will be displayed at the top of the mailing overview.

Additional information

Rename trigger mailing

The name of the converted mailing will be *Copy of <name of original mailing>*. You can rename the mailing by clicking the (*Rename trigger mailing*) button.

Configuring converted trigger mailings

Configure the time settings for timed trigger mailings in the *Dispatch* workflow step.

22.10.2 Converting trigger mailings to standard mailings

Step-by-step

1. On the tab of the mailing list, click the *Mailings* agent > *Trigger mailings* tab. The mailing overview is displayed.
2. Highlight the trigger mailing that you would like to convert to a standard mailing.
3. Click the (*Copy*) button.
4. Click the *Mailings* tab.
5. Click the (*Paste*) button.

✓ The mailing that you have converted will be displayed at the top of the mailing overview.

Additional information

Renaming a standard mailing

The name of the converted mailing will be Copy of <name of original mailing>. You can rename the mailing by clicking the (Rename mailing) button.

Recipients and target groups

When converting trigger mailings, any target groups that you have specified will be retained. If no target groups have been specified, the 'All recipients in the list' option in the Dispatch workflow step is activated.

Converting a birthday mailing – Age command

The Age command is only allowed in birthday mailings.

If you convert a birthday mailing containing an Age command into a standard mailing, a corresponding error message will be displayed in the Editing workflow step. Remove the Age command in order to be able to use the converted birthday mailing.

23 Bounces and returns

In this chapter, you will learn:

- how to display and, if necessary, filter the bounces (that is, undeliverable emails) and returns (for example, automated replies) you receive
- how to manage your bounces and returns manually or automatically (for example, delete or forward bounces and returns, delete the respective recipients or add them to a black list, or export information on bounces and returns)

23.1 Overview: Bounces and returns

You can expect to receive bounces and returns at a level of between five and ten per cent after dispatching a mailing.

'Bounces' are all emails that could not be delivered. Bounces may be caused by invalid email addresses (hard bounces, permanent errors) or full email inboxes (soft bounces, temporary errors), for example.

Returns include automatic holiday messages (autoresponders), replies or complaints.

By default, bounces and returns in Inxmail Professional end up in a table on the (*Global settings*) tab > *Inbox & bounces* agent > *Bounces* tab or *Inbox* tab. Inxmail Professional assigns returns and bounces to specific categories (for example, 'spam', 'reply', 'soft bounce' or 'hard bounce').

23.2 Displaying bounces and returns

23.2.1 Displaying and filtering bounces

Step-by-step

1. Click the (*Global settings*) tab > *Inbox & bounces* agent > *Bounces* tab.

   All the bounces received after your mailing has been dispatched appear in the table. The following information is displayed for each bounce:

   - Category: Inxmail Professional automatically assigns each bounce to a category (soft and hard bounces, unknown bounces, spam bounces and autoresponder bounces)
   - Recipient to whom the mailing was sent
   - Sender and subject of the bounce
   - Date on which the bounce was received by Inxmail Professional
   - Size of the bounce email

   Further information is displayed below the table (for example, header information such as the corresponding list or mailing) when you select a bounce in the table.
2. Click the *Filter* button to filter the bounces displayed in the table.

The filter section opens.

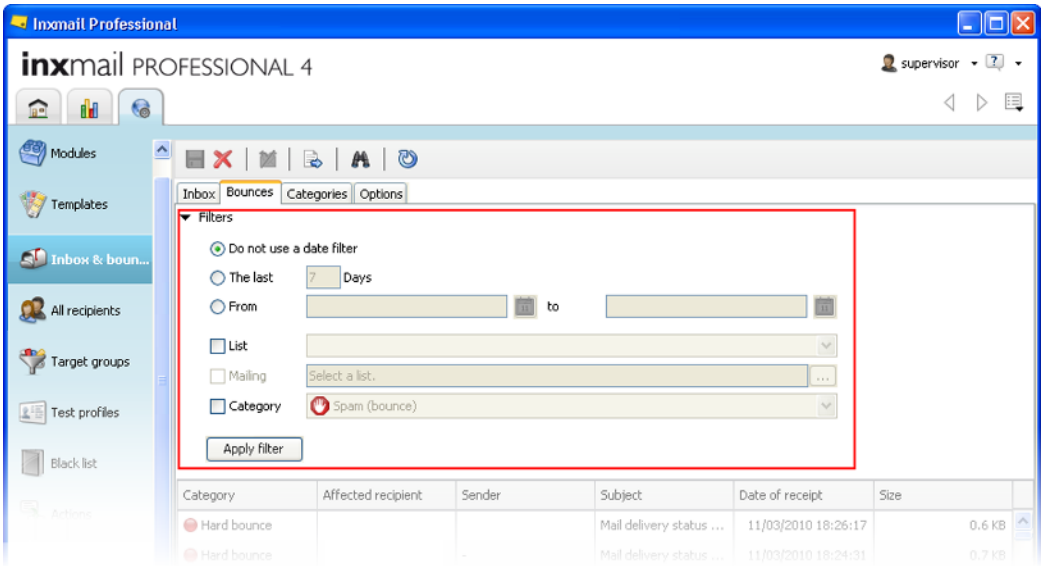


Figure 208: "Inbox & bounces" agent > "Bounces tab": filter section

You can set one or more of the following filters:

- Filter bounces by date (the table should only display bounces that occurred in the last 'X' days or in a particular time period).
- Filter bounces by category (the table should only display bounces in a particular category, for example, hard bounces).
- Filter bounces by list or mailing (the table should only display bounces that occurred for a specific mailing list or for a particular mailing in the mailing list).

Important Ensure that you have activated the VERP function so that your bounces can be split up according to your mailing lists. If necessary, consult your Inxmail Professional administrator (administrators can configure this in the Administration section, *Configuring email receipt* page 581).

3. Click *Apply filter* to apply your filter settings.

✓ The table now contains only the bounces that match your filter settings.

23.2.2 Displaying and filtering returns

Step-by-step

1. Click the (*Global settings*) tab > *Inbox & bounces* agent > *Inbox* tab.

   All the returns received after your mailing has been dispatched appear in the table. The following information is displayed for each return:

   - Category: Inxmail Professional automatically assigns each return to a category (replies, complaints, spam and autoresponders)
   - Recipient to whom the mailing was sent
   - Sender and subject of the return
   - Date on which the return was received by Inxmail Professional, and the size of the return

Further information such as the email content of the return is displayed when you select a return in the table.

2. Click the *Filter* button to filter the returns displayed in the table.

   The filter section opens.

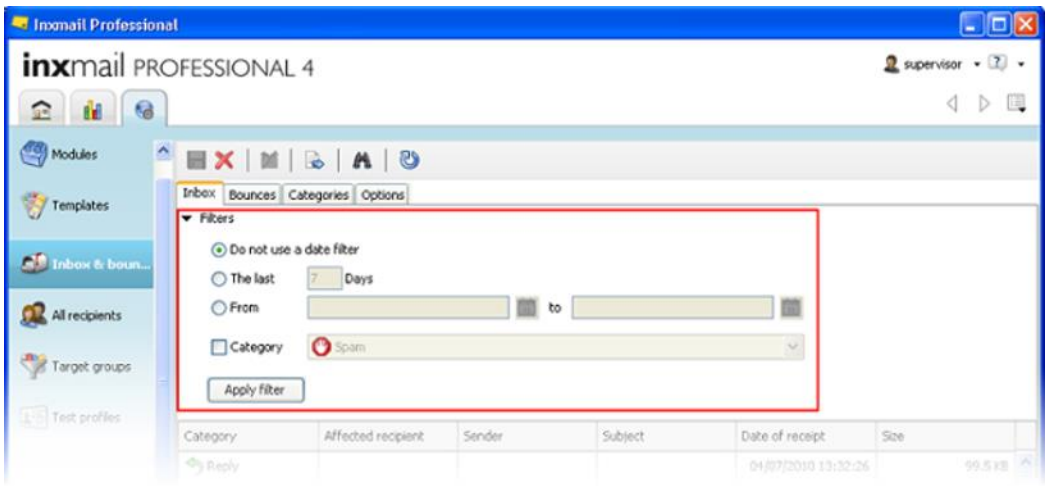


Figure 209: "Inbox & bounces" agent > "Inbox tab": filter section

You can set one or more of the following filters:

- Filter returns by date (the table should only display returns that occurred in the last 'X' days or in a particular time period)
- Filter returns by category (the table should only display returns in a particular category, for example, in the 'spam' category)

3. Click *Apply filter* to apply your filter settings.

✓ The table now contains only the returns that match your filter settings.

23.3 Managing bounces and returns

23.3.1 Setting up automated management

Step-by-step

1. Click the (*Global settings*) tab > *Inbox & bounces* agent > *Categories* tab.

   The following table shows all the categories to which Inxmail Professional can assign bounces and returns.

Category	Description
Spam	Emails that have been dispatched to you and that contain spam characteristics are assigned to this category.
Autoresponder	Automatically generated reply emails are assigned to this category (for example, automatically generated away notes). Your mailing is received by the recipient in this case.

Category	Description
Complaint	Reply emails that contain a complaint or a threat are assigned to this category.
Reply	Reply emails that can neither be assigned to the 'complaint' nor the 'autoresponder' category are assigned to this category.
Spam (bounce)	Emails that have been sent to your bounce account and that contain spam characteristics are assigned to this category.
Hard bounce	If an email could not be dispatched to a recipient because of a permanent error (for example, email address is incorrect or email account has been terminated), Inxmail Professional generates a hard bounce entry.
Soft bounce	If an email could not be dispatched to a recipient because of a temporary error (for example, the target mail server could not be reached because the recipient's email inbox is full), Inxmail Professional generates a soft bounce entry. The email is delivered as soon as the temporary error has been rectified.
Unknown bounce	All bounces that cannot be assigned to any other category are assigned to this category.
Autoresponder bounce	Autoresponders that have been sent from a mail server as a bounce instead of a return are assigned to this category.

2. You can specify that Inxmail Professional automatically deletes all emails belonging to a particular category. To do this, select the check box for the relevant category in the *Delete email* table column.

   For example, you can activate this function for the 'spam', 'autoresponder', 'spam (bounce)', 'soft bounce', 'unknown bounce' and 'autoresponder bounce' categories.

3. You can specify that Inxmail Professional automatically forwards all emails belonging to a particular category. For the relevant category, enter the email address to which these emails are to be forwarded in the *Forward to* table column.

Note If you have selected the check box in the *Delete email* table column and have also specified a forwarding email in the *Forward to* table column, Inxmail Professional first forwards the email and then deletes it from the table.

For example, you can forward emails in the 'reply' or 'complaint' category to support staff who can then provide further assistance to customers.

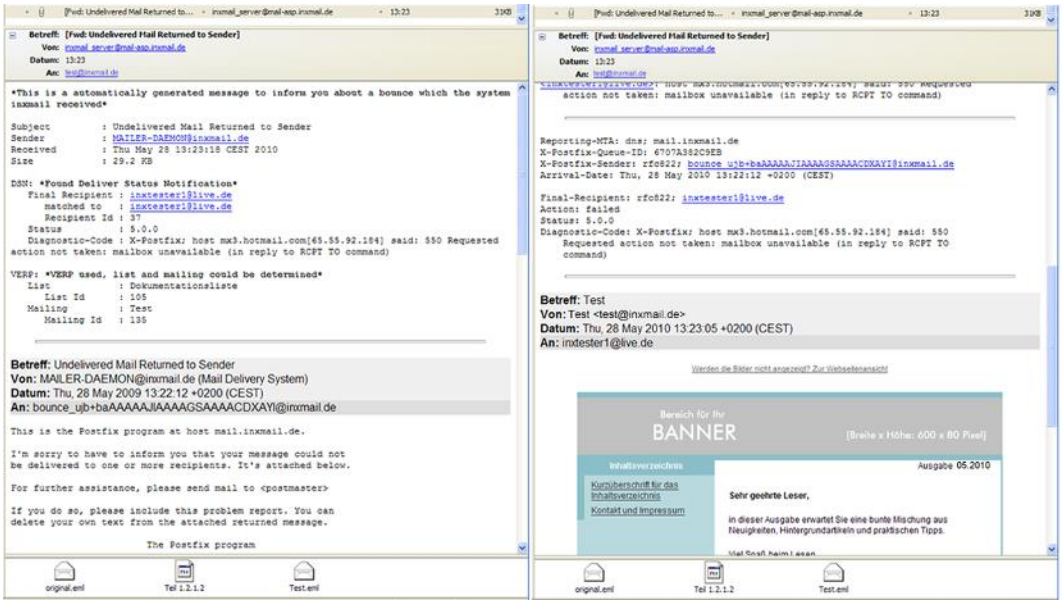


Figure 210: Forwarded bounce email

4. Save your settings.

✓ You have now set up automated bounce and return processing.

Additional information

In addition to setting up automated processing, you can also define action sequences that are triggered when bounces and returns are received. For further information, see *Action sequences* page 405.

23.3.2 Manually processing bounces and returns

The following options are available for processing bounces and returns in the table ((*Global settings*) tab > *Inbox & bounces* agent > *Inbox* or *Bounce* tab):

- To delete bounces and returns, select the respective entries in the table while holding down the CTRL key and click (*Delete*).
- To change the list association of a recipient who triggered a bounce or a return, select the recipient in the table. Right-click and then click *Manage list association*. In the dialog box, you can subscribe the recipient to or unsubscribe the recipient from mailing lists (*Managing list association* page 119).
- To delete recipients who triggered bounces or returns from Inxmail Professional, select the respective entries in the table while holding down the CTRL key, right-click and then click *Delete recipient from the system*.
- To add recipients who triggered bounces or returns to the black list (*Adding recipients to the black list* page 618), select the respective entries in the table while holding down the CTRL key, right-click and then click *Add recipient to the black list*.

- To forward bounces and returns that have been received to a person, select the respective entries in the table while holding down the CTRL key, right-click and select one of the following options from the shortcut menu:
  - To forward bounces or returns to your supervisor, select *Send email(s) to the supervisor*. The emails will be dispatched immediately.
  - To forward bounces or returns to another person, select *Send email(s) to...* and enter the email address of the person in the dialog box.
- To change the category to which Inxmail Professional automatically assigned a bounce or return, select the respective entry in the table while holding down the CTRL key. Right-click, click *Category* and then select the respective category.

Note You can use the search function (for each table column) to search for specific bounces, returns or information in the table. To do this, select the table column and then click the (*Search*) button.

23.3.3 Exporting information

Step-by-step

1. To export information on returns, click the (*Global settings*) tab > *Inbox & bounces* agent > *Inbox* tab.
   To export information on bounces, click the (*Global settings*) tab > *Inbox & bounces* agent > *Bounces* tab.
2. If you want to export information for specific returns or bounces only, select these in the table while holding down the CTRL key.
3. Click the (*Export*) button.
   A dialog box appears.
4. If you previously selected entries in the table, the dialog box allows you to specify whether information should be exported for all the emails or only for the selected emails.
5. Specify the full file path (that is, including the file name) under which Inxmail Professional should save the exported file.
6. Confirm your entries by clicking *OK*.

✓ The export file will be generated and saved at the previously specified file path.

24 Reports

In this chapter, you will learn how to create and view reports (that is, analyses) on your mailings, split test mailings, trigger mailings, welcome mailings, lists, recipients or mail servers in Inxmail Professional:

- You are given an overview of all the reports that you can create in Inxmail Professional.
- You find out what the key figures in the reports mean.
- You learn how to create reports and how to export and print them, if required.

24.1 General information on reports

Note Please note that based on the Inxmail Professional user rights concept, not every user can view all the elements or use all the functions.

Note ASP customers receive users that are already set up from Inxmail GmbH or its partners.
In the case of license customers, Inxmail Professional administrators can create users individually and assign the required user rights (*Users, roles, rights and security* page 557).

Inxmail Professional contains a number of reports and analysis options for different application reports. A central component of these are analyses for mailings, lists and recipients. In addition to these, there are reports on bounces and returns, as well as more technically oriented reports on topics like the mail servers in use.

You can generate reports from different points in the application. The central point to generate reports can be reached by clicking the (*Reports*) tab. Here you can generate **all** the reports available in Inxmail Professional. Detailed information on this can be found in *Creating reports* page 354.

You can also generate some of the reports from the context of relevant points in Inxmail Professional. This functionality allows you to generate the central reports on mailings directly from the mailing overview, for example. Detailed information on this subject can be found in *Creating context-sensitive reports* page 357.

A large number of the reports can be generated with reference to a specific list or on a cross-list basis (globally). List-specific reports are generally created under *List reports*, while cross-list reports are generally generated under *Global reports*.

24.2 Overview of the range of reports

This section contains an overview of all the reports that you can create in Inxmail Professional. The respective tables contain the name of the report, the point in Inxmail Professional from where the report may be opened or generated, and a short description of the content of the report in question.

The overview of reports contains the 'Open from' column. This column contains an abbreviated name of the point from which the respective reports may be opened. The following table provides a detailed description of each abbreviated name.

Open from	Description
Reports – Mailing reports	*(Reports)* main tab, *Mailing reports* entry
Reports – List reports	*(Reports)* main tab, *List reports* entry
Reports – Global reports	*(Reports)* main tab, *Global reports* entry
Sending overview	*(Cockpit)* main tab, *Sending overview* entry
List overview	*(Cockpit)* main tab, *List overview* entry
Mailings agent	*Mailings* agent
Analysis WS	*Analysis* workflow step

24.2.1 Reports on mailings

These reports analyse the regular dispatch of your mailings.

Note Email sequence mailings are **not** included in the reports.

If forwards exist for a mailing, they are likewise included in the reports on mailings:

- Forwards sent via the 'Send the dispatched mailing' action (*Adding actions to the action sequence* page 411)
- Forwards sent during subscription using the 'Send most recently sent mailing in this list to new recipient' function (*Subscription setup* page 135)

You can generate the following reports on mailings:

Report	Open from	Description
Important key figures	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report summarises all the important key figures for a mailing. It shows you how successfully your mailing was received by your recipients. We recommend taking a regular look at this report.
Visual link analysis	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report graphically displays the links that recipients clicked (how often).
Link analysis	• Reports – Mailing reports • Analysis WS	This report shows the number of clicks of a link within a particular time period.

Report	Open from	Description
Clicks per link	• Reports – Mailing reports	This report shows the number of clicks for each link.
Clicks per day and hour	• Reports – Mailing reports	This report shows the number of clicks of a link for the weekday or time of day.
Email clients used	• Reports – Mailing reports	This report shows you which email clients your recipients use to open a particular mailing. This information is very useful as it points out which email clients you should optimise your mailing for. This report identifies which email clients were used based on graphic call-ups: The email client can be determined if a recipient opens a mailing and (at least) one image is loaded. The email client cannot be determined if a mailing does not contain any images or images are blocked in the mailing. A maximum of one opening is counted per email client for each recipient. To ensure that this report can be generated graphically, your mailing must contain at least one image that is loaded when the mailing is opened.
Target group comparison	• Reports – Mailing reports	This report shows you how often which target group clicked which link. You can select any number of links and target groups.
Mailing comparison	• Reports – Mailing reports	This report compares all the important key figures (mailing size, sending information, open rate, click rate, reaction rate, etc.) of two or more mailings. You can generate the report for mailings in a single list or for mailings from different lists.

24.2.2 Reports on split test mailings

You can generate the following reports on split test mailings:

Report	Open from	Description
Important key figures	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report summarises all the important key figures for a split test mailing. It shows how successfully your split test mailing was received by your recipients. We recommend taking a regular look at this report.
Visual link analysis	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report graphically displays the links that recipients clicked (how often).
Split test analysis	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report uses key performance indicators to show how well the individual mailing versions were received.

24.2.3 Reports on trigger mailings or welcome mailings

You can create reports on trigger mailings that have the *Active* or *Inactive* status.

You can generate the following reports on trigger mailings or welcome mailings:

Report	Open from	Description
Important key figures	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report summarises all the important key figures for a mailing. It shows you how successfully your mailing was received by your recipients. We recommend taking a regular look at this report.
Visual link analysis	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report graphically displays the links that recipients clicked (how often).

Report	Open from	Description
Sendings overview	• Reports – Mailing reports • Sending overview • Mailings agent • Analysis WS	This report lets you determine the number of dispatches of a trigger mailing or welcome mailing in a user-selectable time interval. There are two ways in which you can define the time interval: You can specify a particular number of days from today's date into the past. You can specify a time interval using calendar dates. **Refresh** The 'Sendings overview' report is refreshed to the full hour.

24.2.4 Reports on lists

You can generate the following reports on lists:

Report	Open from	Description
Key figures (list-specific)	• Reports – List reports • List overview	This report provides an overview of all the important key figures for a mailing list (for example, the number of recipients in the mailing list, the subscriptions to and unsubscriptions from the mailing list, the number of mailings sent for the mailing list, the total number of emails sent and the number of bounces generated).
Key figures (cross-list)	• Reports – Global reports	This report provides an overview of the important key figures for all mailing lists.
Sending overview (list-specific)	• Reports – List reports • List overview	This report shows you which mailing was sent from a mailing list and when, how large the mailing was and to how many recipients it was sent.
Sending overview (cross-list)	• Reports – Global reports	This report shows you when the mailings for all mailing lists were sent and to how many recipients.
Sending frequency (list-specific only)	• Reports – List reports • List overview	This report shows you when the mailings from a mailing list were sent. This report reveals whether you send your mailings at regular intervals.
Subscriptions	• Reports – List	This report provides an overview of subscriptions

Report	Open from	Description
(list-specific only)	reports	to and unsubscriptions from a mailing list over time (within a particular time period).
Subscriptions and unsubscriptions per weekday and hour (list-specific only)	• Reports – List reports	This report shows you how many subscriptions to and unsubscriptions from a mailing list took place on individual weekdays or at individual times of the day (within a particular time period).
Email volume (cross-list only)	• Reports – Global reports	This report shows how high the volume of email was in the individual mailing lists or the *(Global settings)* tab within a defined period. You will see (for each mailing list, from which mailings were sent in this period, or for the (*Global settings*) tab): • How many emails were sent in total in this period • How many campaign emails (emails from mailing dispatches or email sequences) were sent in this period How many service emails (subscription and unsubscription emails, action emails, approval emails, test emails, system emails or redirect emails from the *(Inbox & bounces*) agent) were sent in this period • How many emails were sent as email copies (that is, as BCC or CC copies) of mailings in this period (if applicable) **Email copies** Information on email copies can be found in this report only if at least one email copy was sent in the set time period.

24.2.5 Reports on recipients

You can generate the following reports on recipients:

Report	Open from	Description
Recipient data (list-specific)	• Reports – List reports	You can use this report to analyse the individual column values of the recipient table and find out, for example, how many male and how many female recipients are managed in a mailing list or in the entire system, or which city most recipients come from, assuming you created and appropriately populated the 'Gender' and 'Postcode' columns.
Recipient data (cross-list)	• Reports – Global reports	You can use this report to analyse the individual column values of the recipient table across all lists.
Domains (list-specific)	• Reports – List reports	You can use this report to identify which domains (for example, inxmail.de or google.de) are featured in your recipients' email addresses (and how often a domain is used by your recipients).
Domains (cross-list)	• Reports – Global reports	You can use this report to identify across all lists which domains (for example, inxmail.de or google.de) are featured in your recipients' email addresses (and how often a domain is used by your recipients).
Top level domains (list-specific)	• Reports – List reports	This report shows how many recipients in a mailing list or in the system use which top-level domains. This allows you to see which countries your recipients come from (for example, '.de' or '.fr').
Top level domains (cross-list)	• Reports – Global reports	This report shows how many recipients in a mailing list or in the system use which top level domains across all lists. This allows you to see which countries your recipients come from (for example, '.de' or '.fr').
Email clients used (list-specific)	• Reports – List reports	This report identifies which email clients the recipients in your list used to open your mailings.
Email clients used (cross-list)	• Reports – Global reports	This report identifies which email clients the recipients in your list used to open your mailings across all lists.

24.2.6 Reports on bounces

You can create a range of different reports on bounces. These show how many of your email addresses generated bounces, and what type of bounces occurred.

- You can display a bounce report on all of the system's bounces.
- You can display a bounce report on the bounces for a single mailing list.
- You can display a bounce report on the bounces for a particular mailing in a mailing list.

Important Ensure that you have activated the VERP function so that your bounces can be split up according to your mailing lists. If necessary, consult your Inxmail Professional administrator (administrators can configure this in the Administration section, *Configuring email receipt* page 581).

You can generate the following reports on bounces:

Report	Open from	Description
Bounce analysis (list-specific)	• Reports – List reports	This report shows the number of bounces over time. This report therefore allows you to determine how many non-functioning email addresses are contained in your mailing lists.
Bounces over time (list-specific & cross-list)	• Reports – Global reports	This report shows the number of bounces over time across all lists. This report therefore allows you to determine how many non-functioning email addresses are contained in your mailing lists.
Bounces per domain (list-specific)	• Reports – List reports	This report shows how many bounces per category came from which domains. This report therefore allows you to determine how many non-functioning email addresses are contained in your mailing lists.
Bounces per domain (list-specific & cross-list)	• Reports – Global reports	This report shows how many bounces per category came from which domains across all lists. This report therefore allows you to determine how many non-functioning email addresses are contained in your mailing lists.
Bounces per top level domain (list-specific & cross-list)	• Reports – Global reports	This report shows how many bounces per category came from which top level domains across all lists.
Bounces in domains over time (list-specific & cross-list)	• Reports – Global reports	This report shows the number of bounces for the five domains that caused the most bounces within the selected time period.
Bounces in top level domains over time (list-specific & cross-list)	• Reports – Global reports	This report shows how many bounces occurred for each top level domain over time. The ten top-level domains with the most bounces are included.

24.2.7 Reports on returns

Reports on returns can only be generated across lists, that is, for the entire system. Reports on returns always show the corresponding reports on bounces as well.

You can generate the following reports on returns:

Report	Open from	Description
Returns over time (cross-list)	• Reports – Global reports	This report shows the number of returns over time.
Returns per domain (cross-list)	• Reports – Global reports	This report shows how many returns per category came from which domains.
Returns per top level domain (cross-list)	• Reports – Global reports	This report shows how many returns per category came from which top level domains.
Returns in domains over time (cross-list)	• Reports – Global reports	This report shows the number of returns over time for the first five domains that caused the most bounces in the selected time period.
Returns in top level domains over time (cross-list)	• Reports – Global reports	This report shows how many returns occurred for each top level domain over time. The ten top-level domains with the most returns are included.

24.2.8 Reports on mail servers

You can generate the following reports on mail servers:

Report	Open from	Description
E-mail volume on all mail servers	• Reports	This report provides an overview of all the mail servers you use and shows how many emails were sent and received via these mail servers (within a particular time period).
Email volume on a sending mail server (SMTP)	• Reports	This report shows how many emails were sent for a selected outgoing SMTP mail server within a particular time period.
Email volume on a receiving mail server (POP3)	• Reports	This report shows how many emails were received for a selected incoming POP3 mail server within a particular time period.

24.3 Important key figures for reports

This section contains an overview of the most important key figures appearing in the reports.

Note To determine the opening rate, you need to insert tracked links or images into your mailing (*Inserting, tracking, personalising and testing links (general)* page 203 or *Inserting images (HTML mailings only)* page 218).

Key figure for report	Description
Number of recipients (gross)	Number of recipients to whom a mailing was sent
Number of recipients (net)	Number of recipients who actually received the mailing (without delivery errors such as hard bounces)
Bounces	Number of hard and soft bounces for a mailing dispatch
Number of opening recipients	Number of recipients who opened a mailing. Determined by the first unique click or image automatically loaded and tracked in the email.
Opening rate (%)	Number of opening recipients/number of net recipients
Total clicks	All clicks of links in a mailing
Number of clicking recipients	Number of recipients who clicked any link in a mailing
Click rate, click-through rate (CTR) (%)	Number of clicking recipients/number of net recipients
Click-to-open rate (CTOR) (%)	Unique clicks/number of times opened
All clicks	Number of all clicks of the tracked link, including multiple clicks
Unique clicks	Number of recipients who clicked the tracked link at least once
All graphic call-ups	Number of all images loaded automatically when mailing is opened
Unique graphic call-ups	Number of recipients where an image has been loaded at least once on opening an email
Click-through rate (CTR) (%) related to graphic call-ups	Unique graphic call-ups/number of net recipients
Reaction	Click a tracked link and/or automatic graphic call-up when opening the mailing
Click reaction (%)	Unique clicks or graphic call-ups/number of net recipients

Key figure for report	Description
Number of unsubscribe clicks (of this, how many via list-unsubscribe)	Number of unique clicks of an unsubscribe link (of this, how many unsubscriptions were carried out via a list-unsubscribe header)
Unsubscribe rate (%)	Number of unsubscribe clicks/number of net recipients
Initial reaction	Number of mailing openings within a particular time period
Initial reaction rate	It can be recognised when 100 per cent of the total openings took place

24.4 Creating reports

Reports are generally created in three steps. The desired report is selected first. The corresponding settings and restrictions are specified in the next step. Finally, the report is generated by clicking the *Generate report* button.

Figure 211: Report generation procedure

The report settings to be made differ depending on the context from which the report is selected. In some cases they may be omitted completely. This is the case, for example, if you select a particular report from the shortcut menu in a mailing. The corresponding report settings are already made simply through selection of the mailing.

24.5 Generating reports from the Reports tab

24.5.1 Navigating in the Reports tab

Open the *Reports* tab by clicking the (*Reports*) main tab.

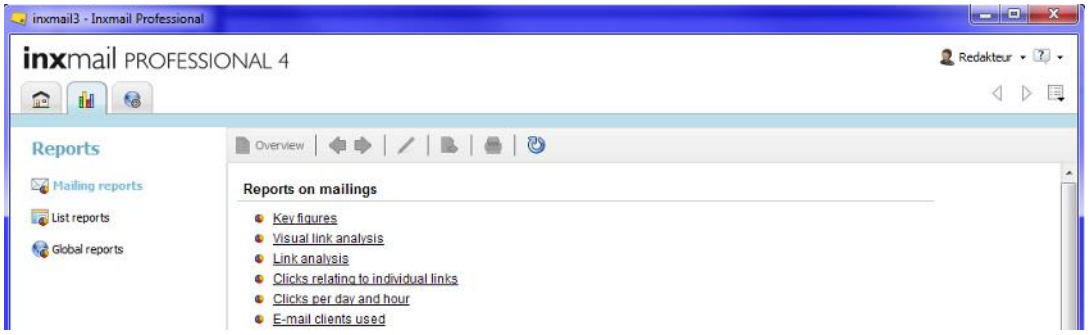


Figure 212: Reports tab overview

The Navigation area contains the *Mailing reports*, *List reports* and *Global reports* entries. Clicking one of these entries will display a thematically sorted overview of reports in the area on the right of the tab (Content area).

The upper part of the Content area contains a series of buttons, which may be enabled or disabled depending on the state of the program:

- Click the *Overview* button to open an overview of the reports for the currently active entry.
- Click the (*Back*) button to go to the page that was last visited (for example, the last visited report).
- Click the (*Forward*) button to go to the next page.
- Click the (*Change report settings*) button to change your settings for a report.
- Click the (*Print*) button to print the report.
- Click the (*Refresh*) button to refresh your report data.

24.5.2 Generating the key figures report

This section demonstrates how to prepare the 'Sending overview' (list-specific) report. Other reports are prepared in the same or a similar way.

Step-by-step

1. Click the (*Reports*) main tab/tab.

The *Reports* tab will appear.

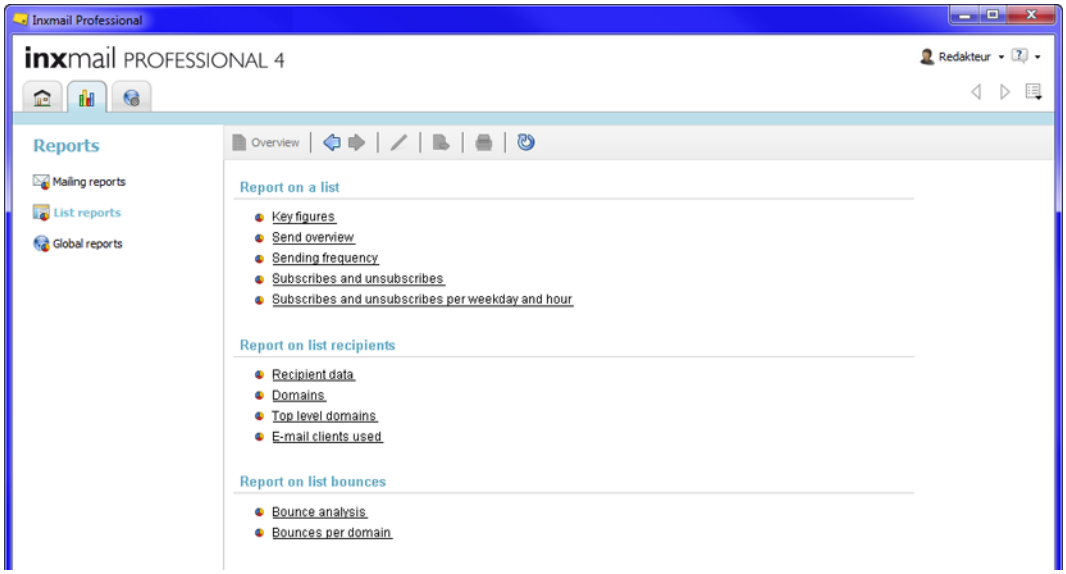


Figure 213: Reports overview

2. Click the *List reports* entry.

   The overview of list reports appears in the Content area.

3. Click the *Sending overview* report in the overview.

   The fields to configure the report appear in the Content area.

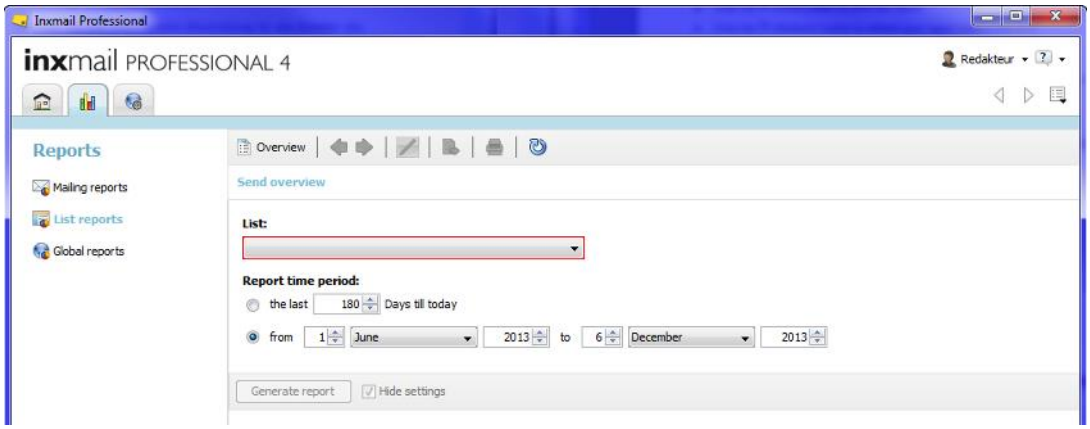


Figure 214: Report settings

4. Specify the settings for the report you want to create.

   All the settings you must specify to be able to create a report are displayed with a red border (for example, settings on the reporting period, mailing list or mailing).

   The *Generate report* button remains greyed out until all the necessary settings have been specified.

5. If you want the settings section to remain visible on the report, deactivate the *Hide settings* check box.

6. Click the *Generate report* button to create the report.

✓ The report will now be generated with the specified settings.

Additional information

You can also open some reports directly for a pre-defined time period (for example, in the *Reports related to this list* section, you can open the *Key figures for a list* report for the pre-defined time period of *30 days*, *12 weeks* or *6 months*).

In the reports overview, click the appropriate link that comes after the report. The report opens immediately without you having to specify any further settings.

24.6 Creating context-sensitive reports

Context-sensitive reports can be prepared from the following points in the application:

- *Cockpit – the application's home page* page 26 – *Sending overview*
  Here you can generate reports on sendings of individual mailings or trigger mailings.
- *Cockpit – the application's home page* page 26 – *List overview*
  Here you can generate reports with key figures on the respective lists.
- *Mailings agent* page 61 *Mailings*
  Here you can generate reports on mailings, split test mailings or trigger mailings.
- *Subscriptions agent* page 50 *Subscriptions*
  Here you can generate reports on welcome mailings.
- *Analysis* workflow step
  Here you can generate reports on mailings, split test mailings or trigger mailings.

The following describes how reports may be generated from different points in Inxmail Professional.

24.6.1 Cockpit

24.6.1.1 Sending overview

Step-by-step

1. Click the (*Cockpit*) main tab/tab.
2. In the Navigation area, click *Sending overview*.

You will be directed to the Sending overview.

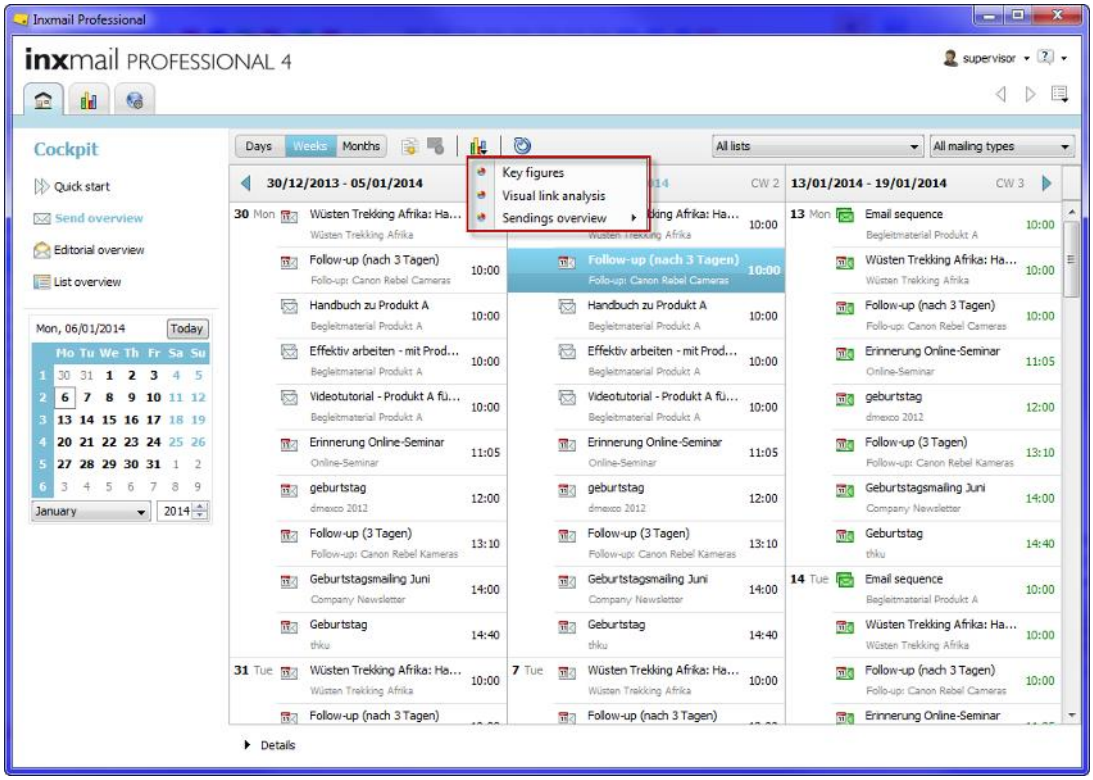


Figure 215: Reports – Sending overview

3. Select the mailing for which you want to generate a report.
4. Click the (*Display selected reports*) button in the toolbar or open the shortcut menu using the right mouse button.
5. Select the report you require.

✓ The report is generated and displayed on the (*Reports*) tab.

Note Depending on the status of the mailing, no reports will be available for selection in some cases.

24.6.1.2 List overview

Step-by-step

1. Click the (*Cockpit*) main tab/tab.
2. In the Navigation area, click (*List overview*).
3. Select the mailing list for which you want to generate a report.

4. Click the (*Display selected reports*) button in the toolbar or open the shortcut menu using the right mouse button.

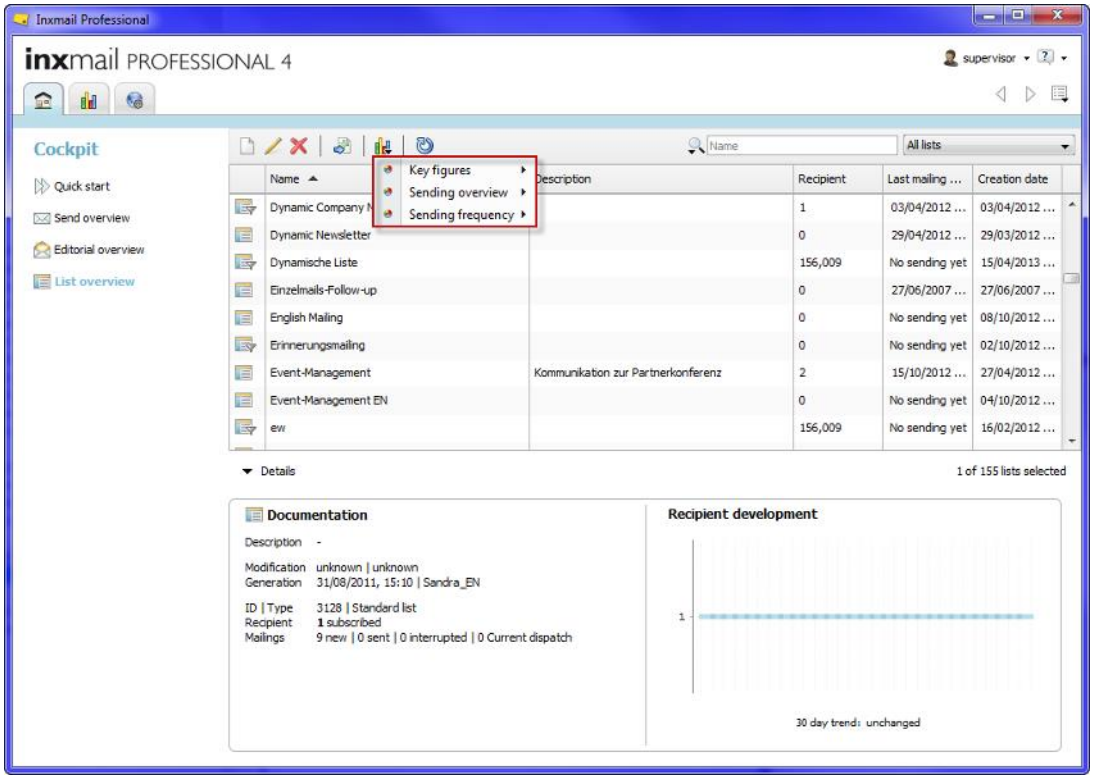


Figure 216: Reports – List overview

5. Select the report you require.

✓ The report is generated and displayed on the (*Reports*) tab. If you select a report that requires further settings, these must be made in the following step.

Related Topics

» *Creating reports* page 354

24.6.2 Mailings agent

Step-by-step

1. On the tab of the mailing list, click the *Mailings* agent.
   You will be directed to the mailing overview.
2. Select the mailing, split test mailing or trigger mailing for which you want to generate a report.

3. Click the (*Display selected reports*) button in the toolbar or open the shortcut menu using the right mouse button.

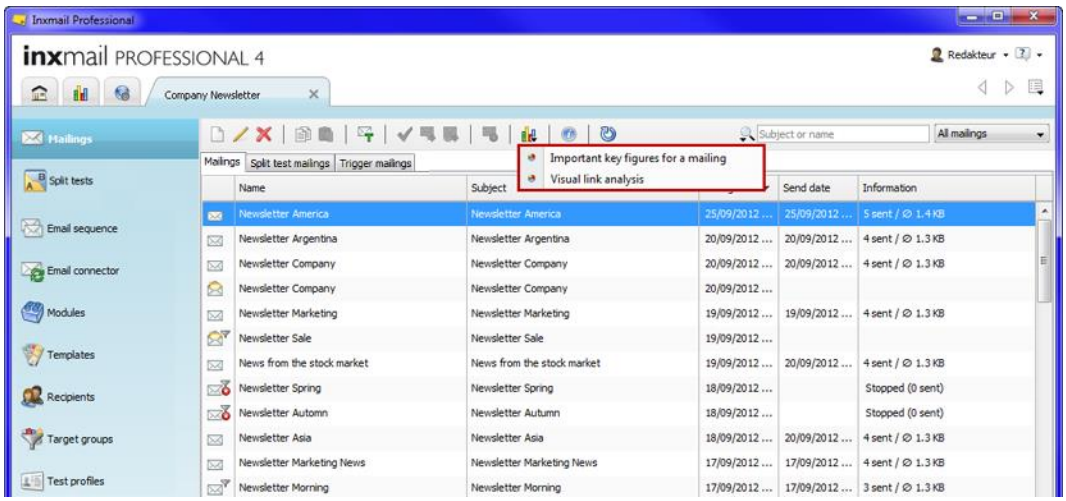


Figure 217: Reports – Mailings agent

4. Select the report you require.

✓ The report is generated and displayed on the (*Reports*) tab.

Note Depending on the status of the mailing, no reports will be available for selection in some cases.

24.6.3 Subscriptions agent

Step-by-step

1. On the tab of the mailing list, click the *Subscriptions* agent.
2. Click the *Subscribe/unsubscribe mailings* tab.
   You will be directed to the overview of subscribe/unsubscribe mailings.
3. Select the welcome mailing for which you want to generate a report.

4. Click the (*Display selected reports*) button in the toolbar or open the shortcut menu using the right mouse button.

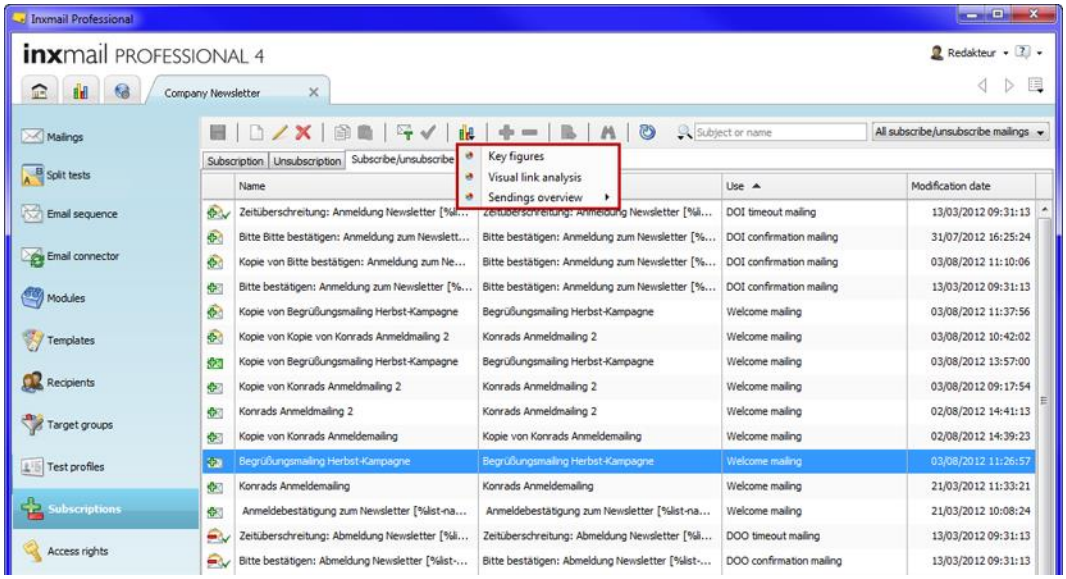


Figure 218: Reports – Subscriptions agent

5. Select the report you require.

✓ The report is generated and displayed on the (*Reports*) tab.

Note Depending on the status of the mailing, no reports will be available for selection in some cases.

24.6.4 Analysis workflow step

Step-by-step

1. Open the appropriate mailing in the *Analysis* workflow step.

The visual link analysis for the mailing will be generated.

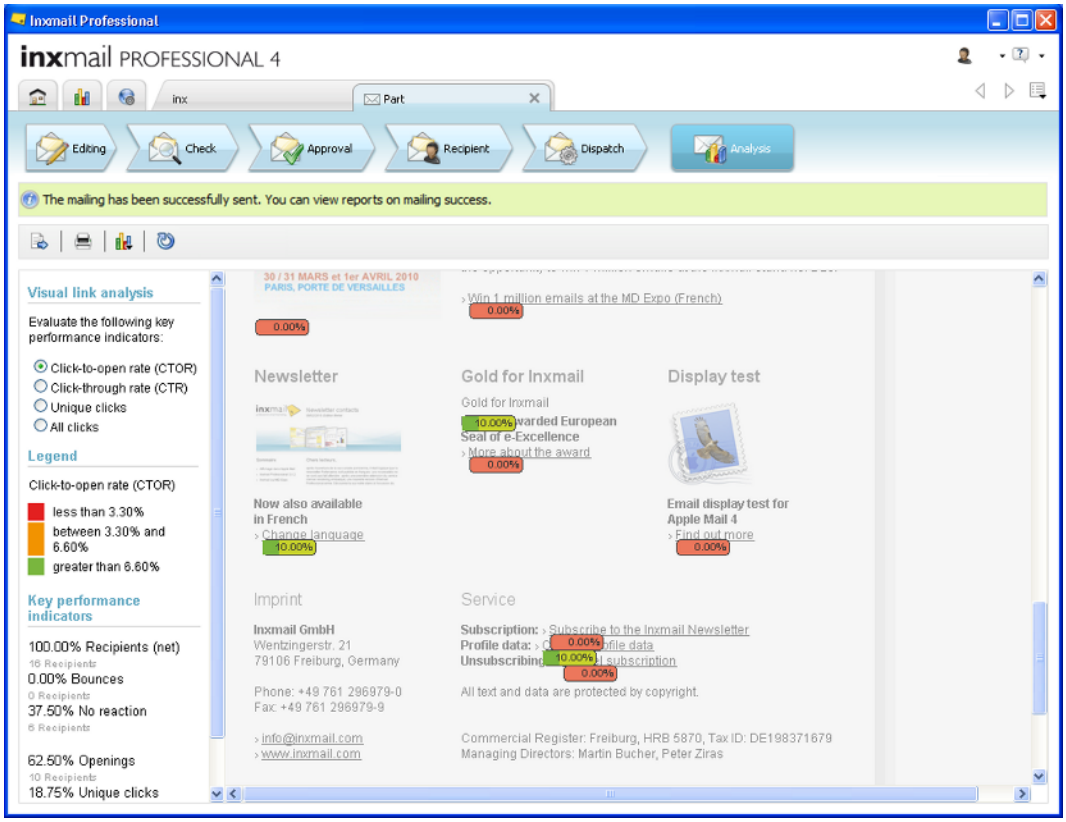


Figure 219: "Analysis" workflow step

2. Click the (*Display selected reports*) button to view any further reports.

24.7 Exporting reports

Step-by-step

1. Create the report you require.
   You will be directed to the report view.
2. Click the (*Export report*) button.

The *Exporting 'Reports'* dialog box is displayed.

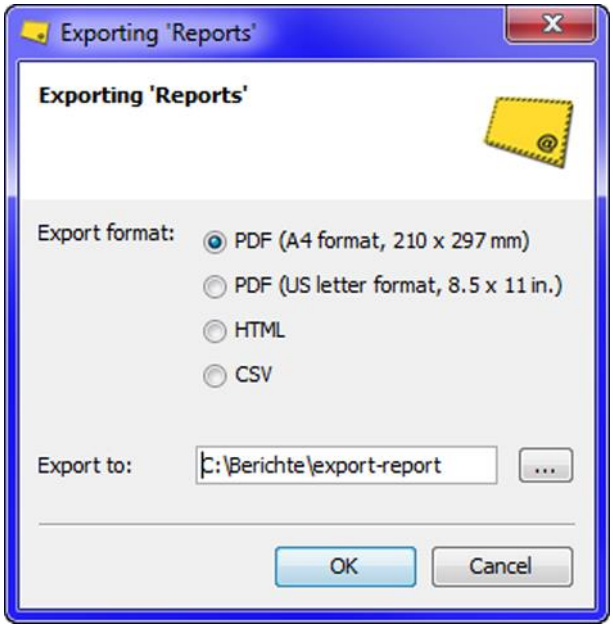


Figure 220: Exporting "Reports" dialog box

3. Select the export format:
   - PDF (A4, 210 x 297 mm) or PDF (US Letter, 8.5 x 11 in.)

     In addition to the actual report, the exported *.pdf file also contains the date and time of the export process as additional information. *.pdf files are optimally suited to printing reports.
   - HTML

     Reports may also be exported as HTML files. A *.zip file containing the HTML file and the analysis graphics is available after the export.
   - Text (comma-separated values)

     Text format is the preferred choice if the reports are to be further processed in Office programs. Several text files are created and combined in a *.zip file during the export. The *.zip file contains at least two text files. One text file contains the meta data, that is, the report settings and the creation date. Each further text file contains the analysis data of one report.
4. Specify the file path (including a file name) under which the exported file is to be saved.
5. Confirm your entries by clicking *OK*.

✓ Inxmail Professional saves the exported report at the file path you specified.

25 Mailings (advanced editing)

In this chapter, you will learn the following advanced methods to create mailing content:

- how to arbitrarily extend the email header of your mailing (for example, to specify the priority or CC and BCC settings of a mailing)
- how to create personalised text that is only visible to certain recipients
- how to add system data to the mailing content, for example, the name of the mailing list or the current date
- how to integrate external content into your mailing using the Content-Include command (for example, content from a web page or PDF file attachments with personalised text in the form fields)
- how to create dynamic landing pages using your Inxmail Professional newsletter templates (which recipients can then open by clicking the article overview to read the full article text)

Related Topics

Mailings (editing) page 189

25.1 Extending the email header

25.1.1 Adding pre-specified email header fields

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Click the (*Add/delete other email headers*) button before the subject of the mailing. Then select one of the following email header fields from the drop-down list:

Email header field	Description
Recipients	Specifies to which email addresses of the assigned recipients (in the *Recipients* workflow step, *Mailings (recipient)* page 264) the mailing should be sent. Note: If you do **not** use the email header field, the mailing will automatically be sent to the recipient email addresses specified in the *email* column of the recipient table. For this reason, you should only use the email header field if you want to send the mailing to other recipient email addresses (for example, to email addresses stored in a different column of the recipient table). Example: You want to send the mailing to recipient email addresses stored in the 'Active email addresses' column of your recipient table. To do so, add the *Recipients* email header field. Then enter [active email addresses] in this email header field.

Email header field	Description
Sender	Specifies the sender's email address. Note: If you use this email header field, the sender settings made in the properties of the mailing list (*Setting up the properties of mailing lists* page 82) will be ignored for the current mailing.
Reply address	Specifies the email address to which returns for the mailing (that is, replies from recipients or automatically generated replies) are sent or redirected. Note: If you use this email header field, the settings for the reply address configured in the properties of the mailing list (*Setting up the properties of mailing lists* page 82) will be ignored for the current mailing.
Priority	Specifies the priority (importance) with which the mailing is sent. The recipient's email client will indicate the priority with, for example, an icon (exclamation mark for highest priority).

The email header field appears below the subject line.

3. Now fill out the field and save your specifications.

✓ You have successfully added a standard element to the email header of the mailing.

Additional information

To remove the email header field, click the (*Add/delete other email headers*) button again and then click the corresponding email header field in the drop-down list. The email header field will be removed (together with all settings made for it).

25.1.2 Specifying other email header settings

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Click in the content area of the mailing.
3. To specify email header entries for sending the mailing to recipients as a CC or BCC copy, enter the following:

Personalised email header	Format / Example
CC	Format: [%header(CC,<email address1>,<email address2>)] Example: [%header(CC,test1@inxmail.de,test2@inxmail.de)]
BCC	Format: [%header(BCC,<email address1>,<email address2>)] Example: [%header(BCC,test1@inxmail.de,test2@inxmail.de)]

4. To specify arbitrary personalised email header entries, enter the following:

Personalised email header	Format / Example
Email header entry that displays a fixed piece of text	Format: [%header(X-<any name in the email header field>,<text>)] Example: The email header entry 'Version', which displays the fixed text 'Inxmail Professional 4.1', may be specified as follows: [%header(X-Version,Inxmail Professional 4.1)]
Email header entry that displays data read out from the system *Inserting system data (commands)* page 374)	Format: [%header(X-<name of the email header field>,[<name of the system data field>])] Example: The email header entry 'Mailinglist', which displays the name of the mailing list, may be specified as follows: [%header(X-mailing list,[%list-name])]
Email header entry that displays column values read out from the recipient table.	Format: [%header(X-<name of the email header field>,[<column value>])] Example: The email header entry 'Changedate', which displays the date of the last modification to the recipient data set (read from the 'Modified on' system column), may be specified as follows: [%header(X-change date,[Changed on])]

5. Save your settings.

✓ You have successfully specified a personalised email header entry for the email header of the mailing.

25.1.3 Example: Setting up email header entries for text message dispatch

Prerequisites

For the example described here, you will also require a column in the recipient table containing the corresponding mobile numbers of the recipients (for example, 'Mobile'). If necessary, create a corresponding column in the recipient table before carrying out the following steps.

Step-by-step

You must add the following email header entries for the mailing to send your mailing as a text message using a corresponding service provider:

1. Open the mailing in the *Editing* workflow step.
2. Click the (*Add/delete other email headers*) button before the subject of the mailing. Then select the *Recipients* entry from the drop-down list.
3. In the *Recipients* field, enter the email address of your text message service provider, for example, sms@inxmail.de.
4. Then click in the content area of the mailing.
5. Now, specify in the following format a personalised email header entry to access the corresponding recipient table column:

   `[%header(X-<arbitrary name of the email header field>,<name of the recipient table column>)]`
6. Save your settings.

✓ When sending your mailing, it will now be sent to the recipient's corresponding mobile numbers.

Example

Personalised email header entry with the name "SMS-Dispatch" to access mobile numbers in the "Mobile" column of the recipient table: `[%header(X-SMS dispatch,mobile)]`

Related Topics

» *Creating a new column* page 123

25.2 Creating personalised text (for target groups)

In Inxmail Professional, you can insert conditional text (for example, a specific paragraph or sentence) which recipients will only see if the condition applies (for example, the form of address displayed for all female recipients may be 'Dear Ms', while for all male recipients it is 'Dear Mr'). This allows you to change the appearance of a mailing for each recipient.

The following steps may be necessary to create conditional text:

- *Add conditions (if/elseif/else)* page 367

  You can integrate conditional text by inserting (conditional) commands. During mailing dispatch, these conditions control whether, and if so, which text is inserted for the current recipient.
- *Extending existing conditions (and/or)* page 371
- *Inserting system data (commands)* page 374

25.2.1 Add conditions (if/elseif/else)

Step-by-step

Open the *Add condition* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the conditional text.
3. Click the *Commands* button and select the *Add condition (if/else)* entry

Step 1/3: Select element for setting up the condition of the *Add condition* dialog is displayed.

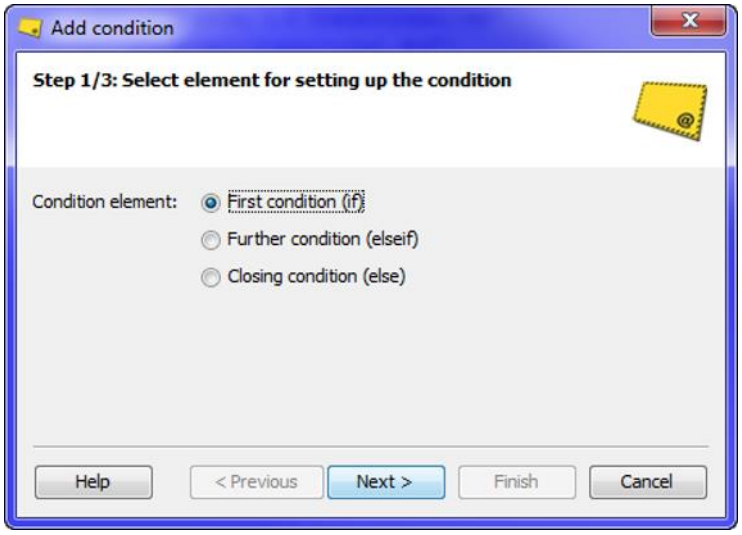


Figure 221: 'Add condition' dialog box

4. In the dialog box, select the *First condition (if)* option.

Note If you have already added a condition, you can also select the *Further condition (elseif)* or *Closing condition (else)* option.

5. Click *Next*.

   You will be directed to *Step 2/3: Select type of condition*.

6. In the dialog box, select the section to which the new condition is to apply from the *Condition for* drop-down list:

Entry	Description
Condition on column value	Used to display text only for recipients with a particular entry in a column in the recipients table (for example, if the text in the salutation should be dependent on the value entered in the *Gender* column of the recipients table)
Condition on recipient reaction	Used to only display text to recipients which have (prior to dispatch of this mailing) carried out a particular action (such as clicking a link). Note: To use this type of condition, you require the consent of your recipients. This means you can only use this type of condition if the appropriate property rights have been activated in your system (that is, in the Inxmail Professional administration section).
Condition on mailings sent	Used to only display text to recipients who have previously received a particular mailing or a certain number of mailings.
Dispatch interruption	Used to only display text to recipients who have not received one or several mailings as a result of a dispatch interruption.
Particular target group	Used to only display text to recipients assigned to a particular target group (*Creating target groups* page 160).

Entry	Description
Free condition expression	Used to create a personalised conditional expression through which text is assigned to recipients.

7. Click *Next*.
8. If you selected the *Condition on column value* option, specify the following additional information in the dialog box:
   - In the recipient table, select the column to which the condition is to apply (for example, the *Gender* column) and click *Next* to confirm.
   - In *Step 3/3: Specify comparison value for the condition*, specify the relational operator and the comparison value (e.g., specify the 'equal to' operator and the value 'm' for male to only display the text for male recipients).
9. If you selected the *Condition on recipient reaction* option, specify the following additional information in the dialog box:
   - Select the recipient reaction to which the condition is to apply (for example, the *Has clicked a particular link (HasClicked, HasClickedContent)* option) and click *Next* to confirm.
   - In *Step 3/3: Specify reference mailing for the condition*, specify the mailing list and the mailing to which the recipient reaction applies.
10. If you selected the *Condition on mailing sent* option, specify the following additional information in the dialog box:
    - Select the mailing dispatch to which the condition is to apply (for example, the *Was a particular mailing successfully received* option) and click *Next* to confirm.
    - In *Step 3/3: Specify reference mailing for the condition*, specify the mailing list and the mailing to which the mailing dispatch applies.
11. If you selected the *Dispatch interruption* option, specify the following additional information in the dialog box:
    - Select the dispatch interruption to which the condition is to apply (for example, the *The recipient did not receive a specific mailing due to a dispatch interruption* option) and click *Next* to confirm.
    - In *Step 3/3: Specify reference mailing for the condition*, specify the mailing list and the mailing to which the dispatch interruption applies.
12. If you selected the *Existing target group* option, specify the following additional information in the dialog box:
    - Move the target groups to which the condition is to apply to the *Selected target groups* section.
    - In the *Recipients:* drop-down list, specify whether the recipients (for whom the text is to be displayed) must belong to each, to at least one or to none of these target groups.
13. If you selected the *Free condition expression* option, specify the relevant condition expression in the dialog box under *Free condition expression*.
14. Confirm your settings in the dialog box by clicking *Finish*.
15. Click the mouse pointer between the `[%if]` and `[%endif]` commands.
16. Then specify what should happen if the condition applies (e.g. add the text 'Dear Ms', if this text should be displayed in this case).

17. To add further conditions, click at the end of the last condition (e.g., behind the text 'Dear Ms'), and then repeat steps 1c to 7 (see above).

    To specify a condition that applies if all other conditions do not apply, for example, select the *Further condition (elseif)* option in step 2.

    Example

    To display different images in the mailing content, depending on the sport interests of the recipient:

```
[%if Column("Sportinterest")="Tennis"]
<img src="[%url; "http://www.company.de/tennis.gif"]"border="0"/>
[%elseif Column("Sportinterest")="Sailing"]
<img src="[%url; "http://www.company.de/sailing.gif"]"border="0"/>
[%else]<img src="[%url; "http://www.company.de/landscape.gif"]"border="0"/>
[%endif]
```

    Example

    In some cases, it may make sense to not send a mailing to particular recipients. To ensure that recipients whose customer number is not known do not receive a mailing, insert the following into your mailing:

```
[%if CustomerNumber IS_EMPTY][%no-mail][%endif]
```

18. Save your settings.

✓ You have successfully added a condition. The quick preview ((*Show/hide quick preview*) button) shows the conditional text for the recipient currently selected in the *Check* workflow step using the *Check content* button.

Example

Examples for the use of Inxmail Professional functions (*Functions* page 519) when creating conditional text:

To include a reminder text for recipients whose subscription will expire within 30 days, you can use the **'DateDiff(#Date1#, #Date2#)' function** (*Date functions* page 525). This function allows you to calculate the interval between two specified dates. The function subtracts the first date from the second and determines the difference in days.

Insert the following into your mailing:

```
[%if DateDiff(SubscriptionEnd, Date())30] Renew your subscription. [%endif]
```

In this function, 'SubscriptionEnd' stands for the column of the same name in the recipients table. The data type of this column must be 'Date'. Date() is always the current date. If the result of the function is less than '30', the text 'Renew your subscription' will appear.

- If you want to specially address new subscribers in a monthly mailing to the "test" mailing list, insert the **'SubscriptionDate("ListName")' function** (*Recipient functions* page 529). The function will return the subscription date for the specified mailing list.

  Insert the following into your mailing:

  ```
  [%if Month(SubscriptionDate"test"))=Month(Date())] Welcome to your first
  issue of the newsletter. [%endif]
  ```

  Only recipients who registered in the current month will see the text 'Welcome to your first issue of the newsletter.'
- If you allow recipients to update their recipient profile themselves through profile management (JSP-Vorlage „Profilverwaltung"), you can define that all recipients whose records have not been updated since 20 April 2007 should receive a text block with the following content: 'Please update your profile regularly.' This can be achieved using the **'LastModificationDate()' function** (*Recipient functions* page 529).

  Insert the following into your mailing:

  ```
  [%if LastModificationDate() #20.04.2007 0:00:00#] Please update your profile
  regularly.[%endif]
  ```

Related Topics

» *Operator, command and function reference* page 515

» *Content check using test or recipient profiles* page 228

25.2.2 Extending existing conditions (and/or)

You can extend an already added conditional expression if multiple factors must all be fulfilled simultaneously (for example, the text is displayed to all recipients who have opened the mailing **and** are male).

Step-by-step

Open the *Extend condition* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.

2. Click at the end of an already created conditional expression (e.g., `[%if x=y <`end of the conditional expression`>]paragraph[%endif]`).
3. Click the *Commands* button and select the *Extend condition (and/or)* entry.

   A dialog box appears.

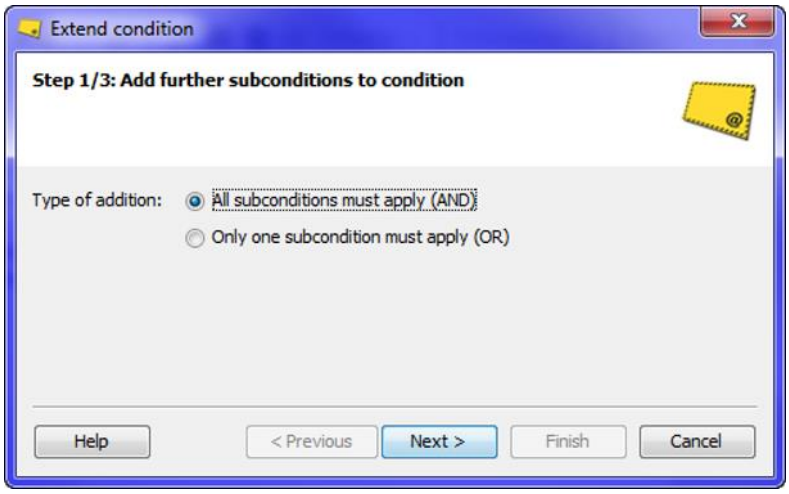


Figure 222: 'Extend condition' dialog box

4. In the dialog box, specify if you want to extend the already added conditional expression with an AND function (both the already added subcondition 1 **and** simultaneously the new subcondition 2 must be met) or with an OR function (either the already added subcondition 1 **or** the new subcondition 2 must be met).
5. Click *Next*.

   You will be directed to *Step 2/3: Select type of condition*.
6. In the dialog box, select the section to which the new condition is to apply from the *Condition for* drop-down list:

Entry	Description
Condition on column value	Used to display text only for recipients with a particular entry in a column in the recipients table (for example, if the text in the salutation should be dependent on the value entered in the *Gender* column of the recipients table)
Condition on recipient reaction	Used to only display text to recipients which have (prior to dispatch of this mailing) carried out a particular action (such as clicking a link). Note: To use this type of condition, you require the consent of your recipients. This means you can only use this type of condition if the appropriate property rights have been activated in your system (that is, in the Inxmail Professional administration section).
Condition on mailings sent	Used to only display text to recipients who have previously received a particular mailing or a certain number of mailings.
Dispatch interruption	Used to only display text to recipients who have not received one or several mailings as a result of a dispatch interruption.

Entry	Description
Particular target group	Used to only display text to recipients assigned to a particular target group (*Creating target groups* page 160).
Free condition expression	Used to create a personalised conditional expression through which text is assigned to recipients.

7. Click *Next*.
8. If you selected the *Condition on column value* option, specify the following additional information in the dialog box:
   - In the recipient table, select the column to which the condition is to apply (for example, the *Gender* column) and click *Next* to confirm.
   - In *Step 3/3: Specify comparison value for the condition*, specify the relational operator and the comparison value (e.g., specify the 'equal to' operator and the value 'm' for male to only display the text for male recipients).
9. If you selected the *Condition on recipient reaction* option, specify the following additional information in the dialog box:
   - Select the recipient reaction to which the condition is to apply (for example, the *Has clicked a particular link (HasClicked, HasClickedContent)* option) and click *Next* to confirm.
   - In *Step 3/3: Specify reference mailing for the condition*, specify the mailing list and the mailing to which the recipient reaction applies.
10. If you selected the *Condition on mailing sent* option, specify the following additional information in the dialog box:
    - Select the mailing dispatch to which the condition is to apply (for example, the *Was a particular mailing successfully received* option) and click *Next* to confirm.
    - In *Step 3/3: Specify reference mailing for the condition*, specify the mailing list and the mailing to which the mailing dispatch applies.
11. If you selected the *Dispatch interruption* option, specify the following additional information in the dialog box:
    - Select the dispatch interruption to which the condition is to apply (for example, the *The recipient did not receive a specific mailing due to a dispatch interruption* option) and click *Next* to confirm.
    - In *Step 3/3: Specify reference mailing for the condition*, specify the mailing list and the mailing to which the dispatch interruption applies.
12. If you selected the *Existing target group* option, specify the following additional information in the dialog box:
    - Move the target groups to which the condition is to apply to the *Selected target groups* section.
    - In the *Recipients:* drop-down list, specify whether the recipients (for whom the text is to be displayed) must belong to each, to at least one or to none of these target groups.
13. If you selected the *Free condition expression* option, specify the relevant condition expression in the dialog box under *Free condition expression*.
14. Confirm your settings in the dialog box by clicking *Finish*.

15. The condition added to your mailing will be extended (for example, resulting in the following condition: `[%if x = y AND a = b] Paragraph [%endif]`).

✓ You have successfully extended a condition.

Examples for extended conditions

- You can define that a paragraph should only be visible to either female recipients from London or male recipients from Berlin. To do so, insert the following into your mailing:
  ```
  [%if (Gender="f" AND Residence="London") OR (Gender="m" AND Residence="Berlin")] Your personalised paragraph [%endif]
  ```
- If a recipient has a birthday on the day the mailing is sent, birthday greetings can be sent after the salutation. To do so, use the 'Day()' and 'Month()' functions (*Date functions* page 525). You will also require a column in the recipients table containing the birthday of the recipient. Insert the following into your mailing:
  ```
  [%if Month(Birthday)=Month(Date()) AND Day(Birthday)=Day(Date())] Happy birthday![%endif]
  ```
  You can also use this condition for target groups (*Creating target groups* page 160) or dynamic lists (*Overview: Recipients* page 90). This allows you to define, for example, a dynamic 'Birthday' mailing list.

Related Topics

» *Add conditions (if/elseif/else)* page 367

25.3 Inserting system data (commands)

25.3.1 Inserting system data

In Inxmail Professional, you can integrate system data into your mailing, such as the name of the mailing list in which the mailing was created, or the current date. To do so, you must insert the corresponding commands into your mailing.

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Click the position in your mailing where you would like to insert the system data.
3. Click the *Commands* button and select one of the following entries from the drop-down list:

> **Note** You may also enter the commands manually. After inserting commands, you can use the quick preview (button (*Show/hide quick preview*)) to see which information will be displayed to the recipients of your mailing.

- *Insert list name*: This entry inserts the `[%list-name]` command into your mailing, to display the name of the current mailing list.

Example

Enter the following text in the editing area:

- Dear subscriber of the '`[%list-name]`' mailing list

After dispatch, the recipients of your mailing will then see the following text, for example:

- Dear subscriber of the 'News Channel' mailing list

- *Insert list size*: This entry inserts the `[%list-size]` command into your mailing to display the number of recipients in the mailing list. The number of recipients will be formatted according to the regional settings and number formats configured for the mailing list.

  Example

  Enter the following text in the editing area:

  - This newsletter has `[%list-size]` subscribers.

  After dispatch, the recipients of your mailing will then see the following text, for example:

  - This newsletter has 10,121 subscribers.

- *Insert recipient ID*: This entry inserts the `[%id]` command into your mailing, to display the internal recipient identification number. This number may be inserted to uniquely identify a recipient. This number is returned without formatting.

  Example

  Enter the following text in the editing area:

  - http://www.yourcompany.de/shop.jsp?refId=[%id]

  After dispatch, the recipient of your mailing with ID '5126' will then see the following text, for example:

  - http://www.yourcompany.de/shop.jsp?refId=5126

- *Insert date*: This entry inserts the [%date} command into your mailing to display the mailing dispatch date (or, if the mailing was not yet sent, the current date). The date will be formatted according to the regional settings configured for the mailing list (for example, for the 'France' regional setting, the date will be displayed as '13/06/2010', for the 'Germany' regional setting, as '13.06.2010' and for the English (US) regional setting, as '06/13/2010').

  More options are available using the `Date()` and `SendDate()` date functions. This allows you to access the individual date and time fields:

  - `Date()` returns the current (server) date and the current time.
  - `SendDate()` returns the send time of the mailing. If the mailing has not been sent yet, the function will return the current date.

  The `Format()` function allows you to format the date and time values. The following control characters are available.

Examples

- You can insert the issue number of a mailing. For this to appear to your recipients as, for example, 'Issue 02-2007', you must manually enter the following function:

  `Issue[%=Format(Date(), "MM-yyyy")]`

- You may also specify the issue number, for example, using the calendar week:

  `Issue Week:[%=Format(Date(), "ww")]`

- To display the sentence 'Our current monthly tip for February:' in your mailing, enter the following:

  'Our current monthly tip for `[%=Format(Date() "MMMM")]`:'

The following functions allow you to determine the date value from a specific column in the recipients table:

- `Day(`<date column>`)`
- `Month(`<date column>`)`
- `Year(`<date column>`)`

Example

Thank you for your subscription to our newsletter since `Year(SubscriptionDate)`!

You can use the following functions to convert date values:

- `CVDate`

  This function returns the date from a value of the "Date" data type (without e.g. time details).

  `CvDate( Date())` returns the current date.

- `CvTime`

  This function returns the time from a value of the "Date" data type (without date details, for example).

  `CvTime( Date())` returns the current time.

- `CvText`

  This function converts a number or a Yes/No value into text.

- `CvInt`

  This function converts text or a Yes/No value into a number.

- *Insert time*: This entry inserts the [%time] command into your mailing, to display the mailing dispatch time. The time will be formatted according to the regional settings configured for the mailing list (for example, for most regional settings as '14:05:03').

4. Save your settings.

✓ You have successfully integrated system data into your mailing.

Related Topics

» *Date functions* page 525

✓ *Other functions* page 548

25.4 Inserting external content (Content-Include)

25.4.1 Creating a new data source

Step-by-step

1. To open the *Create new content sources* dialog box, click the (*Global settings*) tab > *Content* agent > *Data sources* tab. Then click the (*Create new content sources*) button.
   A dialog box appears.

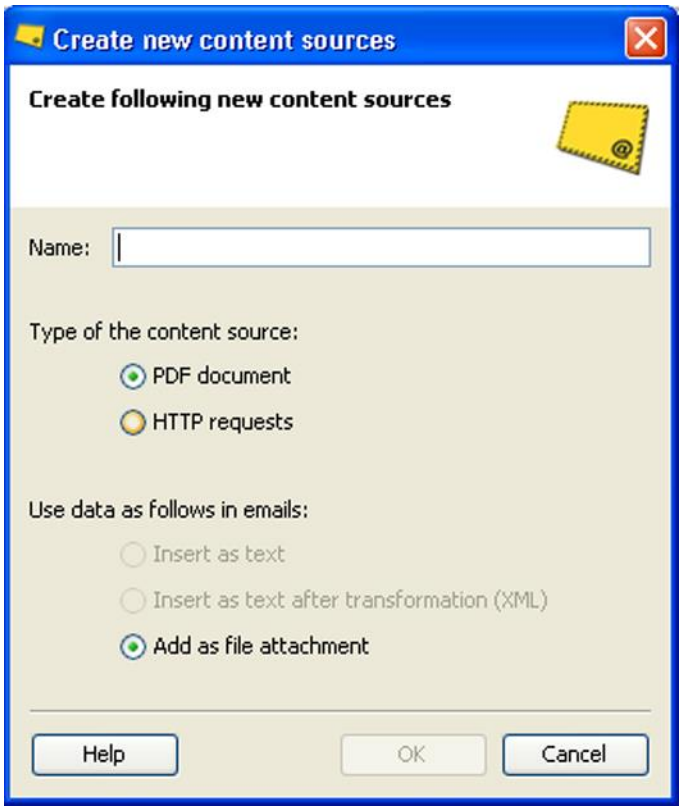


Figure 223: "Create new content sources" dialog box

2. Enter a new and meaningful name for the data source in the dialog box (for example, 'Shareprices_XML'). The data source will be integrated into the mailing using this name.

   Note Note that changing the name at a later point may cause problems if this content has already been integrated in a mailing (*Integrating external content in mailings* page 382).

3. Select from the following types of data source:
   - PDF document: Used to include a PDF document with form fields as a file attachment

     Only integrate PDF documents as external content in Inxmail Professional if you want to personalise the form fields in PDF documents using commands.

     Otherwise, you can insert PDF documents as a normal file attachment (*Adding file attachments* page 225).
   - HTTP requests: Used to either integrate the content of a web page (for example, the first five entries from an RSS feed) or a file (for example, a file saved to a webspace).

4. Specify how the data should be integrated into the mailing. Depending on the previously selected data source type, you may select from the following:
   - *Insert as text*: Select this option to later (when integrating the mailing content) insert the content directly into the text of the mailing. In HTML mailings, the content may also contain HTML tags.
   - *Insert as text after transformation (XML)*: Select this option if the content is available in the XML format. You can then later (when integrating the mailing content) link the data source with an XML transformation.
   - *As file attachment*: Select this option to later add the content (for example, a file saved on a webspace) as a file attachment to the mailing.
5. Confirm your settings by clicking *Finish*.

✓ You have successfully created a new data source in Inxmail Professional. Next you must configure this data source (depending on the type of data source selected).

Related Topics

» *Creating new transformations* page 382

» *Integrating external content in mailings* page 382

25.4.2 Setting up created PDF data sources

Prerequisites

Your PDF file should meet the following requirements:

- the PDF file must contain form fields which:
  - are set to visible
  - were named differently (form fields with the same name will only appear in the Content agent once, however when sending all instances of the field will be respected)
  - are only of the 'Text' data type
  - are large enough to display recipient-specific data

    Note: If you use very large form fields (for example, a single form field for the entire address), you can take line breaks into consideration using the 'Multi-line' field property in Adobe Acrobat.
  - are not write-protected (so that they may be edited in Inxmail Professional)
- the PDF file should not contain any personalised text (this may be added in Inxmail Professional, see below)

Step-by-step

1. On the (*Global settings*) tab > *Content* agent > *Data sources* tab, select an already created data source of the 'PDF document' type.

   The *Source* table column displays the type of data source.
2. To upload the PDF file, click the (*Upload file attachment*) button.

After successfully uploading the file, all form fields in the PDF document appear as editable input fields. If the form fields in the PDF already contain text, it will appear in the input fields.

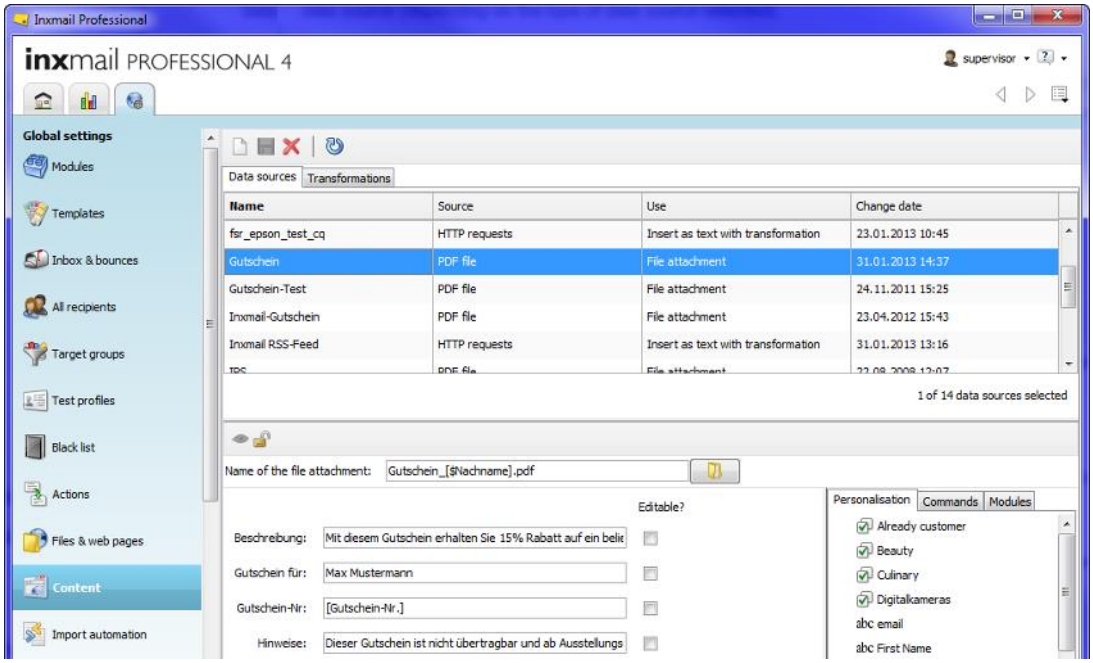


Figure 224: "Content" agent > "Data sources" tab: Created PDF data source

3. You can edit the content of the input fields. The following options are available:
   - You can insert personalised text on the *Personalisation* tab (*Insert personalised text* page 199). To do so, double-click the corresponding recipient table column in this tab.

     If the name of the input fields largely corresponds with the recipient table columns you have created, you can also click the (*Automatically fill all field contents*). This will automatically assign the corresponding recipient tables to the input fields.

     Already added content will not be overwritten.

     You can also personalise the name of the file attachment in the *Name of the file attachment* field.

     Example

     To use a personalised file name to make a differently named document available to each recipient, enter the following in the *Name of the file attachment* field:

     `offer-[$customer number].pdf`

   - You can use the *Commands* tab to insert system data, links or personalised text. (*Inserting system data (commands)* page 374, *Insert link* page 203 and *Creating personalised text (for target groups)* page 367). To do so, double-click the corresponding command in this tab.
   - You can insert modules on the *Modules* tab (*Inserting modules* page 227). To do so, double-click the corresponding module in this tab.

     Note Do not use any HTML or multipart modules, as HTML is not supported by PDF form fields. HTML tags will not be replaced and will therefore remain in the created text.

   - The (*Clear all field contents*) button allows you to delete the content from the text fields.

4. You can activate write protection for individual fields in the PDF document to prevent the recipients from editing form fields in the PDF document. To do so, select the corresponding check box in the *Editable?* column.
5. To configure rights and passwords for use of the PDF document, click the (*Define PDF security settings*).

   A dialog box appears.

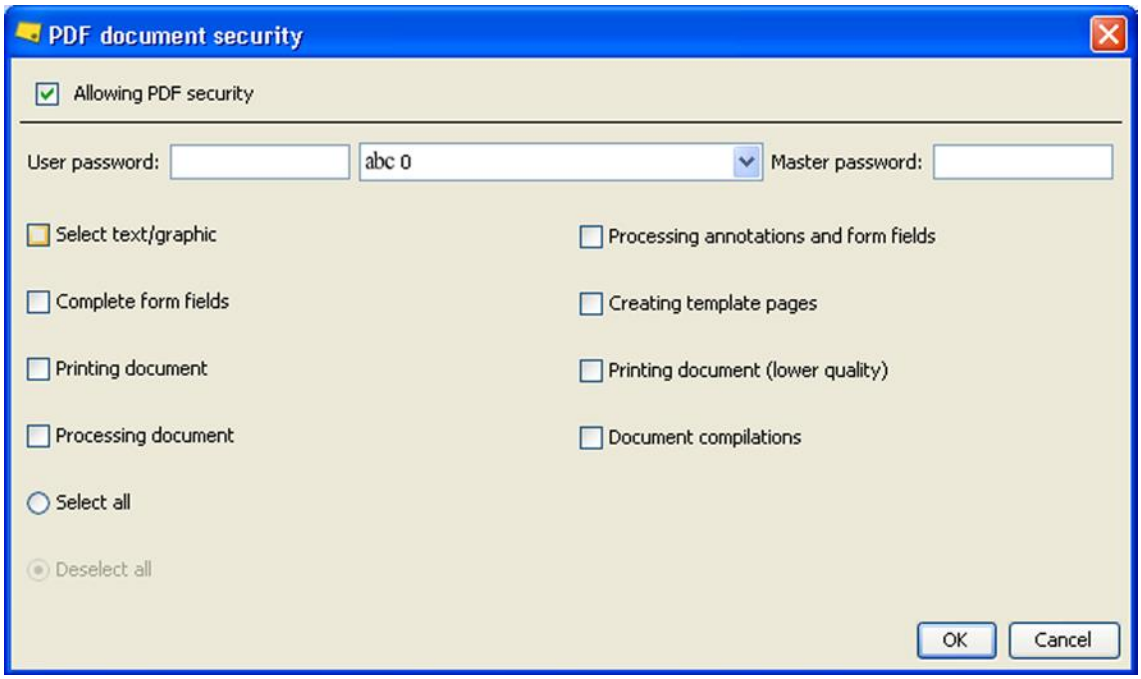


Figure 225: "PDF document security" dialog box

6. If the *Allowing PDF security* check box is activated, you may specify the following in the dialog box:
   - a user password, so only authorised users can open the document

     You can either enter the password as text (so all users must use the same password) or select a column from the recipients table containing the password. If, for example, users should login with their birthday, select the column from the recipients table that contains the recipients' date of birth.
   - a master password

     The master password allows you to open all target documents. This will deactivate all security settings made in this dialog box.

     If the password fields are left empty, no password request will appear when opening the target document.
   - the rights which all recipients have after opening the document (for example, the 'Select text/graphic' right)
   - selection of the functions for which the user password is required
7. Confirm your entries in the dialog box by clicking *OK*.
8. Save your settings.

✓ You have successfully set up a PDF data source.

25.4.3 Setting up created HTTP request data sources

Step-by-step

1. On the (*Global settings*) tab > *Content* agent > *Data sources* tab, select an already created data source of the 'HTTP request' type.
2. In the *URL* field, specify the URL through which the web page or source file of the content may be accessed (directory path on the server).
3. Content that is inserted using the Content-Include command is updated again when the mailing is sent. In the *Query URL only once for each email dispatch* field, specify whether the URL:
   - should be queried only once for each mailing dispatch (i.e., when the mailing is sent to the first recipient) and external content should be cached (i.e., for sending to all the remaining recipients)

     This will reduce the volume of data and allow mailings to be sent more quickly.
   - should be queried for each recipient when the mailing is dispatched

     This is necessary if you personalise the content of your mailing, for example.
4. In the *Process Inxmail commands* field, specify whether Inxmail commands contained within the content should be processed (for example, commands for personalisation, conditions or modules).
5. If a username and password is necessary to access the content web page or source file, you may enter this data here. This makes it possible to load the content from the recipient's location without entering this login data.
6. For access to web pages, specify the web page character set encoding in the *Character set encoding* field.
7. If you specified during creation of the data source that the data drawn from the data source is to be used as a file attachment to the email, you can specify the name of the file attachment in the *Name of the file attachment* field. This file name will then appear in the recipient's email.
8. Save your settings.

✓ You have successfully set up a HTTP request data source.

Additional information

Only integrate files as external content in Inxmail Professional if you want to personalise the attachments. Otherwise you can insert the files as a normal file attachment (*Adding file attachments* page 225).

Related Topics

Further information on personalising files can be found under *Personalising integrated content using parameters* page 383.

25.4.4 Creating new transformations

Transformations are required for XML content. This must be transformed before it can later be integrated in your text or HTML mailing. To do so, you must create 'transformation rules' using the XSLT (XSL Transformation) programming language.

Step-by-step

1. To open the *Create new transformation* dialog box, click the (*Global settings*) tab > *Content* agent > *Transformations* tab. Then click the (*Create new transformation*) button.
   A dialog box appears.

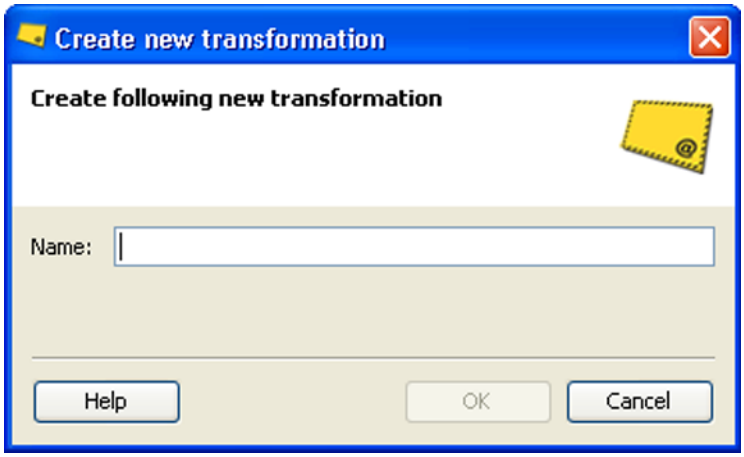


Figure 226: "Create new transformation" dialog box

2. Enter a unique name for the transformation in the dialog box and click *OK*.

   Note Note that you must later (when integrating the content in a mailing) use this name to recognise and assign the transformation (*Integrating external content in mailings* page 382).

3. You may specify XSLT entries for the transformation as follows:
   - You can enter the XSLT commands directly in the input field (whole area below the table).
   - You can import the content of an XSLT file by clicking the (*Insert text from file...*) button.
4. Save your settings.

✓ You have successfully created a new transformation and can now assign this when integrating external content in a mailing.

25.4.5 Integrating external content in mailings

Step-by-step

Open the *Integrate content* dialog box as follows:

1. Open the mailing in the *Editing* workflow step.
2. Click the position in the content area of the mailing where you want to integrate the external content.
3. Click the *Commands* button and select the *Integrate content* option in the drop-down list.

A dialog box appears.

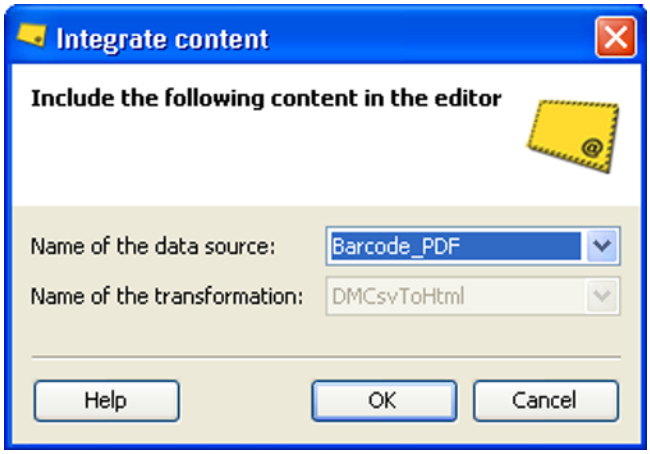


Figure 227: 'Integrate content' dialog box

4. In the dialog box, select a previously created data source that contains external content.
5. If the content of the selected data source is present in the XML format, you must transform the raw XML data for your text or HTML mailing as appropriate. To do so, select a previously created transformation.

   You can only select a transformation if a data source of the 'Insert as text after transformation (XML)' type was selected.
6. Confirm your entries by clicking *OK*.
7. The external content will be integrated in the mailing with the following command:
8. `[%content-include(DateSourceName);xslt(TransformationName)]`
9. Save your mailing.

✓ You have successfully inserted external content into your mailing. The quick preview (*Show/hide quick preview*) button) allows you to view the external content.

Note Please note that the integrated external content will be updated at the time of sending. Provided you have set this up for the data source, this content will also be updated each time the dispatched mailing is opened.

Related Topics

» *Creating a new data source* page 377

» *Creating new transformations* page 382

» *Creating a new data source* page 377

25.4.6 Personalising integrated content using parameters

Use parameters for the personalisation of external content in order to implement, for example, the following:

You have added external content from an HTTP request data source as a file attachment (*Setting up created HTTP request data sources* page 381). You now want to personalise this content before sending.

The personalisation parameters must be entered in the mailing **and** in the *Content* agent for the data source.

Step-by-step

1. Open the mailing in the *Editing* workflow step.
2. Extend the command for the integrated external content with the personalisation parameters and save your entries. For example, use the following command to pass recipient data from the 'CustomerNumber' and 'Email' columns of the recipients table:
3. `[%content-include(test);$cnr=[CustomerNumber];$email=[email]]`
4. On the (*Global settings*) tab > *Content* agent > *Transformations* tab, select the (HTTP request) data source for the content and enter the following:
   a. Extend the URL in the *URL* field by adding the parameter (for example, `http://news2.inxmail.de/test.jsp?cnr=[$cnr]&email=[$email]`).
   b. Deactivate the *Query URL only once for each email dispatch* check box.
   The parameters will be transferred to the data source.
5. Save your settings.

✓ You have successfully used parameters to personalise the integrated content.

Note It is also possible to pass constant arguments to the content data sources. These must be set in quotation marks.

25.4.7 Tracking links in external content (optional)

Important Do not track links in your data source if you also want to integrate these data sources, for example, in your actual Internet presence. The links there will be rendered inactive by the Inxmail commands.

Step-by-step

1. To track a link located in external content, extend the link directly in the external content (for example, in your PDF document) by adding the `[%url:unique-count;...]` Inxmail Professional command.

   Example

   ```
   [%url:unique-count;"http://www.inxmail.de/mailings/shop.xml";"Go to shop"]
   ```

2. Create a data source of the 'HTTP request' type on the mailing list tab > *Content* agent > *Data sources* tab (*Creating a new data source* page 377). Set up this data source (*Setting up created HTTP request data sources* page 381) and enter the following:
   a. In the *URL* field, enter the path to the data source.
   b. Activate the *Process Inxmail commands* check box, so that the Inxmail Professional link tracking command is functional.
3. Then integrate the external content in your mailing (*Integrating external content in mailings* page 382).

✓ You have successfully set up tracking for a link in external content. After mailing dispatch, you can use reports to see how often the link was clicked (*Reports on mailings* page 345).

Note If you want to integrate different content for each individual recipient, link tracking in this content will be deactivated by the 'unique-count' command (*Example: Tracking links in external content (in the case of different content for each recipient).* page 385).

25.4.8 Example: Tracking links in external content (in the case of different content for each recipient).

You want to use your CMS system to create different content for each recipient. This content should also differ with respect to the links inserted in the content (that is, the links lead to different URLs).

You then want to integrate the corresponding content (as external content) for each recipient in the first article of your mailing. After mailing dispatch, you want to analyse how many recipients clicked the link in the first article (no matter where this link leads for each different recipient).

25.4.8.1 Creating content in the CMS system

Step-by-step

1. Create the corresponding content for each recipient in your CMS system.

   Create the content such that Inxmail Professional is able to use the 'CustomerNumber' column in the recipients table to identify which content should be added for which recipient.
2. For each content item, add a link in your CMS system:
   - the same "Name in the report" must be entered for all links (for example, 'Article1', *Insert link* page 203).
   - the links may point to different URLs
   - all links must have the (new) 'content' link type

   Example

   The content for the recipient with customer number 1 contains a link to target page 1:

   `[%url:content; "http://www.company.de/targetpage1.html"; "Article1"]`

   The content for the recipient with customer number 2 contains a link to target page 2:

   `[%url:content; "http://www.company.de/targetpage2.html"; "Article1"]`

25.4.8.2 Integrating content in your mailing as external content

Step-by-step

1. In Inxmail Professional, create a data source of the 'HTTP request' type on the mailing list tab > *Content* agent > *Data sources* tab (*Creating a new data source* page 377). Set up this data source (*Setting up created HTTP request data sources* page 381) and enter the following:

   a. In the *URL* field, enter the path to your CMS system where the content is stored.

Because you may want to add different content for each recipient, you must also extend the URL with a command pointing to the 'CustomerNumber' column in the recipients table, e.g.: `http://www.xyz.de/page.html/cnr=[customer number]`

b. Deactivate the *Query URL only once for each email dispatch* check box so that Inxmail Professional queries the URL again for each recipient during mail dispatch.

This can lead to high data transfer volumes and slower mailing dispatch.

c. Activate the *Process Inxmail commands* check box, so that the Inxmail Professional link tracking command is functional.

2. Then integrate the external content in your mailing (*Integrating external content in mailings* page 382).
3. Send the mailing (Sending mailings).

25.4.8.3 Viewing reports

To determine how often recipients have clicked the links in the sent mailing, go to the main *Reports* tab and create a click evaluation report (*Creating reports* page 354).

In this report, all clicks on links in the mailing with the 'content' link type and the 'Name in the report' 'Article 1' will be summarised under a single link.

The new 'content' link type is only analysed in the context of external content. In other cases, it returns an error.

A link of the 'content' link type is handled exactly like a link of the 'unique-count' link type when saving (*Overview: Link tracking* page 207).

When creating conditions for click reactions (*Creating personalised text (for target groups)* page 367), selecting *Has clicked a particular link (HasClicked)* also allows you access the tracked links in the content.

You can also manually use the 'HasClickedContentLink()' and 'HasOpenedContent()' functions for the same effect (*Recipient functions* page 529).

25.5 Dynamic landing pages (newsletter templates)

You can order newsletter templates from Inxmail GmbH or associated partners, through which it is possible to quickly create dynamic landing pages for articles with longer content. This allows you to include a short teaser text in your mailing, for example, and at the end of the text link to a dynamic landing page with the full article text. The landing page may also contain personalised text.

On request, we can also prepare these landing pages in your company's corporate design. Contact us at customer-care@inxmail.de for more information.

25.5.1 Creating dynamic landing pages with a newsletter template

Step-by-step

1. Create a mailing based on your newsletter template.
2. Click the (*Add element*) button in the *Editing* workflow step of the mailing.

A dialog box appears.

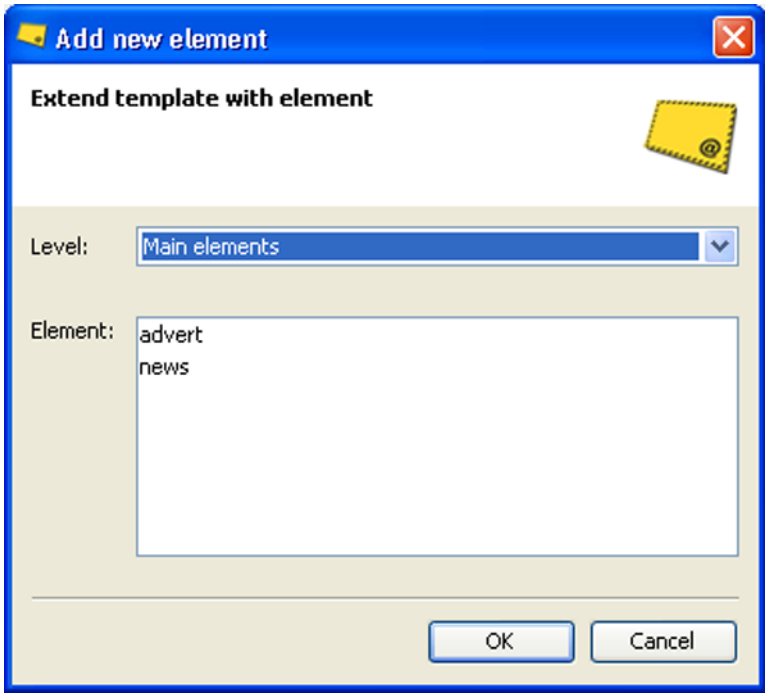


Figure 228: "Add new element" dialog box

3. In the dialog box, select the *Main elements* entry in the *Level* field. Then, select the *Dynamic landing page* element in the *Element* field and confirm with *OK*.

   The 'Dynamic landing page' element will be added as the main element.

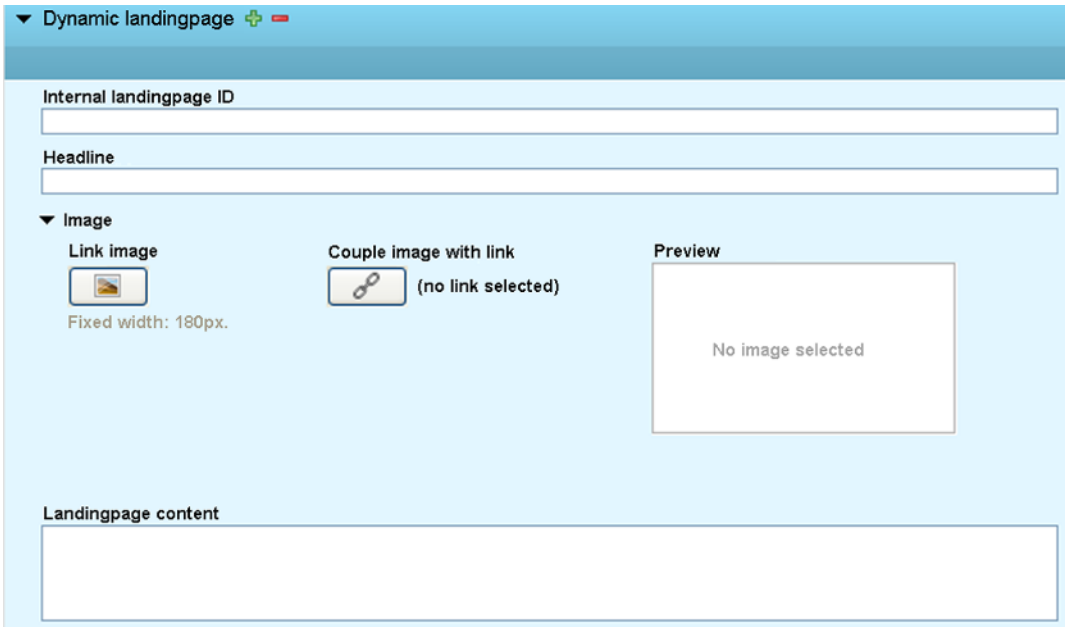


Figure 229: "Dynamic landing page" element

4. Enter an arbitrary unique ID for the landing page (for example, '123').

   You require the ID to be able to link an article with a landing page, for example.

5. Specify the heading and content of the landing page.

You can format this text and add links. The links in the dynamic landing page can be tracked.

6. Add an image using the *Link image* button. You can also add a link to this image using the *Couple image with link* button.

   This image can be used by your recipients to jump from the header of a dynamic landing page to the dynamic landing pages of other articles in your current mailing.
7. Now create an article in your mailing.
8. To link the article with the landing page, click in the article and then click the (*Add element*) button.

   The *Add new element* dialog box will appear again.
9. In the dialog box, select the *Elements for article* entry in the *Level* field.
10. Select the *Dynamic landing page* element in the *Element* field.
11. Confirm your selection with *OK*.

    The 'Dynamic landing page' element will be added to the article as an element.

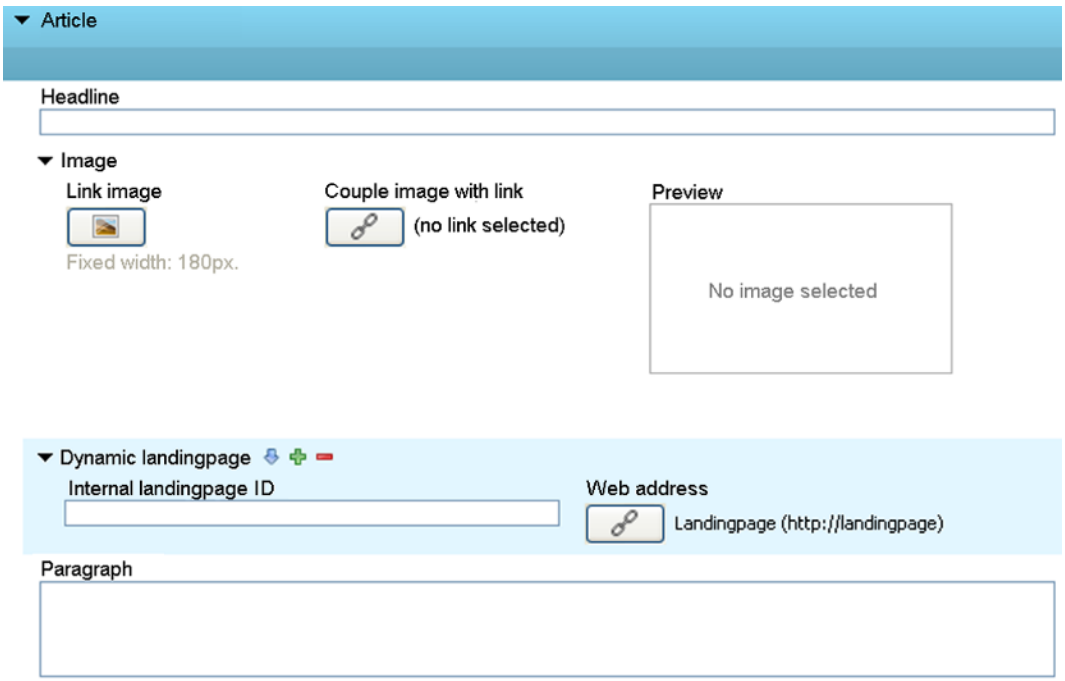


Figure 230: "Dynamic landing page" element

12. Enter the ID of the landing page to be linked (step 4).
13. Save your settings.
14. To test the dynamic landing page, open the quick preview by clicking the (*Show/hide quick preview*) button.
15. Click the link to the article in the mailing.

    The dynamic landing page is displayed.

    ✓ You have successfully created a dynamic landing page.

Related Topics

» *Creating a new mailing* page 184

✓ *Inserting an image as a reference (linking an image)* page 219

Additional information

The following is visible on the dynamic landing page:

- In the header you can see your header graphic (banner or logo, depending on the newsletter template).
- Beneath that, you can see the images that allow you to jump to the other landing pages of the mailing. These images are customised according to the target groups (that is, if you have defined an article for a specific target group, the linked image does not appear in the header of the dynamic landing page for the recipients that do not belong to this target group).
- The defined content of the dynamic landing page (with the mailing header) will appear under the linked images. The image you specified in your article will also appear here.

25.5.2 Analysing clicks and open rates for dynamic landing pages

In the *Reports* agent, you can analyse the open rates of dynamic landing pages and see how often links on the dynamic landing pages were clicked (*Reports* page 344).

Clicks per evaluable link

Link	Link type	Unique clicks	CTR[1]	All clicks	CTOR[2]
Browser link	Unique count	0	0.00%	0	0.00%
Browser link (Text mailing)	Unique count	0	0.00%	0	0.00%
Footer: Unsubscription	Cancel subscription	0	0.00%	0	0.00%
Footer: Website	Unique count	0	0.00%	0	0.00%
Imprint: Website	Unique count	0	0.00%	0	0.00%
Landingpage «Enter a short headline for table of contents»	Unique count	1	33.33%	1	33.33%
Landingpage «This is article one. »	Unique count	2	66.67%	3	66.67%
	Total	3		4	

[1] Click-through rate (CTR): The number of unique clicks on a link divided by the net number of recipients.
[2] Click-to-open rate (CTOR): The number of unique clicks divided by the number of opened emails.

Graphic call-ups of web addresses when mailing is opened

Web address	Unique graphic call-ups	All graphic call-ups	CTR[1]
Impressions of the landingpage «Enter a short headline for table of contents»	1	1	33.33%
Impressions of the landingpage «This is article one.»	2	3	66.67%
Opening rate	1	1	33.33%
Total	4	5	

[1] Click-through rate (CTR): The number of unique call-ups of a graphic divided by the net number of recipients.

Figure 231: Reports on clicks and open rates

26 Email sequences

This chapter includes the following:

- You are introduced to email sequences and email sequence mailings.
- You will learn how to display and manage existing email sequence mailings (that is, how to copy, rename, delete and open email sequence mailings).
  In addition, you will learn how to create and set up email sequence mailings (that is, set up and check contents, and assign recipients).
- You will learn how to set up an email sequence in a (standard) mailing list.

26.1 Overview: Email sequences and email sequence mailings

Email sequences contain email sequence mailings that are sent automatically in particular intervals to one another (for example, to send a learning series comprising lessons one to ten). The individual email sequence mailings can be sent to different target groups.

You can set up exactly one email sequence for each standard mailing list or dynamic mailing list. You set this up on the tab of the mailing list in the *Email sequence* agent.

The following are **not** provided for email sequences:

- Email sequence reports
- Approval function for the mailings in an email sequence

26.2 Email sequence mailings

26.2.1 Displaying and sorting the email sequence mailings table

Step-by-step

1. On the tab of the (standard) mailing list, click the *Email sequence* agent > *Emails* tab.
   The table shows an overview of existing email sequence mailings.

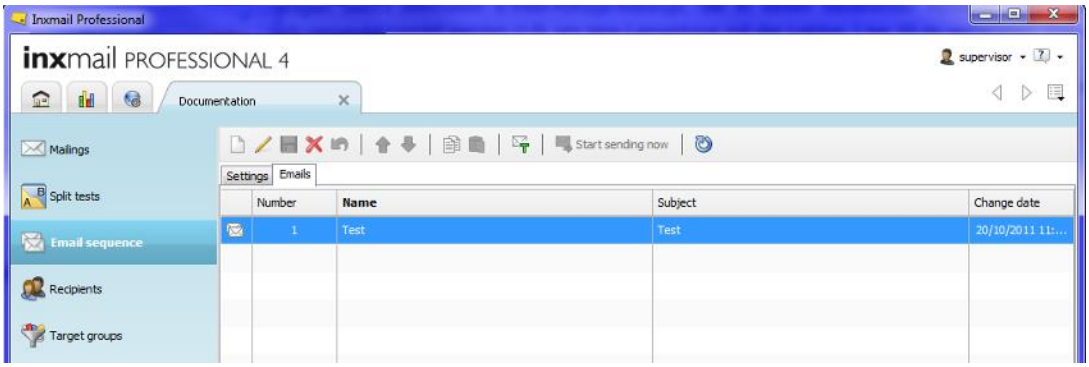


Figure 232: "Email sequence" agent: Email sequence mailings table

2. To sort the table by columns, double-click the relevant column header, for example, *Name*.

✓ The email sequence mailings are displayed sorted in the table.

Additional information

The order of the email sequence mailings in the table corresponds to the order in which the email sequence mailings are sent within the email sequence.

The *Number* column gives the position of each email sequence mailing in the sending sequence.

The following symbols may be shown in front of the email sequence mailing in the table:

- symbol: email sequence mailing that is sent to all recipients in the mailing list
- symbol: email sequence mailing that is sent only to recipients who belong to one or more target groups

When you select an email sequence mailing in the table, further information on the email sequence mailing is displayed in the 'Details' section beneath the table (for example, you can see which template was used (if any), the format in which the email sequence mailing was created and the email sequence mailing ID).

26.2.2 Managing email sequence mailings

On the tab of the mailing list > *Email sequence* agent > *Emails* tab, the following options are available for editing one or more email sequence mailings selected in the table:

- The (*Rename mailing*) button allows you to rename an email sequence mailing.
- The (*Delete mailing*) button allows you to delete email sequence mailings.
- The (*Move mailing up*) and (*Move mailing down*) buttons allow you to change the position of an email sequence mailing in the table.

  Note The order in which the email sequence mailings in the email sequence are sent will change as a result.

- The (*Copy*) and (*Paste*) buttons allow you to make copies of the email sequence mailing.
- The (*Send test emails*) button allows you to send test emails for the email sequence mailing (*Test emails* page 249).
- By double-clicking an email sequence mailing, you can open it in its own tab and edit it (*Setting up and checking an email sequence mailing, and assigning recipients* page 393).

26.2.3 Creating a new email sequence mailing

Step-by-step

1. To open the *Create new mailing* dialog box, click the tab of the mailing list > *Email sequence* agent > *Emails* tab and then click the (*Create new mailing*) button.

A dialog box appears.

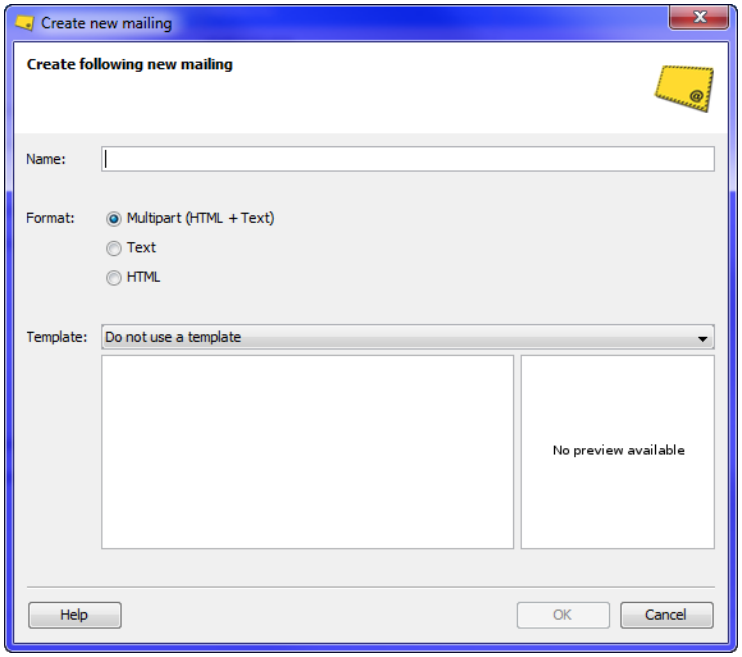


Figure 233: "Create new mailing" dialog box

2. Enter the following in the dialog box (*Creating a new mailing* page 184):
   a. Enter a name for the email sequence mailing.
   b. Select a format for the email sequence mailing.

   > **Note** If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset.

   c. Select whether you wish to use a template to create the email sequence mailing.
3. Confirm your entries by clicking *OK*.
4. The email sequence mailing opens in a new tab for editing.

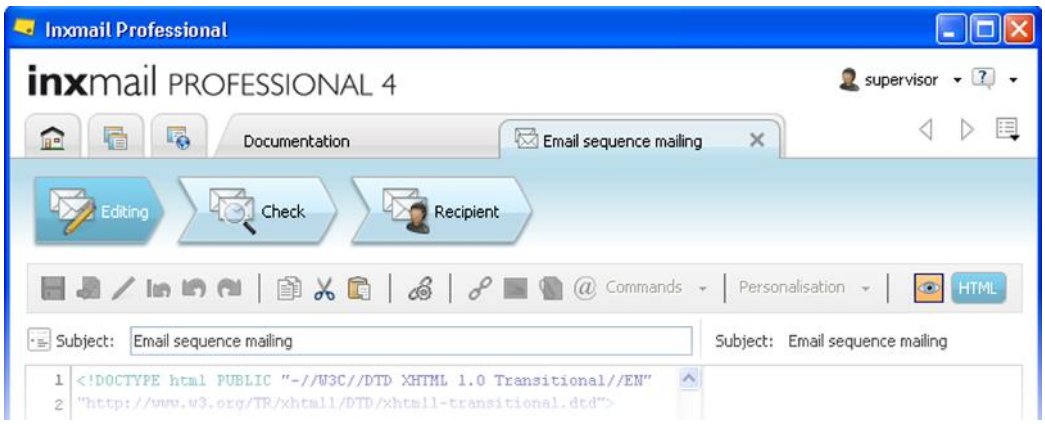


Figure 234: Email sequence mailing tab

At the same time, the email sequence mailing is added to the table in the *Email sequence* agent > *Emails* tab.

✓ You have created a new email sequence mailing.

26.2.4 Setting up and checking an email sequence mailing, and assigning recipients

Step-by-step

1. Open the email sequence mailing in the *Editing* workflow step.
2. Create the content of the email sequence mailing (*Mailings (editing)* page 189 and *Mailings (advanced editing)* page 364).
3. Check your email sequence mailing in the *Check* workflow step, for example, using the quality test (*Mailings (check)* page 228).
4. In the *Recipients* workflow step, assign the recipients or target groups to whom this email sequence mailing is to be sent (*Mailings (recipient)* page 264).

✓ You have now set up an email sequence mailing, checked it and assigned recipients. The mailings in your email sequence will be sent (in particular intervals to one another) as soon as you have activated the email sequence.

26.3 Setting up an email sequence

Step-by-step

1. On the tab of the mailing list > *Email sequence* agent, select the *Settings* tab.
2. Configure the following fields under *Activity after completion of email sequence*:

Field	Description
Do not trigger any further activity	When this option is selected, the following happens after a recipient has received the last email sequence mailing in the email sequence: The recipient remains in the recipient table of the mailing list. The recipient does **not** receive the email sequence mailing in this email sequence again.
Remove recipient from the list	If this option is selected, recipients are removed from the recipient table of the mailing list after they have received the last email sequence mailing in the email sequence. This way, the email sequence subscriber list remains small and mailings can be dispatched more quickly. Note: Recipients are not deleted immediately but are removed at the next email sequence dispatch date. Note: Please note that this may also affect the dispatch of mailings that were created in this mailing list in the *Mailings* agent > *Mailings* tab.
Repeat the email sequence from the start	If this option is selected, recipients will receive the email sequence again after they have received the last email sequence mailing in the email sequence. Note: This is useful for sending horoscopes, daily proverbs, etc.

3. Configure the following fields under *Dispatch settings*:

Field	Description
Sending start time (hour: 0 to 23)	In this field, you can specify the time at which each mailing in the email sequence is to be sent. Note: You specify the day on which the email sequence mailings are to be sent at the set time in the *Send in fixed intervals* or *Send on these weekdays* field.
Send in fixed intervals	When this option is selected, you can specify in which particular intervals to one another (that is, after how many days) the mailings in the email sequence are to be sent. Note: The first email sequence mailing may be sent no earlier than 24 hours after a recipient has subscribed.
Send on these weekdays	When this option is selected, you can specify the weekdays on which the mailings in the email sequence are to be sent. Note: You can also define several weekdays. If you only selected one weekday, you can also specify an interval of 'n' weeks after which the next email sequence mailing is to be sent (on this weekday).

4. To start your email sequence, click the *Inactive* button.

> **Note** You can only click the *Inactive* button if the following applies:
> – You have created one or more email sequence mailings for the email sequence (*Creating a new email sequence mailing* page 391).
> – You have also selected one or more weekdays if you previously selected the *Send on these weekdays* option.
> Otherwise the *Inactive* button is greyed out.

✓ Your email sequence is active and the mailings in the email sequence will now be sent on the days you have specified.

Additional information

You can use the *Start sending now* button to send the next email sequence mailing in this email sequence to your recipients. Please note that the email sequence mailing will then be sent immediately and all the dispatch settings you specified on the *Settings* tab will be ignored. After the mailing has been sent, mailings in your email sequence will continue to be sent as normal.

Once an email sequence mailing has been sent, the number of the sent email sequence mailing is entered into the *Sequence no.* column (with a grey background) in the *Recipients* agent (*Overview: Recipients* page 90). You can change the number in this column (for example, you can decrease the number by one so that the recipient receives the last email sequence mailing again).

To change an email sequence that has already been activated (for example, if you want to modify your dispatch settings), click the *Active* button on the *Settings* tab and make the necessary changes.

27 Templates

You can use templates to help you create mailings or JSP web pages quickly and consistently in Inxmail Professional.

In this chapter, you will learn how to import these templates to Inxmail Professional or create them:

- *Importing the template library* page 396

  In Inxmail Professional, a differentiation is made between the following template libraries:

  - Newsletter templates

    You use newsletter templates to create mailings (*Creating a new mailing* page 184). They support editors in content and layout creation through predefined elements.

    Newsletter templates contain one or more templates. Each template can contain one or more designs.

    The designs of a template always contain the same structure and the same template elements. They differ only in layout.

  - JSP template libraries

    You use JSP template libraries to create JSP web pages (Erstellen von Webseiten). They enable you to easily create and integrate subscription, unsubscription, email archive, profile management and survey JSP web pages, for example.

    JSP template libraries contain one or more JSP templates.

    JSP templates always contain only one design.

  Template libraries are created outside Inxmail Professional as an *.itc file. You must import template libraries to Inxmail Professional to be able to use them.

  If you require a newsletter template that is customised to your company (for example, to automatically create mailings with your corporate design), then contact us at: customer-care@inxmail.de

  You can also create newsletter templates yourself. No knowledge of XML programming is required. Further information on creating newsletter templates can be found in the Inxmail Community (http://community.inxmail.de) under *Technical know-how* (there you will also find information on the Inxmail template editor available for order).

- *Setting up a data source (for the transfer of content in the template)* page 397

  Template developers can make it possible for editors using already imported newsletter templates to transfer content from external data sources with just a few clicks (*Editing area: Templates (newsletter templates)* page 195). For this, the template developers must create the relevant external data sources in Inxmail Professional and link them with the newsletter templates.

  Alternatively, you can order custom newsletter templates that already contain these functions. When these newsletter templates are imported, the required data sources are automatically created in Inxmail Professional and linked with the relevant newsletter templates. You may need to enter your login data for the data sources.

- *Setting up a user template (text, HTML, multipart)* page 402

You can create your own user templates for your mailings directly in Inxmail Professional. You can choose between text, HTML or multipart format.

These user templates can contain predefined mailing contents (for example, the imprint). In addition, they can contain form areas that are then completed by editors when they create a mailing.

27.1 Importing the template library

After installing Inxmail Professional, you will find the following template libraries already imported on the (*Global settings*) tab > *Templates* agent > *Template libraries* tab:

- Basic template demo version

  A demo version of the basic template that you can use to test the creation of a mailing based on a newsletter template. If you subsequently wish to use the basic template to create your mailings, you can order it by sending an email to: customer-care@inxmail.de
- Dynamic web pages (JSP)

  You can use this JSP template library to create your JSP web pages.

Step-by-step

1. Open the *Import template library* dialog box as follows:
   - To import a template library (for example, a newsletter template) that is only to be available in one specific mailing list, click the tab of the mailing list > *Templates* agent > *Template libraries* tab. Then click the (*Import template library*) button.
   - To import a template library (for example, a newsletter template or a JSP template library) that is to be available in all your mailing lists, click the (*Global settings*) tab > *Templates* agent > *Template libraries* tab. Then click the (*Import template library*) button.

   A dialog box appears.

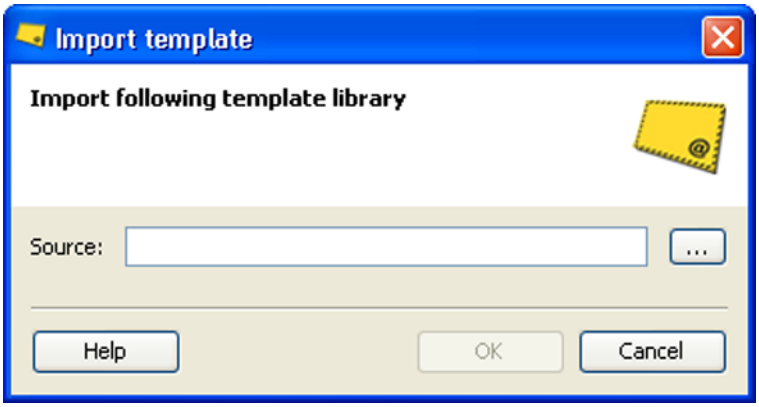


Figure 235: "Import template library" dialog box

2. In the dialog box, use the (*Search*) button to select the *.itc file of the template library and confirm by clicking *OK*.

✓ The template library is imported and appears in the table. You can now use it when creating mailings.

Additional information

Preview area

In the *Preview* area beneath the table, you will see:

- the templates (and the designs) of the currently selected template library
- the data sources linked with the template (if applicable)
- an HTML preview of the design (if applicable)

New version of an already integrated template library

If you import a new version of a template library that has already been integrated into the software, Inxmail Professional overwrites the previous version of the template library in the table.

Mailings or JSP web pages that were created with the previous version of the template library are **not** updated. They continue to contain all the functions and elements of the previous template library.

You can, however, update the design for these mailings or JSP web pages. To do this, open the mailing or select the JSP web page in the table, click the (*Change design of the template*) button and select the design of the current version of the template library.

Delete template library

You can select an imported template library in the table and then delete it by clicking the (*Delete template library*) button.

Note If you delete a template library (newsletter template) that is linked with external data sources, the linked data sources will also be deleted.

27.2 Setting up a data source (for the transfer of content in the template)

Prerequisites

Note Only template developers should set up data sources in Inxmail Professional.

For **every** element in a newsletter template that is to be filled, if necessary, with external content, you must set up one or more data sources in Inxmail Professional.

When the data source is set up, the (*Fill in element*) button is automatically added to the element (in all designs of this template) in the template editor (*Editing area: Templates (newsletter templates)* page 195).

To be able to create a data source, you must have imported at least one newsletter template to Inxmail Professional (*Importing the template library* page 396).

Step-by-step

To create a new data source, open the *Create new content sources* dialog box as follows:

1. To create a data source that is only to be available in a specific mailing list, click the tab of the mailing list > *Templates* agent > *Data sources* tab. Then click the (*Create new content sources*) button.

2. To create a global data source that will be available in all your mailing lists, click the (*Global settings*) tab > *Templates* agent > *Data sources* tab. Then click the (*Create new content sources*) button.

   A dialog box appears.

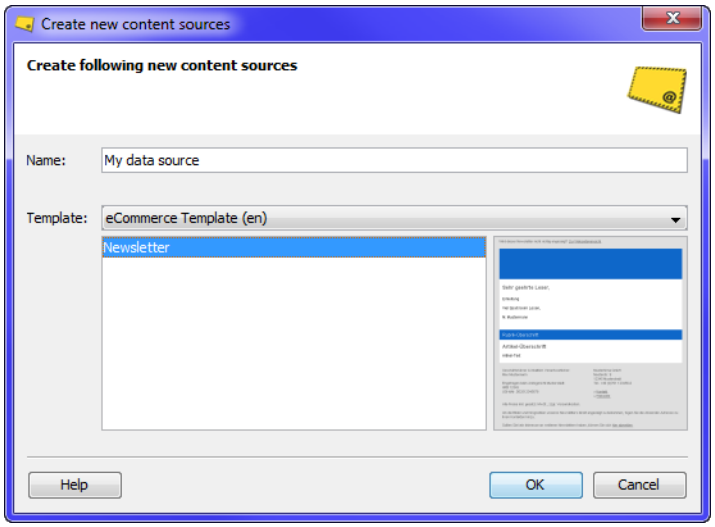


Figure 236: Create new content sources' dialog box

3. Enter a name for the data source in the dialog box.
4. Select the newsletter template in the *Template* drop-down list. Then select the template with which you wish to link the data source in the field below.

   If the selected template contains several designs, the preview will automatically show the first design of the template. The data source will, however, be set up for all designs of the template.
5. Confirm the dialog box by clicking *OK*.

6. The new data source is opened in a tab.

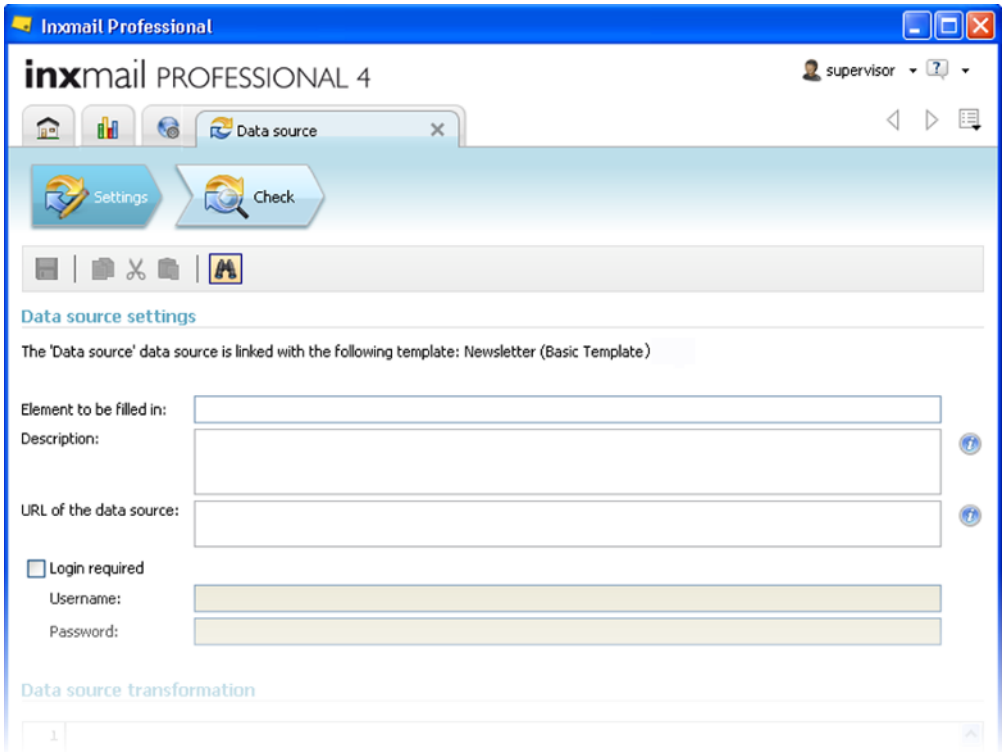


Figure 237: Data source tab

7. In the *Element to be filled in* field ( *Settings* workflow step), enter the internal name of the newsletter template element that is to be filled with the external content (for example, the internal name 'news' for the 'article' element).

   You will find the internal name of an element in the code of the newsletter template. Note that this is not necessarily the name that is displayed for the element in Inxmail Professional.

8. You can enter a description for the internal name of the newsletter template element, if desired. The description can be up to 255 characters long.

This description appears if, when you create a mailing, you wish to fill the newsletter template element with external content and have selected this data source in the *Fill in element* dialog box.

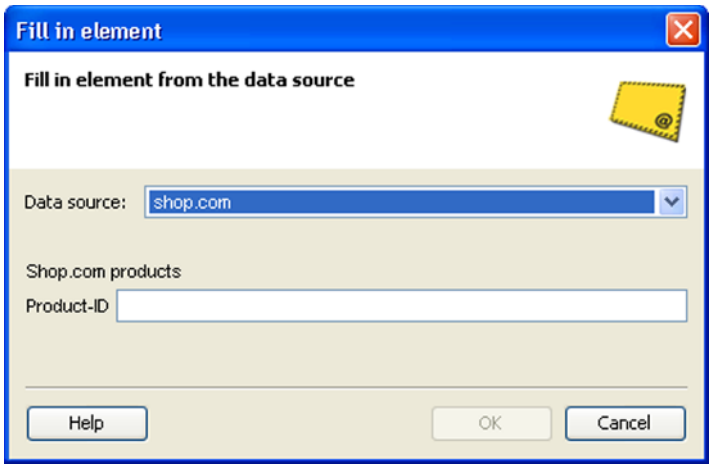


Figure 238: "Fill in element" dialog box

9. Enter the URL of the data source from which the content is to be transferred.

   Note that the content in the data source must be in XML format.
10. Up to five 'dynamic' parameters (whose value is defined through a variable) can be added to the URL, for example to call up a webshop article with a particular product ID via the URL (`id=[$Product-ID]`) or to call up a webshop article in a particular language via the URL (`language=[$Language]`).

    The dynamic parameters you define will affect the *Check* workflow step (below).
11. Any number of 'static' parameters (for which a fixed value is defined) can be added to the URL, for example to call up the webshop article with the product ID '25' via the URL (`id=25)` or to call up the webshop article in English via the URL (`language=EN`).
12. If a login is required to call up the data source, enable the Login required check box.
13. Enter the login data.

    This login data is stored in Inxmail Professional. If an editor fills the element with content when creating a mailing, the login data is automatically passed in the background to the data source.
14. In order that the XML content of the external data source may be included in text or HTML mailings, it must be transformed. Make all the necessary XSLT entries for the transformation under *Data source transformation*.
15. Save your settings.
16. In the *Check* workflow step, check the transfer of the content and whether it is transformed correctly.

If you added dynamic parameters to the URL of the data source in the *Settings* workflow step (above), then an entry field is displayed per dynamic parameter in the *Check* workflow step. You can use this entry field to test the transfer of content for various parameter values.

The result shows you the XML content before the transformation and the result after the transformation.

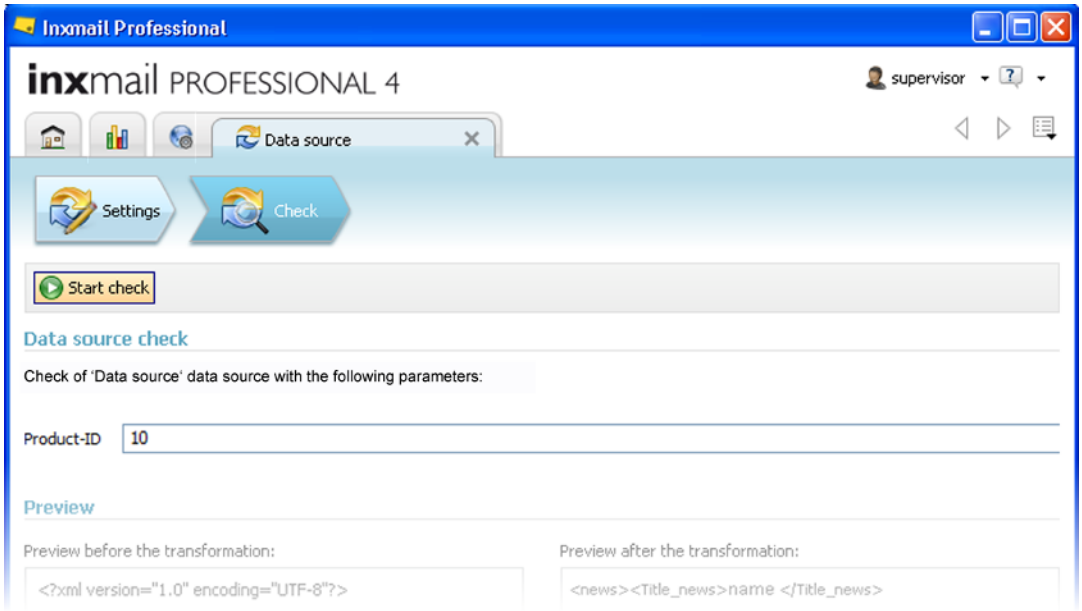


Figure 239: "Check" workflow step

17. Close the data source tab.
18. You return to the *Templates* agent > *Data sources* tab. The new data source is displayed in the table.

✓ You have set up a new data source. Whenever you create a new mailing with this newsletter template, you can transfer the external content using the (*Fill in element*) button in the template editor.

✓

Additional information

You can select an existing data source in the table and then:

- make a copy using the (*Copy*) and (*Paste*) buttons.

  Note The copy of the data source is automatically linked with the same newsletter template. You cannot change this link.

- open the data source for editing by double-clicking it in the table.
- delete the data source using the (*Delete data source*) button.
- rename the data source using the (*Rename data source*) button.

Related Topics

» *Editing area: Templates (newsletter templates)* page 195

27.3 Setting up a user template (text, HTML, multipart)

Step-by-step

To create a new user template, open the *Create new user template* dialog box as follows:

1. To create a user template that is only to be available in a specific mailing list, click the tab of the mailing list > *Templates* agent > *User templates* tab. Then click the (*Create new user template*) button.
2. To create a global user template that will be available in all your mailing lists, click the (*Global settings*) tab > *Templates* agent > *User templates* tab. Then click the (*Create new user template*) button.

   A dialog box appears.

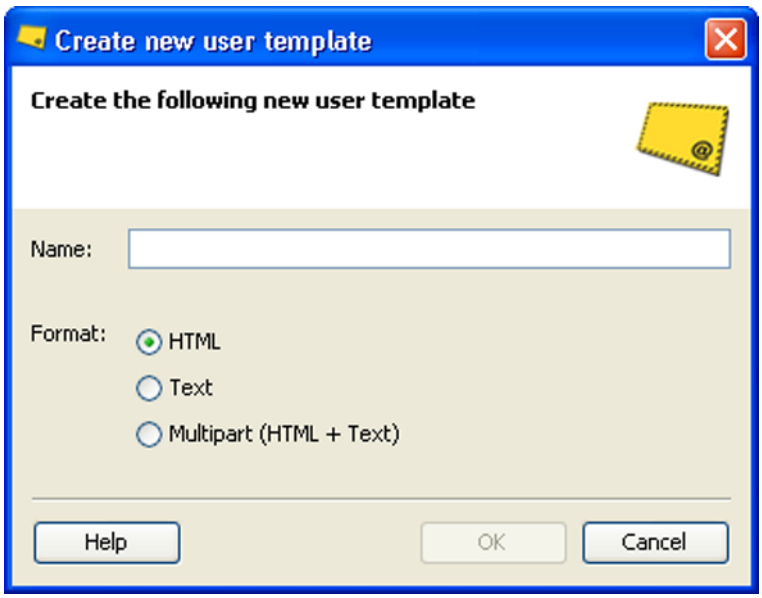


Figure 240: "Create new user template" dialog box

3. Enter a name for the user template in the dialog box.
4. Select one of the following formats for the user template:
   - HTML

     User templates created in this format can be used to create HTML mailings.
   - Text

     User templates created in this format can be used to create text mailings.
   - Multipart (HTML + Text)

     User templates created in this format can be used to create text and HTML mailings.
5. Confirm the dialog box by clicking *OK*.

The new user template is opened in a tab.

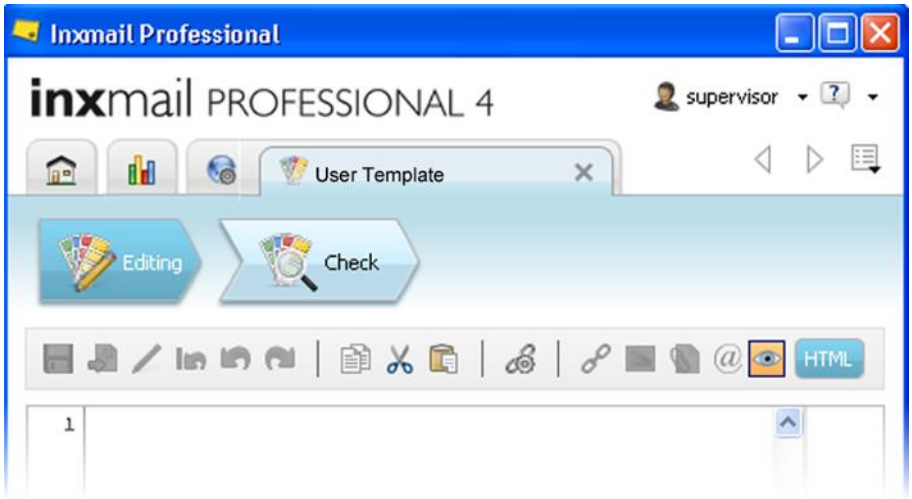


Figure 241: Tab of the user template

6. In the *Editing* workflow step, click in the editor and create all content for the user template. Template content is created in the same way as mailing content. You can also use texts, modules or placeholders, among other things.
7. To define a form area in the user template, create corresponding form fields in the *Editing* workflow step.
8. Click the appropriate place in the editor and then select *Form field* in the *Commands* drop-down list.

   A dialog box appears.

Figure 242: "Insert form field" dialog box

9. Enter a field name in the dialog box (for example, maintext). Then enter the number of lines that the form field should contain (for example, '12').
10. Confirm the dialog box by clicking *OK*.

The field function for the inserted form field is displayed in the editor (for example, [inx:replace("maintext",12)]).

You can format the title of the form field (for example, the title 'Maintext') using HTML code.

In HTML or multipart templates, you can turn the form view on by clicking the (*Turn on form view*) button (or turn the form view off by clicking the (*Turn off form view*) button).

If you would like to edit the inserted form field, then, with the form view turned off, select the form field and click the (*Edit selection*) button.

11. Save your entries in the *Editing* workflow step.
12. In the *Check* workflow step, you can check your template content for selected test profiles or recipients.
13. Close the tab of the user template.
14. You return to the tab of the mailing list or the (*Global settings*) tab > *Templates* agent > *User templates* tab. The new user template is displayed in the table.

✓ You have created a user template that you can now use to create mailings.

Additional information

You can select an existing user template in the table and then:

- make a copy using the (*Copy*) and (*Paste*) buttons.
- open the user template for editing by double-clicking it in the table.
- delete the user template using the (*Delete user template*) button.
- rename the user template using the (*Rename user template*) button.

Note that when you edit, delete or rename a user template, this will not affect mailings created with the user template before the template was modified.

Related Topics

» *Mailings (editing)* page 189

» *Mailings (advanced editing)* page 364

» *Content check using test or recipient profiles* page 228

28 Actions

This chapter includes the following:

- Your are introduced to actions and action sequences.
- You will learn how to display and manage existing action sequences (that is, how to copy, rename, delete and open action sequences).

  In addition, you will learn how to create and subsequently set up new action sequences (that is, define an event and add actions).

28.1 Overview: Actions and action sequences

An 'action' refers to an action (for example, recipient is unsubscribed from a mailing list) that is automatically performed by the system when a particular event occurs (for example, recipient clicks a link). An event can trigger one or more actions.

The term 'action sequence' is used in Inxmail Professional to refer to the triggering event and all linked (successively performed) actions (*Actions and action sequences* page 308).

You set up action sequences in the global *Actions* agent.

28.2 Action sequences

28.2.1 Displaying and sorting the action sequence table

Step-by-step

1. On the (*Global settings*) tab, click the *Actions* agent.
   The table provides an overview of all the action sequences created in your system.

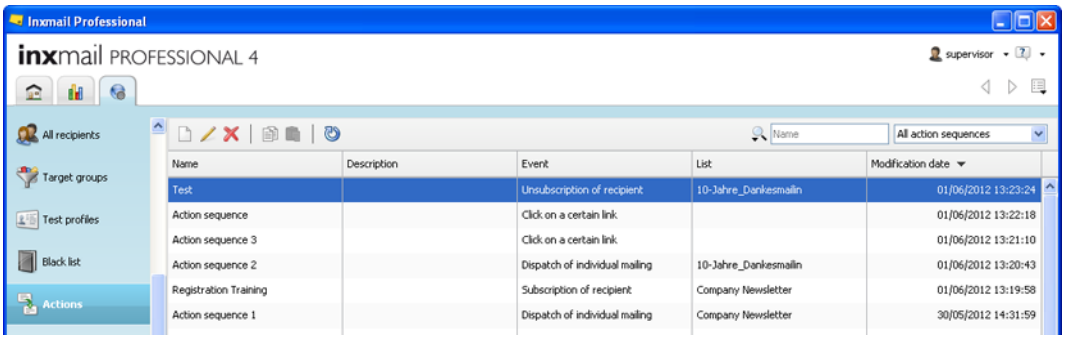


Figure 243: "Actions" agent: action sequence table

   If you select an action sequence in the table, further information on the action sequence is displayed in the Details section beneath the table (for example, you can see the event and the actions of the action sequence; if 'Click on a certain link' was selected as the event for an action sequence, the action ID is displayed).

2. To sort the table by columns, double-click the relevant column header, for example, *Name*.

✓ The action sequences are displayed sorted in the table.

28.2.2 Filtering the action sequence table

Step-by-step

1. On the (*Global settings*) tab, click the *Actions* agent.
   The table with an overview of all the action sequences created in your system is displayed.
2. You can filter the actions using the filter input field as follows:

   Figure 244: Filter input field

   a. Click the button and then select in the drop-down list whether you want to filter the action sequences by the *Name*, *Description*, *Name or description*, *List* or *Action ID* table column.
   b. Enter the character string you want to filter by in the input field.
   c. To apply the filter settings, click .
3. In addition, you can filter the action sequences using the filter drop-down list.

   Figure 245: Filter drop-down list

   Note If you set filters both in the filter input field and in the filter drop-down list, only action sequences that fulfil the criteria of both settings are displayed.

   The following values are displayed in the drop-down list:
   - All action sequences: If you select this option, the table displays all action sequences. Select this option to remove your filter settings.
   - *No list restriction:* If you select this option, the table displays all action sequences that are not assigned to a list.
   - *With list restriction:* If you select this option, the table displays all action sequences that are assigned to a list.
   - *Events that can trigger an action:* When you select an appropriate entry, the table shows all action sequences that are triggered through the selected event.
     A detailed overview of the events can be found in 'Table 21-1: Events that can trigger actions'.

✓ The table will only show the actions that correspond to your filter settings.

Additional information

To delete the filter settings, click .

28.2.3 Managing action sequences

On the (*Global setting*) tab > *Actions* agent, the following options are available for editing one or more action sequences selected in the table:

- The (*Rename action sequence*) button allows you to rename an action sequence.
- The (*Delete action sequence*) button allows you to delete action sequences.
- The (*Copy*) and (*Paste*) buttons allow you to make copies of the action sequences.

- By double-clicking an action sequence, you can open it in a separate tab for editing (*Defining an event for the action sequence* page 408 and *Adding actions to the action sequence* page 411).

28.2.4 Creating a new action sequence

Step-by-step

1. On the (*Global settings*) tab > *Actions* agent, click the (*Create new action sequence*) button.

   A dialog box appears.

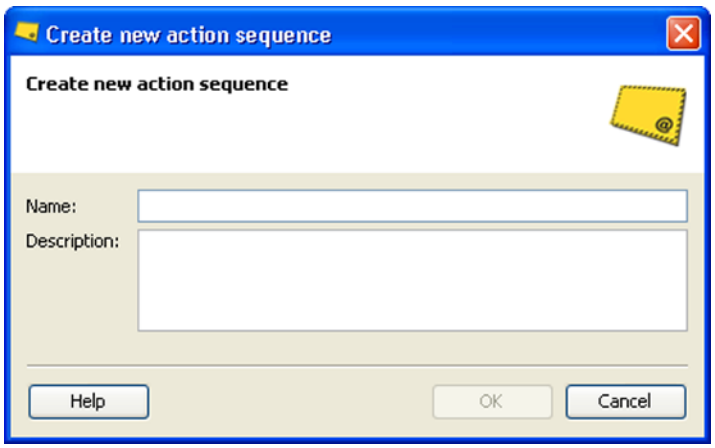


   Figure 246: "Create new action sequence" dialog box

2. Specify a (unique) name for the action sequence.
3. You can enter a description for the action sequence.

   The description of the action sequence appears in the *Actions agent* page 49 *Actions*, in the *Details* section beneath the table.
4. Confirm the dialog box by clicking *OK*.

The action sequence opens in a new tab for editing.

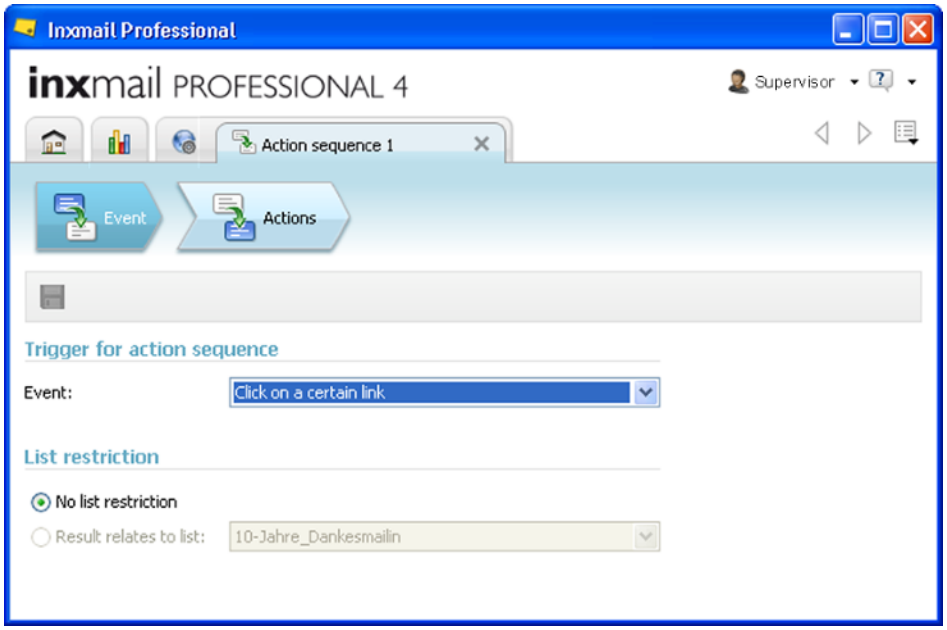


Figure 247: Action sequence tab

✓ You have created a new action sequence and can now set it up.

28.2.5 Defining an event for the action sequence

Step-by-step

1. Open your action sequence in the *Event* workflow step.
2. In the *Event* drop-down list, select the event that is to trigger the action sequence (for example, 'Receipt of a hard bounce').

   Depending on the selected event, you can then specify in the *List restriction* section whether the event is to relate to all mailing lists or only to one in particular (for example, whether a hard bounce in general or only a hard bounce for a particular mailing list is to trigger the action sequence).

Event	Description	For all lists	For a particular list
Click on a certain link	The action sequence is started when: • the recipient clicks a link coupled with the action sequence. • an image coupled with the action sequence is loaded when the recipient opens the mailing. Note: In addition, you must couple the respective link or image with the action sequence (*Insert link* page 203 or *Inserting an image as a reference (linking an image)* page 219).	x	-

Event	Description	For all lists	For a particular list
Receipt of a: • Hard bounce • Soft bounce • Autoresponder bounce • Unknown bounce • Spam bounce	The action sequence is started when a bounce of the corresponding category is received in the *Inbox & bounces* agent > *Bounces* tab. Note: Further information on bounces can be found in *Bounces and returns* page 338.	x	x
Receipt of a: • Autoresponder • Complaint • Reply • Spam	The action sequence is started when a return of the corresponding category is received in the *Inbox & bounces* agent > *Inbox* tab. Note: Further information on returns can be found in *Bounces and returns* page 338.	x	-
Subscription of a recipient	The action sequence is started when a recipient subscribes to a particular mailing list. Only subscriptions that are carried out using the *Subscriptions* agent are taken into account. This includes: • Subscriptions via a subscription web page that accesses the *Subscriptions* agent (for example, subscription web pages that were created with the JSP 'Subscription' template in Inxmail Professional, JSP-Vorlage „Anmeldung") • Subscriptions via the old subscribe procedure by email (*Mailing list subscription and unsubscription by email* page 512) • Subscriptions that are carried out via the 'Subscribe recipient' action (*Adding actions to the action sequence* page 411)	x	x

Event	Description	For all lists	For a particular list
Unsubscription of a recipient	The action sequence is started when a recipient unsubscribes from a particular mailing list. Only unsubscriptions that are carried out using the *Subscriptions* agent are taken into account. This includes: • Unsubscriptions via an unsubscription web page that accesses the *Subscriptions* agent (for example, unsubscription web pages that were created with the JSP 'Cancel subscription' or 'Confirm unsubscribe' template in Inxmail Professional, *JSP templates 'Cancel subscription' and 'Confirm unsubscribe'* page 418) • Unsubscriptions via the old unsubscribe procedure by email (*Mailing list subscription and unsubscription by email* page 512) • Unsubscriptions that are carried out via the 'Unsubscribe recipient' action (*Adding actions to the action sequence* page 411)	x	x
Dispatch of a mass mailing	The action sequence is started when a mailing, split-test mailing or an email sequence mailing from a particular mailing list is sent (regular sending). Note: This action slows down the sending speed.	x	x
Dispatch of an individual mailing	The action sequence is started when the following mailings are sent during subscription to or unsubscription from a particular mailing list (based on your settings in the *Subscriptions* agent): • Subscribe mailings (welcome, timeout or confirmation mailings) • Unsubscribe mailings (farewell, timeout or confirmation mailings) • Last sent mailing of the mailing list Note: This action slows down the sending speed.	x	x

3. Save your settings.

✓ You have defined an event that triggers the action sequence.

Now you must add actions to the action sequence; these actions will be triggered in succession through the event.

28.2.6 Adding actions to the action sequence

Step-by-step

1. Open your action sequence in the *Actions* workflow step.
2. Click the (*Add new action*) button.
3. A dialog box appears.

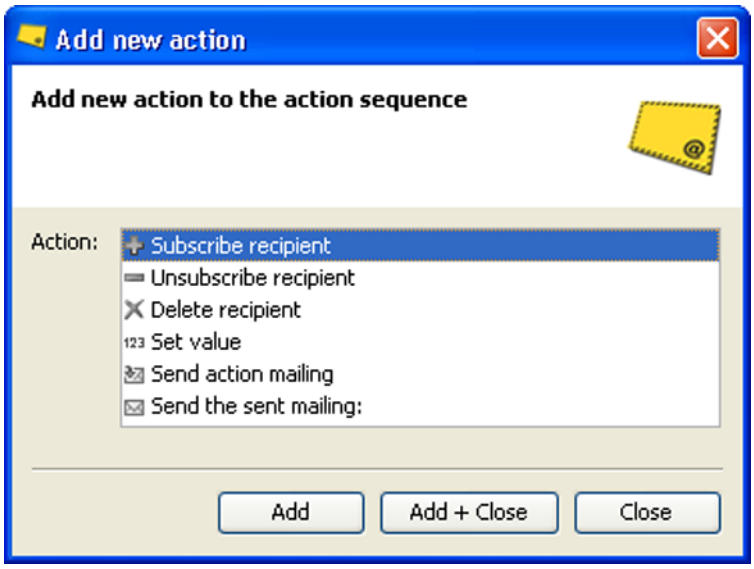


Figure 248: "Add new action" dialog box

4. Add one of the following actions, close the dialog box and then set up the action accordingly.
5. Action - Subscribe recipient page 412
6. Action - Unsubscribe recipient page 413
7. Action - Delete recipient page 413
8. Action - Set value page 414
9. Action - Send action mailing page 415
10. Action - Send sent mailing page 415
11. The (*Add new action*) button allows you to add any number of further actions to the action sequence.

    All actions of an action sequence are successively triggered (according to their order in the *Actions* workflow step) by the specified event.

    Example: After a bounce, the constant value 'Invalid email address' is entered in the 'Unsubscribed' column of the recipient table (first action). The recipient is then unsubscribed from the previous mailing list (second action). Finally, the recipient is transferred to the 'Bounce' mailing list (third action).
12. Save the action sequence.

✓ You have added actions to the action sequence.

Additional information

You can select an action that has already been added and then:

- Make a copy of the action using the (*Copy*) and (*Paste*) buttons
- More or delete the action using the following buttons that appear directly in the action element:
  - Click the (*Move action up*) or (*Move action down*) button to move the action.
  - Delete the action using the (*Delete action*) button.

If the action sequence is triggered through the 'Click on a certain link' event, you must now couple the link or the linked image with the action sequence (*Insert link* page 203 and *Inserting an image as a reference (linking an image)* page 219).

All other action sequences are triggered immediately when the corresponding event occurs.

If you would like to test your action sequence, we recommend creating a new mailing list (*Creating and setting up mailing lists* page 76), to be used for testing purposes only. In this mailing list, you can add test recipients (*Creating recipients manually and editing them* page 109) and send test mailings (Sending mailings).

You cannot test your action sequences using test emails. For security reasons, link tracking and all actions are deactivated in test emails.

If an action cannot be performed due to an error (for example, because the mailing list to which the action relates has been deleted), then no subsequent actions of the action sequence can be performed.

28.2.7 Overview of the individual actions

28.2.7.1 Action - Subscribe recipient

Action - Subscribe recipient

Description

Through this action, the recipient who triggered the event is automatically subscribed to a particular mailing list.

Note Please note that you always require the consent of your recipients in order to send mailings to them.

Example A recipient clicks the 'Take survey' link (event). This recipient is automatically added to the recipient list of the 'Keen on surveys' mailing list (action).

Setup

You set up the action using the following elements:

- *Subscribe recipient to the following list*: Select the mailing list to which the recipient is to be subscribed.
- *Use settings of the 'Subscriptions' agent*: Select the check box if the subscription is to be carried out using the *Subscriptions* agent of the mailing list.
  When the check box is not checked, the *Subscriptions* agent is circumvented, meaning that no subscribe mailings are sent and no log entry is generated.

28.2.7.2 Action - Unsubscribe recipient

Action - Unsubscribe recipient

Description

The recipient who triggered the event is automatically unsubscribed from a particular mailing list or from all mailing lists. The recipient is then moved to the *Recipients* agent > *Unsubscribed* tab of this/these mailing list(s).

Example A recipient clicks the 'Cancel subscription' link (event). The recipient is then unsubscribed from the relevant mailing list (action).

Setup

You set up the action using the following elements:

- *Unsubscribe recipient from the following list*: Select this option to unsubscribe the recipient from a particular mailing list. Then select the mailing list.
- *Use settings of the 'Subscriptions' agent*: Select the check box if the unsubscription is to be carried out using the *Subscriptions* agent of the mailing list. When the check box is not checked, the *Subscriptions* agent is circumvented, meaning that no unsubscribe mailings are sent and no log entry is generated.
- *Unsubscribe recipient from all lists*: Select this option to unsubscribe the recipient from all mailing lists.

28.2.7.3 Action - Delete recipient

Action - Delete recipient

Description

The recipient who triggered the event is automatically deleted from one mailing list, from all mailing lists or from the entire system.

Example A recipient clicks the 'Delete profile' link (event). This recipient is then deleted from the system (action).

Setup

You set up the action using the following elements:

- *Delete recipient from the following list*: Select this option to delete the recipient from a particular mailing list. Then select the mailing list.
- *Delete recipient from all lists*: Select this option to delete the recipient from all mailing lists. The recipient will then only appear on the (*Global settings*) tab > *All recipients* agent.
- *Delete recipient from the system*: Select this option to delete the recipient from the entire system.

28.2.7.4 Action - Set value

Action - Set value

Description

The following can be entered or changed in a particular recipient table column for the recipient who triggered the event:

- A constant value is entered.
- An existing value in the recipient table column is incremented or decremented by a specific numerical value.
- A value that is determined beforehand using an expression is entered.

Example A recipient clicks an image coupled with a link in an HTML mailing (event). The value 'HTML' is entered for the recipient in the 'Format' recipient table column (action). This method is known as HTML sensing, as information on whether the recipient can display HTML mailings is acquired through the action.

Setup

You set up the action using the following elements:

- *Set value in the following column*: Select the recipient table column in which the value is to be entered.
- *Set to constant value*: Select this option to enter a constant value in the column. Then enter the constant value.

  Example For a column with the column type 'Yes/No', enter the constant value 'TRUE' in the input field.
- *Change numerical value by +/- amount*:

  Select this option to increment or decrement an existing value in the column by a specific amount.

  Then specify the amount.

  Example If the numerical value is to be decreased by 1, enter the amount '-1' in the input field.
- *Get value from expression*: Select this option to enter a value in the column that is determined beforehand using a particular expression. Then enter the expression (beginning with an equals sign ('=')).

  Example When the recipient clicks a link, the current date is entered in the 'Click date' column. Enter the following expression: =Format(Date(), "dd.MM.yy HH:mm")

28.2.7.5 Action - Send action mailing

Action - Send action mailing

Description

The recipient who triggered the event automatically receives a particular action mailing from a mailing list.

Example A recipient clicks a link to your web shop in a mailing (event). The recipient automatically receives a voucher for your web shop (action).

Setup

- *List*: Select the mailing list from which the action mailing is to be sent.
- *Send the following action mailing*: Use the button to select the action mailing to be sent.

  Note Only approved action mailings can be selected (*Creating, checking and approving an action mailing* page 332).

28.2.7.6 Action - Send sent mailing

Action - Send sent mailing

Description

The recipient who triggered the event automatically receives the last sent mailing from a mailing list or a particular sent mailing from a mailing list.

Example A recipient subscribes to a mailing list using your subscription page (event). The recipient automatically receives the last sent mailing from the mailing list (action). This gives the recipient an initial impression of the newsletter and bridges the interval until the next regular mailing is sent out.

Note If the target group for the corresponding mailing was restricted, this restriction is ignored for the action.

Setup

You set up the action using the following elements:

- *List*: Select the mailing list from which the mailing is to be sent.
- *Send the most recently sent mailing*: Select this option to automatically send the last sent mailing from the mailing list.
- *Send the following sent mailing*: Select this option to send a particular sent mailing from the mailing list. Then use the button to select the mailing to be sent.

  Note Only sent mailings can be selected.

29 JSP templates for web pages

In this chapter, you will learn how to use Inxmail Professional JSP templates to create the individual web pages you need for your email marketing activities (for example, for managing subscriptions to mailing lists using your website):

- You will get an overview of all Inxmail Professional JSP templates and learn about the types of web pages that you can create.
- You will learn the basics about creating web pages using JSP templates and familiarise yourself with the editing area of JSP templates.
- Web pages created using the JSP templates already contain default settings. You will learn how to customise these default settings (for example, link the web page with a mailing list).
- You will learn how to publish the web pages created with the JSP templates to create a URL for the web pages. You can then call up a preview of the web page.
- You will learn how to integrate the created web pages into your website.
- Some web pages created using JSP templates can be opened by the user using individual login links. You will learn how to create these login links and send them in a mailing.

Note You can also manually create the web pages for your email marketing activities (for example, based on HTML files). You can find more on manually creating subscription forms, for example, in the Inxmail Community (http://community.inxmail.de) under *Inxmail Know-how* > *How to*.

29.1 Overview: JSP templates

With the Inxmail Professional JSP templates, you can:

- create dynamic web pages quickly and consistently
- create barrier-free web pages that are compatible with XHTML 1.0 (exception: 'Email archive' JSP template)
- customise your web page (for example, customise the layout by adjusting the stylesheet)
- integrate these web pages into your company's website
- integrate web pages into your Inxmail Professional environment

29.1.1 'Subscription' JSP template

Using the 'Subscription' JSP template, you can create a web page where users can subscribe to one or more of your mailing lists.

A confirmation web page then informs the user that the subscription has been carried out successfully. You can then directly integrate this subscription web page into your website.

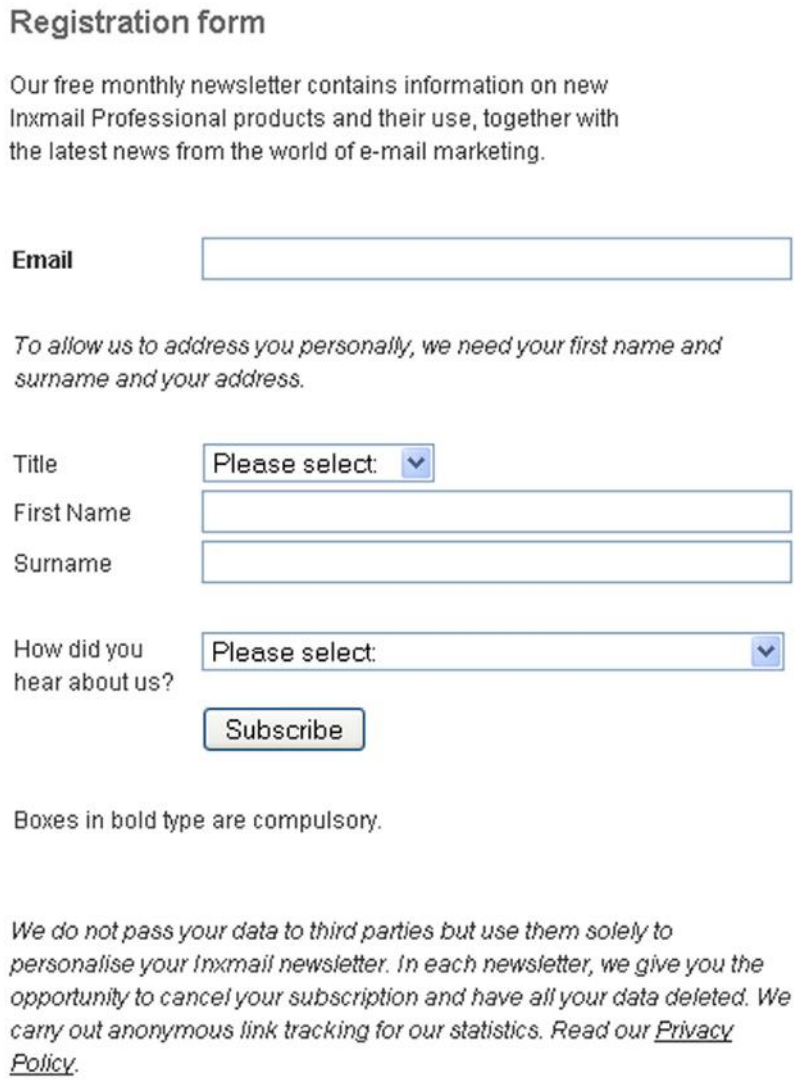


Figure 249: Web page created using the "Subscription" JSP template

Additional information

Creating a subscription web page involves the following steps:

- Create a subscription web page using a JSP template
- Customise the subscription web page using the JSP template (for example, link with a mailing list using the *Form* main element > *Subscription* form element)
- Publish the subscription web page
- Integrate the subscription web page into your website

Related Topics

» *Overview: Subscription and unsubscription* page 128

» *Create new web page* page 426

» *Customising web pages* page 431

» *Publishing the web page (creating the link address/URL)* page 454
» *Integrating the web page into your website* page 455

29.1.2 JSP templates 'Cancel subscription' and 'Confirm unsubscribe'

Using the JSP templates 'Cancel subscription' and 'Confirm unsubscribe', you can create web pages where users can cancel their subscription to your mailing lists.

A confirmation web page then informs the user whether or not the cancellation has been successful.

The two JSP templates for unsubscription have the following differences:

- Using web pages created with the 'Cancel subscription' JSP template, users can cancel their subscriptions to one or more of your mailing lists. To do this, the unsubscription form of the web page must contain at least one field by which Inxmail Professional can identify the users (for example, a field for entering an email address).
  You can then directly integrate this web page into your website.

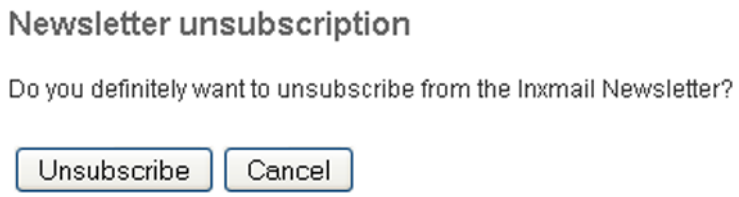


Figure 250: Web page created using the "Cancel subscription" JSP template

- Using web pages created with the 'Confirm unsubscribe' JSP template, users can cancel their subscriptions to exactly one of your mailing lists. Users can access this web page only via an unsubscribe link from a mailing (from the corresponding mailing list).

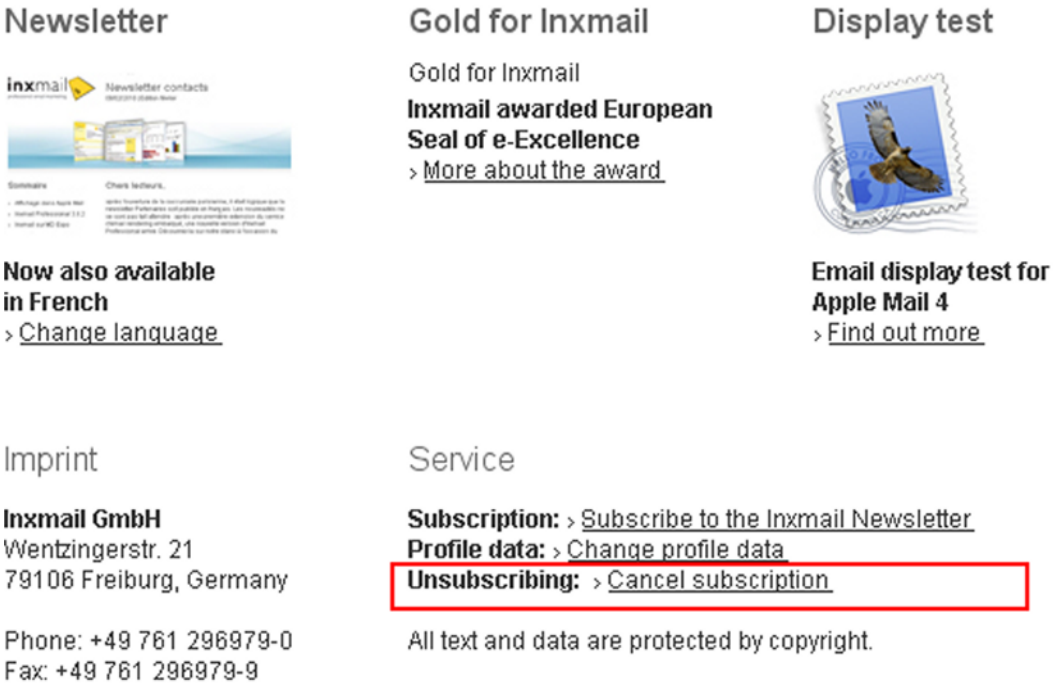


Figure 251: Login link for the "Confirm unsubscribe" web page in a mailing

When the user clicks the unsubscribe link, Inxmail Professional automatically transfers the authentication data from the mailing to the web page. This method of unsubscription offers increased protection from abuse of user data.

If the authentication data could not be transferred correctly to the web page or the user (or his/her email address) is not subscribed to the mailing list, the system issues an error message.

The web page appears and users must confirm the cancellation of their subscription from the corresponding mailing list.

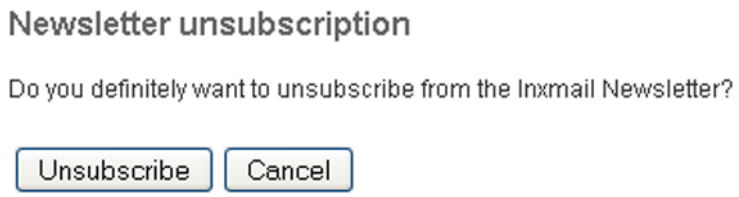


Figure 252: Web page created using the "Confirm unsubscribe" JSP template

Additional information

Creating an unsubscribe web page involves the following steps:

- Create an unusbscribe web page using a JSP template
- Customise the unsubscribe web page using the JSP template (for example, link with a mailing list using the *Form* main element > *Cancel subscription* form element)
- Publish the unsubscribe web page
- Integrate the unsubscribe web page into your website (only for the 'Cancel subscription' JSP template)
- Integrate the unsubscribe link into a mailing (only for the 'Confirm unsubscribe' JSP template)

Related Topics

» *Overview: Subscription and unsubscription* page 128

» *Inserting an unsubscribe link* page 212

» *Create new web page* page 426

» *Customising web pages* page 431

» *Publishing the web page (creating the link address/URL)* page 454

» *Integrating the web page into your website* page 455

» *Inserting an unsubscribe link* page 212

29.1.3 'Last issue' JSP template

Using the 'Last issue' JSP template, you can create a web page that automatically displays the latest mailing (the last issue) of one of your mailing lists.

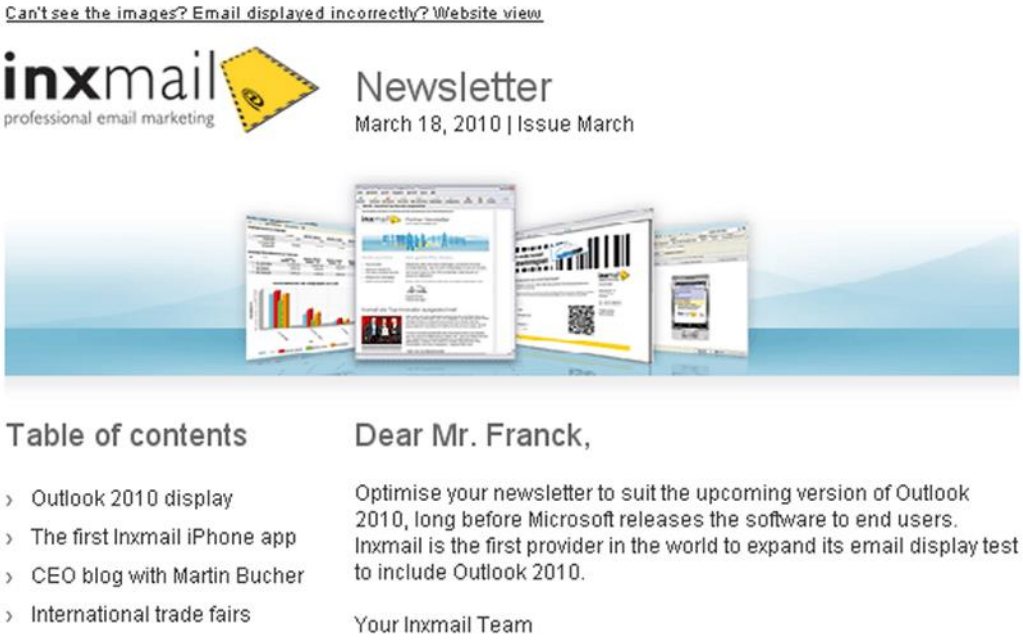


Figure 253: Web page created using the "Last issue" JSP template

You can integrate a link to this web page on your website to help interested users decide whether they would like to subscribe to your mailing list.

Figure 254: Link to web page created using the 'Last issue' JSP template

Additional information

Creating a last issue web page involves the following steps:

- Create a last issue web page using a JSP template
- Customise the last issue web page using the JSP template (for example, link the web page with a mailing list using the *Settings* main element > *List* drop-down list)
- Publish the last issue web page
- Integrate a link to the last issue web page into your website

Related Topics

» *Create new web page* page 426

» *Customising web pages* page 431

» *Publishing the web page (creating the link address/URL)* page 454

29.1.4 'Email archive' JSP template

Using the 'Email archive' JSP template, you can create a web page that displays an archive of the last mailings for your mailing list and provides direct links to these mailings.

You can then directly integrate this web page into your website.

Newsletter archive

Inxmail Professional 4.0 available now	30.11.2010
Test Inxmail Professional 4.0	28.10.2010
Inxmail Professional 4.0: New design, new operating concept	24.09.2010
iPad - More than just hype!	09.08.2010
Trigger actions: Using the pre-header successfully	08.07.2010

Figure 255: Web page created using the "Email archive" JSP template

Additional information

Creating an email archive web page involves the following steps:

- Create an email archive web page using a JSP template
- Customise the email archive web page using the JSP template (for example, link the web page with a mailing list using the *Settings* main element > *List* drop-down list)
- Publish the email archive web page
- Integrate the email archive web page into your website

Related Topics

» *Create new web page* page 426

» *Customising web pages* page 431

» *Publishing the web page (creating the link address/URL)* page 454

» *Integrating the web page into your website* page 455

29.1.5 'Profile management' JSP template

You can create a profile management web page using the 'Profile management' JSP template. Using this web page, users who have a subscription to one or more of your mailing lists can display and edit their subscription data.

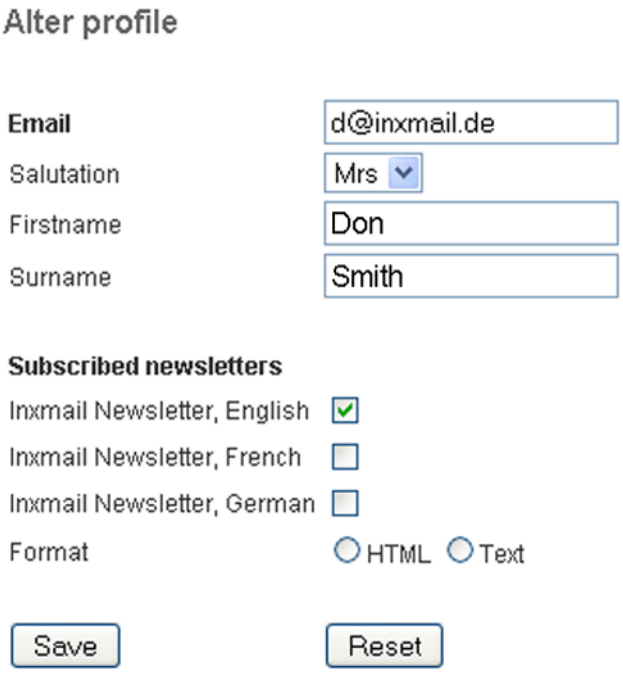


Figure 256: Web page created using the "Profile management" JSP template

Users can display the profile management web page only via a login link. Users can obtain this login link as follows:

- in one of your mailings
- by requesting the login link via your website
  When the user enters the URL of the profile management web page, they are first sent to a welcome page (which is created automatically using the 'Profile management' JSP template). On this welcome web page, users can request a login link by entering their email address.

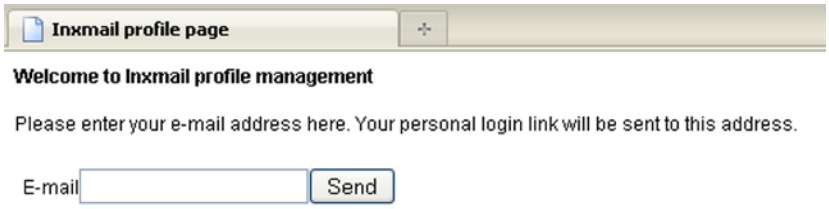


Figure 257: Login page of the "Profile management" web page

Users then receive the login link via email. The login link is only valid for a certain period of time.

Figure 258: Confirmation web page after login link is sent

Note When you create a web page using the 'Profile management' JSP template, Inxmail Professional creates a template for the email with the login link, which will be sent automatically. You can customise this email template (*Customising web pages* page 431).

When the user clicks the login link, Inxmail Professional automatically transfers the authentication data from the email or the mailing to the profile management web page and the user is logged on to the web page.

If Inxmail Professional is unable to transfer the user's authentication data to the web page, this error may be caused by the following:

- The authentication data could not be correctly transferred to the web page due to a system error.
- The login link requested via the web page is no longer valid. If this is the case, users are sent to an automatically generated web page where they can repeat the request for a login link.

The system issues a corresponding error message.

The profile management web page is displayed and users can display and edit their subscription data.

Additional information

Creating a profile management web page involves the following steps:

- Create a profile management web page using a JSP template
- Customise the profile management web page using the JSP template, for example:
  - Customise the form area of the web page using the *Form* main element
  - Use the *Security* main element to define whether users can request the login link via your website and which parameters this login link must contain
- Publish the profile management web page
- Integrate the profile management web page into your website
- If necessary, send the login link to the users in a mailing

Related Topics

» *Login links for web pages* page 457
» *Create new web page* page 426
» *Customising web pages* page 431
» *Publishing the web page (creating the link address/URL)* page 454
» *Integrating the web page into your website* page 455

29.1.6 'Survey' JSP template

29.1.6.1 Use 'Survey' JSP template

Using the 'Survey' JSP template, you can create a web page with a survey about a topic of your choice. This way, you can find out more about the interests of your recipients and enrich their profile data.

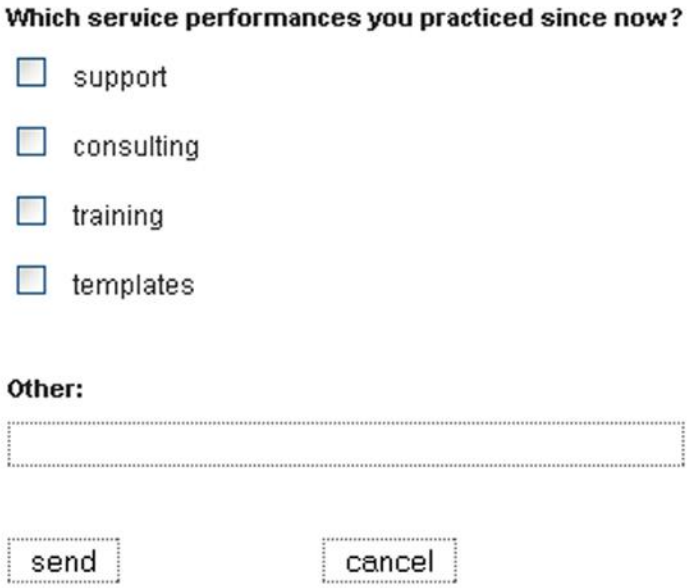


Figure 259: Web page created using the "Survey" JSP template

Users can display the survey web page only via a login link. Users can obtain this login link as follows:

- in one of your mailings
- by requesting the login link via your website
  When the user enters the URL of the survey web page, they are first sent to a welcome page (which is created automatically using the 'Survey' JSP template). On this welcome web page, users can request a login link by entering their email address. Users then receive the login link via email. This login link is valid for exactly **one** hour.

  Note When you create a web page using the 'Survey' JSP template, Inxmail Professional creates a template for the email with the login link, which will be sent automatically. You can customise this email template.

When the user clicks the login link, Inxmail Professional automatically transfers the authentication data from the email or the mailing to the survey web page and the user is logged on to the web page.

If Inxmail Professional is unable to transfer the user's authentication data to the web page, this error may be caused by the following:

- The authentication data could not be correctly transferred to the web page due to a system error.
- The user has already completed the survey and your individual settings for the web page do not allow users to complete the survey more than once.

- The login link requested via the web page is no longer valid. If this is the case, users are sent to an automatically generated web page where they can repeat the request for a login link.
- The survey was ended.

The system issues a corresponding error message.

The survey web page is displayed and users can fill out the survey.

Inxmail Professional saves the results of the survey for the users in the corresponding columns of the recipient table.

Note It is not possible to generate an anonymous survey for which user data is not saved. Therefore, for reasons of data security, make sure to inform all survey participants.

Additional information

Creating a survey web page involves the following steps:

- Create a survey web page using a JSP template
- Customise the survey web page using the JSP template, for example:
  - Customise the form area of the survey (for example, the questions) using the *Form* main element
  - Use the *Validity* main element to activate or deactivate the survey, and to define, for example, whether users may participate only once in the survey
- Publish the survey web page
- If necessary, integrate the survey web page into your website
- If necessary, send the login link to the users in a mailing

Related Topics

» *Login links for web pages* page 457

» *Create new web page* page 426

» *Customising web pages* page 431

» *Publishing the web page (creating the link address/URL)* page 454

» *Integrating the web page into your website* page 455

» *Login links for web pages* page 457

29.1.6.2 View survey results

In the 'Analysis of recipient data' report (*Reports* page 344), you can view an analysis of the survey results by generating reports for the corresponding columns in the recipient tables.

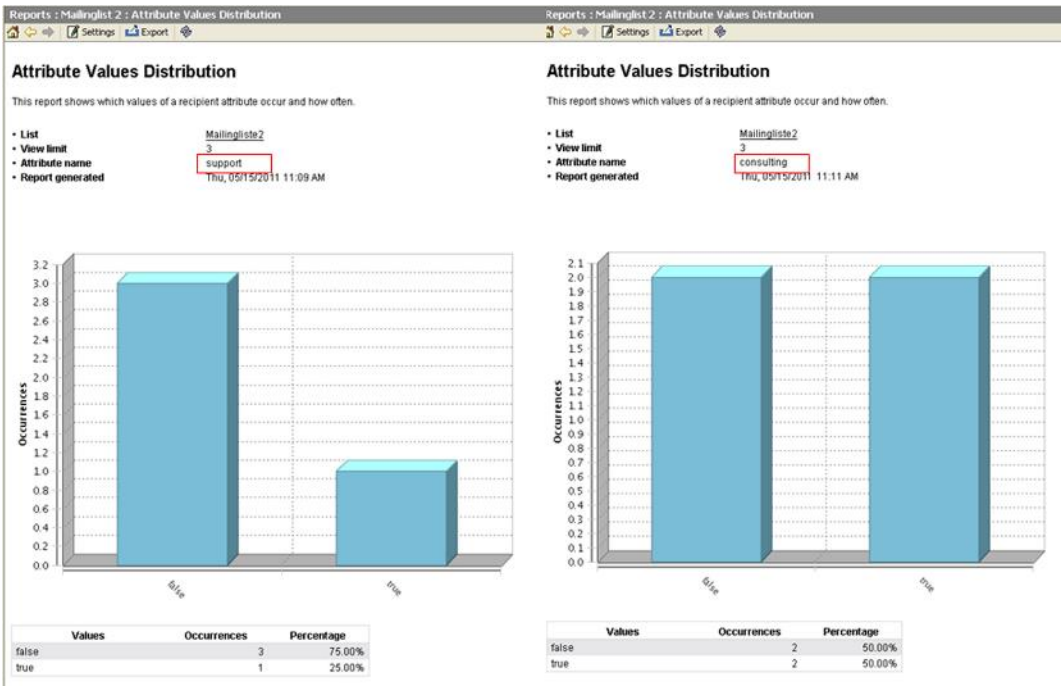


Figure 260: Reports generated for a survey

29.1.6.3 End survey

Important Note the following: To end a survey, you must deactivate it using the JSP template (*Set up 'Validity' main element* page 450).

29.2 Creating web pages

29.2.1 Create new web page

Step-by-step

1. Open the *Create new web page* dialog box as follows:
   a. Click the (*Global settings*) tab > *Files & web pages* agent > *Web pages* tab.

The table displays all of the web pages created in Inxmail Professional using a JSP template.

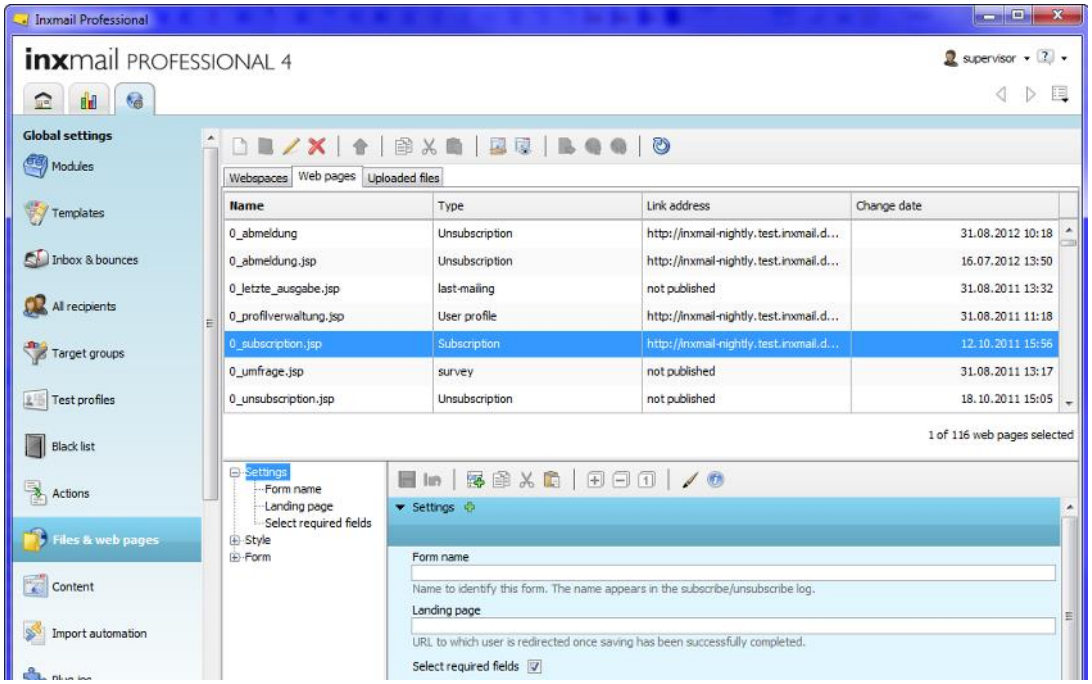


Figure 261: "Files & web pages" agent > "Web pages" tab

b. Click the (*Create new web page*) button.
A dialog box appears.

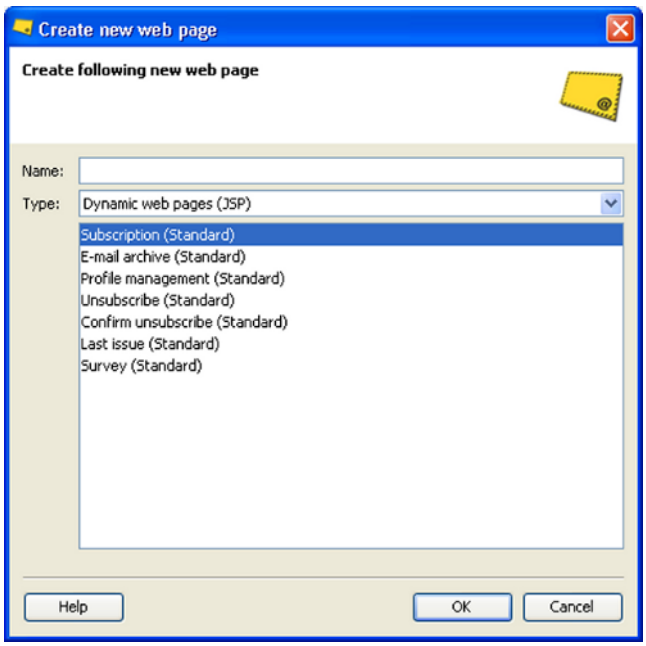


Figure 262: "Create new web page" dialog box

2. Specify the settings for the web page in the following fields of the dialog box:

Field	Setting
Name	Enter a name for the new web page in this field. You are free to choose the name to be assigned. It will be displayed in the first column of the table of created web pages and provides an overview. You will be asked to provide a file name for the web page when publishing the web page (*Publishing the web page (creating the link address/URL)* page 454). The name and file name of the web page may differ.
Template	Select the required template in this drop-down list. Note: Information on importing new JSP templates to Inxmail Professional can be found under *Importing the template library* page 396.
[Field for template selection]	Select (highlight) the corresponding template (for example, 'Subscription (standard)'). Your settings in the *Template* drop-down list determine which templates you can select here. A stylised preview of the selected template is displayed in the right-hand part of the dialog box.

3. Confirm your entries by clicking *OK*.

   A new entry for the web page appears in the table.

✓ You have created a new web page. The web page already contains default settings, which you can now adjust according to your requirements (*Opening and expanding the editing area* page 428 and *Customising web pages* page 431).

Additional information

You can select an existing web page in the table and then:

- make a copy using the (*Copy*) and (*Paste*) buttons.
- delete it using the (*Delete*) button.
- change its name using the (*Change name of web page*) button. Changing the name does not affect the web page file name. This also applies if the web page has already been published (*Publishing the web page (creating the link address/URL)* page 454).

In addition, you can sort the web pages displayed in the table by double-clicking the corresponding column header.

29.2.2 Opening and expanding the editing area

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Web pages* tab. Then select the corresponding web page in the table.

The editing area for the web page is displayed. Depending on the JSP template you used to create the web page, the system displays the following main elements:

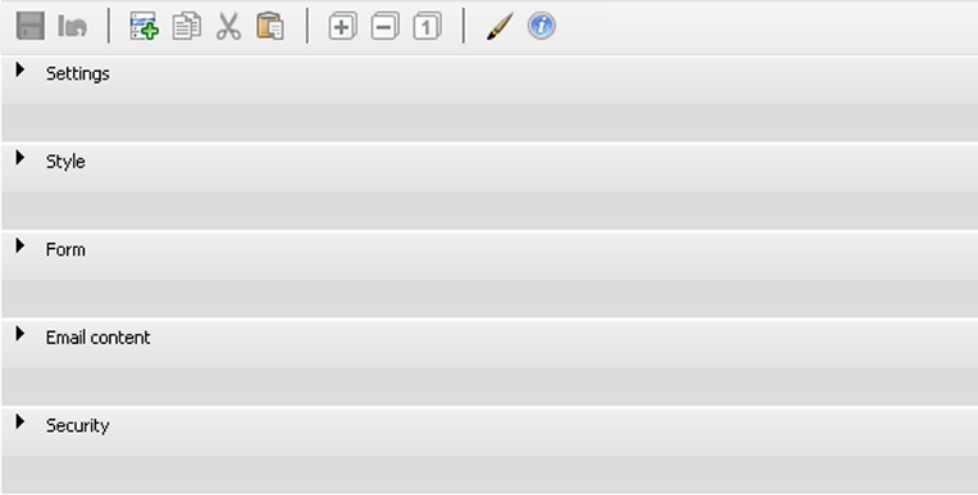


Figure 263: Main elements in the editing area of a web page

- *Settings*
- *Style*
- *Form*
- *Filters*
- *Validity*
- *E-mail content*
- *Security*

2. To open the settings for a main element, go to the structure tree (located to the left of the editing area) and click the '+' symbol next to the main element (for example, the '+' symbol next to the *Settings* main element).

Other child elements assigned to this main element and the settings of these additional elements appear in the editing area.

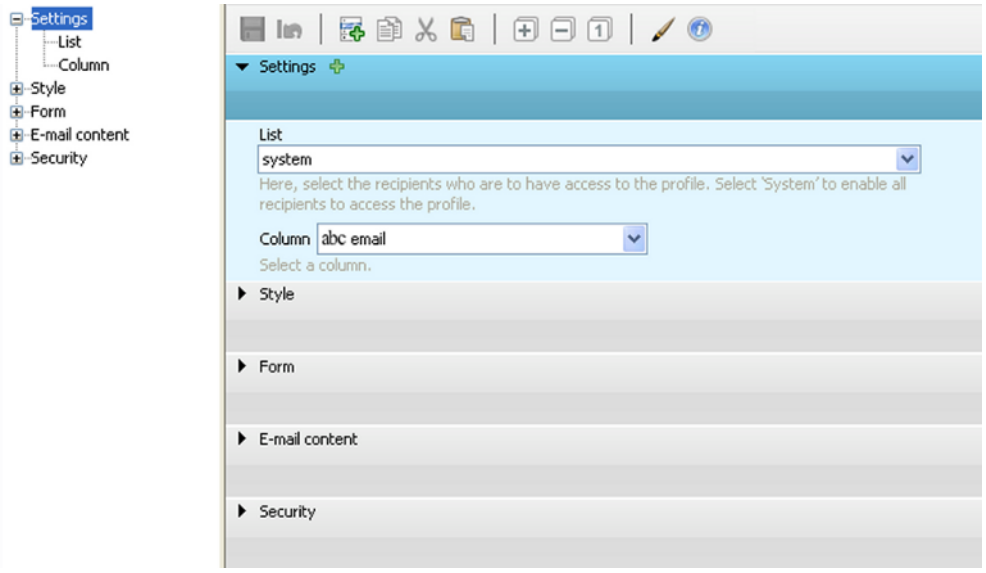


Figure 264: Child elements assigned to the "Settings" main element

3. To add new elements, proceed as follows:
   a. Go to the structure tree and select the main element or the child element for which you would like to add additional elements (for example, the *Settings* main element).
   b. Click the (*Add element*) button.

      Whenever you can add further elements for a selected element, the (*Add element*) button appears in the editing area directly next to the element name. You can likewise add further elements using this button.

      You can add different elements depending on the element that you have selected.

      If you can add additional elements for the selected element, the *Add new element* dialog box appears.

      If you cannot add additional elements for the selected element, an appropriate message appears.
   c. In the dialog box, select the level in which you would like to add the element (for example, the *Main elements* level) and then select the element that you would like to add (for example, *Remote API Control*). Confirm your entries by clicking *Add* + *Close*.
      The new element appears in the editing area.

      At some places, you can move new elements.

      If you can move a selected element, the (*Move element up*) button or (*One element down*) button appears directly next to the element name in the editing area.

      You can delete additionally added elements at any time.

      To do this, select the element and then click the (*Remove element*) button next to the element name in the editing area.
4. Save your settings.

✓ You have expanded the editing area of the web page.

29.3 Customising web pages

29.3.1 Overview

A web page created using a JSP template already contains default settings. You can customise the web page using the following main elements in the editing area:

Note The availability of the main elements (and the contained child elements) in the editing area is dependent on the following:
- The JSP template you used to create the web page
- The additions you have already made to the editing area (*Opening and expanding the editing area* page 428)

- *Set up 'Settings' main element* page 432
  JSP templates 'Email archive' and 'Last issue': You use this main element to link the web page with a mailing list.
  General: In this main element, you can customise the following default settings for the web page:
  - For web pages that contain mailings (for example, 'Last issue' JSP template), you can define the sample recipient for which personalised texts (for example, the salutation) are displayed.
  - You can change the target web page to where users are sent when they leave the web page.
  - You can integrate the contents of the web page into your website (*Integrating the web page into your website* page 455).
- *Set up 'Style' main element* page 435
  In this main element, you can customise default settings for the layout (for example, stylesheets) and the interface texts (for example, page title, general texts, button texts, message texts, etc.) of the web page.
  In addition, you can offer RSS feeds for email archive web pages.
- *Set up 'Form' main element* page 438
  In this main element, you set up the default form of the web page (for example, link form elements with mailing lists). You can also add further form elements (for example, input fields, check boxes, drop-down lists).
- *Set up 'Filters' main element* page 449
  In this main element, you can set up filters to filter the mailings displayed on web pages created with the JSP templates 'Last issue' and 'Email archive'.
- *Set up 'Validity' main element* page 450
  In this main element, you can edit the settings for the validity of a survey web page created with the 'Survey' JSP template (for example, to define that users may participate only once in the survey, or to deactivate a survey).
- *Set up 'E-mail content' main element* page 451
  In this main element, you can edit the contents of the email that Inxmail Professional automatically sends when users request a login link (via your website) to web pages created with the JSP templates 'Survey' or 'Profile management'.
- *Set up 'Security' main element* page 452
  In this main element, you can edit the security settings for the login links to a profile management web page (that is, you can determine whether users can request a login link via

your website, specify the time period for which the login link is valid and define the parameters contained in the link).

- *Set up 'Remote API settings' main element* page 453
  In this main element, you can set the incoming recipient data for the web page to be stored on a remote Inxmail Server and thereby reduce the load on the local Inxmail Server (which is used to store the web pages).

After customising the web page using the editing area, you must save the settings and publish your web page (*Publishing the web page (creating the link address/URL)* page 454).

29.3.2 Set up 'Settings' main element

In the *Settings* main element, you can set up the following:

- **List** drop-down list (JSP templates 'Profile management', 'Survey', 'Last issue' and 'Email archive')
  - *List* drop-down list (JSP templates 'Profile management', 'Survey')
    Users can call up your profile management or survey web pages only via a login link (*'Profile management' JSP template* page 422 and *'Survey' JSP template* page 424).
    If users can request this login link via your website, you use this drop-down list to define which users (that is, recipients of which mailing list) may request the login link to obtain access to your web page. Initially all recipients who are currently subscribed to one or more of your mailing lists have access to the web page ('system' default setting). To grant access only to the recipients of one of your mailing lists, select the mailing list in this drop-down list.

    An error message will appear if non-authorised users request the login link via your website. It contains the message text defined in the *Style* main element, *System error message: Email address does not exist* field.

    If you send the login link in a mailing (*Login links for web pages* page 457), the recipients of the mailing will automatically have access to the web page.
  - *List* drop-down list (JSP templates 'Last issue', 'Email archive')
    You use this drop-down list to assign a mailing list to the web page. The web page will then automatically display information on the mailings for this mailing list.

- **Recipient** field (JSP templates 'Last issue' and 'Email archive')
  If the mailings displayed on your last issue or email archive web page contain personalised texts (12.3 Creating personalised texts), use this field to define the sample recipient for which these texts are displayed in a personalised manner. Enter the email address of the sample recipient in this field.

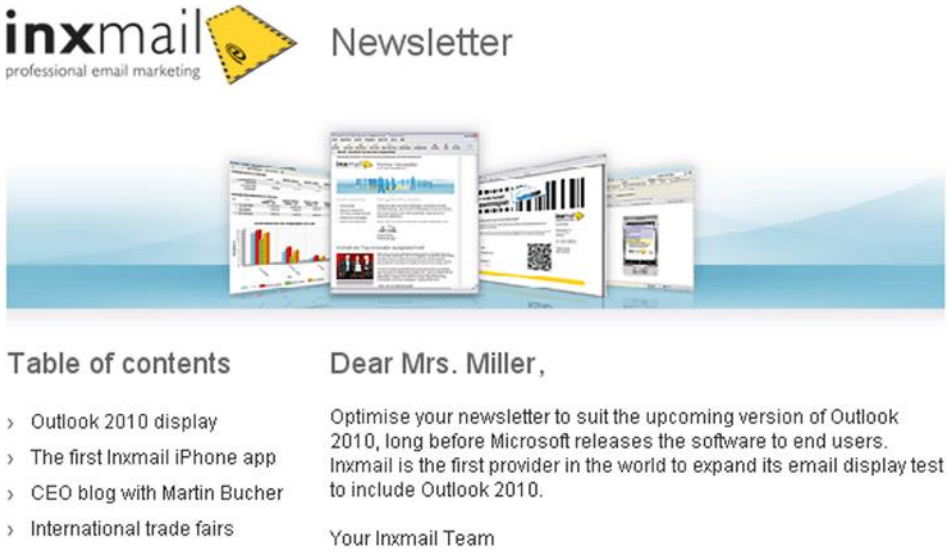


Figure 265: Personalised mailing

  The sample recipient must be contained in the recipient table of the selected mailing list.

  If you leave this field blank, Inxmail Professional will generate non-personalised mailings (for example, with the salutation 'Dear Sir or Madam').

- **Form name** field (JSP templates 'Subscription', 'Cancel subscription', 'Confirm unsubscribe', 'Profile management')
  In this field, you define a name for the form.
  This form name appears in the log of the *Subscriptions* agent (for example, 'user2@test.de;[form name];11.111.111.111', *Displaying and filtering the subscribe/unsubscribe log* page 153) if a user subscribes to or unsubscribes from a mailing list using the form.

- **Target page** field (JSP templates 'Subscription', 'Cancel subscription' and 'Survey')
  - *Target page* field (JSP templates 'Subscription' and 'Survey'
    In this field, you define the target web page that users will be directed to after subscribing to one or more mailing lists or taking part in a survey via the web page. Enter the URL of the target web page in this field.

    If you leave this field blank, Inxmail Professional automatically creates a target web page which will appear when users leave the web page. This target web page then contains the text specified in the *Style* main element, under *Text for successful subscription* or *Text for successful participation*.
  - *Target page: Success, Target page: Error* fields ('Cancel subscription' JSP template)
    In these fields, you define the target web pages that users will be directed to after successfully unsubscribing from, or failing in their attempt to unsubscribe from, one or mailing lists via the web page. Enter the URL of the target web pages in these fields.

If you leave these fields blank, Inxmail Professional automatically creates two target web pages to confirm the successful or failed unsubscription. These target web pages then contain the text specified in the *Style* main element, under *Text for successful unsubscription* or *Form error message: Input error*.

- **Select required fields** check box (JSP templates 'Subscription', 'Cancel subscription', 'Survey', 'Profile management')
  By default, all mandatory fields are automatically marked on the web page with an asterisk ('*').

  Figure 266: Mandatory field marked with an asterisk

  If you disable this check box, the mandatory fields are no longer automatically marked.

  To use a different character to mark mandatory fields, disable the check box. Then manually add the desired character at the end of every field description.

- **System error message: Email does not exist** field ('Last issue' JSP template
  In this field, you can change the preset system error message that appears if Inxmail Professional cannot find a mailing to display on the web page.

  For web pages created with a different JSP template, you define system error messages in the *Style* main element (*Set up 'Style' main element* page 435).

In addition, you can make further settings if you add the following elements to the editing area of the web page (*Opening and expanding the editing area* page 428):

- **Use alternative email column** drop-down list ('Profile management' JSP template
  If users request a login link for profile management via your web page, then they must specify their email address. This email address must be already stored in your recipient table.

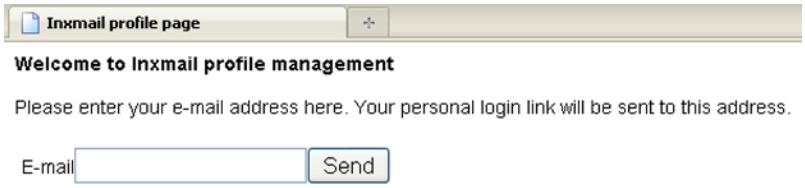
  

  Figure 267: Requesting a login link

  The email addresses are stored in the 'email' recipient table column by default. If you store the email addresses in a different recipient table column, then select the column in the *Alternative email column* drop-down list.

- **Dynamic entry** elements: **Dynamic entry (URL)** and **Form encoding** fields (all JSP templates except for 'Last issue')
  You can use these fields to integrate the content of the web page into your website (*Integrating the web page into your website* page 455).

- **Overwrite URL for website links** field (all JSP templates except for 'Last issue')
  By default, the URL (that is, the domain name) that is set on the (*Global settings*) tab > *Properties* (Administration) agent (*Global properties (Administration)* page 587) is automatically used for all JSP web pages created in Inxmail Professional.
  In the *Overwrite URL for website links* field, you can specify an individual URL for the current web page.

- 'Forwarded for header' field ('Subscription (standard)' JSP template)
  This element only concerns certain license customers and is irrelevant if you use Inxmail ASP

services. In special configurations of the Inxmail Server, the IP address of the recipient who fills out and sends the form is transferred not directly to the Inxmail Server but via a reverse proxy. If this reverse proxy transfers the recipient's IP address in an HTTP header that is different from 'X-Forwarded-For', enter the name of the HTTP header in this field; otherwise, Inxmail will log the IP address used by the reverse proxy in the Subscriptions agent, if necessary. If in doubt, please contact your Inxmail Server administrator or your Inxmail contact person.

29.3.3 Set up 'Style' main element

In the *Style* main element, you can edit the following default settings for the layout and interface texts of the web page:

- **Stylesheet** field (all JSP templates except for 'Last issue')
  In this field, you can change the preset layout of the web page. To do this, manually adjust the preset stylesheet specifications in this field.
- **Style sheet URL** field (all JSP templates except for 'Last issue')
  In this field, you can change the preset layout of the web page by referencing an external stylesheet. To do this, enter the URL of the external stylesheet.

  If you have additionally made specifications in the *Stylesheet* field, these stylesheet specifications as well as those in the external stylesheet will be considered.
- **Page title** field (all JSP templates except for 'Last issue')
  In this field, you can change the preset page title of the web page.

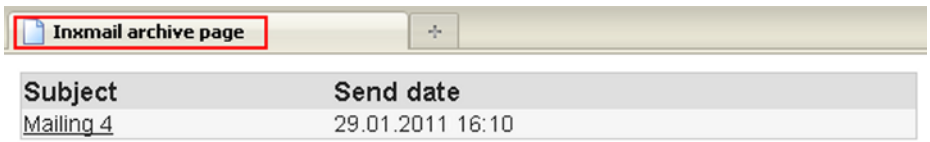


Figure 268: Page title of a web page

For a web page created with the 'Email archive' JSP template, you can also edit the preset page title for the individual mailings (called up via the email archive web page); to do this, enter the title in the *Page title for individual mailings* field.

> **No umlauts** Note that no German umlauts should be used in the page title as they are not correctly displayed on the web page. Instead you should use the predefined character entities of HTML (for example, for 'ü' use 'ü').

You can insert system data into a page title using commands (for example, you can insert the name of the mailing list using `[%list-name]` or the subject of the mailing using `[%subject]`, 18.3 Inserting system data (commands)).

- Fields for the definition of texts (all JSP templates except for 'Last issue')

Note that German umlauts should not be used for particular texts (for example, texts for links to the next or previous page) as they are not correctly displayed on the web page. At such places, you should use the predefined character entities of HTML (for example, for 'ü' use 'ü').

- General texts and (form) headings
  You can change preset general texts (for example, in the *Disclaimer* field), as well as headings on the web page (for example, in the *Subscription page text*, *Unsubscription page text*, *Text that is to be displayed before the profile* fields).

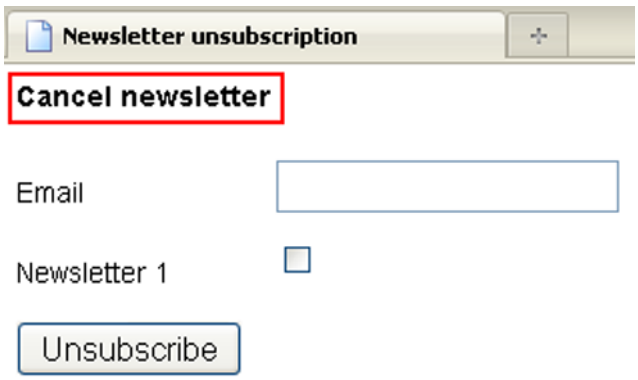


Figure 269: Heading on a web page

- Notes and message texts
  You can change preset notes and message texts that appear after particular events (for example, in the *Text for successful subscription*, *Text that is to be displayed for saving*, *Please note: Test mode* fields).
  These notes and message texts can appear on additional web pages generated automatically (for example, on confirmation web pages after successful subscription, unsubscription or participation in a survey; on welcome or login web pages for the requesting of a login link).
- Graphical User Interface (GUI) element texts
  You can change the preset texts of the GUI elements of the web page (for example, texts for buttons, links or fields).
  In addition, you can change column names for a web page created with the 'Email archive' JSP template (for more information, see 'Further fields' below).
- Error message texts
  You can change the texts for form error messages (these messages appear if, for example, mandatory fields are not completed) and for system error messages (these appear if, for example, elements were not found in the system, a process is not possible or parameters are missing).

- **Target page** field ('Profile management' JSP template)
  In this field, define the target web page that users will be directed to when they save their profile management data. Enter the URL of the target web page in this field.

  If you leave this field blank, the confirmation specified in the *Text that is to be displayed for saving* field will automatically appear on the current web page.
- **RSS link** field, **RSS feed summary** field ('Email archive' JSP template)

RSS is a technology that enables the user to subscribe to contents of a web page. This saves having to call up each individual web page separately. The contents subscribed to can be called up centrally, sorted and archived.

By default, the web page does not contain an RSS feed that allows users to subscribe to notifications of new web page features. You can change this; with these fields you can integrate an RSS feed on your web page:

- *RSS link* field
  In this field, enter a text for the RSS feed link that is to appear on your web page.

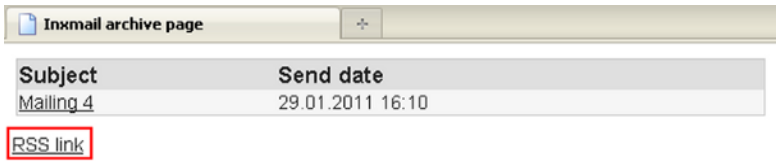


Figure 270: RSS feed link

  When you enter a text in this field, the RSS feed is automatically integrated into the web page. If users click on the RSS link, Inxmail Professional will generate the corresponding RSS feed web page automatically.

- *RSS feed summary* field
  In this field, enter a brief summary of the RSS feed. This summary appears on the RSS feed web page.

- Further fields ('Email archive' JSP template)
  - **Date format** field
    By default, date values are displayed in the format specified for the mailing list in the regional settings (*Setting up the properties of mailing lists* page 82).
    In this field, you can change the default date format for all date values that appear on the web page.

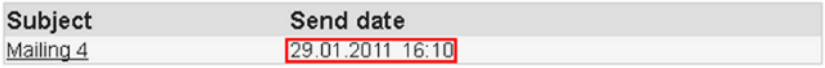


Figure 271: Date values on an email archive web page

    Further information on the control characters required for the date format entry can be found under *Other functions* page 548.

  - **Column name for the subject column** field, **Subject visible** field
    By default, the subject of the mailings is displayed in a column on an email archive web page.

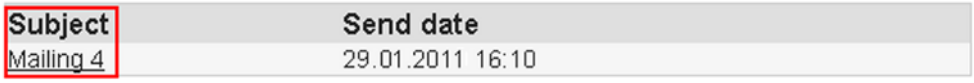


Figure 272: Subject column of an email archive web page

    In the *Column name for the subject column* field, you can change the default name for this subject column.

    If you do not want the column with the subject to be displayed, then disable the *Subject visible* field.

  - **Column name for the send column** field, **Send date visible** field
    By default, the send date of the mailings is displayed in a column on an email archive web page.

In the *Column name for the send column* field, you can change the default name for the send column.
If you do not want the column with the send date to be displayed, then disable the *Send date visible* field.

29.3.4 Set up 'Form' main element

In the *Form* main element, you can edit the default form of the web page as follows:

Note You can insert the following form elements (multiple times if necessary) into your form (*Opening and expanding the editing area* page 428).

29.3.4.1 'Subscription' form element

Subscription form element (JSP templates 'Subscription' and 'Profile management')

Use this form element to insert a check box on the web page. This check box allows users to subscribe to one of your mailing lists.

Figure 273: "Subscription" form element

Set up this form element using the following fields:

- *Name* field

  In this field, enter a name for the check box (for example, 'Newsletter 1').

  Note If you leave this field blank, Inxmail Professional automatically uses the name of the mailing list that you assign via the *List* drop-down list (below).

- *List* drop-down list

  In this drop-down list, select the mailing list that users can subscribe to using the form element.

- *Setting* drop-down list

In this drop-down list, you can set the following:

Editable: The form element is displayed on the web page and is editable. The form element is disabled when the web page is called up.

Editable (preselected): The form element is displayed on the web page and is editable (that is, users can enable or disable the check box). The form element is enabled when the web page is called up.

Hidden (preselected): The form element is not displayed on the web page. It is enabled (in the background).

Inactive: The form element is displayed on the web page but is not editable. The form element is always disabled.

Inactive (preselected): The form element is displayed on the web page but is not editable. The form element is always enabled.

Figure 274: Editable form element, inactive (greyed out) form element

29.3.4.2 'Cancel subscription' form field

Cancel subscription form element ('Cancel subscription' JSP template)

You use this form element to insert a check box on the web page. This check box allows users to unsubscribe from one of your mailing lists.

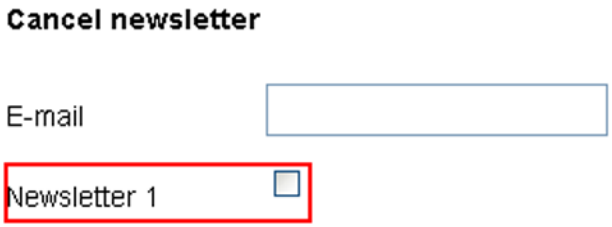


Figure 275: "Cancel subscription" form element

Set up this form element using the following fields:

- *Name* field

  In this field, enter a name for the check box (for example, 'Newsletter 1').

  Note If you leave this field blank, Inxmail Professional automatically uses the name of the mailing list that you assign via the *List* drop-down list (below).

  - *List* drop-down list

    In this drop-down list, select the mailing list that users can unsubscribe from using the form element.

  - *Setting* drop-down list ('*Subscription* form element')

29.3.4.3 'Text field' form field

Text field form element (JSP templates 'Subscription', 'Cancel subscription' and 'Profile management')

Use this form element to insert a one-line text field on the web page.

Figure 276: "Text field" form element

Users can either enter a new text in this text field or change a text already displayed there.
Set up this form element using the following fields:

(Text already displayed on the web page is the text that is stored for the current user in the recipient table column selected in the *Column* drop-down list (below)).

- *Name* field

  In this field, enter a name for the text field (for example, 'First name').

  If you leave this field blank, Inxmail Professional automatically uses the name of the recipient table column that you assign via the *Column* drop-down list (below).

- *Column* drop-down list

  Use this drop-down list to assign a recipient table column of the 'Text' data type. The data entered by users in the text field of the web page is stored for every user in this recipient table column.

  Before you can select the relevant recipient table column in the *Column* drop-down list, you must create it in the recipient table of the relevant mailing list (*Creating a new column* page 123).

  If you assign a recipient table of a different data type, Inxmail Professional cannot store the entered data. An error message will appear.

  'Profile management' JSP template: If data is already stored for the user in this recipient table column, then this data is displayed in the entry field when the web page is called up.

- *Setting* drop-down list

  In this drop-down list, you can set the following:

  Editable: The form element is editable and is not a mandatory field (that is, users may complete the text field but are not required to do so).

  Mandatory field: The form element is editable and is a mandatory field (that is, users must always enter a text in the text field).

  Inactive: The form element is not editable.

  By default, all mandatory fields are automatically marked on the web page with an asterisk ('*'). You can change this default setting using the *Select required fields* check box in the 'Settings' main element.

29.3.4.4 'Text field (multiline)' form element

Text field (multiline) form element ('Subscription' and 'Cancel subscription' JSP templates)

This form element appears only if you add it to the editing area (*Opening and expanding the editing area* page 428). Use this form element to insert a multiline text field on the web page.

Figure 277: "Text field (multiline)" form element

Users can either enter a new text in this text field or change a text already displayed there.

Text already displayed on the web page is the text that is stored for the current user in the recipient table column selected in the *Column* drop-down list (below).

Set up this form element using the following fields:

- *Name* field, *Column* drop-down list, *Setting* drop-down list

  Information on these fields can be found under '*Text field* form element' (above).
- *Lines* field, *Columns* field

  In these fields, you define the size of the multiline text field displayed in the form. Specify the width using the number of columns and the length using the number of lines.

29.3.4.5 'Paragraph' form element

Paragraph form element (JSP templates 'Subscription', 'Cancel subscription', 'Profile management' and 'Survey')

Use this form element to insert a text paragraph on the web page.

Figure 278: "Text paragraph" form element

You set up this form element using the following field:

- *Paragraph* field

  In this field, enter the text that is to appear as a paragraph on the web page.

  You cannot make any line breaks within this field.

  To make line breaks, you need to add the *Paragraph* form element multiple times (*Opening and expanding the editing area* page 428).

29.3.4.6 'Heading' form element

Heading form element (JSP templates 'Subscription', 'Cancel subscription' and 'Profile management'

Use this form element to insert a heading on the web page.

Figure 279: "Heading" form element

You set up this form element using the following field:

- *Heading* field

In this field, enter the text that is to appear as a heading on the web page.

29.3.4.7 'Drop-down list' form element

Drop-down list form element (JSP templates 'Subscription', 'Cancel subscription' and 'Profile management')

Use this form element to insert a drop-down list on the web page. In the drop-down list, users can select values (selection items) that you have defined.

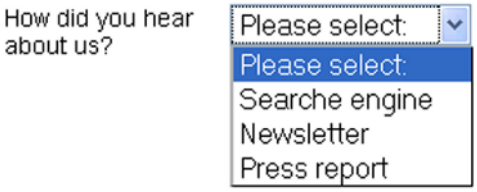


Figure 280: "Drop-down list" form element

Set up this form element using the following fields:

- *Name* field

  In this field, enter a name for the drop-down list (for example, 'How did you find us?').

  If you leave this field blank, Inxmail Professional automatically uses the name of the recipient table column that you assign in the *Column* field (below).

- *Column* drop-down list

  Use this drop-down list to assign a recipient table column of the 'Text' data type. The value users selected in the form element is stored for every user in this recipient table column.

  'Profile management' JSP template: If a value is already stored for the user in this recipient table column, then this value is preselected in the drop-down list when the web page is called up.

  Otherwise, the value that you specify first in the *Values* field will automatically appear as the default selection.

- *Setting* drop-down list

  In this drop-down list, you can set the following:
  Editable: The form element is editable and is not a mandatory field (that is, users may select a value in the drop-down list but are not required to do so).
  Mandatory field: The form element is editable and is a mandatory field (that is, users must always select a value in the drop-down list).
  Inactive: The form element is not editable (that is, users cannot change the default selection in the drop-down list).

- *Values* field

In this field, enter all values that are to appear as selection items in the drop-down list. Enter the values in the format 'internal value;displayed name' (for example, 'f;female').

The internal value is stored in the recipient table column specified in the *Column* field. The displayed name is displayed as a selection item in the drop-down list.

If the internal value and the displayed name are the same, then you can also enter the value in the format 'Value' (for example, 'female').

Separate the individual values with '\n' (for example, 'f;female\nm;male').

29.3.4.8 'Check box' form element

Check box form element (JSP templates 'Subscription', 'Cancel subscription' and 'Profile management')

Use this form element to insert a check box on the web page. The check box allows users to enable or disable a function.

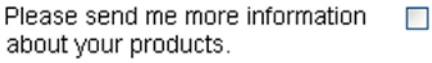


Figure 281: "Check box" form element

Set up this form element using the following fields:

- *Name* field

  In this field, enter a name for the *Check box* form element (for example, 'I wish to receive further information on the products.').

  If you leave this field blank, Inxmail Professional automatically uses the name of the recipient table column that you assign in the *Column* field (below).

- *Column* drop-down list

  In this drop-down list, assign a recipient table column of the 'Yes/No' data type. Whether users have enabled the *Check box* form element is stored for every user in this recipient table column.

  'Profile management' JSP template: If a value is already stored for the user in this recipient table column, then the form element is enabled or disabled accordingly when the web page is called up. The settings for the *Preselected* check box (below) are then ignored.

- *Setting* drop-down list

In this drop-down list, you can set the following:

Editable: The form element is displayed on the web page and is editable. The form element is disabled when the web page is called up.

Editable (preselected): The form element is displayed on the web page and is editable (that is, users can enable or disable the check box). The form element is enabled when the web page is called up.

Mandatory field: The form element is a mandatory field. The form element is disabled when the web page is called up.

Mandatory field (preselected): The form element is a mandatory field. The form element is enabled when the web page is called up.

Hidden (preselected): The form element is not displayed on the web page. It is enabled (in the background).

Inactive: The form element is displayed on the web page but is not editable. The form element is always disabled.

Inactive (preselected): The form element is displayed on the web page but is not editable. The form element is always enabled.

- *Value (selected)* field, *Value (not selected)* field

  In these fields, define which values are stored (in the recipient table column specified in the *Column* drop-down list) when the *Check box* form element is enabled or disabled.

  Enter 'true' in the *Value (selected)* field.

  Enter 'false' in the *Value (not selected)* field.

  As you must always assign a column of the 'Yes/No' data type for the *Check box* form element, you must always enter the values 'true' and 'false' in the *Value (selected)* and *Value (not selected)* fields.

29.3.4.9 'Radio button' form element

Radio button form element (JSP templates 'Subscription', 'Cancel subscription' and 'Profile management'). You use this form element to add one or more option buttons to your web page. Users may select only one of them.

Figure 282: "Radio button" form element

Set up this form element using the following fields:

- *Name* field

  In this field, enter a name for the *Radio button* form element (for example, 'Salutation').

  If you leave this field blank, Inxmail Professional automatically uses the name of the recipient table column that you assign in the *Column* field (below).

- *Column* drop-down list

In this drop-down list, assign a recipient table column of the 'Text' data type. The option button users selected in the form element is stored for every user in this recipient table column (see also *Value* field below).

'Profile management' JSP template: If a value is already stored for the user in this recipient table column, then the corresponding option button of the form element is preselected when the web page is called up.

Otherwise, the first option button of the form element is always preselected when the web page is called up.

- *Setting* drop-down list

  In this drop-down list, you can set the following:
  Editable: The form element is editable and is not a mandatory field (that is, users may select an option but are not required to do so).
  Mandatory field: The form element is editable and is a mandatory field (that is, users must select an option).
  Inactive: The form element is not editable (that is, users cannot change the default setting for the *Radio button* form element).

- *Value* field

  Use this field to add an option button (value) to the form element.

  You can add several option buttons to the *Radio button* form element (users will be able to select only one of them). To do this, add the *Value* field multiple times to the editing area (*Opening and expanding the editing area* page 428).

  When entering the option button in the *Value* field, enter it in the format 'internal value;displayed name' (for example, 'm;Mr').

  The displayed name is specified as the name of the option button (for example, 'Mr').

  If the user selects the option button on the web page, the internal value (for example, 'm') is stored in the recipient table column specified in the *Column* drop-down list.

29.3.4.10 'Password field' form element

Password field form element (JSP templates 'Subscription' and 'Profile management')

Use this form element to insert text fields on the web page. These text fields allow users to define a password ('Subscription' JSP template) or change their password ('Profile management' JSP template).

Figure 283: "Password field" form element

Set up this form element using the following fields:

- *Name* field

In this field, enter a name for the (first) password input field of the form element (for example, 'Password').

If you leave this field blank, Inxmail Professional automatically uses the name of the recipient table column that you assign in the *Column* field (below).

If the form element contains a second input field for confirming the password (in accordance with your settings in the *Both checked* check box below), you cannot directly enter the name of the second input field. Inxmail Professional automatically composes the name (for example, 'Repeat password') from the following entries:

- Specified name for the (first) password field (for example, 'Password')
- Specified text in the *Style* main element, *Text for password repetition* field (for example, 'Repeat')

- *Column* drop-down list

  In this drop-down list, assign a recipient table column of the 'Text' data type. The password that users specify is stored for every user in this recipient table column.

  Note Inxmail Professional stores passwords **unencrypted** in the recipient table. All users with access to the recipient table can view the users' passwords.
  On the web page, however, user passwords are always shown encrypted (as dots).

- *Setting* drop-down list

  In this drop-down list, you can set the following:

  Editable: The form element is editable and is not a mandatory field (that is, users may specify a password but are not required to do so).

  Mandatory field: The form element is editable and is a mandatory field (that is, users must specify a password).

  Both checked: The form element is editable and is a mandatory field. In addition to the password input field, it contains a further input field for repeating the password.

  Inactive: The form field is not editable (that is, users cannot specify a password in the password field; nor can they change their password (displayed there as dots)).

29.3.4.11 'Question type: Single choice' form element

Question type: Single choice form element ('Survey' JSP template)

You use this form element to insert a question on the web page. In this case, users may select only one of the preset options (option buttons).

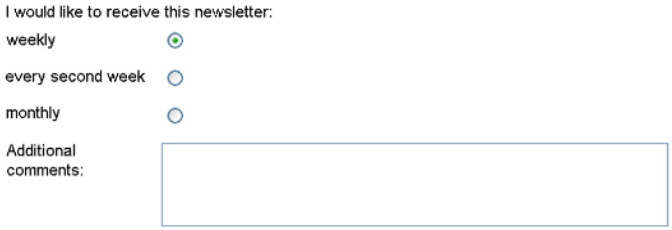


Figure 284: Question type:Single choice

Set up this form element using the following fields:

- *Question text* field

In this field, enter a text for the question (for example, 'I would like to receive this newsletter according to the following sending cycle:').

- *Column* drop-down list

  In this drop-down list, assign a recipient table column of the 'Text' data type. The option users selected is stored for every user in this recipient table column.

- *Mandatory field* check box

  By default, the form element is not a mandatory field (that is, users may answer the question but are not required to do so). If you enable the *Mandatory field* check box, users will always be required to answer the question.

- *Option* field

  Use this field to define an option (option button) for the question.

You can add several options to the *Question type: Single choice* form element; users will be able to select only one option. To do this, add the *Option* field multiple times to the editing area (*Opening and expanding the editing area* page 428).

When entering the option in the *Option* field, enter it in the format 'internal value;displayed name' (for example, '1;weekly').

The displayed name is specified as the name of the option (for example, 'weekly').

If the user selects this option on the web page, the internal value (for example, '1') is stored in the recipient table column specified in the *Column* drop-down list.

29.3.4.12 'Question type: Open-ended question' form element

Question type: Open-ended question form element ('Survey' JSP template)

Use this form element to insert a question on the web page. In this case, users may freely specify their answer in an input field.

Figure 285: "Question type: Open-ended question" form element

Set up this form element using the following fields:

- *Question text* field

  In this field, enter a text for the question's input field (for example, 'Further comments:').

- *Column* drop-down list

  In this drop-down list, assign a recipient table column of the 'Text' data type. The answer users give in the question's input field is stored for every user in this recipient table column.

- *Mandatory field* check box

  By default, the form element is not a mandatory field (that is, users may answer the question but are not required to do so). If you enable the *Mandatory field* check box, users will always be required to answer the question.

- *Horizontal dimension* field, *Vertical dimension* field

In these fields, define the size of the input field displayed in the form. You specify the width of the input field (Horizontal dimension) using the number of characters (per line), the length of the input field (Vertical dimension) using the number of lines.

29.3.4.13 'Question type: Multiple choice' form element

Question type: Multiple choice form element ('Survey' JSP template)

You use this form element to insert a question on the web page. In this case, users may select one or more preset options (check boxes).

Figure 286: "Question type: Multiple choice" form element

Set up the question text using the following field:

- *Question text* field

  In this field, enter a text for the question (for example, 'Which services have you signed up to?').

  Set up an option (check box) using the following fields of the *Option* element:

  You can add several options to the *Question type: Multiple choice* form element. To do this, add the *Option* field multiple times to the editing area (*Opening and expanding the editing area* page 428).
- *Text* field

  In this field, enter a text for the option (for example, 'Support').
- *Value (selected)* field, *Value (not selected)* field

  In these fields, define which values are stored for every user (in the recipient table column specified in the *Column* drop-down list):

  The *Value (selected)* field determines which value is stored if the user enables the check box. The default value in this field is 'true'. Do not change this value.

  The *Value (not selected)* field determines which value is stored if the user disables the check box. The default value in this field is 'false'. Do not change this value.

  As you must always assign a recipient table column of the 'Yes/No' data type for the *Option* element of this question type (below), you must always enter the values 'true' and 'false' in the *Value (selected)* and *Value (not selected)* fields.
- *Column* drop-down list

In this drop-down list, assign a recipient table column of the 'Yes/No' data type. The relevant value for the option associated with the question (that is, the value 'true' or 'false') is stored for every user in this recipient table column.

29.3.5 Set up 'Filters' main element

The *Filters* main element is only available for web pages created with the 'Email archive' or 'Last issue' JSP templates.

If Inxmail Professional finds no mailing to match the filter settings, a system error message will appear on the web page. You can change this system error message as follows:

- 'Last issue' JSP template: You can change the system error message in the *Settings* main element, *System error: Mailing does not exist* field.
- 'Email archive' JSP template: You can change the system error message in the *Style* main element, *System error: Mailing does not exist* field.

In the *Filters* main element, you can set up the following to filter the mailings displayed on the email archive or last issue web page:

- **Number of entries** field, **Allow scrolling** check box ('Email archive' JSP template)
  You use these fields to define the maximum number of mailings displayed on the email archive web pages.

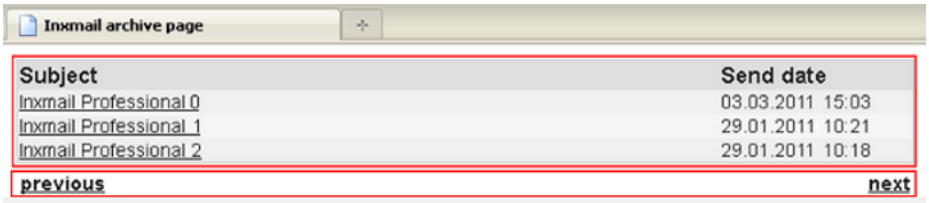


Figure 287: View of the email archive web page - here restricted to three mailings

  - *Number of entries* field
    Use this field to define the maximum number of mailings displayed per email archive web page.
  - *Allow scrolling* check box ('Email archive' JSP template)
    If the number of mailings per email archive web page is restricted (*Number of entries* field), this check box lets you define whether or not the remaining mailings are displayed on further email archive web pages (that is, users can scroll to further mailings).
- **Email age** field ('Email archive' JSP template)
  In this field, define the maximum email age (in days); if the send date of a mailing is older than this, the mailing will not be displayed on the web page.
- **Sort order** drop-down list ('Email archive' JSP template)
  In this drop-down list, specify whether the mailings displayed on the web page are to be sorted by send date (most recent or oldest).
- **Subject filter** field (JSP templates 'Last issue' and 'Email archive')
  In this field, you can specify a filter word. The effect of the filter word is as follows:
  - 'Last issue' JSP template: The web page displays the most recent mailing that has the filter word in its subject.

  - 'Email archive' JSP template: The web page displays only mailings that have the filter word in their subject.
- **Mailing name filter** field (JSP templates 'Last issue' and 'Email archive')

  In this field, you can specify a filter word. The effect of the filter word is as follows:
  - 'Last issue' JSP template: The web page displays the most recent mailing that has the filter word in its name.
  - 'Email archive' JSP template: The web page displays only mailings that have the filter word in their name.
- **Invert filter** check box (JSP templates 'Last issue' and 'Email archive')

  The setting in this check box relates to the filter settings specified in the *Subject filter* and *Mailing name filter* fields.

  All other filter settings are not affected.

  If you enable this check box, the following will occur:
  - 'Last issue' JSP template: The web page displays the most recent mailing that does not have, in its subject, the filter word specified in the *Subject filter* field and does not have, in its name, the filter word specified in the *Mailing name filter* field.
  - 'Email archive' JSP template: The web page displays only mailings that do not have, in their subject, the filter word specified in the *Subject filter* field and do not have, in their name, the filter word specified in the *Mailing name filter* field.

29.3.6 Set up 'Validity' main element

The *Validity* main element is only available for web pages created with the 'Survey' JSP template.

In the *Validity* main element, you can set up the following for the validity of a survey web page:

- *Activate survey* check box

  This check box is enabled by default, that is, the survey is active. To end the survey, disable this check box.
- *Message for deactivated survey* field

  In this field, you can change the preset text that appears if users call up an already ended survey via a login link.

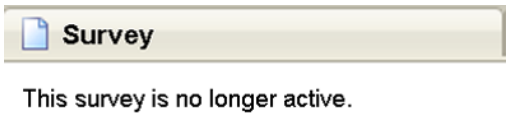
  

  Figure 288: Message for deactivated survey
- *Permit participation only once* check box

This check box is disabled by default, that is, users can take part in a survey more than once.

If you keep this default setting and users fill out the survey again, Inxmail Professional overwrites the data that was stored for the user when he/she previously took part.

Enable the check box if users are to be able to take part only once in the survey. In this case, you must also enable the *Save participation in column* check box and make a selection in the *Column* drop-down list.

Inxmail Professional then checks whether an earlier survey participation (date and time) is stored for the user in the recipient table assigned using the *Column* drop-down list. If this is the case, the message text defined in the *Message text for survey that has already been completed* field will appear.

- *Check participation* form element

  If you enabled the *Permit participation only once* check box, you must set up the following in order that Inxmail Professional can check whether the user has already taken part in the survey:

  - *Save participation in column* check box: Enable this check box in order that Inxmail Professional may store the date and time of survey participation in a column.
  - *Column* drop-down list: In the *Column* drop-down list, select the recipient table column in which the date and time of survey participation are to be stored.
  - Before you can select the relevant recipient table column in the *Column* drop-down list, you must create it in the recipient table of the relevant mailing list (*Creating a new column* page 123). You must specify the 'Date and time' data type for the column.

- *Message for survey that has already been completed* field

  In this field, you can change the preset text that appears if a user attempts to participate more than once in a survey and this is not permitted.

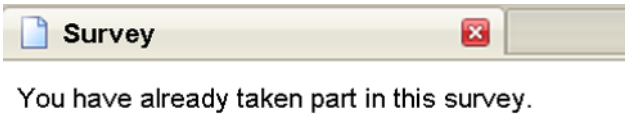


Figure 289: Message if user has already taken part in a survey

29.3.7 Set up 'E-mail content' main element

The *E-mail content* main element is only available for web pages created with the 'Survey' or 'Profile management' JSP template.

Users can call up profile management or survey web pages only via a login link (*'Profile management' JSP template* page 422 and *'Survey' JSP template* page 424). If users can request this login link via your website, an email is sent to them automatically. You can customise this email in the *E-mail content* main element:

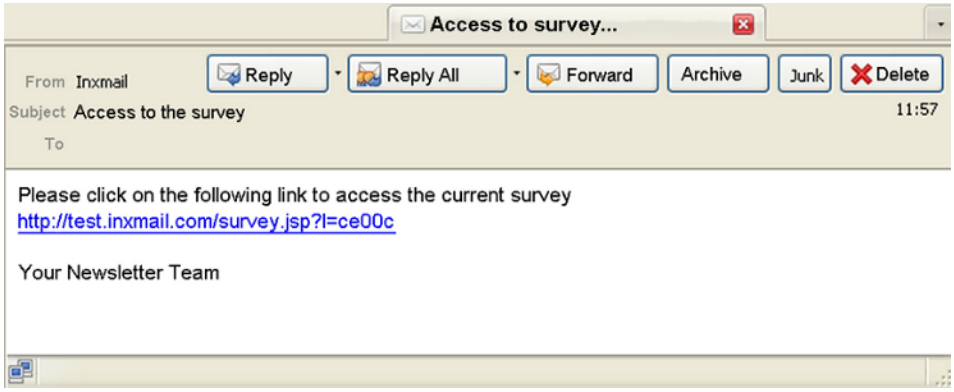


Figure 290: Email with login link

- **Sender address** field, **Sender name** field
  In these fields, define which sender address is contained in the email and which sender name is displayed.
- **E-mail subject** field, **Login e-mail text** field
  In these fields, define the subject and content of the email.

  The *Login e-mail text* field contains, by default, an email text and the login link requested by the user in the format '[$insert(url)][%br][%br]'. Do not change this login link.

29.3.8 Set up 'Security' main element

The *Security* main element is only available for web pages created with the 'Profile management' JSP template.

In the *Security* main element, you can configure the following security settings for the login to a profile management web page:

- **Use a web form to request a login link** option button

  A login link is **always** required to call up the JSP profile management web page.

  If you enable the *Web form* option button, a page allowing users to request their personal login link automatically appears when they call up the JSP profile management web page.

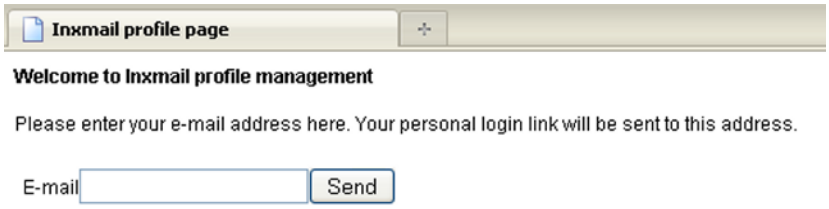


Figure 291: Login page of the "Profile management" web page

The users then receive the email with the login link that was defined in the *Email* main element (*Set up 'E-mail content' main element* page 451). The JSP profile management web page opens as soon as the users click the link in the email.

If you disable the option button, users will only be able to call up the JSP profile management web page if they receive a mailing from you that contains the relevant login link.

You should therefore never disable the option button if you integrate the profile management web page directly into your website (*Integrating the web page into your website* page 455).

If you would like to integrate a login link for the profile management web page into your mailing, then you must always add the `online_params` parameter to the link (*Login links for web pages* page 457).

- **Period of validity (in hours)** field

  In this field, you can change the preset time period (in hours) for which a login link requested via your website is valid.

  Login links that you integrate into your mailings have no restricted validity period.

- **Error message: Login link expired** field

  In this field, you can change the preset error message that appears if users attempt to log in to your profile management web page via an invalid login link (that is, the validity period of the login link has expired).

29.3.9 Set up 'Remote API settings' main element

The *Remote API settings* main element is available for all Inxmail Professional JSP templates. However, before you can use it, you must add it to your editing area (*Opening and expanding the editing area* page 428).

To reduce the load on the local Inxmail Server (which is used to store the web pages), you can set the incoming recipient data for the web page to be stored on a remote Inxmail Server. For this purpose, set up the following in the *Remote API settings* main element:

Note To be able to define the remote API settings, you require an Inxmail API interface (and a corresponding API license).

- **Enable API login (requires an API licence)** option button

  This option button is disabled by default and Inxmail Professional stores all data on the local Inxmail Server. If you have an API license for a remote Inxmail Server, you can disable this option button; Inxmail Professional will then automatically store the recipient data on the remote server.

- **Inxmail Server address** field

  In this field, enter the server address of the remote Inxmail Server on which the recipient data is to be stored.

- **API user name** field, **API password** field

In these fields, enter the login data for your API license.

29.4 Publishing the web page (creating the link address/URL)

29.4.1 Publishing the web page (creating the link address/URL)

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Web pages* tab. Select the corresponding web page in the table and click the (*Publish web page*) button.
   A dialog box appears.

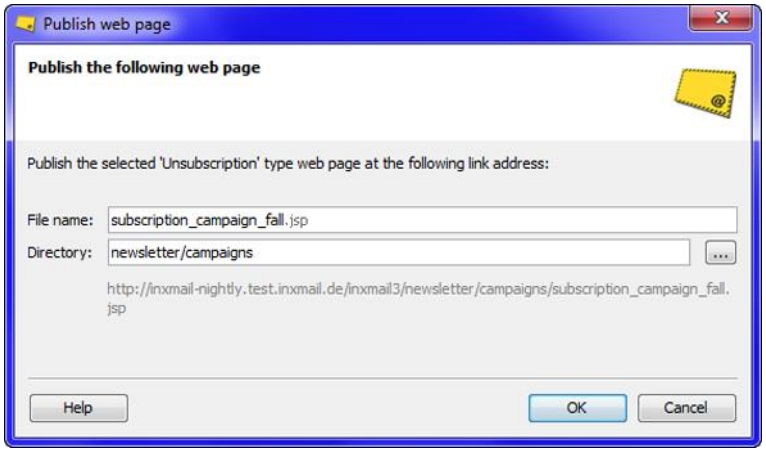


Figure 292: "Publish web page" dialog box

2. In the *File name* field, enter the file name with which the web page should be created. (The file name appears in the *Link address* column in the overview of web pages.)
3. Enter the directory in which you want to publish the web page in the *Directory* field, or select an existing directory using the (*Select directory*) button.
4. Confirm your entries by clicking *OK*.
   Inxmail Professional publishes the web page. The link address (URL) of the web page will now be displayed in the table in the *Link address* column.

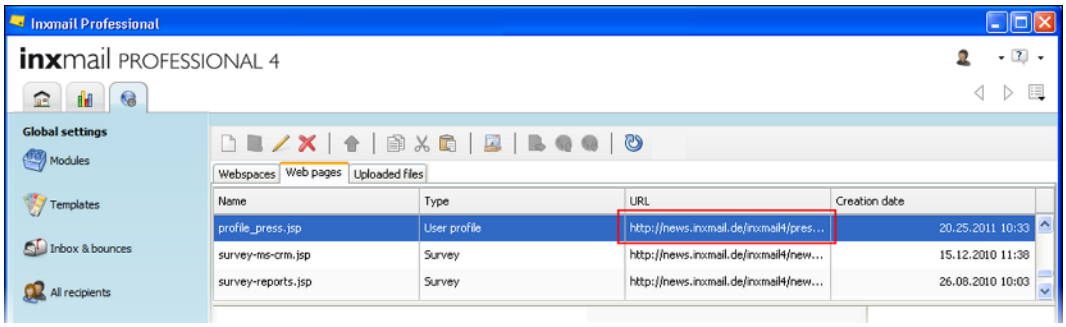


Figure 293: Link address of the web page

✓ You have now published the web page.

29.4.2 Call up a preview of the web page

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Web pages* tab. Then click the cell in the table containing the URL of the web page.
   The row is highlighted in blue and the cell is marked with a dotted border.
2. Click the (*View web browser preview*) button.

   Note The (*View web browser preview*) button is only enabled if you have already published the web page (*Publishing the web page (creating the link address/URL)* page 454).

   The preview of the web page is displayed.

✓ You have called up the web page preview.

29.5 Integrating the web page into your website

You can also integrate a web page created with a JSP template directly into your website (all JSP templates except for 'Last issue').

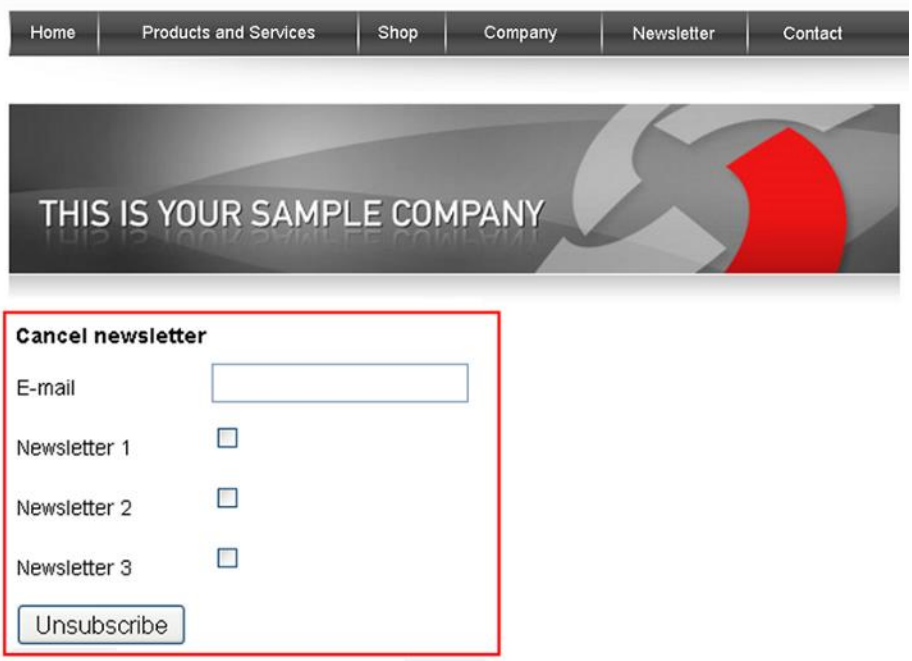


Figure 294: Unsubscription form integrated into a website (JSP "Cancel subscription" template)

The following steps are required:

1. In the *Settings* main element, add the *Dynamic entry* element to the editing area of the web page (created with a JSP template) (*Opening and expanding the editing area* page 428).
   The *Dynamic entry (URL)* and *Form encoding* fields are added.
2. Set up these fields as follows:
   - *Dynamic entry (URL)* field
     In this field, enter the URL of your website in which you would like to integrate the content of this web page.

- *Form encoding* field
  In this field, enter the character encoding of your website (for example, UTF-8).

Figure 295: "Dynamic entry (URL)" and "Form encoding" fields

3. Publish the web page again (*Publishing the web page (creating the link address/URL)* page 454 and *Call up a preview of the web page* page 455).

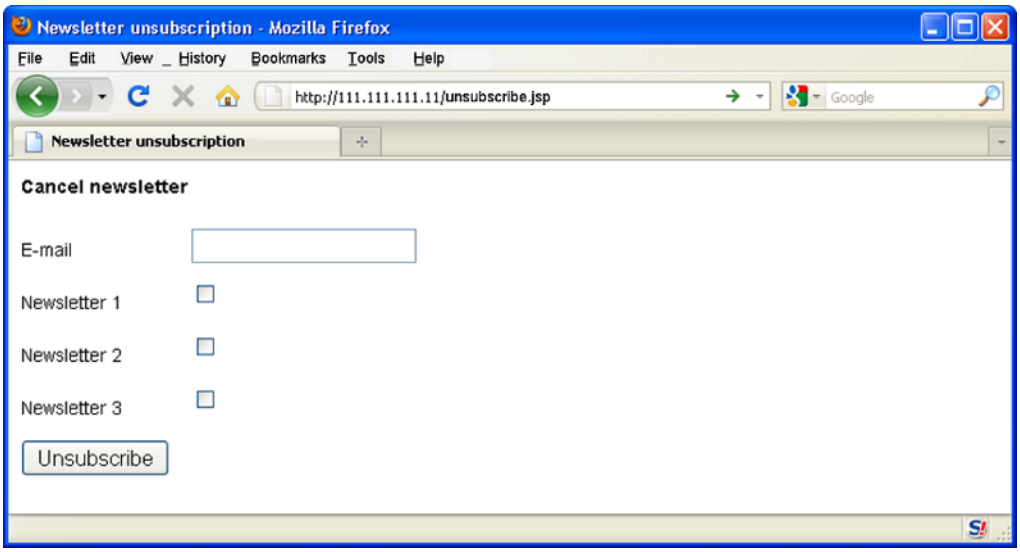


Figure 296: Published web page (web browser preview)

4. Insert the `[$include(content)]` command into the code of the desired place of your website.

✓ You have integrated the web page into your website.

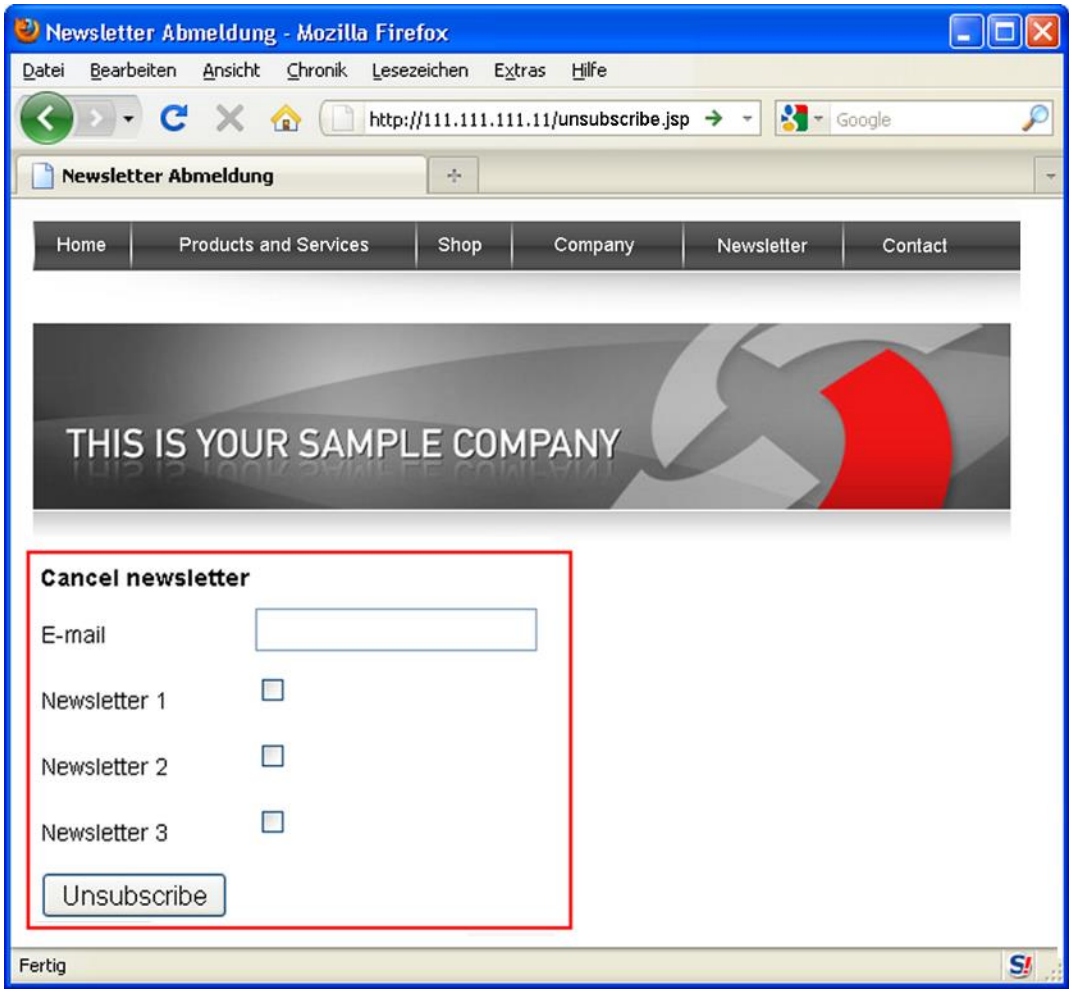


Figure 297: Unsubscription form integrated into a website (JSP "Cancel subscription" template)

29.5.1 Login links for web pages

Overview

Web pages that you have created using the 'Profile management' or 'Survey' JSP template can only be viewed via login links. When the user clicks the login link, Inxmail Professional automatically transfers the authentication data to the web page.

The user can obtain the login link as follows:

- by requesting the login link via your website. The link is then sent automatically via email.

  A template for this automatically sent email (including login link) is created when the web page is created using a JSP template. You can customise this email template (*Customising web pages* page 431).
- in one of the mailings addressed to them

29.5.2 Integrating a login link for a web page into a mailing

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Web pages* tab. Then select the corresponding web page in the table.
2. Publish this web page.
3. To copy the URL of the web page, click the cell in the table containing the URL of the web page. Then click the (*Copy*) button.
4. To open the mailing in which you would like to add the login link, click the tab of the mailing list > *Mailings* agent and then double-click the corresponding mailing in the table.

   The mailing opens on a new tab. The editor (in the *Editing* workflow step) is displayed.
5. Click the position in the editor in which you would like to insert the login link.
6. Manually insert a link to the copied URL for the web page in this position.

   Example

   A link inserted into an HTML mailing:

   ```
   <a href="http://test.inxmail.de/inxmail/Umfrage.jsp ">Link to the survey</a>
   ```

   Note You must **manually** insert the link in this position (**not** for example, using the Commands drop-down menu), because the link will have to be manually expanded to create a login link.

7. To expand the inserted link to create a login link, add the 'online_params' parameter to authenticate the users:

   ```
   <URL of the web page>?params=[%online_params]
   ```

   Example

   Login link inserted into an HTML mailing:

   ```
   <a
   href="http://test.inxmail.de/inxmail/Umfrage.jsp?params=[%online_params]">Lin
   k to the survey</a>
   ```

8. Save the mailing.
9. To test the login link, click the *Browser preview* button in the *Check* workflow step.
10. Click the login link in the browser preview.

✓ You have integrated a login link in a mailing and viewed the web page using the subscribe link.

Additional information

You can view the mailing preview for different test profiles.

You call up the web page via the login link.

If you have created the web page using the 'Survey' JSP template, Inxmail Professional opens the web page in test mode and your entries are **not** saved.

A note (above) on the web page informs you that you are in test mode (the text for the note can be changed in the *Style* main element in the *Please note: Test mode* field).

If you have created the web page using the 'Profile management' JSP template, Inxmail Professional does **not** open the web page in test mode, and therefore all your entries are saved.

Related Topics

» *Publishing the web page (creating the link address/URL)* page 454

» *Adding personalisation parameters to the link (optional)* page 209

» *Content check using test or recipient profiles* page 228

30 Webspaces and uploaded files

In this chapter, you will learn how to use the following (optional) functions in Inxmail Professional:

- Use webspaces to store and manage the files (for example, images, texts) needed for Inxmail Professional on webspaces (*Using webspaces* page 460)
- Manage uploaded files that you need to create mailings (for example, manually upload images or file attachments)

30.1 Using webspaces

30.1.1 Overview

A webspace is a storage location on a server where authorised users can upload files (for example, images, texts). If you use a webspace for storing files in Inxmail Professional, the following tasks may be required:

- *Logging in to the webspace* page 460
  Depending on the settings for the webspace, it may be necessary to log in to the webspace before you are able to use it.
- You can manage the folders and files stored on the webspace:
  - *Uploading and downloading files* page 462
  - *Creating a new folder* page 464
  - *Deleting a file or folder* page 465
  - *Renaming a file or folder* page 465
  - *Copying, cutting and pasting files or folders* page 466

Additional information

You can find more information about using webspaces in the Inxmail Community (http://community.inxmail.de) under *Inxmail Know-how* > *How to*.

30.1.2 Logging in to the webspace

Note Inxmail GmbH will set up webspaces for ASP customers upon request.
The Inxmail Professional administrator sets up webspaces for license customers. Inxmail Professional administrators can find additional information under *Webspaces* page 601.

Depending on the settings for the webspace, you may or may not be required to log into the webspace.

ASP customers will receive login data (user name and password) from Inxmail GmbH.

License customers will receive login data from their Inxmail Professional administrator.

Prerequisites

The required webspace has been set up.

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   If the webspace requires you to log in, a dialog box will be displayed.

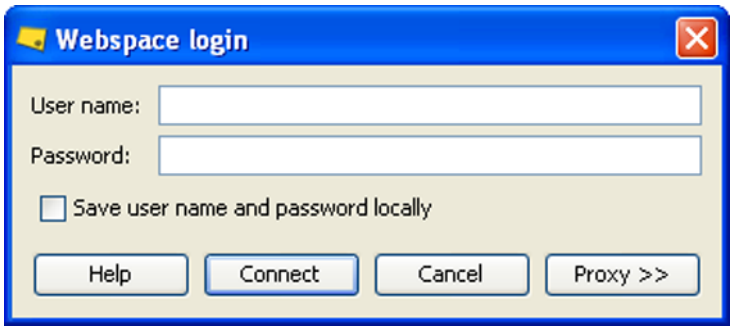


Figure 298: "Webspace login" dialog box

2. Enter your user name and password for the webspace in the dialog box.
3. If you would like to save the login data on your computer so that you can log in to the webspace in the future, select the *Save user name and password locally* check box in the dialog box.
4. If you require a special proxy setting for the webspace (for example, for the FTP protocol, which has no integrated proxies), click the *Proxy* button in the dialog box.

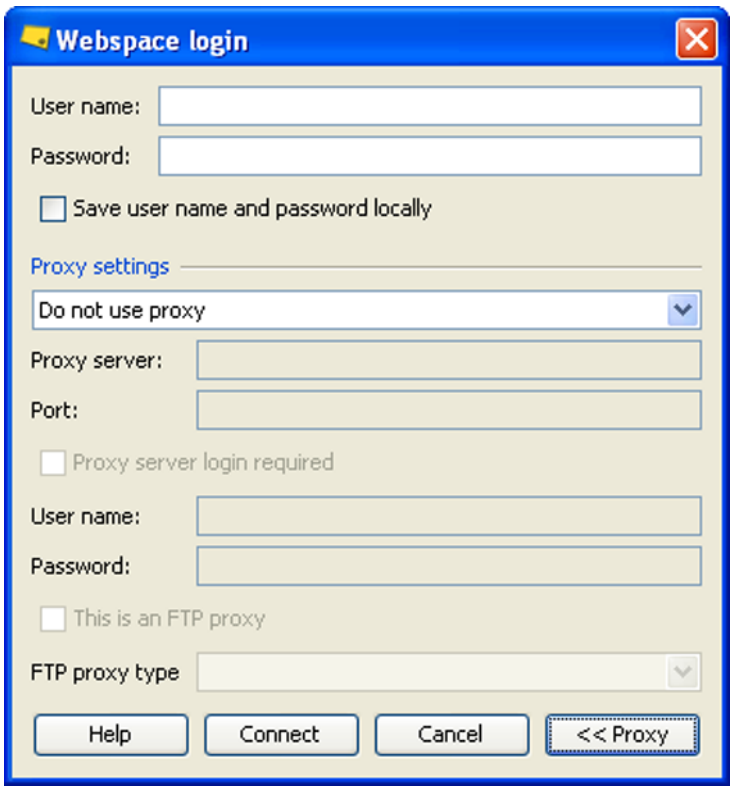


Figure 299: "Webspace login" dialog box

   Select one of the following proxy server settings:

   - *Do not use proxy* (if you do not require a proxy server to access the webspace)

- *Same proxy as for Inxmail server connection* (to transfer your proxy server settings from the Inxmail Professional login section)
- *Same proxy as for Internet connections* (to transfer your Internet proxy server settings from the user menu; *Configuring an Internet proxy* page 41)
- *Specify other proxy settings...* (to configure another proxy server)

If you use an FTP proxy server, you may only select *Do not use proxy* or *Specify other proxy settings....*

If you select *Specify other proxy settings...* you must enter the following additional information:

- Enter the HTTP address of the proxy server in the *Proxy server* fields, and in the *Port* field, enter the port number of the proxy server.
- If you are required to complete an extra login to access the proxy server, select the *Proxy server login required* check box and enter the user name and password for the proxy server in the fields below.
- If you use an FTP proxy server, then select the check box *This is an FTP proxy* and select the FTP proxy type in the drop-down list (if necessary, ask your Inxmail Professional administrator for the type used).

5. To log in to the webspace using the information you entered, click the *Connect* button (with proxy settings) or *OK* (without proxy settings).

✓ The webspace is now open and you can view the stored folders and files.

30.1.3 Uploading and downloading files

30.1.3.1 Uploading a file

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   The webspace is opened.
2. If you would like to save the file in a particular folder on the webspace, click this folder.
3. Click the *Upload file* button.

A dialog box appears.

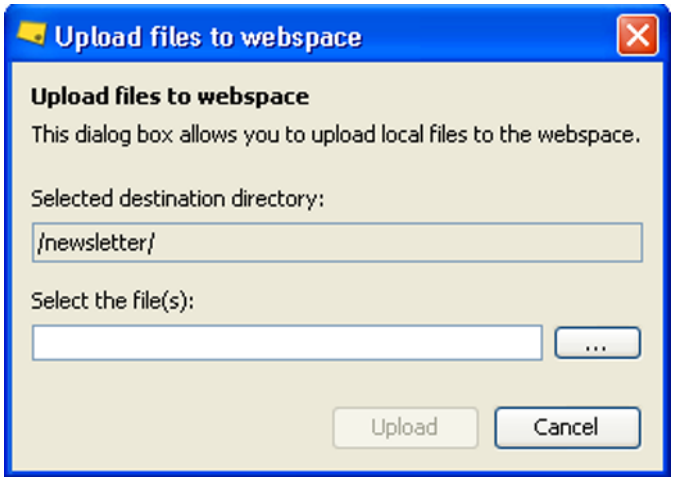


Figure 300: "Upload files to webspace" dialog box

4. In the dialog box, click the ... button to select the location where the file is stored.

   Note The file name should not contain any umlauts or special characters.

5. Click the *Upload* button.
6. The dialog box will inform you when the upload is complete. Then close the dialog box.

✓ The file will appear in the webspace or in the designated webspace folder.

30.1.3.2 Downloading a file

Note When you download a file, Inxmail Professional saves a copy of the file in a target directory. The file in the webspace will **not** be deleted.

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   The webspace is opened.

2. Click the file that you would like to download from the webspace and then click the (*Download file*) button.

A dialog box appears.

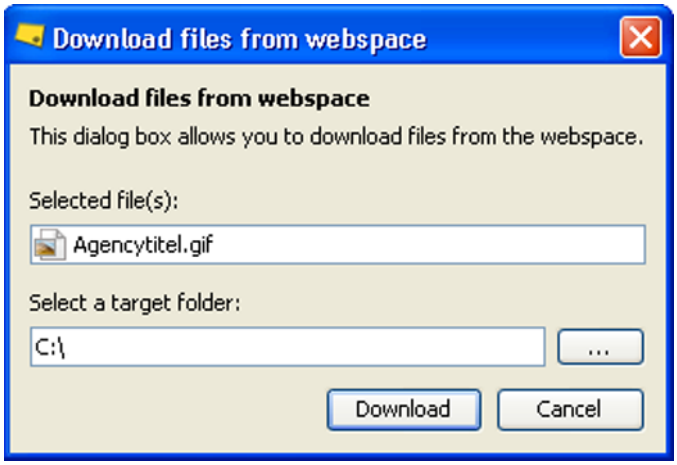


Figure 301: Download file dialog box

3. In the dialog box, click the ... button to select the target directory in which you would like the downloaded file to be saved.
4. In the dialog box, click the *Download* button.
5. The dialog box will inform you when the download is complete and the file has been saved. Then close the dialog box.

✓ You will find the downloaded file in the target directory that you have specified.

30.1.4 Creating a new folder

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   The webspace is opened.
2. Click the (*Create new directory*) button.

   A dialog box appears.

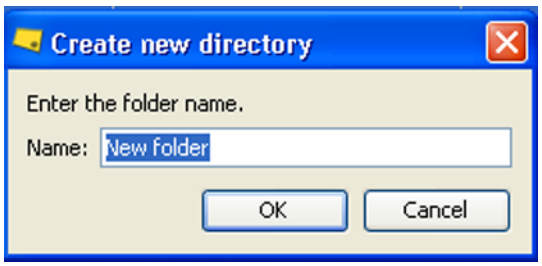


Figure 302: "Create new directory" dialog box

3. Enter a name for the folder in the dialog box and confirm by clicking *OK*.

✓ The new folder will appear in the content area of the webspace.

30.1.5 Deleting a file or folder

Important Please note that when you delete a folder, all subfolders and files contained within the folder will be deleted as well. When you delete folders or files, existing links to the corresponding files will no longer work properly.

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   The webspace is opened.
2. Click the folder or file that you would like to delete.
3. Click the (*Delete*) button.

   A message box appears, informing you of the possible consequences of deleting the folder or file.
4. Confirm the message by clicking *Next* if you wish to proceed.

   Another message box appears.
5. To delete the folder or file, confirm the second message box by clicking *OK*.

✓ The folder or file is deleted.

30.1.6 Renaming a file or folder

Note You can rename files or folders at any time. Note that existing links to the corresponding files will no longer work properly.

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   The webspace is opened.
2. Click the folder or file that you would like to rename and then click the (*Edit*) button.

   A message box appears, informing you of the possible consequences of renaming the folder or file.
3. Confirm the message by clicking *Next*.

   A dialog box appears.

Figure 303: "Rename file" dialog box

4. Enter the new name in the dialog box.

Note The file name should not contain any umlauts or special characters.

5. Confirm your entries by clicking *OK*.

✓ The folder or file is renamed.

30.1.7 Copying, cutting and pasting files or folders

You can copy or cut and paste files, folders or entire webspaces. This way, you can move elements in the webspace and perform other tasks.

Note After cutting and pasting, existing links to the corresponding files will no longer work properly.

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab. Then select the corresponding webspace in the table.

   The webspace is opened.
2. Click the folder or file that you would like to copy or cut.

   To copy multiple files, hold down the CTRL key as you click each file.
3. Click the following button:
   - To copy, click the (*Copy*) button.
   - To cut, click the (*Cut*) button.
4. Click the location (for example, the webspace or folder) where you would like to paste the folder or the file.
5. Click the (*Paste*) button.

   When you have cut the folder or file to be pasted, a message box with a warning appears. To paste the folder or file, confirm the message by clicking *Next*.

✓ The folder or file is pasted in the desired location.

30.2 Managing uploaded files

30.2.1 Overview

You can upload files (for example, images or file attachments) that you need for your mailings to the Inxmail Professional Server and release them for one mailing list or all mailing lists.

In addition, you can release files for the current mailing list or all mailing lists while creating a mailing (for example, when inserting images) and thereby automatically upload them to the Inxmail Professional Server (*Inserting images (HTML mailings only)* page 218).

If you do **not** release these files for the current mailing list or all mailing lists when creating a mailing, they are not uploaded to the Inxmail Professional Server.

All files uploaded to the Inxmail Professional Server can be found on the (*Global settings*) tab > *Files & web pages* agent > *Uploaded files* tab.

30.2.2 Uploading files to the Inxmail Professional Server

Step-by-step

1. Click the (*Global settings*) tab > *Files & web pages* agent > *Uploaded files* tab.

   All files uploaded to the Inxmail Professional Server are shown in the table. You can use these files when creating mailings (depending on the mailing lists for which the files have been released).

2. To upload a new file to the Inxmail Professional Server, click the (*Upload new file*) button.

   A dialog box appears.

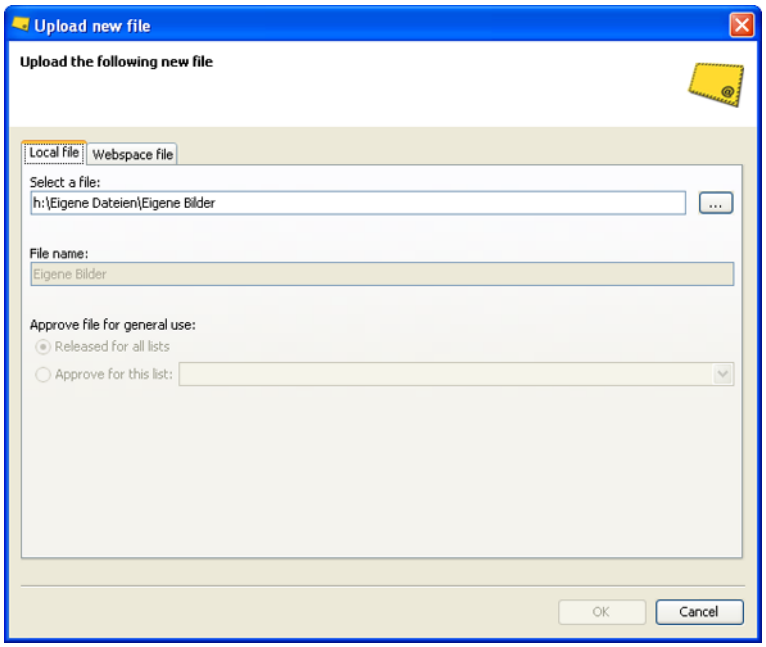


Figure 304: "Upload new file" dialog box

3. Specify the path in which the file is stored.
4. Specify whether the file may be used only in a particular mailing list or in all mailing lists.
5. Confirm your entries by clicking *OK*.

✓ You have uploaded a file. This file will appear in highest position in the table of uploaded files. The *Release* column shows the mailing lists for which you have released the file.

Additional information

You can select an uploaded file in the table and:

- export it from Inxmail Professional using the (*Export*) button.
- delete it from Inxmail Professional using the (*Delete*) button.

31 Import Automation

31.1 Overview

The *Import Automation* agent allows you to import recipient data to <Inxmail_Professional_no_version> automatically at regular intervals. The recipient data must exist as a CSV file or CSV files.

The description of the Import Automation is divided into the following sections:

Creating and controlling imports

In this section, you will learn how to create, set and activate automatic imports. After you have performed the actions and specified the settings described here, imports will be carried out automatically by <Inxmail_Professional_no_version>.

Displaying imports

This section describes the overview of imports. You will find explanations on the detailed information that is also displayed in the overview. This section also contains a list of the various statuses that imports can have.

Logging imports

This section describes how imports are logged. You find out where import logs are/can be stored and which information they contain.

Checking imports

In this section, you will find explanations on the individual import processes and import executions. In the import details, you can find detailed information on why an import file could not be imported, for example.

The chapter concludes with an overview of critical scenarios that can arise during imports.

31.2 Terms

Below you will find explanations of the key terms as they are used in this chapter.

Import

One of the central objects related to the Import Automation is the import. In this object, you specify the settings for the physical transfer of data from a source server to the Inxmail Professional Server. The settings that you specify here concern, among other things, the source directory or the recipient table into which data is to be imported.

Import execution/import process

Import execution or import process refers to the actual physical transfer of data from a source to a target server. An import execution or import process takes place based on the settings that have been specified in the import.

Import file

Import file refers to the file that will be transferred from the source to the target server. The term 'source file' is also sometimes used in place of 'import file'. The import file must be available in CSV format.

31.3 Creating and controlling imports

31.3.1 Introduction

The following diagram provides an overview of the main steps that need to be taken to ensure that the automatic import of recipient data or import files works correctly.

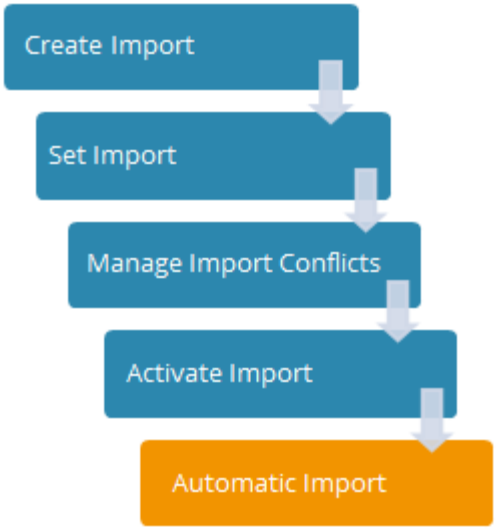


Figure 305: Import Automation – Process steps

Create import

In the first step, you must create an import. This simply involves giving the import a unique name.

Set import

This step involves specifying the main settings for the automatic import. For example, you need to specify the import source and import target here. You also have to make sure that the import file and the respective recipient table in Inxmail are compatible by 'telling' Inxmail how the import file is constructed.

Unlike when you import recipient data manually, no assignments between import file columns and recipient table columns can be made in the course of an automatic import process. Therefore it is essential that the source and target columns are assigned correctly before an automatic import takes place.

Manage import conflicts

In this step, you specify how the system should handle data that already exists in the recipient table. For example, you can specify that existing recipient data should be overwritten or extended. The settings that need to be specified correspond to the settings for a manual import (see the *Import recipients* page 39 section).

Activate import & Automatic import

After you have specified the import settings, you must activate the import. The system will then perform the imports automatically at the specified intervals.

The following contains a detailed description of the individual process steps.

31.3.2 Create import

Note The *Import Automation* agent is only displayed in the *Global settings*.

Step-by-step

To create a new import in the *Import automation* agent, proceed as follows:

1. Click the (*Global settings*) tab.
2. Click the *Import automation* agent.
   The *Imports* tab is displayed.
3. In the *Import automations* agent, click the *Create new import* button in the toolbar.
   The *Create new import* dialog box opens.

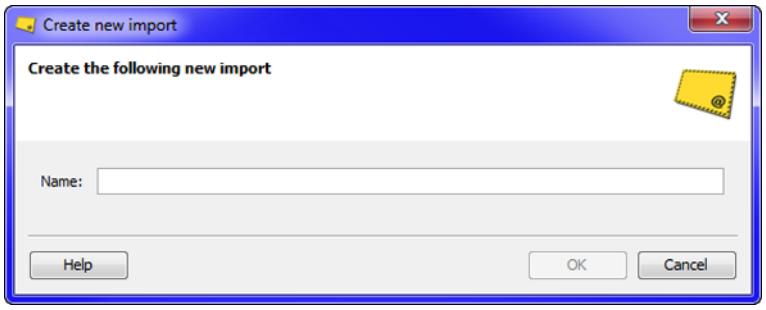


Figure 306: 'Create new import' dialog box

4. Enter a name for the import.

Note The name of the import must be unique and should neither start nor end with a space character.

5. Confirm the dialog box by clicking *OK*.

This takes you to the *Settings* workflow step.

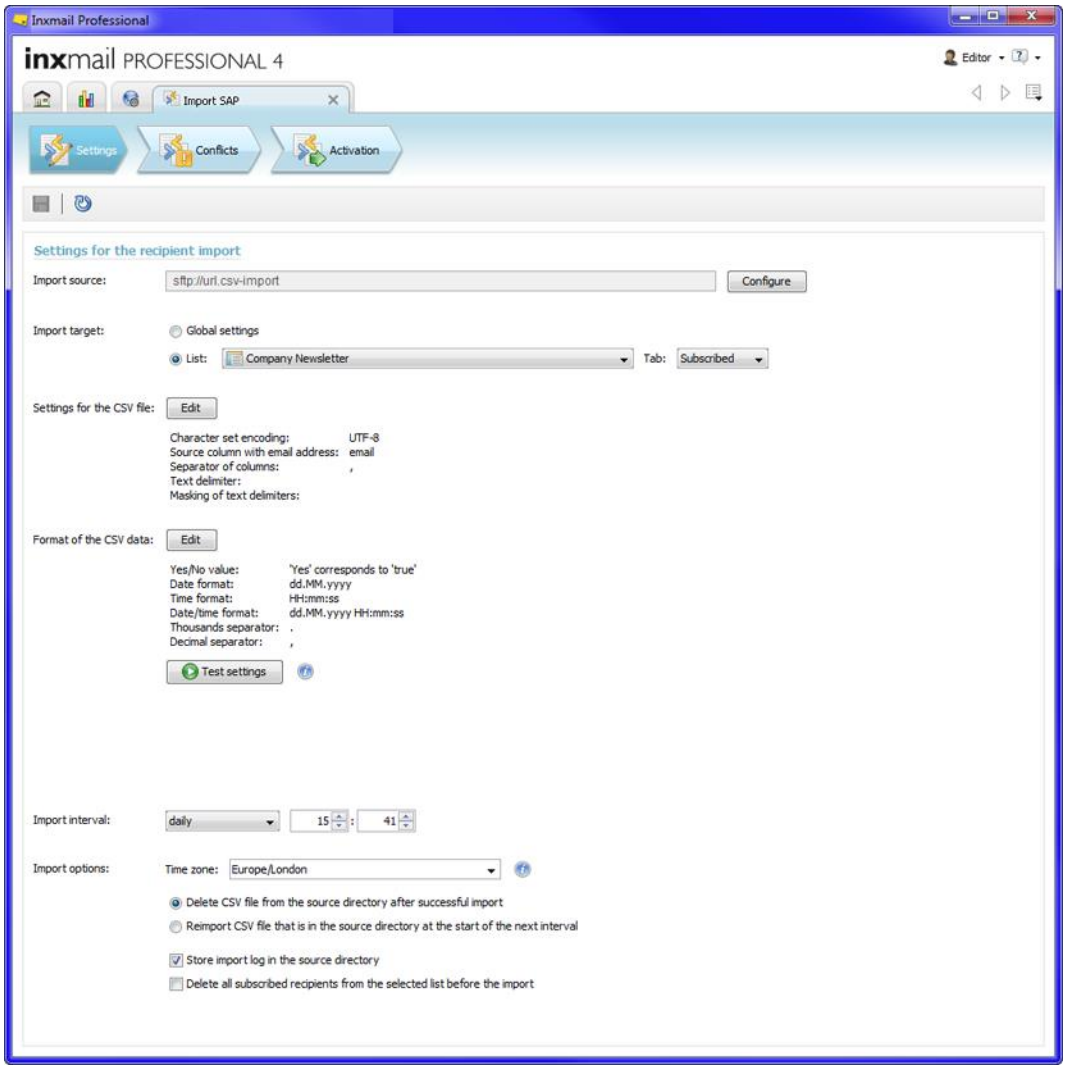


Figure 307: Import Automation – 'Settings' workflow step

✓ You have now created a new import.

The new import that you have just created will be displayed in the overview of imports (*Overview of created imports* page 493).

How to proceed from here

Now perform the following actions in the *Settings* workflow step:

- *Configure import source* page 472
- *Test access to import source* page 473
- *Specify import target* page 477
- *Edit settings for the CSV file* page 477
- *Specify format of the CSV data* page 479
- *Test settings for the CSV file* page 482
- *Specify import interval* page 483

- *Specify import options* page 484

31.3.3 Specify import settings

The settings described here can be found in the *Settings* workflow step. Please note that you can only enter or modify the settings when the import is **not** active.

31.3.3.1 Configure import source

Configuring the import source involves specifying the source path or the import file as well as the information that is required for authentication on the server on which the import files are located.

Step-by-step

To configure the import source, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Click the *Configure* button.

   The *Configure import source* dialog box opens.

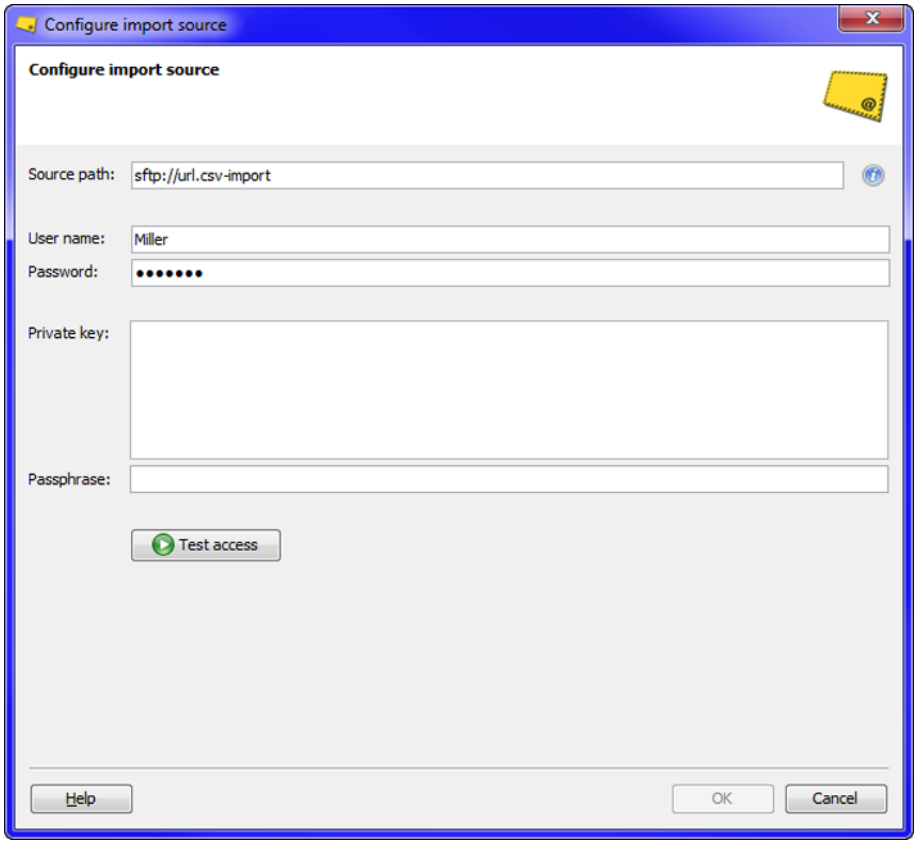


Figure 308: 'Configure import source' dialog box

Name	Description
Source path	Enter the path to the source directory or the path to the import file here. Enter the path to the source **directory** if you want to import multiple files. Enter the path to the import **file** if you only want to import one file. Please note the following points: • For security reasons, only the SFTP protocol can be used. • Only files in CSV format can be imported. • You can create multiple imports with the same source path. However, you can only activate one import with the same source path.
User name	In the *User name*, *Password*, *Private key* and *Passphrase* fields, enter the information required for authentication on the server. The following combinations can be used for authentication: • User name + password • User name + private key • User name + private key + passphrase **Note** The private key needs to be entered in the OpenSSH key file format.
Password	
Private key	
Passphrase	

3. Click the *Test access* button to check whether it is possible to access the server or file import.

   The system checks whether a connection can be established to the server and whether read and write permissions have been set for the respective directory.

   Rights To ensure that a file import can be carried out properly, read permissions must be set for the source directory.
   Write permissions only need to be set if the import log is to be stored in or deleted from the source directory.

   The result of the test access is displayed below the *Test access* button.

   (For detailed information on the access test, see the *Perform access test* page 474 section.)

   The *OK* button only becomes active after the access test has been performed successfully.
4. Confirm the dialog box by clicking *OK*.

✓ You have now configured the import source.

Related Topics

» *General information on the access test* page 473

» *Perform access test* page 474

31.3.3.1.1 Test access to import source

31.3.3.1.1.1 General information on the access test

To be able to configure an import fully, you must test the access to the source server and the source directory or the import file. The system checks the following:

- Connection setup to the server
- Read access

When you specify a directory, the server checks the read access to the directory that holds the file to be imported.

When you specify an import file, the system checks the read access to the import file.

- Write access to the directory that holds the file(s) to be imported.

When the system checks the connection setup and read access, you will either receive a success message or an **error** message.

When the system checks the write access, you will either receive a success message or a **warning** message. The following contains an overview of the possible messages.

Test	Possible messages	
Connection setup	✔	Connection setup successful
	✖	Connection setup failed
Read access	✔	Read access to <source path> is possible
	✖	Read access failed
Write access	✔	Write access to <source path> is possible
	⚠	Write access failed

To ensure that your import can be configured and performed properly, a connection to the server and read access must be available. Write access is not absolutely necessary for the import. For this reason, the system only displays a warning message. However, please bear in mind that you will not be able to delete the import file from the source directory after the import if no write access exists. It will also not be possible to store the import log in the source directory. (For more information on this, see the *Specify import options* page 484 section.)

For your import to be configured and performed properly, the result of the test should be as follows:

Test	Messages	
Connection setup	✔	Connection setup successful
Read access	✔	Read access to <source path/import file> is possible
Write access	✔	Write access to <source path> is possible
	or	
	⚠	Write access to <source path> failed

Related Topics

» *Test access to import source* page 473

» *Perform access test* page 474

31.3.3.1.1.2 Perform access test

Step-by-step

To perform an access test, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Click the *Configure* button.

   The *Configure import source* dialog box opens.

Name	Description
Source path	Enter the path to the source directory or the path to the import file here. Enter the path to the source **directory** if you want to import multiple files. Enter the path to the import **file** if you only want to import one file. Please note the following points: • For security reasons, only the SFTP protocol can be used. • Only files in CSV format can be imported. • You can create multiple imports with the same source path. However, you can only activate one import with the same source path.
User name	In the *User name*, *Password*, *Private key* and *Passphrase* fields, enter the information required for authentication on the server. The following combinations can be used for authentication: • User name + password • User name + private key • User name + private key + passphrase **Note** The private key needs to be entered in the OpenSSH key file format.
Password	
Private key	
Passphrase	

3. Click the *Test access* button.

The result of the access test is displayed.

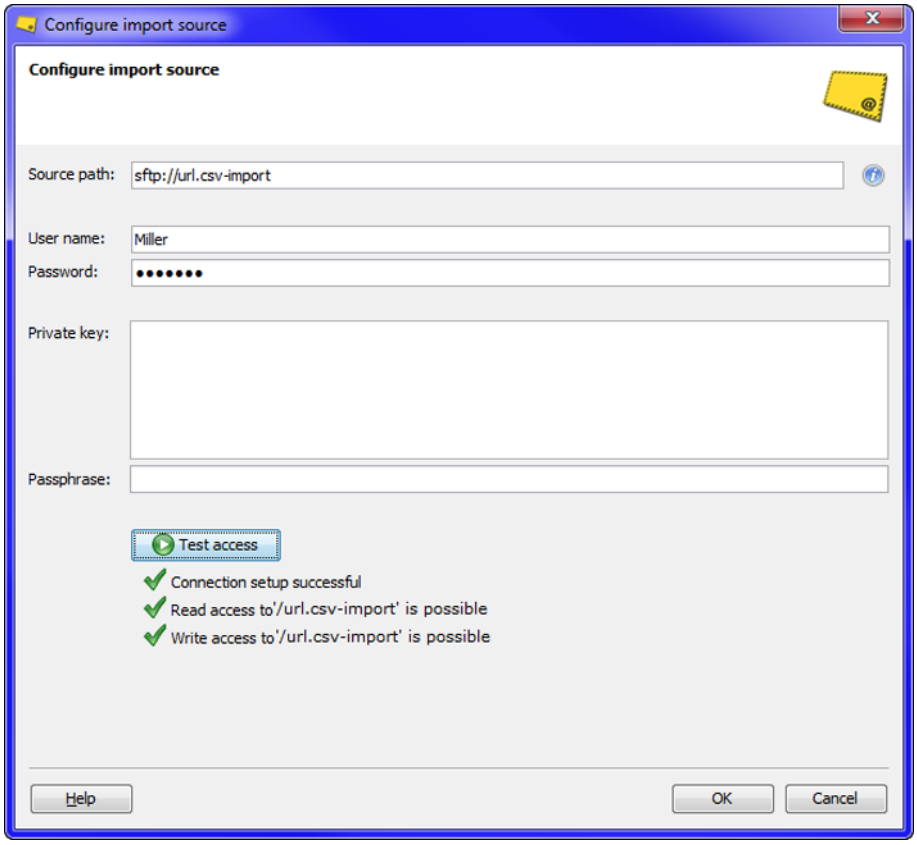


Figure 309: Test access to import source

✓ You have now performed the access test.

The *OK* button becomes active if the access test was successful.

You can now confirm the dialog box by clicking *OK*.

Successful access test

For your import to be configured and performed properly, the result of the test should be as follows:

Test	Messages	
Connection setup	✔	Connection setup successful
Read access	✔	Read access to <source path/import file> is possible
Write access	✔	Write access to <source path> is possible
	or	
	⚠	Write access to <source path> failed

Related Topics

» *Test access to import source* page 473

» *General information on the access test* page 473

31.3.3.2 Specify import target

You can specify *Global settings* or a specific list as the import target:

- Global settings

  If you select this option, the recipients in the import file will be imported to the global recipient list of <Inxmail_Professional_no_version>.
- List/tab

  If you select this option, you can select the mailing list into which you want to import the recipients in the import file. You must also specify whether the recipients should be imported to the *Subscribed*or *Unsubscribed* tab of the respective mailing list.

31.3.3.3 Edit settings for the CSV file

In this step, you must make sure that the import file and the recipient table in Inxmail Professional are compatible by 'telling' Inxmail Professional how the import file is constructed. This will allow the system to interpret the data correctly.

Column assignment

The system assigns the columns in the import file to the columns in the recipient table using the names of the respective columns. This means that the columns in the import file must have the same names as the columns in the recipient table to ensure that the columns can be assigned correctly.

Unlike when you import recipient data manually, no assignments between import file columns and recipient table columns can be made in the course of an automatic import process. Therefore it is essential that the source and target columns are assigned correctly before an automatic import takes place.

Step-by-step

To edit the settings for the import file, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Click the *Edit* button next to *Settings for the CSV file*.

The *Edit settings for the CSV file* dialog box opens.

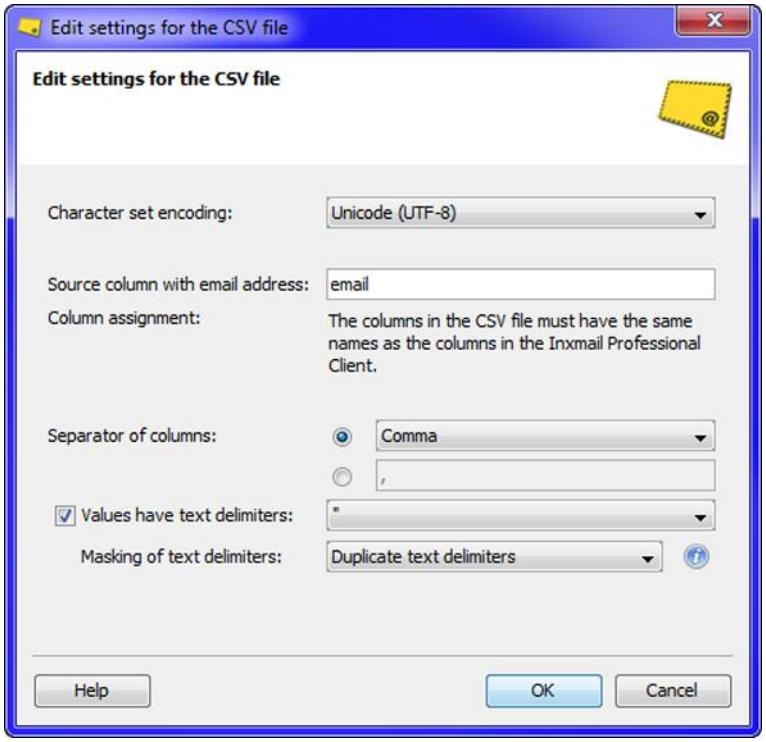


Figure 310: 'Edit settings for the CSV file' dialog box

Name	Description
Character set encoding	Select the character set encoding for the source file here. (You must set the correct character set encoding to ensure, for example, that German umlauts and special characters are interpreted correctly.)
Source column with email address	Enter the name of the column that contains the email address in the import file. The system assigns the name you enter here to the *email* column in Inxmail Professional.
Separator of columns	Select the separator that will separate the columns in the import file. Alternatively, you can enter a character of your own.
Values have text delimiters	Select this check box if the import file contains text delimiting characters. **Note** You use text delimiting characters if a file contains special characters within the data (for example, commas within decimal values) that then have to be marked accordingly.
Masking of text delimiters	Select Duplicate text delimiters or Preceding backslash here to mask the text delimiters. This ensures that the system actually interprets text delimiters as such and does not interpret them as column separators.

3. Specify your settings in the fields.
4. Confirm the dialog box by clicking *OK*.

✓ You have now edited the settings for the import file.

31.3.3.4 Specify format of the CSV data

In this step, you specify the format of the data in the import file, for example. The settings that you specify apply to the entire import file or for all import files. It is not possible to specify varying settings for individual import files, data records or data fields.

Step-by-step

To specify the format of the import file, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Click the *Edit* button next to *Format of the CSV data*.

   The *Edit format of the CSV data* dialog box opens.

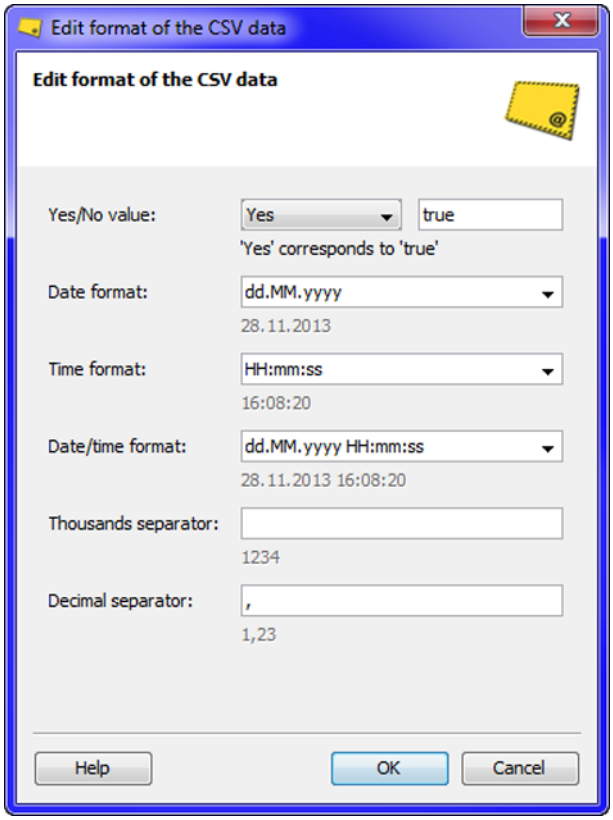


Figure 311: 'Edit format of the CSV data' dialog box

Note The format specifications that can be made in the *Edit format of the CSV data* dialog box, are based on the ISO 8601 standard.

Name	Description
Yes/No value	The setting that you specify here relates to all columns of the Yes/No data type. You can either specify the value for Yes or the value for No. If you have specified a value for Yes, all other values in the column will be interpreted by the system as No. If you have specified a value for No, all other values will be interpreted by the system as Yes. You can enter any characters in the input field. The system does not distinguish between upper and lower case. You can also leave the input field empty. The system will then interpret empty data fields in the import file either as Yes or No, depending on the setting. (Please also see the examples Beispiel 1: CSV-Import and Beispiel 1: CSV-Import.)
Date format	Select the date format here. You can also enter the date format manually. In this case, please follow the ISO 8601 standard. The current date is then displayed below the selection box or input field in the previously specified format.
Time format	Select the time format here. You can also enter the time format manually. In this case, please follow the ISO 8601 standard. The current time is then displayed below the selection box or input field in the previously specified format.
Date/time format	Select the date/time format here. You can also enter the date/time format manually. In this case, please follow the ISO 8601 standard. The current date and the current time are then displayed below the selection box or input field in the previously specified format.
Thousands separator	Enter the thousands separator here. Please note that the thousands separator and the decimal separator should not be identical.
Decimal separator	Enter the decimal separator here. Please note that the decimal separator and the thousands separator should not be identical.

Example 1: Yes/No value

Import file

email,first name,surname,already a customer

a.allmeier@inxmail.de,Andreas,Allmeier,true

d.dannenberger@inxmail.de,Doris,Dannenberger,-

h.hemberger@inxmail.de,Herbert,Hemberger,-
j.bloggs@inxmail.de,Joe,Bloggs,true
p.petersen@inxmail.de,Petra,Petersen,true

Yes/No value

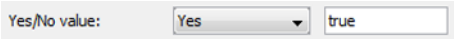


Figure 312: Example 1 – Yes/No setting

Data in Inxmail Professional

email	Surname	First Name	Already customer
a.allmeier@inxmail.de	Allmeier	Andreas	☑
d.dannenberger@inxmail.de	Dannenberger	Doris	☐
h.hemberger@inxmail.de	Hemberger	Herbert	☐
m.mustermann@inxmail.de	Mustermann	Max	☑
p.petersen@inxmail.de	Petersen	Petra	☑

Figure 313: Example 2 – CSV import

Notes

true was specified as the Yes value.

In <Inxmail_Professional_no_version>, the *Already a customer* column has the Yes/No data type.

In <Inxmail_Professional_no_version>, the check box in the *Already a customer* column is selected for all data records with the value true.

In <Inxmail_Professional_no_version>, the check box in the *Already a customer* column is not selected for all data records with the value - (hyphen).

Example 2: Yes/No value

Import file

email,first name,surname,already a customer
a.allmeier@inxmail.de,Andreas,Allmeier,active
d.dannenberger@inxmail.de,Doris,Dannenberger,
h.hemberger@inxmail.de,Herbert,Hemberger,—
j.bloggs@inxmail.de,Joe,Bloggs,active
p.petersen@inxmail.de,Petra,Petersen,active

Yes/No value

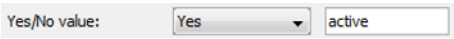


Figure 314: Example 2 – Yes/No setting

Data in Inxmail Professional

email	Surname	First Name	Already customer
a.allmeier@inxmail.de	Allmeier	Andreas	☑
d.dannenberger@inxmail.de	Dannenberger	Doris	☐
h.hemberger@inxmail.de	Hemberger	Herbert	☐
m.mustermann@inxmail.de	Mustermann	Max	☑
p.petersen@inxmail.de	Petersen	Petra	☑

Figure 315: Example 2 – CSV import

Notes

active was specified as the Yes value.

In <Inxmail_Professional_no_version>, the *Already a customer* column has the Yes/No data type.

In <Inxmail_Professional_no_version>, the check box in the *Already a customer* column is selected for all data records with the value active.

In <Inxmail_Professional_no_version>, the check box in the *Already a customer* column is not selected for all data records with the value ' (no entry) ' and '—'.

1. Specify your settings in the fields.

   You can choose values from the drop-down lists or you can enter valid values manually.
2. Confirm the dialog box by clicking *OK*.

✓ You have now specified the format of the import data.

Related Topics

» *Configure import source* page 472

» *Test access to import source* page 473

» *Specify import target* page 477

» *Edit settings for the CSV file* page 477

31.3.3.5 Test settings for the CSV file

The *Test settings* button allows you to check whether the import file can be imported correctly using the settings that you have specified. The system checks the following:

- Assignment between columns in the import file and in the recipient table
- Validity of data in the import file

The test is carried out for the first 15 lines of the import file. If several import files exist in the source directory, the system uses the most recent import file for the test.

Information messages

If an information message is output, you can still perform the import.

The following information messages are possible:

Information messages
Please note that you are importing data to columns that do not exist in the system. Column: <Name of the column>

ℹ	Columns from the import file are hidden in the selected list.

Error messages

If an error message is output, you must correct the settings for the import file or the data in the import file. The message for the first error that has been found is always displayed. The following error messages, among others, are possible:

Error messages	
✗	The source column with the email address does not exist in the CSV file.
✗	A line in the CSV file contains too few columns. Line <Line number>
✗	A column in the CSV file has no name.
✗	No files are contained in the directory.
✗	The CSV file is too short to test. Select a CSV file with at least 15 data records.

Success message

Success message	
✓	The test was performed with the file <filename.csv>. Settings were successfully tested

Step-by-step

To test the settings for the import file, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Click the *Test settings* button.
   The respective success, information or error message appears below the *Test settings* button.

✓ You have now tested the settings for the import file.

31.3.3.6 Specify import interval

The *Import interval* selection box allows you to specify the intervals, in which the import file should be imported. The import interval can be set exact to the minute.

Step-by-step

To specify the import interval, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Select the required interval in the *Import interval* selection box.
3. Specify the hour and minute for the start of the interval.

✓ You have now specified the import interval.

31.3.3.7 Specify import options

Under *Import options*, you are required to specify several further settings. The following contains an explanation of how to set the time zone.

31.3.3.7.1 Specify time zone

Select the time zone that was used when creating the recipient data in order to keep your data consistent. Please note that the time zones are specified using standard (winter) time.

Example

You are working in Germany and regularly receive customer data in CSV format from your head office in Great Britain. The time difference between Germany and Great Britain is one hour.

If the data to be imported was created in British time and this is not specified when the data is imported, the data will be displayed inconsistently.

1. Time zone selection: Europe/*Berlin*

Import file	Display on the client
(Generated in Great Britain)	(Client in Germany)
Date and time	Date and time
31.12.2013 23:30	31.12.2013 23:30

The client displays the same time as in the import file. This is not correct because of the time difference between Great Britain and Germany. The data is inconsistent.

2. Time zone selection: Europe/*London*

Import file	Display on the client
(Generated in Great Britain)	(Client in Germany)
Date and time	Date and time
31.12.2013 23:30	01.01.2014 00:30

The correct time is displayed on the client. 23:30 pm British time corresponds to 00:30 am German time. The data is consistent.

Data types

The system handles date and time-related data types as follows:

Data type	Description
date only	Data with the data type date only is imported one-to-one. The system does not convert the data at all.

time only	Data with the data type time only is converted in accordance with the selected time zone. *Summer or winter time* When only a time is specified, the system uses the date on which the import was started to decide whether the time is in summer or winter time. For example, if you import an import file on 1 December using an Inxmail Professional Client that is operated in Germany, the times will be interpreted as winter times.
Date and time	Data with the data type Date and time is converted in accordance with the selected time zone. *Summer or winter time* The system uses the date specified in the import file to decide whether the time is in summer or winter time. For example, if '31.12.2013 23:30' is specified in the import file and Europe/London has been selected as the time zone, the system interprets 23:30 as winter time because it was winter time in Great Britain/London on 31 December 2013 (31.12.2013). **Further examples**

Date and time	Country	Time zone	Summer time/ Winter time
31.12.2013	Australia	Australia/Sydney	Summer time
	Australia	Australia/Perth	Winter time
	Turkey	Europe/Istanbul	Winter time

31.3.3.7.2 Further import options

Under *Import options*, you are required to specify the following further settings.

Name	Description
Delete CSV file from the source directory after successful import	Specify here whether the import file should be deleted from the source directory after the import or whether it should be imported again at the start of the next interval. **Note** You can only delete the import file if write permissions have been set for the source directory.
Reimport CSV file that is in the source directory at the start of the next interval	

Store import log in the source directory	Select this check box if you want to store the import log in the source directory. Please note that the import log may be quite large and therefore require a lot of storage space. **Note** You can only store the log here if write permissions have been set for the source directory. You can also save the import log manually. You can save the import log manually for up to seven day after the import execution (see the *Save import log* page 499 section).
Delete all subscribed recipients from the selected list before the import	Select this check box if you want to delete all recipients from the recipient table of the selected mailing list before the import. This option is only enabled if a specific list and the tab *Subscribed* has been selected for the import. The option is not enabled if data is to be imported to a specific list and the tab *Unsubscribed* has been selected or if *Global settings* have been selected.

Step-by-step

To specify the import options, proceed as follows:

1. Open the import in the *Settings* workflow step.
2. Select the required time zone from the *Time zone* selection box under *Import options* (see the *Specify time zone* page 484 section).
3. Specify the other import options (see *Further import options* page 485).
4. Save your settings.

✓ You have now specified the import options.

31.3.4 Manage import conflicts

In this step, you specify how the system should handle data that already exists in the recipient table. For example, you can specify that existing recipient data should be overwritten or extended. The settings that need to be specified correspond to the settings for a manual import (see the *Import recipients* page 39 section).

In this step, you can also specify whether a notification should be sent by email after the import. This notification can be made dependent on the result of the import.

Step-by-step

To manage import conflicts, proceed as follows:

1. Open the import in the *Conflicts* workflow step.

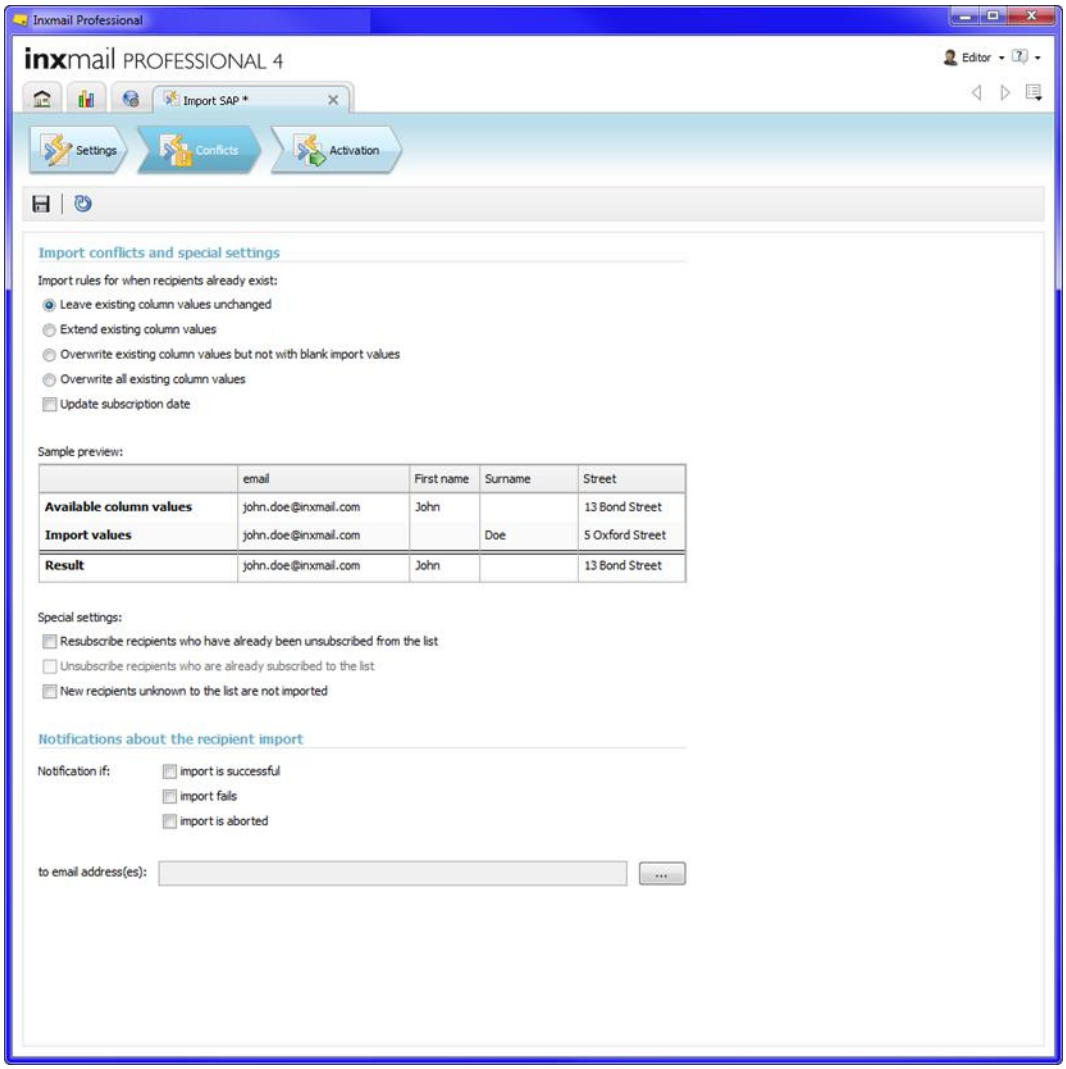


Figure 316: Import automation – 'Conflicts' workflow step

Note The options for the import conflicts are deactivated in case you import to the *Unsubscribed* tab of a specific list.

Import rules	Description
Leave existing column unchanged	Columns that exist in the import source and in the recipient table: Existing values in the recipient data record are retained and are not overwritten.
Extend existing column values	Columns that exist in the import source and in the recipient table: Existing values in the recipient data record are retained and are not overwritten. Column fields that contain no values in the recipient data record are filled with the values from the import source.

Overwrite existing column values but not with blank import values	Columns that exist in the import source and in the recipient table: Existing values of the recipient data record are overwritten with the values from the import source. If the import source contains column fields without values, the values of the recipient data record are retained.
Overwrite all existing column values	Columns that exist in the import source and in the recipient table: Existing values of the recipient data record are overwritten with the values from the import source. If there are column fields in the import source that contain no values, the corresponding column fields of the recipient data record are deleted.
Update subscription date	If you select this check box, the date on which recipients were subscribed to the current mailing list will be updated if new data is imported for them. **Note** This check box will only be displayed if you have selected a specific list for the import and not the *Global settings*.

Special settings	Description
Resubscribe recipients who have already been unsubscribed from the list	If you select this check box, data of recipients who are currently unsubscribed from the mailing list is also imported. In this case, these recipients are then resubscribed to the mailing list (that is, moved from the *Unsubscribed* tab to the *Subscribed* tab). This check box is only activated when you import recipients to the *subscribed* tab of a specific list. **Note** You need the consent of the affected recipients in order to do this.
New recipients unknown to the list or system are not imported	If you select this check box, only existing recipient data is updated in accordance with the import rules. New recipients are not imported. This check box is only activated when you import recipients to the *subscribed* tab of a specific list or to the system list.
Unsubscribe recipients who are already subscribed to the list	You have the option to unsubscribe recipients via an import. The respective recipients are moved from the *Subscribed* tab to the *Unsubscribed* tab. Note that when you import recipient data to the *Unsubscribed* tab, only the email addresses of the recipients are imported. The recipient table may, however, show other recipient data after the import if these recipients are already created in the system. This option is only activated when you import recipients to the *Unsubscribed* tab of a specific list.

Name	Description
Notification on	Here you can determine if and when you would like to be notified about the result of the import.

to email address(es)	Here you can specify one email address or several email addresses to which the notification about the result of the import should be sent. Click the button to specify one or several email address(es) to which the notifications are to be sent. Now click the editing area of the dialog box with the mouse. Enter the email address(es).

2. Specify your settings in the fields.
3. Save your settings.

✓ You have managed the import conflicts and specified notifications for the import.

Related Topics

» *Import recipients* page 39

31.3.5 Activate import

To ensure that an import can be performed automatically by the system, it must be activated first.

Step-by-step

To activate an import, proceed as follows:

1. Open the import in the *Activation* workflow step.
2. Click the *Activate* button.
   The *Activate import* dialog box opens.

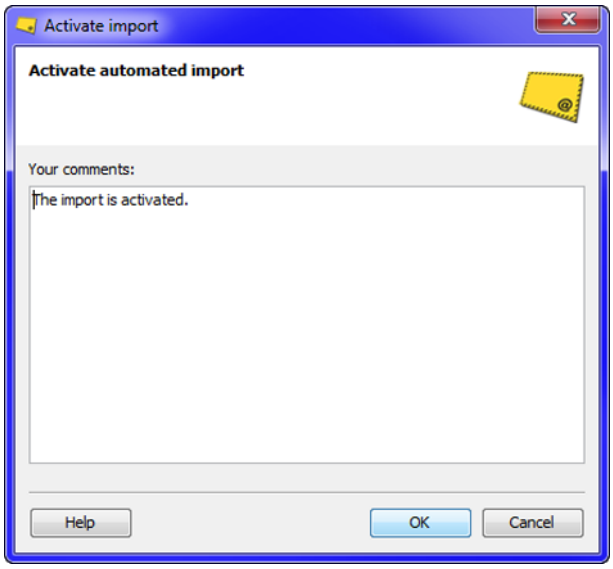


Figure 317: 'Activate import' dialog box

3. Enter a comment if required.
4. Confirm your entries by clicking *OK*.

Ctrl+Enter You can use the Ctrl+Enter shortcut to confirm the dialog box with OK.

5. A confirmation dialog box appears.
6. Click *Yes*.

   The last activated (or deactivated) import is displayed at the top of the status changes table.

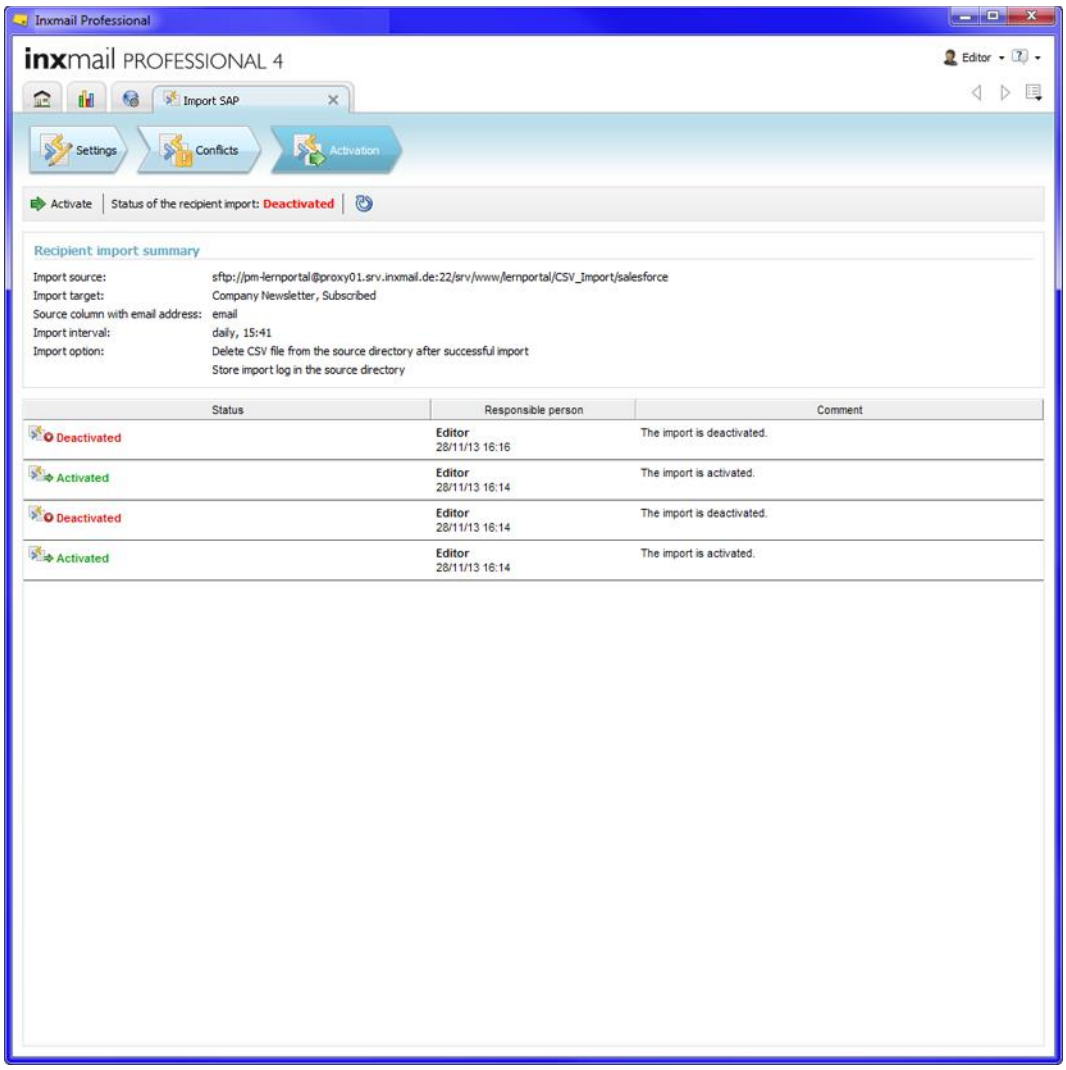


Figure 318: Import automation – 'Activation' workflow step

✓ You have now activated an import.

Additional information

You can also activate an import directly in the overview of imports (*Overview of created imports* page 493) using the (*Activate import*) button. The (*Activate import*) button is only activated if the corresponding import is not opened.

31.3.6 Deactivate import

After you have deactivated an import, no further import executions will be carried out by the system for this import. It makes sense to deactivate an import if you want to restart import executions at a later time. Unlike when you delete an import, all the import settings remain in the system when you deactivate an import.

Step-by-step

To deactivate an import, proceed as follows:

1. Open the import in the *Activation* workflow step.
2. Click the *Deactivate* button.
   The *Deactivate import* dialog box opens.
3. Enter a comment if required.
4. Confirm your entries by clicking *OK*.

   Ctrl+Enter You can use the Ctrl+Enter shortcut to confirm the dialog box with OK.

5. A confirmation dialog box appears.
6. Click *Yes*.
   The last deactivated import is displayed at the top of the status changes table.

✓ You have now deactivated an import.

Additional information

You can also deactivate an import directly in the overview of imports (*Overview of created imports* page 493) using the (*Deactivate import*) button. The (*Deactivate import*) button is only activated if the corresponding import is not opened. You can deactivate an import at any time.

If you deactivate an import that is currently being performed, the import will be completed.

31.3.7 Edit import

Prerequisites

The import that you want to edit has been deactivated.

Step-by-step

To edit a (deactivated) import, proceed as follows:

1. Click the *Import Automation* agent on the (*Global settings*) tab.
   The *Imports* tab with the overview of created imports will be displayed.
2. Double-click the import that you want to edit.
   The import opens in the *Settings* workflow step.
3. Make the required changes.
4. Save your settings.
5. If required, switch to the *Conflicts* workflow step to make any further changes.
6. Close the import by closing the tab.
   You return to the overview of imports.

✓ You have now edited an import.

31.3.8 Postpone import

You can postpone the import of individual import files. This can be useful if, for example, you want to stop a specific file from being imported during an import execution that involves multiple import files.

The following table indicates in which status pending imports can still be postponed:

Status	Possible to postpone import
File is being retrieved	Yes
Ready for processing	Yes
New	Yes
Processing is running	No

Step-by-step

To postpone the import of individual files, proceed as follows:

1. Click the *Import Automation* agent on the (*Global settings*) tab.
   The *Imports* tab with the overview of created imports will be displayed.
2. Click the (*View pending imports*) button in the toolbar.
   The *View pending imports* dialog box opens.
3. Select the import file whose import you want to postpone.
4. Click the (*Postpone import*) button.
   The *Postpone import* dialog box opens.

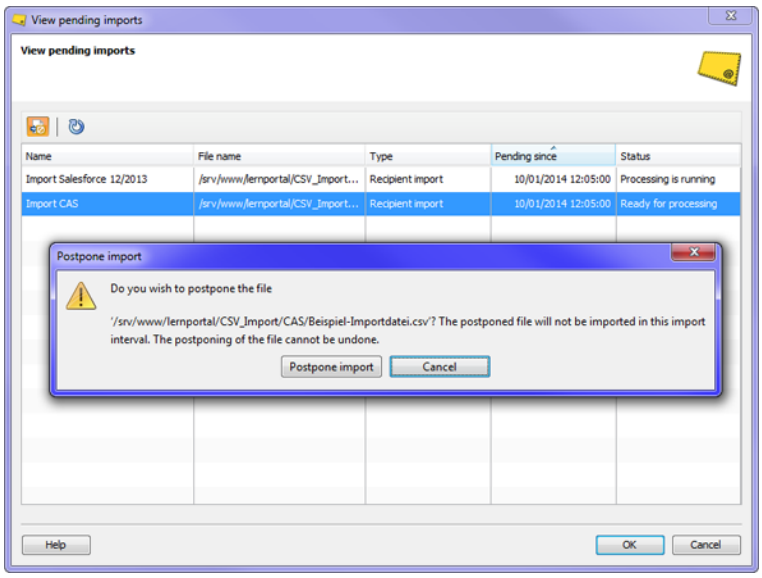


Figure 319: Dialog box – Postpone pending imports

5. Click *Postpone import*.

✓ You have now postponed the import of an import file.

Note You will receive an error message if the automatic import process has reached the point where it can no longer be postponed.

Note Please note that import files whose import has been postponed can only be imported again at the start of the next import interval. You cannot initiate a postponed import manually.

Related Topics

» *Status of pending import executions* page 506

31.3.9 Delete import

Step-by-step

To delete a new import in the *Import Automation* agent, proceed as follows:

1. Click the *Import Automation* agent on the (*Global settings*) tab.
   The *Imports* tab with the overview of created imports will be displayed.
2. Select the import that you want to delete.

   Note You can only delete imports that have been deactivated.
3. Click the (*Delete import*) button in the toolbar.
   The *Delete* dialog box opens.
4. Click *Delete*.

✓ You have now deleted the import.
The entries belonging to this import on the *History* tab will be deleted automatically from the system after 30 days.

Related Topics

» *Deactivate import* page 490

31.4 Displaying imports

31.4.1 Overview of created imports

The following contains a description of the overview of created imports.

To go to the overview of imports, click the *Import Automation* agent on the (*Global settings*) tab.

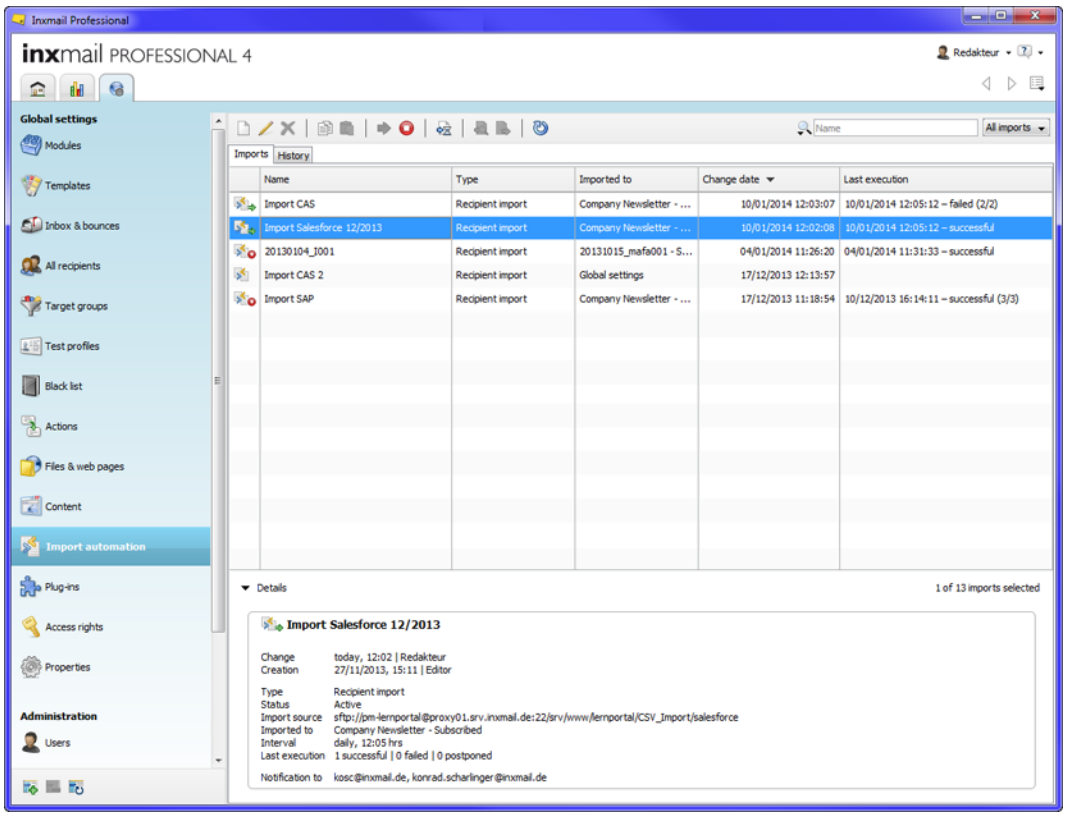


Figure 320: Overview of imports

Toolbar

The buttons, which are specifically relevant for imports, are described below.

Note Please note that the buttons are only active if the respective import has a status in which the specific action can be performed.

Button	Description
(*Activate import*)	You can use this button to activate imports (*Activate import* page 489).
(*View pending imports*)	You can use this button to view pending imports (*View pending imports* page 497).
(*Deactivate import*)	You can use this button to deactivate imports (*Deactivate import* page 490).

Table.first column

Imports may have the following statuses:

Status	Description
(*Draft*)	An import has this status until it is activated for the first time. No imports are carried out by the system while an import has this status. You can perform the following actions for an import with this status: • Make changes in the *Settings* workflow step • Make changes in the *Conflicts* workflow step • Delete imports
(*Active*)	An import has this status after it has been activated. When an import has this status, it is performed automatically in accordance with the settings that have been specified.
(*Inactive*)	An import has this status after it has been deactivated. No imports are carried out by the system while an import has this status. You can perform the following actions for an import with this status: • Make changes in the *Settings* workflow step • Make changes in the *Conflicts* workflow step • Delete imports

Table.further columns

Name	Description
Name	The name of the import is displayed here.
Type	The type of the import is displayed here. Only the Recipients import type is available in Inxmail Professional 4.4.
Imported to	Displays the import target. (For information on specifying the import target, see the *Specify import target* page 477 section.)
Change date	Displays the date on which the last change was made to the import. The changes here refer to details that are amended in the *Settings* and *Conflicts* workflow steps.
Last execution	The following information is displayed here: • Date of the last import execution • Status of the last import execution • Progress indicator for the import currently being performed

Import executions/import processes may have the following statuses:

Status	Description
Successful	• All the source files to be imported can be imported. • At least one data record in each source file can be imported.
Failed	One or several source files to be imported cannot be imported for the following reasons: • The import source is not available. • Import source authentication failed. • Access to the source file is unsuccessful. • The source file cannot be found. • No data record could be imported.
Aborted	• The target list was deleted during the import. • The import cannot be resumed after a server restart. • The import is postponed for all source files.

Details section

Description	Name
Change	Displays the date on which the last change was made to the import. The changes here refer to details that are amended in the *Settings* and *Conflicts* workflow steps. The user who made the last change is displayed after the date.
Creation	Indicates when the import was created and which user created it.
Type	The type of the import is displayed here. Only the Recipients import type is available in Inxmail Professional 4.4.
Status	Displays the status of the import (see *Status of imports* page 497).
Import source	Indicates the import source. (For information on specifying the import source, see the *Configure import source* page 472 section.)
Imported to	Displays the import target. (For information on specifying the import target, see the *Specify import target* page 477 section.)
Interval	Displays the import interval. (For information on specifying the import interval, see the *Specify import interval* page 483 section.)

Last execution	Indicates for how many import files the import was successful, failed or postponed during the last execution.
Notification to	Displays the email addresses to which notifications are sent after an import execution. (For information on specifying notifications, see the *Manage import conflicts* page 486 section.)

31.4.1.1 Status of imports

Imports may have the following statuses:

Status	Description
(*Draft*)	An import has this status until it is activated for the first time. No imports are carried out by the system while an import has this status. You can perform the following actions for an import with this status: • Make changes in the *Settings* workflow step • Make changes in the *Conflicts* workflow step • Delete imports
(*Active*)	An import has this status after it has been activated. When an import has this status, it is performed automatically in accordance with the settings that have been specified.
(*Inactive*)	An import has this status after it has been deactivated. No imports are carried out by the system while an import has this status. You can perform the following actions for an import with this status: • Make changes in the *Settings* workflow step • Make changes in the *Conflicts* workflow step • Delete imports

31.4.1.2 View pending imports

You can view manually initiated imports as well as automatically triggered imports in the *View pending imports* dialog box.

Step-by-step

To view the pending imports, proceed as follows:

1. Click *Import Automation* in the toolbar on the (*Global settings*) tab.
   You will be directed to the overview of imports.
2. Click (*View pending imports*).

The *View pending imports* dialog box opens.

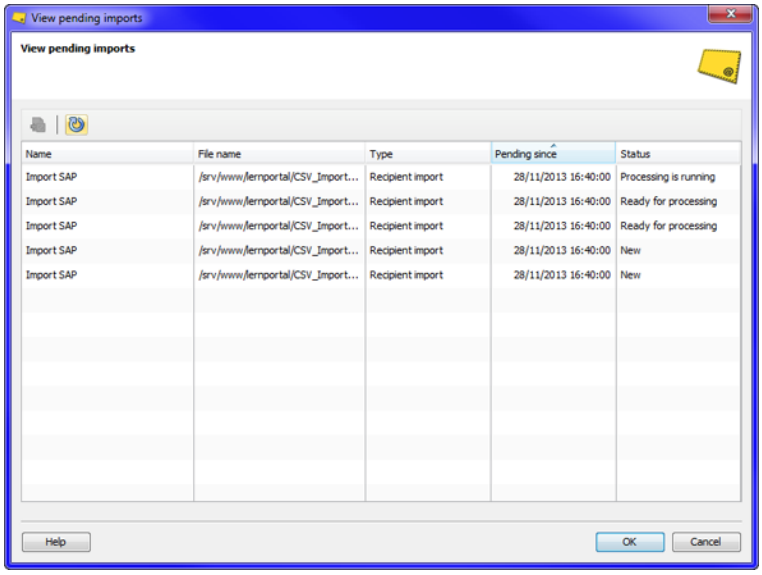


Figure 321: 'View pending imports' dialog box

The dialog box displays all pending executions for the individual imports.

The following information is displayed in the table:

Name	Description
Name	The name of the import is displayed here.
File name	The name of the import file is displayed here with the path to the source directory.
Type	The import type is shown here. Possible values are: • Recipients CSV Import • Manual recipients import
Pending since	Displays the time at which the import execution entered the import queue.

Status

This column displays the statuses of the pending import executions. Possible values are:

Column	Description
New	The import file is placed in the queue.
File is being retrieved	The import file is being retrieved from the source directory.
Ready for processing	The import file has been retrieved from the source directory and can now be imported.
Processing is running	The import file is currently being imported.

3. Click OK or Cancel to close the dialog box.

✓ You have now viewed the pending imports.

31.5 Logging imports

Both automatic and manual imports are logged in <Inxmail_Professional_no_version>. Automatic imports are held in the system for seven days and manual imports are held for 30 days.

31.5.1 Save import log

There are two ways you can save logs for automatic imports:

- Save the log automatically in the source directory

  In the *Settings* workflow step, select the *Store import log in the source directory* check box to enable the automatic saving of logs in the source directory (see *Specify import options* page 484).

  After each import, the log will be stored automatically in the source directory.

  The log is compressed during automatic saving and is available afterwards as a *.gz file.

  > **Log file size** During an import, the system validates **all** the data records in the import file(s). When import files are of a particular size and contain a large number of data records with errors, the log files may become quite large and therefore require a lot of storage space.

- Save the log manually in any directory in the *Recipients* or *All recipients* agent.

Below is a step-by-step description of how to save the import log.

Step-by-step

To save a import log manually, proceed as follows:

1. Open the mailing list which you want to save the log file for.

   > Note You may manually save the import log also for the system list (*(Global settings)* *(All recipients)).*

2. Click the *Recipients* tab.

   The *Subscribed* tab with the overview of subscribed recipients will be displayed.

3. Click the (*Save import log*) button.

   The *Save import log* dialog box opens.

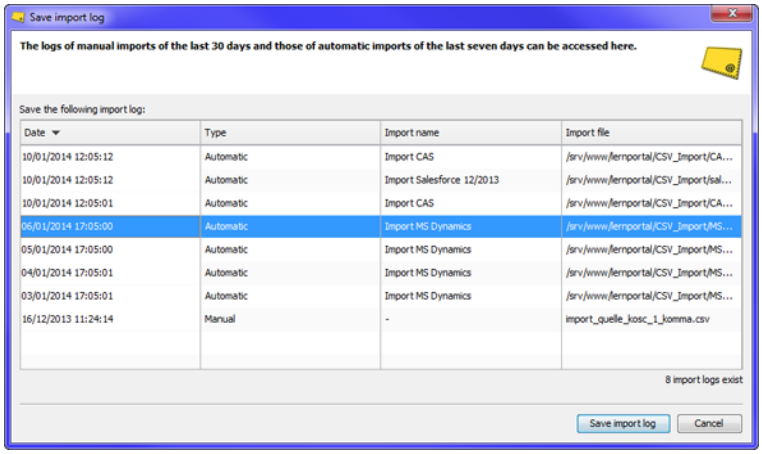


Figure 322: 'Save import log' dialog box

Note In the *All recipients* agent, the mailing list into which the recipients were imported, is displayed in the *List* column. The import logs for the respective mailing list are displayed in the *Recipients* agent.

4. Select the import for which you want to save the log.
   The *Save import log* button is active.
5. Click the *Save import log* button.
   The *Save import log file as* dialog box opens.
6. Select the directory in which you want to save the log.
7. Specify a file name for the log file.
8. Click *Save*.

✓ You have now saved the import log.

31.5.2 Information in the import log

The following information is displayed in the import log:

Name	Description
Name of the import source file	Name of the import file
Import rules for recipients already existing in Inxmail Professional	Description of import conflict resolution (import conflicts)
Special settings	Description of special settings (special settings)
Import finished on	End time of import execution for the respective file
Imported in List	Name of the target list or system list (Global settings)
Processed lines	Total number of import file lines processed/read
Imported lines	Number of imported lines (subset of processed/read lines)
Not imported lines	Number of **non**-imported lines (subset of processed/read lines)
WARNINGS	Information on columns that could not be found
Errors in connection with email address	Error validating the email addresses
Errors in connection with column values	Error validating a value in a specific column
Not imported due to applied settings	Ignored on the basis of the special settings (special settings)
Recipients already unsubscribed (import blocked)	Recipients already unsubscribed for whom the subscription cannot be overwritten (special settings).
Recipients contained in blacklist (import blocked)	Recipients who are on the blacklist

Errors occurred when saving	Error saving the recipient in the Inxmail recipient database

31.6 Checking imports

In the overview of import processes, you can check whether the import executions were successful.

31.6.1 Display import processes

The following contains a description of the overview of import processes.

To go to the overview of import processes, click the *Import Automation* agent on the (*Global settings*) tab. Now click the *History* tab.

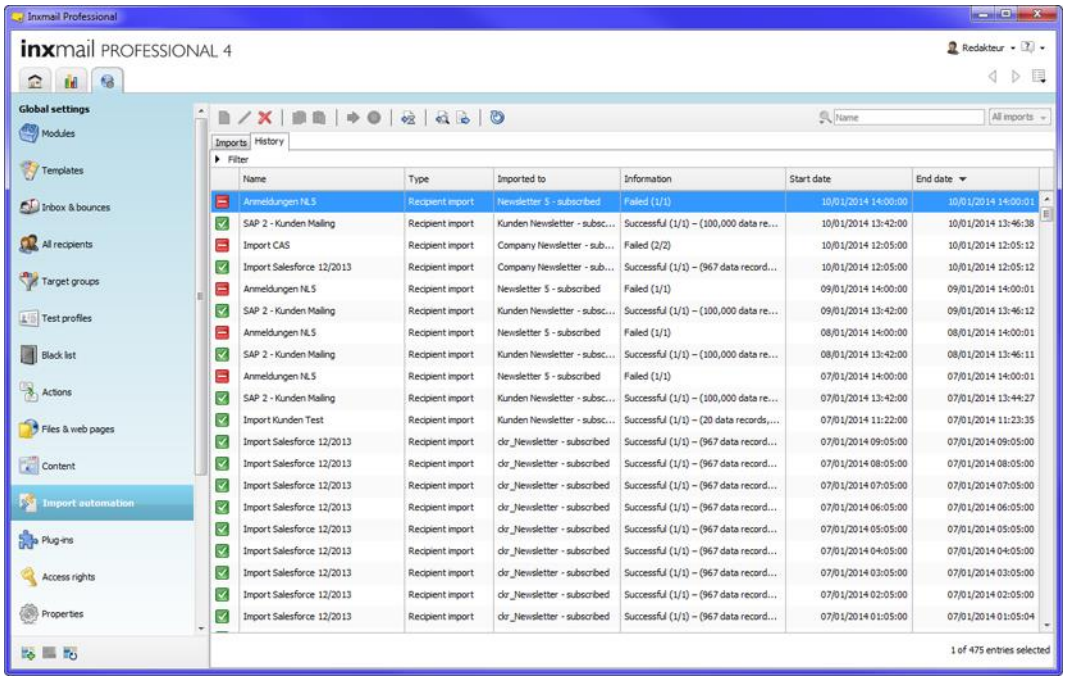


Figure 323: Overview of import processes

Toolbar

The buttons, which are specifically relevant for the import processes, are described below.

Note Please note that the buttons are only active if the respective import has a status in which the specific action can be performed.

Button	Description
(*View pending imports*)	You can use this button to view pending imports (*View pending imports* page 497).

(*View import details*)	You can use this button to display details for the selected import. **Double-click** You can also display these import details by double-clicking the required import process.
(*Export history*)	You can use this button to export import processes (*Export import processes* page 504).

Table.**first column**

Status	Description
Successful	• All the source files to be imported can be imported. • At least one data record in each source file can be imported.
Failed	One or several source files to be imported cannot be imported for the following reasons: • The import source is not available. • Import source authentication failed. • Access to the source file is unsuccessful. • The source file cannot be found. • No data record could be imported.
Aborted	• The target list was deleted during the import. • The import cannot be resumed after a server restart. • The import is postponed for all source files.

Table.further columns

Name	Description
Name	The name of the import is displayed here.
Type	The type of the import is displayed here. Only the Recipients import type is available in Inxmail Professional 4.4.
Imported to	Displays the import target. (For information on specifying the import target, see the *Specify import target* page 477 section.)

Information	Detailed information on the import process is displayed here. • Successful import executions The number of successfully imported files, the total number of files to be imported, the sum of data records for all the files to be imported and the duration of the import are all displayed here. • Failed import executions The number of files that could not be imported and the total number of files to be imported are displayed here. **Note** Click (*View import details*) or double-click to view detailed information on why an import failed.
Start date	This is where you will find the start or end date of the import execution.
End date	

Related Topics

» *Filter import processes* page 503

» *Export import processes* page 504

31.6.2 Status of import executions/import processes

Import executions/import processes may have the following statuses:

Status	Description
Successful	• All the source files to be imported can be imported. • At least one data record in each source file can be imported.
Failed	One or several source files to be imported cannot be imported for the following reasons: • The import source is not available. • Import source authentication failed. • Access to the source file is unsuccessful. • The source file cannot be found. • No data record could be imported.
Aborted	• The target list was deleted during the import. • The import cannot be resumed after a server restart. • The import is postponed for all source files.

31.6.3 Filter import processes

To get a better overview, you can filter the import processes.

Step-by-step

To filter the import processes, proceed as follows:

1. Click the *Import Automation* agent on the (*Global settings*) tab.
   The *Imports* tab with the overview of created imports will be displayed.
2. Click the *History* tab.
   The overview of import processes is displayed.
3. Click Filter .
   The area for filtering import processes opens.

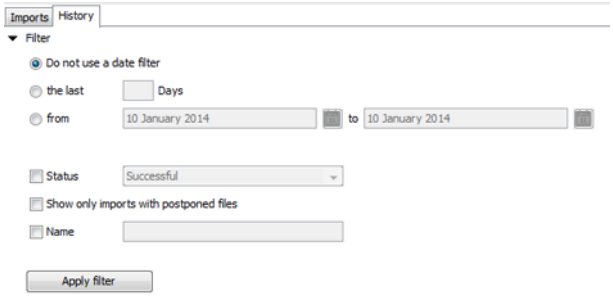


Figure 324: Area for filtering import processes

4. Specify the settings that you require to filter the import processes.
5. Click *Apply filter*.
   The import processes that match your filter settings will now be displayed.

✓ You have now filtered the import processes.

31.6.4 Export import processes

You have the option to export import processes and save them as a CSV file. The CSV file contains the following information for each process: Status, Name, File name, Type, Imported to (import target), Information, Start date and End date.

Step-by-step

To export an import process, proceed as follows:

1. Click the *Import Automation* agent on the (*Global settings*) tab.
   The *Imports* tab with the overview of created imports will be displayed.
2. Click the *History* tab.
   The overview of import processes is displayed.
3. Click the (*Export history*) button.

The *Export history* dialog box opens.

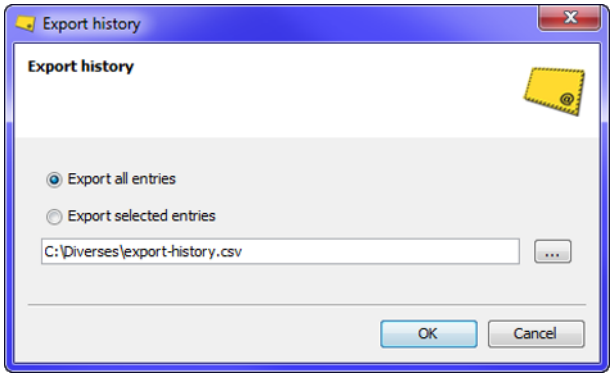


Figure 325: 'Export history' dialog box

Name	Description
Export all entries	Select this option if you want to export all the entries in the overview.
Export selected entries	Select this option if you only want to export the selected entries.
<Storage location, Name>	Select the storage location and specify the name of the CSV file.

4. Specify your settings in the fields.

✓ You have now exported an import process.

31.7 Overview of statuses

This section contains an overview of all the relevant statuses for the Import Automation.

31.7.1 Status of imports

Imports may have the following statuses:

Status	Description
(*Draft*)	An import has this status until it is activated for the first time. No imports are carried out by the system while an import has this status. You can perform the following actions for an import with this status: • Make changes in the *Settings* workflow step • Make changes in the *Conflicts* workflow step • Delete imports
(*Active*)	An import has this status after it has been activated. When an import has this status, it is performed automatically in accordance with the settings that have been specified.

(*Inactive*)	An import has this status after it has been deactivated. No imports are carried out by the system while an import has this status. You can perform the following actions for an import with this status: • Make changes in the *Settings* workflow step • Make changes in the *Conflicts* workflow step • Delete imports

31.7.2 Status of import executions/import processes

Import executions/import processes may have the following statuses:

Status	Description
Successful	• All the source files to be imported can be imported. • At least one data record in each source file can be imported.
Failed	One or several source files to be imported cannot be imported for the following reasons: • The import source is not available. • Import source authentication failed. • Access to the source file is unsuccessful. • The source file cannot be found. • No data record could be imported.
Aborted	• The target list was deleted during the import. • The import cannot be resumed after a server restart. • The import is postponed for all source files.

31.7.3 Status of pending import executions

Pending import executions may have the following statuses:

Column	Description
New	The import file is placed in the queue.
File is being retrieved	The import file is being retrieved from the source directory.
Ready for processing	The import file has been retrieved from the source directory and can now be imported.
Processing is running	The import file is currently being imported.

31.8 Critical scenarios

Situation

Column in the source file does not exist in Inxmail Professional.

Behaviour of the system

The column in the source file, which does not exist in Inxmail Professional, is ignored during the import. The other columns are imported.

Situation

Email addresses exist more than once in the import file.

Behaviour of the system

An email address may only appear once in the recipient table. The system writes the line, which 'wins' as a result of the conflict settings (Import conflicts), to the recipient table.

Situation

An import has been set to start before another import has ended.

Behaviour of the system

Imports cannot be performed simultaneously. The second import will start as soon as the first import has finished.

Situation

An import contains multiple source files. One source file has errors.

Behaviour of the system

The error-free source files are imported. The import of the faulty file(s) fails in accordance with the type of error.

Situation

The 'source server' goes down during the import.

Behaviour of the system

How the system behaves depends on the time of the server failure.

Background: In the first step, the system creates an internal list of the files located on the server that are to be imported.

If the list of available files has already been retrieved, all the source files that could already be retrieved from the 'source server' will be imported. The imports of the remaining files will fail.

If the 'source server' goes down before the list of files to be imported can be retrieved, the entire import will fail.

Situation

The target list was deleted before the import.

Behaviour of the system

All imports with the deleted target list were deactivated as part of the delete process.

Situation

The target list is deleted during the import.

Behaviour of the system

The import is aborted. The recipients that have already been imported remain in the recipient table (system list).

Situation

An import that is running is deactivated.

Behaviour of the system

The import execution that is running is completed.

32 Email connector, plug-ins

You will learn how to use the following (optional) functions in Inxmail Professional in this chapter:

- Use the email connector to automatically send emails that you have created in the CMS system or an email client using Inxmail Professional.
- Use the plug-ins to take advantage of additional functions in Inxmail Professional.

32.1 Using the email connector

32.1.1 Overview

If you use the email connector in Inxmail Professional, you can create emails in a CMS system or an email client. When you then send these emails to a specified Inxmail Professional email address, the email connector automatically forwards your emails as mailings (to the corresponding recipients in the mailing list).

The email connector also forwards on recipients' replies to your sent mailings (for example, to your email address or to all recipients on the mailing list) depending on the settings of the email connector.

32.1.2 Sending emails with the email connector

Prerequisites

- The email connector has been set up.

  After the email connector is set up, it provides you with information about the email addresses to which your emails from the email client or CMS system may be sent (if necessary, consult your Inxmail Professional administrator).
- The following agents are displayed on the tab of the mailing list (*Adding/deleting additional agents to mailing lists* page 80):
  - *Email connector* agent
  - *Mailings* agent

Step-by-step

1. Create an email in your email client or CMS system.
2. From there, send your email to the email address of the corresponding Inxmail Professional POP3 account (this email address will be provided by your administrator).

The email connector automatically forwards the email as a mailing (to the recipients on the mailing list) using the *Mailings* agent.

If your administrator has defined a header or footer as part of the setup of the email connector, this is integrated before the mailing is forwarded on.

The email connector also forwards recipients' replies to your sent mail depending on its settings. The replies are either sent directly to your sender address or forwarded to a sender address specified for the mailing list.

The mailing sent via the email connector is displayed on the tab of the mailing list > *Mailings* agent.

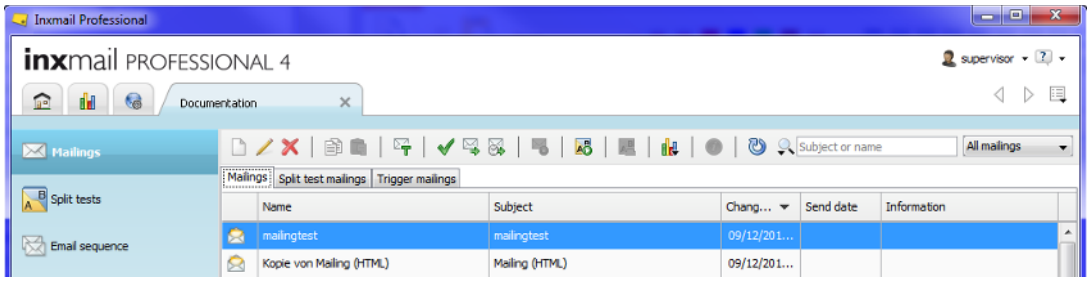


Figure 326: Mailing sent via the email connector

A mailing sent via the email connector is always displayed automatically in the corresponding mailing table. The mailing can be recognised by its designation in the *Name* column: 'Email connector <Sender address of the original mailing>'.

You can view reports on these mailings in the *Reports* agent.

✓ You have sent an email as a mailing using the email connector.

Related Topics

» *Email connector* page 596

32.2 Using plug-ins

32.2.1 Overview

To extend the functions of Inxmail Professional, you can also integrate and use your own plug-ins (or plug-ins developed by Inxmail GmbH or its partners) as agents in Inxmail Professional.

Information about existing Inxmail Professional plug-ins and ordering options can be found in the Inxmail Community (http://community.inxmail.de) under *Plug-in Store*.

32.2.2 Using plug-ins

Prerequisites

- The plug-in has been installed and configured.
- The plug-in is displayed as an agent in the tab in which you would like to use it (*Adding/deleting additional agents to mailing lists* page 80).

Just like other agents, the installed plug-ins can be added or removed from a mailing list. Please note that some plug-ins cannot be added to all mailing lists.

Step-by-step

1. Click the tab in which you would like to use the plug-in (for example, the tab of the mailing list). Then click the corresponding plug-in agent.

   The plug-in application is opened (in the workspace).

2. Use the plug-in.

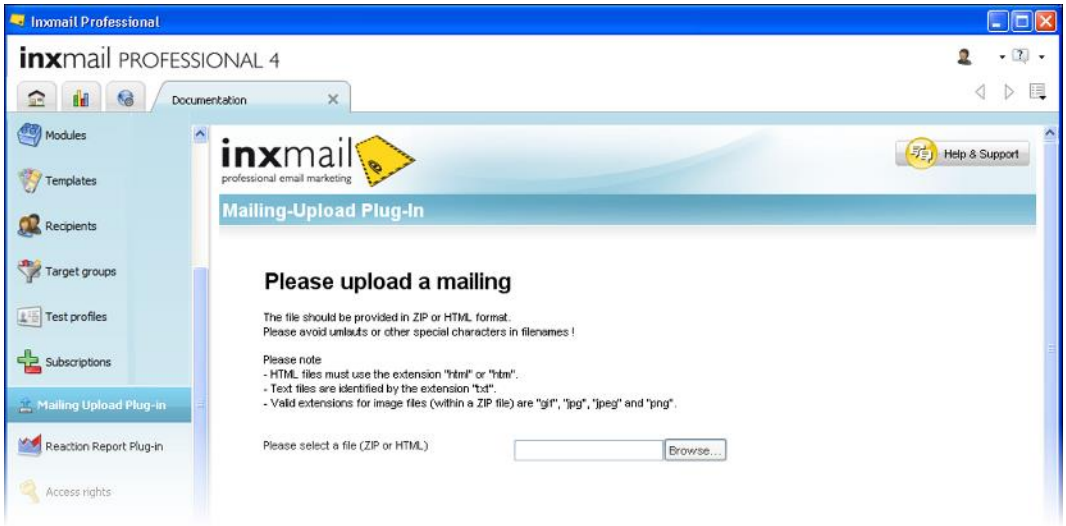


Figure 327: Reaction Report Plug-in

Additional information

Plug-ins can be used simultaneously in one or more mailing lists and they can be used in the global settings.

For more information about using plug-ins, see the manufacturer's instructions for the plug-in.

The manufacturer is responsible for the contents of the plug-in. For information about the manufacturer, click the 'Support' button from within the workspace of the plug-in. If you have any support questions about the plug-in, please contact the manufacturer directly.

To close the plug-in, exit the plug-in agent.

Related Topics

» *Plug-ins* page 606

33 Mailing list subscription and unsubscription by email

33.1 General information

These days, mailing list subscription and unsubscription by email is used only very rarely as subscriptions and unsubscriptions now tend to be implemented using JSP or HTML web pages (*JSP templates for web pages* page 416).

Please note that these subscribe and unsubscribe procedures also require you to specify various settings in the *Subscriptions* agent (*Overview: Subscribe and unsubscribe procedures* page 129) and that you can view the subscribe and unsubscribe events in the log (*Displaying and filtering the subscribe/unsubscribe log* page 153).

When a prospective/existing subscriber subscribes to or unsubscribes from a standard mailing list by email, the subscriber sends an email to the email address of the (news) POP3 mail server account of Inxmail Professional and not the bounce POP3 mail server account.

To prevent the prospective/existing subscriber from having to create the email manually, you can allow the subscriber (for example, using PHP) to click a subscribe or unsubscribe button on your web page that automatically opens a predefined email in their particular email program.

To find out the email address of the (news) POP3 mail server account, ask your Inxmail Professional administrator, if necessary (you can find them on the (*Global settings*) tab > *Mail server* agent > *Email receipt* tab, *Configuring email receipt* page 581).

Please note that the *Poll automatically for new emails* check box must be selected on the (*Global settings*) tab > *Mail server* agent >*Email receipt* tab > *General settings* tab, so that Inxmail Professional automatically polls for emails from the POP3 mail server account (if necessary, consult your Inxmail Professional administrator, *Configuring email receipt* page 581).

Related Topics

» *Overview: Subscribe and unsubscribe procedures* page 129

» *JSP templates for web pages* page 416

33.2 Mailing list subscription by email

The email of the prospective subscriber must include the subscribe command and the mailing list name (for example, `subscribe <mailing list name>`).

The default subscribe command is `subscribe`. However, you can change this on the tab of the mailing list > *Subscriptions* agent > *Subscription* tab in the *Command for subscriptions by email* field.

You can also insert a placeholder for the subscribe command and ensure that the command currently set in the *Change command for subscriptions by email* field on the tab of the mailing list > *Subscriptions* agent > *Subscription* tab is always used.

Step-by-step

1. Open the mailing and click in the mailing in the *Editing* workflow step.

2. In the *Commands* drop-down list, select *Insert subscribe command*.
3. The `[%subscription-command]` command will be inserted into the mailing.
4. Add the mailing list name to the command. The following options are available:
   - For a subscription to any mailing list:
     `[%subscription-command] <mailing list name>`
   - For a subscription to the current mailing list:
     In the *Commands* drop-down list, select *Insert list name*.
     The command is extended to `[%subscription-command][%list-name]`.

✓ The quick preview ((*Show/hide quick preview*) button) shows the respective subscribe command.

Related Topics

» *Managing mailings* page 186

Examples of the subject line or content of an email (for the `subscribe <mailing list name>` command)

- Subject: (any)
  Content: `subscribe <mailing list name>`
- Subject: `subscribe <mailing list name>`
  Content: (any)
- Subject: (any)
  Content: `subscribe <mailing list name>`
- A different email address from the one that was used to send the email can also be subscribed. This is achieved using the `email` keyword:
  Subject: (any)
  Content:
  - `subscribe = <mailing list name>`
  - `email = <your.name@company.co.uk>`

A subscribe email may also contain additional data for personalisation. This is often the case, when subscription takes place via an HTML form.

Example

Such an email, subscribing Mr Jack Trade to the 'press list' mailing list, could look like this:

- Subject: (any)

  Content:
  - `subscribe = press list`
  - `email = jack.trade@company.co.uk`
  - `First name = Jack`
  - `Surname = Trade`
  - `Gender = m`

Please note that the 'First name', 'Surname' and 'Gender' columns must already exist in Inxmail Professional, otherwise this data will be ignored.

33.3 Mailing list unsubscription by email

The email of the recipient must include the unsubscribe command and the mailing list name (for example, `unsubscribe <mailing list name>`).

The default unsubscribe command is `unsubscribe`. However, you can change this on the tab of the mailing list > *Subscriptions* agent > *Cancel subscription* tab in the *Command for unsubscriptions by email* field.

You can also insert a placeholder for the unsubscribe command and ensure that the command currently set in the *Change command for unsubscriptions by email* field on the tab of the mailing list > *Subscriptions* agent > *Cancel subscription* tab is always used.

Step-by-step

1. Open the mailing and click in the mailing in the *Editing* workflow step.
2. In the *Commands* drop-down list, select *Insert unsubscribe command*.
3. The `[%unsubscription-command]` command will be inserted into the mailing.
4. Add the mailing list name to the command. The following options are available:
   - For an unsubscription from any mailing list:
     `[%unsubscription-command] <mailing list name>`
   - For an unsubscription from the current mailing list:
     In the *Commands* drop-down list, select *Insert list name*.
     The command is extended to `[%unsubscription-command][%list-name]`.

✓ The quick preview ((*Show/hide quick preview*) button) shows the respective unsubscribe command.

Related Topics

» *Managing mailings* page 186

34 Operator, command and function reference

34.1 Operators

You can use the following logical operators, relational operators, arithmetic operators and string operators in Inxmail Professional. The operators can be used in mailing texts, actions and target groups.

Operator	Description
equal to (=)	Checks for exact equality
unequal to (<>)	Check for inequality
empty column value (IS_EMPTY)	The column value must by empty
not empty column value (NOT_IS_EMPTY)	The column value may not be empty
less than (<)	The column value must be less than the comparison value
greater than (>)	The column value must be greater than the comparison value
less than or equal to (<=)	Less than or equal must match
greater than or equal to (>=)	Greater than or equal must match
like (LIKE)	Comparison which ignores letter case
not like (NOT_LIKE)	Inequality which ignores letter case
starts with (STARTS_WITH)	The column value must begin with the comparison value
does not start with (NOT_STARTS_WITH)	The column value may not begin with the comparison value
ends with (ENDS_WITH)	The column value must end with the comparison value
does not end with (NOT_ENDS_WITH)	The column value may not end with the comparison value
contains (CONTAINS)	The column value must contain the comparison value
does not contain (NOT_CONTAINS)	The comparison value may not be present
+	String concatenator, also adds numbers
-	Subtracts numbers
*	Multiplies numbers
/	Divides numbers

Operator	Description
TRUE	Condition is true
FALSE	Condition is not true
OR	Only one condition must be true If you combine several conditions when defining target groups, you must include the OR operator using the OR button in the editor.
AND	All conditions must be true If you combine several conditions when defining target groups, you must include the AND operator using the AND button in the editor.

Example

- All women: `if Gender = "f"`
- All except women: `if Gender <> "f"`
- All with postcode below 79000: `if Postcode < 79000`
- All with postcode above 79000: `if Postcode > 79000`
- All with postcode of or below 79000: `if Postcode <= 79000`
- All born in 1940 or later: `if Birthdate >= 1940`
- Searches for values similar to the following: 'html', 'HTML', 'HTmL': `if format LIKE "html"`
- All in postcode region 7: `if Postcode >= 70000 AND Postcode < 80000`
- All who have an inxmail email address (when searching, a * must never be used as a wild card; use a % instead): `if email ENDS_WITH "inxmail.%"`
- All with the title of professor: `if Title CONTAINS "Prof."`
- All men interested in sports: `if (Gender="m") AND (SportsInterest=TRUE)`
- All women and all male subscribers interested in sports: `if (Salutation="Ms") OR (Salutation="Mr" AND Sport="Yes")`
- All whose gender or surname is unknown should be addressed as 'Dear Subscriber'. All others will be addressed according to their gender.

  Additionally, the 'firstcap' parameter (*Creating personalised text (for target groups)* page 367) will be used to ensure that the name always begins with a capital letter.

  ```
  [%if (Gender IS_EMPTY) OR (Name IS_EMPTY)]Dear Subscriber,
  [%elseif Gender="m"]Dear Mr [Surname,firstcap],
  [%elseif Gender="f"]Dear Ms [Surname,firstcap],
  [%endif]
  ```
- String the 'inxmail' and 's' character strings to inxmails: `[%="inxmail" + "s"]`
- String 'Super-' character string with value from the 'First name' table column:

  ```
  [%"Super-" + First name]
  ```

  becomes e.g. 'Super-Mike'
- String 'Super-' character string with value from the 'First_Name' (special characters!) table column:

  ```
  [%"Super-" + Column("First_Name")]
  ```

  becomes e.g. 'Super-Mike'

34.2 Commands

Most of the commands listed here do not need to be entered manually. Instead, they may be entered using a corresponding dialog in the Inxmail Professional Client. Commands are only available in editors.

They appear as follows: `[%Command]`.

The exception is the `[inx:replace]` special command.

Command	Description
=Age()	Insert age of the recipient into the content of a birthday mailing (*Adding age information in a birthday mailing* page 315)
application-url	Placeholder to insert the server web address (*Inserting links to the alternative view in the web browser (HTML mailings only)* page 217)
attach	Add file attachment (*Adding file attachments* page 225)
br	Force line break (*Editing area: Text mailings* page 192)
content-include	Insert external content (*Integrating external content in mailings* page 382)
date	Insert current date (*Inserting system data (commands)* page 374)
embedded-image	Embed images in HTML mailing (*Embedding an image* page 222)
encoded-application-url	Placeholder for the client URL (see *Adding a client* page 8)
header	Modify mailing header (*Extending the email header* page 364)
hr	Insert horizontal rule (*Editing area: Text mailings* page 192)
id	Placeholder to insert internal identification (*Inserting system data (commands)* page 374)
if, else, elseif, endif	Insert conditional expression (*Creating personalised text (for target groups)* page 367)
listcharset	Placeholder for the character set of the mailing list (*Advanced properties* page 83)
list-name	Insert placeholder for the name of a mailing list (*Inserting system data (commands)* page 374)
list-size	Insert placeholder for the number of recipients of the mailing list (*Inserting system data (commands)* page 374)
mailbuildmode	Placeholder for the mode of a mailing. All mailings are furnished with a mode. There are a number of different modes. Depending on the mode a mailing or elements of a mailing behave in a different way. E.g. mode 2 (TEST_MAIL) results in external content not being saved.
mailid	Placeholder for the unique ID of a mailing (*View and filter the mailings table* page 182)
mailref	Create a reference to a mailing (*Inserting system data (commands)* page 374 and *Inserting links to the alternative view in the web browser (HTML mailings only)* page 217)
no-mail	Prevent creation of individual mailings (*Creating personalised text (for target groups)* page 367)

Command	Description
online_params	Insert the necessary parameters for an external web link (*Inserting links to the alternative view in the web browser (HTML mailings only)* page 217)
p	Create paragraph break (*Editing area: Text mailings* page 192)
pdf-attach	Add a PDF document as a file attachment (*Creating a new data source* page 377 and *Setting up created PDF data sources* page 378)
subscription-command	Insert subscribe link (*Mailing list subscription and unsubscription by email* page 512)
time	Insert current time (*Inserting system data (commands)* page 374)
unsubscription-command	Insert an unsubscribe link (*Mailing list subscription and unsubscription by email* page 512)
url	Insert link into a mailing (*Insert link* page 203)
inx:replace	Special command: Insert an input field into a form template (*Setting up a user template (text, HTML, multipart)* page 402

Only the `[%attach]` and `[%pdf-attach]` commands can be personalised.

34.3 Functions

The use of functions offers a wide range of possibilities. Functions can be used when creating expressions in target groups, actions and in the mailing text. The function may be entered in actions under *Set value* in the *Get value from expression* field.

Functions may also be nested.

Overview: All functions Date functions (*Date functions* page **525**):

Function	Parameter	Can be used in *Actions* agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
Date()	-	x	x	x
SendDate()	-	x	-	x
DateDiff()	Date1 Date2	x	x	x
Day()	Date value	x	x	x
Month()	Date value	x	x	x
Year()	Date value	x	x	x
Hour()	Date value	x	x	x

Function	Parameter	Can be used in *Actions* agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
Minute()	Date value	x	x	x
Second()	Date value	x	x	x
CvDate()	Date value	x	-	x
CvTime()	Date value	x	-	x

Recipient functions (*Recipient functions* page **529**):

Function	Parameter	Can be used in *Actions* Agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
BelongsToGroup() *BelongsNotToGroup()*	Target group name	x	x	x
LastModificationDate()	-	-	-	x
RecipientId()	-	x	x	x
SubsriptionDate()	List name	x	x	x
HasClicked()	LinkId	x	x	x
HasNotClicked()	LinkId	x	x	x
HasClickedAnyLink()	MailId	x	x	x
HasNotClickedAnyLink()	MailId	x	x	x
HasClickedAnyLinkPeriod()	MailId, Number of days or MailId, Start date, End date	x	x	x
HasNotClickedAnyLinkPeriod()	MailId, Number of days or MailId, Start date, End date	x	x	x
HasClickedAnyLinkPeriodList()	ListId, Number of days ListId, Start date, End date	x	x	x

Function	**Parameter**	Can be used in *Actions* Agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
HasNotClickedAnyLinkPeriodList()	ListId, Number of days or ListId, Start date, End date	x	x	x
HasClickedContentLink()	MailId Name in report	x	x	x
HasNotClickedContentLink()	MailId, Link Alias	x	x	x
HasOpened()	MailId	x	x	x
HasNotOpened()	MailId	x	x	x
HasOpenedContent()	MailId Name in report	x	x	x
HasNotOpenedContent()	MailId, Link Alias	x	x	x
HasOpenedPeriod()	MailId, Number of days or MailId, Start date, End date	x	x	x
HasNotOpenedPeriod()	MailId, Number of days or MailId, Start date, End date	x	x	x
HasOpenedPeriodList()	ListId, Number of days or ListId, Start date, End date	x	x	x
HasNotOpenedPeriodList()	ListId, Number of days or ListId, Start date, End date	x	x	x
IsHardBounced()	-	x	x	x

Function	**Parameter**	Can be used in *Actions* Agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
IsNotHardBounced()	-	x	x	x
HardBounceCount()	-	x	x	x

Sending mailings functions (*Sending mailings functions* page **540**):

Function	**Parameter**	Can be used in *Actions* Agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
HasReceived()	MailId	x	x	x
HasNotReceived()	MailId	x	x	x
HasReceivedPeriod()	MailId, Number of days or MailId, Start date, End date	x	x	x
HasNotReceivedPeriod()	MailId, Number of days or MailId, Start date, End date	x	x	x
HasReceivedPeriodList()	ListId, Number of days or ListId, Start date, End date	x	x	x
HasNotReceivedPeriodList()	ListId, Number of days or ListIId, Start date, End date	x	x	x

Function	Parameter	Can be used in *Actions* Agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
HasReceivedPeriodCountMoreThan()	ListId, Number of mailings, Number of days or ListId, Number of mailings, Start date, End date	x	x	x
HasNotReceivedPeriodCountMoreThan()	ListId, Number of mailings, Number of days or ListId, Number of mailings, Start date, End date	x	x	x

Dispatch interruption mailings (*Dispatch interruption functions* page **544**):

Function	Parameter	Can be used in *Actions* Agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
HasNotReceivedSendingAbort	MailId	x	x	x
HasNotReceivedSendingAbortPeriod	MailId, Number of days or MailId, Start date, End date	x	x	x

Character string functions (*Character string functions* page **545**):

Function	Parameter	Can be used in *Actions* agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
Substring()	Source text Start index End index Alternative text	x	-	x

Function	Parameter	Can be used in *Actions* agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
IndexOf()	Source text Search text Search start	x	-	x
LastIndexOf()	Source text Search text Search start	x	-	x
Length()	Source text	x	-	x
FirstCap()	Source text	x	-	x
Upper()	Source text	x	-	x
Lower()	Source text	x	-	x

Other functions (*Other functions* page **548**):

Function	Parameter	Can be used in *Actions* agent	Can be used in *Target groups* agent	Can be used in *Mailings* agent
CvText()	Number value Yes/No value	x	-	x
CvInt()	Text Alternative text Yes/No value	x	-	x
Format()	Value Format model	x	-	x
IIf()	Expression Yes value No value	x	-	x
Mod()	-	-	x	-
MailI()	-	x	-	x
InAlternativeView()	-	-	-	x
InInboxView()	-	-	-	x
Column()	Column name	x	x	x

34.3.1 Date functions

34.3.1.1 Date

The 'Date()' function returns the current date and time.
It can be used in: target groups, mailing text, actions

Syntax	**Date()**
Result	Current date and time, type: date/time
Parameter	-

Tab. 4: 'Date()' function

Related Topics
» *Inserting system data (commands)* page 374

34.3.1.2 SendDate

The 'SendDate()' function returns the send time of the mailing.
It can be used in: mailing text, actions

Syntax	**SendDate()**
Result	Send time of the mailing, type: date/time
Parameter	-

Tab. 5: 'SendDate()' function

34.3.1.3 DateDiff

The 'DateDiff()' function calculates the interval between two specified dates (Date1 minus Date2) and returns the result in days:

- If the result is positive, Date1 is after Date2.
- If the result is negative, Date1 is before Date2.
- If the result is 0, Date1 and Date2 are identical.

Can be used in: target groups, mailing text, actions

Syntax	**DateDiff(Date1, Date2)**
Result	Interval between the dates in days, type: integer
Parameter Date1 Date2	 A date in the past or future, type: date or date/time For example, the current date, type: date or date/time

Tab. 6: 'DateDiff()' function

Example

- `DateDiff(#15.09.2006#, #05.09.2006#)` returns 10 days as result
- `DateDiff(#05.09.2006#, #05.09.2006#)` returns 0 days as result
- `DateDiff(#01.09.2006#, #05.09.2006#)` returns -4 days as result

Example

Sending a reminder mailing dynamically

To send a recipient a reminder email 10 days before a recipient-specific date on which his subscription expires, you can create a target group with the following free conditional expression in the *Recipients* agent of a dynamic list:

```
DateDiff( ExpiryDate, Date())=10
```

'ExpiryDate' corresponds to a column in the recipient table. The data type of this column must be 'Date'. Date() is always the current date. If the function result returns '10', a reminder mailing will be sent to the recipient.

34.3.1.4 Day

The 'Day()' function separates the 'Day' component from a date value.

Can be used in: target groups, mailing text, actions

Syntax	**Day(DateValue)**
Result	Day from the date value, type: integer
Parameter • Date value	• A date value, type: either date or date/time

Tab. 7: 'Day()' function

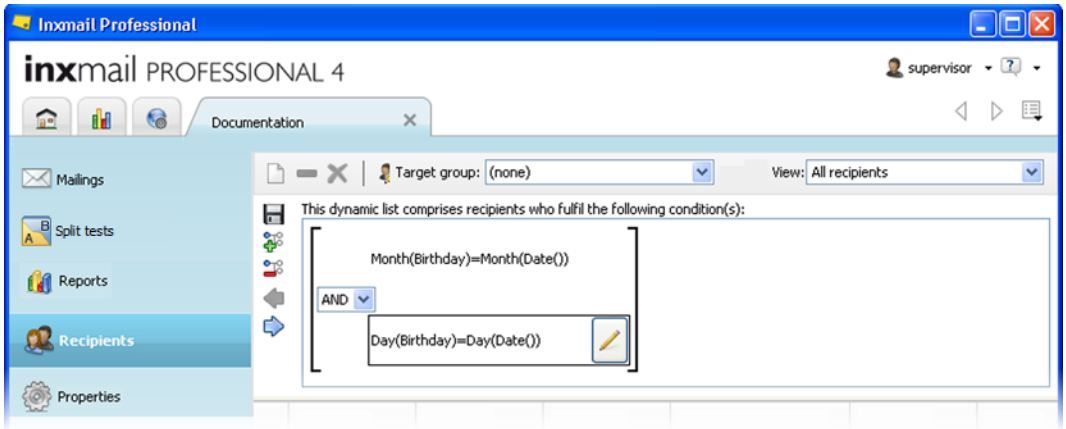


Figure 328: Defining recipients

Example

Sending birthday mailings dynamically

To send a birthday mailing to all recipients with a birthday today, you can create a target group with the following free conditional expression in the *Recipients* agent of a dynamic list:

```
Month(DateOfBirth)=Month(Date())
AND
Day(DateOfBirth)=Day(Date())
```

You will need the *Birthday* column in the recipients table of the dynamic list.

Related Topics

» *Creating personalised text (for target groups)* page 367
» *Inserting system data (commands)* page 374

34.3.1.5 Month

The 'Month()' function separates the 'Month' component from a date value.

Can be used in: target groups, mailing text, actions

Syntax	**Month(DateValue)**
Result	Month from the date value, type: integer
Parameter • Date value	• A date value, type: either date or date/time

Tab. 8: 'Month()' function

Related Topics

» *Creating personalised text (for target groups)* page 367
» *Inserting system data (commands)* page 374

34.3.1.6 Year

The 'Year()' function separates the 'Year' component from a date value.

Can be used in: target groups, mailing text, actions

Syntax	**Year(DateValue)**
Result	Year from the date value, type: integer
Parameter • Date value	• A date value, type: either date or date/time

Tab. 9: 'Year()' function

Related Topics

» *Creating personalised text (for target groups)* page 367

» *Inserting system data (commands)* page 374

34.3.1.7 Hour

The 'Hour()' function separates the 'Hour' component from a date value.
Can be used in: target groups, mailing text, actions

Syntax	**Hour(DateValue)**
Result	Hour from the date value, type: integer
Parameter • Date value	• A date value, type: either date/time or time

Tab. 10: 'Hour()' function

34.3.1.8 Minute

The 'Minute()' function separates the 'Minute' component from a date value.
Can be used in: target groups, mailing text, actions

Syntax	**Minute(DateValue)**
Result	Minute from the date value, type: integer
Parameter • Date value	• A date value, type: either date/time or time

Tab. 11: 'Minute()' function

34.3.1.9 Second

The 'Second()' function separates the 'Second' component from a date value.
Can be used in: target groups, mailing text, actions

Syntax:	**Second(DateValue)**
Result	Second from the date value, type: integer
Parameter • Date value	• A date value, type: either date/time or time

Tab. 12: 'Second()' function

34.3.1.10 CvDate

The 'CvDate()' function splits a date value into its Date component.
Can be used in: mailing text, actions

Syntax	**CvDate(DateValue)**
Result	Date, type: date
Parameter • Date value	• Type: date/time

Tab. 13: 'CvDate()' function

34.3.1.11 CvTime

The 'CvTime()' function splits a date value into its Time component.
Can be used in: mailing text, actions

Syntax	**CvTime(DateValue)**
Result	Time, type: time
Parameter • Date value	• Type: date/time

Tab. 14: 'CvTime()' function

34.3.2 Recipient functions

34.3.2.1 BelongsToGroup, BelongsNotToGroup

The 'BelongsToGroup()' and 'BelongsNotToGroup()' functions establish whether or not a recipient belongs to a target group. Target group conditions can be simplified using this function.
Can be used in: target groups, mailing text, actions

Syntax	**BelongsToGroup(Target group name)** **BelongsNotToGroup(Target group name)**
Result	Recipient belongs/does not belong to target group, type: Yes/No
Parameter • Target group name	• Target group name, type: text

Tab. 15: 'BelongsToGroup()' and 'BelongsNotToGroup()' functions

Example

`BelongsToGroup("Men")` (*Creating target groups* page 160)

34.3.2.2 LastModificationDate

The 'LastModificationDate()' function returns when a change was last made to a recipient record.
Can be used in: mailing text

Syntax	**LastModificationDate()**
Result	Date of last modification, type: date/time
Parameter	-

Tab. 16: 'LastModificationDate()' function

Related Topics

» *Creating personalised text (for target groups)* page 367

34.3.2.3 RecipientId

The 'RecipientId()' function returns the identification number (ID) of a recipient data record. If the function is called in an action on the 'On Send' or 'On Click' events, the ID of the recipient who triggered the action will be returned.

Can be used in: target groups, mailing text, actions

Syntax	**RecipientId()**
Result	The identification number of the recipient, type: integer
Parameter	-

Tab. 17: 'RecipientId()' function

34.3.2.4 SubscriptionDate

The 'SubscriptionDate()' function returns the date on which a recipient subscribed to the specified mailing list.

Can be used in: target groups, mailing text, actions

Syntax	**SubscriptionDate(ListName)**
Result	Subscription date of the recipient, type: date/time
Parameter • List name	• Name of the mailing list, type: text

Tab. 18: 'SubscriptionDate()' function

Related Topics

» *Creating personalised text (for target groups)* page 367

34.3.2.5 HasClicked

The 'HasClicked()' function establishes whether a recipient has clicked on a particular link.

Can be used in: mailing text, actions, target groups

Syntax	**HasClicked(LinkId)**
Result	Has clicked on a particular link, type: Yes/No
Parameter • LinkId	• LinkId, type: integer

Tab. 19: 'HasClicked()' function

Related Topics

» *Creating target groups* page 160

34.3.2.6 HasClicked

The 'HasNotClicked()' function establishes whether a recipient has **not** clicked on a particular link.
Can be used in: mailing text, actions, target groups

Syntax	**HasNotClicked(LinkId)**
Result	Has not clicked on a particular link, type: Yes/No
Parameter • LinkId	• LinkId, type: integer

Tab. 20: Funktion „HasNotClicked()"

Related Topics

» *Creating target groups* page 160

34.3.2.7 HasClickedAnyLink

The 'HasClickedAnyLink()' function establishes whether a recipient has clicked on any links at all in a specific mailing.
Can be used in: mailing text, actions, target groups

Syntax	**HasClickedAnyLink(MailId)**
Result	Has clicked on any link, type: Yes/No
Parameter • MailId	• MailId, type: integer

Tab. 21: 'HasClickedAnyLink()' function

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.8 HasClickedAnyLink

The 'HasNotClickedAnyLink()' function establishes whether a recipient has not clicked on any links at all in a specific mailing.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotClickedAnyLink(MailId)**
Result	Has not clicked on any link, type: Yes/No
Parameter • MailId	• MailId, type: integer

Tab. 22: Funktion „HasNotClickedAnyLink()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.9 HasClickedAnyLink

The 'HasNotClickedAnyLink()' function establishes whether a recipient has not clicked on any links at all in a specific mailing.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotClickedAnyLink(MailId)**
Result	Has not clicked on any link, type: Yes/No
Parameter • MailId	• MailId, type: integer

Tab. 23: Funktion „HasNotClickedAnyLink()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.10 HasClickedAnyLink

The 'HasClickedAnyLinkPeriod()' function establishes whether a recipient has clicked on any links at all in a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasClickedAnyLinkPeriod(MailId, Number of days)** **HasClickedAnyLinkPeriod(MailId, Start date, End date)**
Result	Has clicked on any link within a specific period, type: Yes/No

Syntax	**HasClickedAnyLinkPeriod(MailId, Number of days)** **HasClickedAnyLinkPeriod(MailId, Start date, End date)**
Parameter • MailId • Number of days • Start date, End date	 • MailId, type: integer • Number of days, type: integer • Start date, end date, type: date or datum/time

Tab. 24: Funktion „HasClickedAnyLinkPeriod()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.11 HasClickedAnyLink

The 'HasNotClickedAnyLinkPeriod()' function establishes whether a recipient has not clicked on any links at all in a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotClickedAnyLinkPeriod(MailId, Number of days)** **HasNotClickedAnyLinkPeriod(MailId, Start date, End date)**
Result	Has not clicked on any link within a specific period, type: Yes/No
Parameter • MailId • Number of days • Start date, End date	 • MailId, type: integer • Number of days, type: integer • Start date, end date, type: date or datum/time

Tab. 25: Funktion „HasNotClickedAnyLinkPeriod()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.12 HasClickedAnyLink

The 'HasClickedAnyLinkPeriodList()' function establishes whether a recipient has clicked on any links at all in a specific mailing of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasClickedAnyLinkPeriodList(ListId, Number of days)** **HasClickedAnyLinkPeriodList(ListId, Start date, End date)**
Result	Has clicked on any links at all in a specific mailing of a specific list within a

Syntax	**HasClickedAnyLinkPeriodList(ListId, Number of days)** **HasClickedAnyLinkPeriodList(ListId, Start date, End date)**
	specific period, type: Yes/No
Parameter • ListId • Number of days • Start date, End date	 • ListId, type: integer • Number of days, type: integer • Start date, end date, type: date or datum/time

Tab. 26: Function „HasClickedAnyLinkPeriodList()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.13 HasClickedAnyLink

The 'HasNotClickedAnyLinkPeriodList()' function establishes whether a recipient has not clicked on any links at all in a specific mailing of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotClickedAnyLinkPeriodList(ListId, Number of days)** **HasNotClickedAnyLinkPeriodList(ListId, Start date, End date)**
Result	Has not clicked on any links at all in a specific mailing of a specific list within a specific period, type: Yes/No
Parameter • ListId • Number of days • Start date, End date	 • ListId, type: integer • Number of days, type: integer • Start date, end date, type: date or datum/time

Tab. 27: Funktion „HasNotClickedAnyLinkPeriodList()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.14 HasClickedContentLink

The 'HasClickedContentLink()' function establishes whether a recipient has clicked on any tracked links of a specific name in external content.

Can be used in: mailing text, actions, target groups

Syntax	**HasClickedContentLink(MailId, Name in the report)**
Result	Has clicked on a content link of the name 'name in the report' in the mailing with MailID, type: Yes/No
Parameter • MailId • Name in the report	 • MailId, type: integer • Name in the report, type: string

Tab. 28: 'HasClickedContentLink()' function

The tracked content links can be called along with the other tracked links in the 'Create condition' dialog by selecting 'HasClicked'. They can be identified by the 'Content tracking (content)' link type (*Creating target groups* page 160).

34.3.2.15 HasClickedContentLink

The 'HasNotClickedContentLink()' function establishes whether a recipient has not clicked on any tracked links of a specific name in external content.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotClickedContentLink(MailId, Name in the report)**
Result	Has not clicked on a content link of the name 'name in the report' in the mailing with MailID, type: Yes/No
Parameter • MailId • Name in the report	 • MailId, type: integer • Name in the report, type: string

Tab. 29: Funktion „HasNotClickedContentLink()"

The tracked content links can be called along with the other tracked links in the 'Create condition' dialog by selecting 'HasNotClicked'. They can be identified by the 'Content tracking (content)' link type (*Creating target groups* page 160).

34.3.2.16 HasOpened

The 'HasOpened()' function establishes whether a recipient has opened a specific mailing.

Can be used in: mailing text, actions, target groups

Syntax	**HasOpened(MailId)**
Result	Has opened a specific mailing, type: Yes/NoMailId, type: integer
Parameter • MailId	 • MailId, type: integer

Tab. 30: 'HasOpened()' function

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.17 HasOpened

The 'HasNotOpened()' function establishes whether a recipient has not opened a specific mailing.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotOpened(MailId)**
Result	Has not opened a specific mailing, type: Yes/NoMailId, type: integer
Parameter • MailId	 • MailId, type: integer

Tab. 31: Funktion „HasNotOpened()"

This function also takes content links into account.

Related Topics

» *Creating target groups* page 160

34.3.2.18 HasOpenedContent

The 'HasOpenedContent()' function establishes whether a recipient has opened the tracked content of a specific name in external content.

Can be used in: mailing text, actions, target groups

Syntax	**HasOpenedContent(MailId, name in the report)**
Result	Has opened any tracked content of the name 'name in report' in the mailing with ID MailID, type: Yes/No
Parameter • MailId • Name in the report	 • MailId, type: integer • Name in the report, type: string

Tab. 32: 'HasOpenedContent()' function

Related Topics

» *Creating target groups* page 160

34.3.2.19 HasOpenedContent

The 'HasNotOpenedContent()' function establishes whether a recipient has not opened the tracked content of a specific name in external content.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotOpenedContent(MailId, name in the report)**
Result	Has not opened any tracked content of the name 'name in report' in the mailing with ID MailID, type: Yes/No
Parameter • MailId • Name in the report	 • MailId, type: integer • Name in the report, type: string

Tab. 33: Funktion „HasNotOpenedContent()"

Related Topics

» *Creating target groups* page 160

34.3.2.20 HasOpened

The 'HasOpenedPeriod()' function establishes whether a recipient has opened a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasOpenedPeriod(MailId, Number of days)** **HasOpenedPeriod(MailId, Start date, End date)**
Result	Has opened a specific mailing within a specific period, type: Yes/No MailId, type: integer
Parameter • MailId • Number of days • Start date, End date	 • MailId, typ: integer • Number of days, type: integer • Start date, End date, type: date or date/time

Tab. 34: Function „HasOpenedPeriod()"

Related Topics

» *Creating target groups* page 160

34.3.2.21 HasOpened

The 'HasNotOpened()' function establishes whether a recipient has not opened a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotOpenedPeriod(MailId, Number of days)** **HasNotOpenedPeriod(MailId, Start date, End date)**
Result	Has not opened a specific mailing within a specific period, type: Yes/No MailId, type: integer

Syntax	**HasNotOpenedPeriod(MailId, Number of days)** **HasNotOpenedPeriod(MailId, Start date, End date)**
Parameter • MailId • Number of days • Start date, End date	• MailId, typ: integer • Number of days, type: integer • Start date, End date, type: date or date/time

Tab. 35: Function „HasNotOpenedPeriod()"

Related Topics

» *Creating target groups* page 160

34.3.2.22 HasClickedAnyLink

The 'HasOpenedPeriodList()' function establishes whether a recipient has opened a specific mailing of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasOpenedPeriodList(ListId, Number of days)** **HasOpenedPeriodList(ListId, Start date, End date)**
Result	Has opened a specific mailing of a specific list within a specific period type: Yes/No
Parameter • ListIId • Number of days • Start date, End date	• ListId, type: integer • Number of days, type: integer • Start date, end date, type: date or date/time

Tab. 36: Function „HasOpenedPeriodList()"

Related Topics

» *Creating target groups* page 160

34.3.2.23 HasClickedAnyLink

The 'HasNotOpenedPeriod()' function establishes whether a recipient has not opened a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotOpenedPeriod(MailId, Number of days)** **HasNotOpenedPeriod(MailId, Start date, End date)**
Result	Has not opened a specific mailing within a specific period, type: Yes/No

Syntax	**HasNotOpenedPeriod(MailId, Number of days)** **HasNotOpenedPeriod(MailId, Start date, End date)**
	MailId, type: integer
Parameter • MailId • Number of days • Start date, End date	• MailId, typ: integer • Number of days, type: integer • Start date, End date, type: date or date/time

Tab. 37: Function „HasNotOpenedPeriodList()"

Related Topics

» *Creating target groups* page 160

34.3.2.24 IsHardBounced

The 'IsHardBounced()' function delivers a `TRUE` in the event of a hard-bounced recipient.

Can be used in: mailing text, actions, target groups

Syntax	**IsHardBounced()**
Result	Has produced a hard bounce, type: Yes/No
Parameter	-

Tab. 38: 'IsHardBounced()' function

34.3.2.25 IsNotHardBounced

The "IsNotHardBounced()" delivers a `FALSE` message in the event of a hardbounced recipient.

Can be used in: Mailing text, actions, target groups

Syntax	**IsNotHardBounced()**
Result	Has not produced a hard bounce, Type: Yes/No
Parameter	-

Tab. 39: "IsNotHardBounced()" function

34.3.2.26 HardBounceCount

The 'HardBounceCount()' function provides the number of hard bounces produced by an email address.

Can be used in: mailing text, actions, target groups

Syntax	HardBounceCount()
Result	Current number of hard bounces, type: integer
Parameter	-

Tab. 40: 'HardBounceCount()' function

Example

`[%=HardBounceCount()]` returns a value of '2', for example.

34.3.3 Sending mailings functions

34.3.3.1 HasClicked

The 'HasReceived()' function establishes whether a recipient has successfully received a specific mailing.

Can be used in: mailing text, actions, target groups

Syntax	HasReceived(MailId)
Result	Has successfully received a specific mailing, type: Yes/No
Parameter • MailId	• MailId, type: integer

Tab. 41: Function „HasReceived()"

Related Topics

» *Creating target groups* page 160

34.3.3.2 HasClicked

The 'HasNotReceived()' function establishes whether a recipient has not successfully received a specific mailing.

Can be used in: mailing text, actions, target groups

Syntax	HasNotReceived(MailId)
Result	Has not successfully received a specific mailing, type: Yes/No
Parameter • MailId	• MailId, type: integer

Tab. 42: Function „HasNotReceived()"

Related Topics

» *Creating target groups* page 160

34.3.3.3 HasClicked

The 'HasReceivedPeriod()' function establishes whether a recipient has received a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasReceivedPeriod(MailId, Number of days)** **HasReceivedPeriod(MailId, Start date, End date)**
Result	Has received a specific mailing within a specific period, type: Yes/No MailId, type: integer
Parameter • MailId • Number of days • Start date, End date	• MailId, typ: integer • Number of days, type: integer • Start date, End date, type: date or date/time

Tab. 43: Function „HasReceivedPeriod()"

Related Topics

» *Creating target groups* page 160

34.3.3.4 HasClicked

The 'HasNotReceivedPeriod()' function establishes whether a recipient has not received a specific mailing within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotReceivedPeriod(MailId, Number of days)** **HasNotReceivedPeriod(MailId, Start date, End date)**
Result	Has not received a specific mailing within a specific period, type: Yes/No MailId, type: integer
Parameter • MailId • Number of days • Start date, End date	• MailId, typ: integer • Number of days, type: integer • Start date, End date, type: date or date/time

Tab. 44: Function „HasNotReceivedPeriod()"

Related Topics

» *Creating target groups* page 160

34.3.3.5 HasClickedAnyLink

The 'HasReceivedPeriodList()' function establishes whether a recipient has received a specific mailing of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasReceivedPeriodList(ListId, Number of days)** **HasReceivedPeriodList(ListId, Start date, End date)**
Result	Has received a specific mailing of a specific list within a specific period type: Yes/No
Parameter • ListIId • Number of days • Start date, End date	• ListId, type: integer • Number of days, type: integer • Start date, end date, type: date or date/time

Tab. 45: Function „HasReceivedPeriodList()"

Related Topics

» *Creating target groups* page 160

34.3.3.6 HasClickedAnyLink

The 'HasNotReceivedPeriodList()' function establishes whether a recipient has not received a specific mailing of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotReceivedPeriodList(ListId, Number of days)** **HasNotReceivedPeriodList(ListId, Start date, End date)**
Result	Has not received a specific mailing of a specific list within a specific period type: Yes/No
Parameter • ListIId • Number of days • Start date, End date	• ListId, type: integer • Number of days, type: integer • Start date, end date, type: date or date/time

Tab. 46: Function „HasNotReceivedPeriodList()"

Related Topics

» *Creating target groups* page 160

34.3.3.7 HasClicked

The 'HasReceivedPeriodCountMoreThan()' function establishes whether a recipient has successfully received more than a specific number of mailings of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasReceivedPeriodCountMoreThan(ListId, Number of mailings, Number of days)** **HasReceivedPeriodCountMoreThan(ListId, Number of mailings, Start date, End date)**
Ergebnis	Has successfully received more than a specific number of mailings of a specific list within a specific period, type: Yes/No
Parameter • ListIId • Number of mailings • Number of days • Start date, End date	• ListId, type: integer • Number of mailings, type: integer • Number of days, type: integer • Start date, end date, type: date or date/time

Tab. 47: Function „HasReceivedPeriodCountMoreThan()"

Related Topics

» *Creating target groups* page 160

34.3.3.8 HasClicked

The 'HasNotReceivedPeriodCountMoreThan()' function establishes whether a recipient has not successfully received more than a specific number of mailings of a specific list within a specific period.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotReceivedPeriodCountMoreThan(ListId, Number of mailings, Number of days)** **HasNotReceivedPeriodCountMoreThan(ListId, Number of mailings, Start date, End date)**
Ergebnis	Has not successfully received more than a specific number of mailings of a specific list within a specific period, type: Yes/No
Parameter • ListIId • Number of mailings • Number of days • Start date, End date	• ListId, type: integer • Number of mailings, type: integer • Number of days, type: integer • Start date, end date, type: date or date/time

Tab. 48: Function „HasNotReceivedPeriodCountMoreThan()"

Related Topics

» *Creating target groups* page 160

34.3.4 Dispatch interruption functions

34.3.4.1 HasClicked

The function „HasNotReceivedSendingAbort()" establishes whether a recipient has not received a specific mailing due to a dispatch interruption.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotReceivedSendingAbort(MailId)**
Result	Has not received a specific mailing due to a dispatch interruption, type: Yes/No
Parameter • MailId	 • MailId, type: integer

Tab. 49: Function „HasNotReceivedSendingAbort()"

Related Topics

» *Creating target groups* page 160

34.3.4.2 HasClicked

The function „HasNotReceivedSendingAbortPeriod()" establishes whether a recipient has not received a specific mailing within a specific period due to a dispatch interruption.

Can be used in: mailing text, actions, target groups

Syntax	**HasNotReceivedSendingAbortPeriod(MailId, Number of days)** **HasNotReceivedSendingAbortPeriod(MailId, Start date, End date)**
Result	Has not received a specific mailing within a specific period due to a dispatch interruption, type: Yes/No
Parameter • MailId • Number of days • Start date, End date	 • MailId, typ: integer • Number of days, type: integer • Start date, End date, type: date or date/time

Tab. 50: Function „HasNotReceivedSendingAbortPeriod()"

Related Topics

» *Creating target groups* page 160

34.3.5 Character string functions

34.3.5.1 Substring

The 'Substring()' function separates characters from the source text.

Note: In the source text the first character is in position 1.

Can be used in: mailing text, actions

Syntax	**Substring(SourceText, StartIndex, EndIndex, (AlternativeText))**
Result	Modified source string, type: text
Parameter • Source text • Start index • End index • Alternative text	 • Character string to be modified, type: text • Start from this index (inclusive), type: integer • Up to this index (inclusive), type: integer • Error text if processing fails (optional), type: text

Tab. 51: 'Substring()' function

Example

`[%=Substring("inxmail", 1, 3, "Error")]` returns 'inx'.

34.3.5.2 IndexOf

The 'IndexOf()' function searches for specific instances of characters in a source text. It searches from the indicated beginning of the text and displays the first search result found. If no instance is found, then the value 0 is returned.

Note: In the source text the first character is in position 1.

Can be used in: mailing text, actions

Syntax	**IndexOf(SourceText, SearchText, SearchStart)**
Result	Indicates the position of a specific character string, type: integer
Parameter • Source text • Search text • Search start	 • Character string to be searched in, type: text • Character string to be searched for in the source text, type: text • The position at which the search should start, type: integer

Tab. 52: 'IndexOf()' function

Example

- `[%=IndexOf(email, "@", 1)]` returns a value of 5 for the email address 'info@inxmail.de', for example. This string function outputs the index where the @ character is found.
- If you would like to extract the substring before the @ character from the entries in the 'email' table column, enter the following function:
  `[%=Substring(email, 1, IndexOf(email, "@", 1)-1)]` returns 'mike.miller', for example.
- You can also include string functions in a condition, e.g., you can specify that the phrase 'Caution! Space character found!' appears if a space character is found in an entry in the *Postcode* column.
  `[%=IIf(IndexOf(Name, " ", 1)>0, "Caution!Space character found!", "No errors found!")]` returns 'Caution!Space character found!' if the condition applies. Otherwise 'No errors found'.

34.3.5.3 LastIndexOf

The 'LastIndexOf()' function searches for specific instances of characters in a source text. It searches for the last instance of a character and displays this as a search result. If no character is found, then the value 0 is returned.

Note: In the source text, the first character is in position 1.

Can be used in: mailing text, actions

Syntax	**LastIndexOf(SourceText, SearchText, SearchStart)**
Result	Indicates the position of a specific character string, type: integer
Parameter • Source text • Search text • Search start	 • Character string to be searched in, type: text • Character string to be searched for in the source text, type: text • The position at which the search should start, type: integer

Tab. 53: 'LastIndexOf()' function

Example

- `[%=LastIndexOf(email, ".", Length(email))]` returns for the email address
- You would like to separate and display the substring after the last full stop from entries in the 'email' table column. Specify the following string function:
  `[%=Substring(email, LastIndexOf(email, ".", Length(email))+1, Length(email), "Error")]` outputs 'de', for example.

34.3.5.4 Length

The 'Length()' string function returns the length of text.

Can be used in: mailing text, actions

Syntax	Length(SourceText)
Result	Text length, type: integer
Parameter • Source text	• Text whose length is to be determined, type: text

Tab. 54: 'Length()' function

You would like to find the length of the entries in the 'email' table column:
`[%=Length(email)]` returns a value of 15 for the email address 'info@inxmail.de', for example. If no name is entered in the column then the value 0 is displayed.

34.3.5.5 Firstcap

The 'Firstcap()' string function changes lower-case initial letters to upper case. This also applies after a hyphen or a space character. It changes upper-case letters in the text to lower case.
Can be used in: mailing text, actions

Syntax	Firstcap(SourceText)
Result	Initial letters upper case, other letters lower case, type: text
Parameter • Source text	• Type: text

Tab. 55: 'Firstcap()' function

Example

- `[%=Firstcap("peter")]` returns the value 'Peter'.
- `[%=Firstcap("müller-lüdenscheid")]` returns the value 'Müller-Lüdenscheid'.

34.3.5.6 Upper

The 'Upper()' string function changes all lower-case letters to upper case.
Can be used in: mailing text, actions

Syntax	Upper(SourceText)
Result	Upper-case letters only, type: text
Parameter • Source text	• Type: text

Tab. 56: 'Upper()' function

Example

`[%=Upper("meyeR")]` returns the value 'MEYER'.

34.3.5.7 Lower

The 'Lower()' string function changes all upper-case letters to lower case.

Can be used in: mailing text, actions

Syntax	**Lower(SourceText)**
Result	Lower-case letters only, type: text
Parameter • Source text	• Type: text

Tab. 57: 'Lower()' function

Example

`[%=Lower("MeyeR")]` returns the value 'meyer'.

34.3.6 Other functions

34.3.6.1 CvText

The 'CvText()' function converts a number or a Yes/No value into text. Yes/No values become TRUE or FALSE.

Can be used in: mailing text, actions

Syntax	**CvText(NumberValue)** **CvText(Yes/No-Value)**
Result	Text, type: text
Parameter: • Number value • Yes/No value	• A number, type: integer or floating point • Type: Yes/No

Tab. 58: 'CvText()' function

34.3.6.2 CvInt

The 'CvInt()' function converts text or a Yes/No value into a number. Yes/No values are converted into 1 (Yes) and 0 (No).

Can be used in: mailing text, actions

Syntax	**CvInt(Text, (AltText))** **CvInt(Yes/No-Value)**
Result	A number, type: integer

Syntax	**CvInt(Text, (AltText))** **CvInt(Yes/No-Value)**
Parameter: • Text • Alternative text • Yes/No value	• Text, type: text • Text is used (optional) if conversion from the first text parameter does not work, type: text • Type: Yes/No

Tab. 59: 'CvInt()' function

Related Topics

» *Inserting system data (commands)* page 374

34.3.6.3 Format

The 'Format()' function formats values and returns text.

Can be used in: mailing text, actions

Syntax	**Format(Value, FormatModel)**
Result	The formatted text, type: text
Parameter • Value • Format model	• Value to be formatted, type: date or time or date/time or integer or floating point • Determines how the value is to be formatted, type: text

Tab. 60: 'Format()' function

The following control characters can be used to format date values:

Character	**Description**	**Example**
G	Era	AD
y	Year	1996; 96
M	Month	July; Jul; 07
w	Calendar week	27
W	Week in month	2
D	Day in year	189
d	Day in month	10
E	Weekday	Tuesday; Tu
a	Am/pm	PM
H	Hour (0-23)	0

Character	Description	Example
k	Hour (1-24)	24
K	Hour (0-11)	0
h	Hour (1-12)	12
m	Minute	30
s	Second	55
z	Time zone	Pacific Standard Time; PST; GMT-08:00
Z	Time zone	-0800

Tab. 61: Control characters for date values

The following table demonstrates date and time formats for the regional configuration 'German (Germany)'. As an example, the value '04.07.2001 12:08:56' is entered:

Format model	Result
dd.MM.yyyy G 'at' HH:mm:ss z	04.07.2001 AD at 12:08:56 CEST
EEE, MMM d, "yy	Wed, Jul 4, '01
EEEE, d. MMMM yyyy	Wednesday, 4 July 2001 h:mm
hh 'hour', zzzz	12 pm, Central European Summer Time
K:mm a, z	0:08 PM, CEST
dd. MMMMM yyyyy GGG hh:mm aaa	04 July 02001 AD 12:08 PM
EEE, d MMM yyyy HH:mm:ss Z	Wed, 4 Jul 2001 12:08:56 +0200
yyMMddHHmmssZ	010704120856+0200

Tab. 62: Date and time formats for the regional configuration 'German (Germany)'

You can use these control characters in the format to format numbers:

Format	Description
0	Number
#	Number, zero is not shown
.	Decimal or currency separator
-	Minus sign
,	Hundreds and thousands separator (,## or ,###)

Format	Description
E	Separates the exponent and mantissa in scientific notation
;	Separator between positive and negative in the format model
%	Shows a value as a percentage
'	Special characters can therefore be shown ('E becomes E)

Tab. 63: Control characters for formatting numbers

The following table demonstrates how number values can be formatted:

Value	Format model	Result
1201.56	000000	001202
1201.56	0.00	1201,56
1234001	,###	1.234.001
0.56	#%	56%
10.56	#.000	10,560
-10.56	#.00;(#.00)	(10,56)
10.56	Profit #.00 EUR; Loss #.00 EUR	Profit 10,56 EUR
0.56	##0.#####E0	560E-3

Tab. 64: Formatted number values

Related Topics

» *Inserting system data (commands)* page 374

34.3.6.4 IIf

The 'IIf()' function returns one of two values as a result of a condition. If is a shorthand form of the If function. IIF stands for 'Immediate If'.

Can be used in: mailing text, actions

Syntax	IIf(Expression, YesValue, NoValue)
Result	Result of the Yes or No value, type: depends on the Yes and No values
Parameter • Expression • Yes value • No value	 • The condition to be tested, type: Yes/No • Return value if the expression is true, type: all possible • Return value if the expression is false, type: must always be of the same type as YesValue

Example

```
IIf(email ENDS_WITH ".de", "Email ends with .de", "Email does not end with .de")
```

Related Topics

» *Inserting system data (commands)* page 374

34.3.6.5 Mod

The 'Mod()' function returns the remainder of the division of two whole numbers in the form of an amount (positive number).

Can be used in: target groups

Syntax	**Mod()**
Result	The remainder of the division of two whole numbers, type: integer
Parameter	-

Tab. 65: 'Mod()' function

Example

- `Mod(RecipientId(),5)=0`
- `Mod(RecipientId(),10)=0` is true if the ID of the recipient is a multiple of 5.
- `Mod(RecipientId(),10)` returns the last digit of the recipient ID.
- `Mod(Year(Date()),4)=0` is true if the current year is a leap year.

34.3.6.6 MailId

The 'MailId()' function returns the identification number (ID) of a mailing created in Inxmail Professional. If the function is called in an action on the 'On Send' or 'On Click' events, the ID of the mailing which caused the action to be triggered will be returned.

Can be used in: mailing text, actions

Syntax	**MailId()**
Result	The identification number of a mailing, type: integer
Parameter	-

Tab. 66: 'MailId()' function

34.3.6.7 InAlternativeView

The 'InAlternativeView()' function returns the `TRUE` value if a mailing is shown in the alternative view in the web browser.

Can be used in: mailing text

Syntax	**InAlternativeView()**
Result	Type: Yes/No
Parameter	-

Tab. 67: 'InAlternativeView()' function

Related Topics

» *Inserting links to the alternative view in the web browser (HTML mailings only)* page 217

34.3.6.8 InInboxView

The 'InInboxView()' function returns the `TRUE` value if a mailing is shown in the inbox view in the email client.

Can be used in: mailing text

Syntax	**InInboxView()**
Result	Type: Yes/No
Parameter	-

Tab. 68: 'InInboxView()' function

The 'Column()' function returns the value of a column. The function is to be used if the column name contains special characters (+,-, , ...).

Can be used in: target groups, mailing text, actions

Syntax	**Column("ColumnName")**
Result	Returns the column value, type: depends on the type of the ColumnName parameter
Parameter: • Column name	• Name of the column, type: all types possible

Tab. 69: 'Column()' function

Related Topics

» *Creating personalised text (for target groups)* page 367

35 Installation

You will learn how to install Inxmail Professional in this chapter.

The installation process will depend on whether you are using Inxmail Professional as an ASP solution or as a license solution:

- In the case of the ASP solution, Inxmail GmbH provides the technical environment for you. Therefore, you only have to install the Inxmail Professional Client.
- With the license solution, you use your own technical environment. You must install an Inxmail Professional Server in addition to the Inxmail Professional Client.

35.1 Hardware and software requirements

The computer on which you install the Inxmail Professional Client must fulfil the following hardware and software requirements:

- One of the following operating systems must be installed:
  - Windows XP
  - Windows Vista
  - Windows 7 (32-bit or 64-bit)
  - Windows 8 (32-bit or 64-bit)
  - Windows 8.1 (32-Bit or 64-Bit)
  - Mac OS X 10.7 (Lion)
  - Mac OS X 10.8 (Mountain Lion)
  - Mac OS X 10.9 (Mavericks)
  - Linux (32-Bit oder 64-Bit)Linux (32-bit or 64-bit)
- Java Version 1.7.0_21 must be supported.
- CPU: 1.8 GHz (minimum)
- RAM: 1 GB minimum (2 GB recommended)

Screen resolution

We also recommend a screen resolution of at least 1024 x 768 pixels.

35.2 Installing the Inxmail Professional Client

Important To install the Inxmail Professional Client, you must have administrator rights for the computer on which you want to install the software. If you perform the installation without administrator rights, this can result in problems when you perform updates later or if you use a CAS genesisWorld integration.

35.2.1 Installation using the installation wizard

Step-by-step

To install the Inxmail Professional Client, proceed as follows:

1. In the Inxmail Community (http://community.inxmail.de), select *Software Downloads* > *Inxmail Professional Client* to download the installation file for the Inxmail Professional Client.
2. Run the installation file.

   An installation wizard will guide you through the installation.

Related Topics

For information on installing the Inxmail Professional Server, please refer to the installation manual for the Inxmail Professional Server. You can download it from the Inxmail Community (http://community.inxmail.de) by selecting *Software Downloads* > *Inxmail Server*.

35.2.2 Installation using the command line

The Inxmail Client can also be installed from the command line. Specify the installation path of the Client as a parameter according to the following pattern:

```
msiexec /i <installation file>.msi INSTALLDIR=C:\<directory name>
```

35.3 Running updates

35.3.1 Running an update again

Note If an update process runs incorrectly (for example, due to a premature termination), you should first contact the support team at Inxmail GmbH (support@inxmail.de) before running the update again.

Step-by-step

If an Inxmail Professional Client update did not run correctly, you can run the update again. Proceed as follows:

1. To open the login dialog box, start Inxmail Professional.
2. Select a client in the login dialog box and enter your user name and password.

3. To open the settings section, click *Settings*.

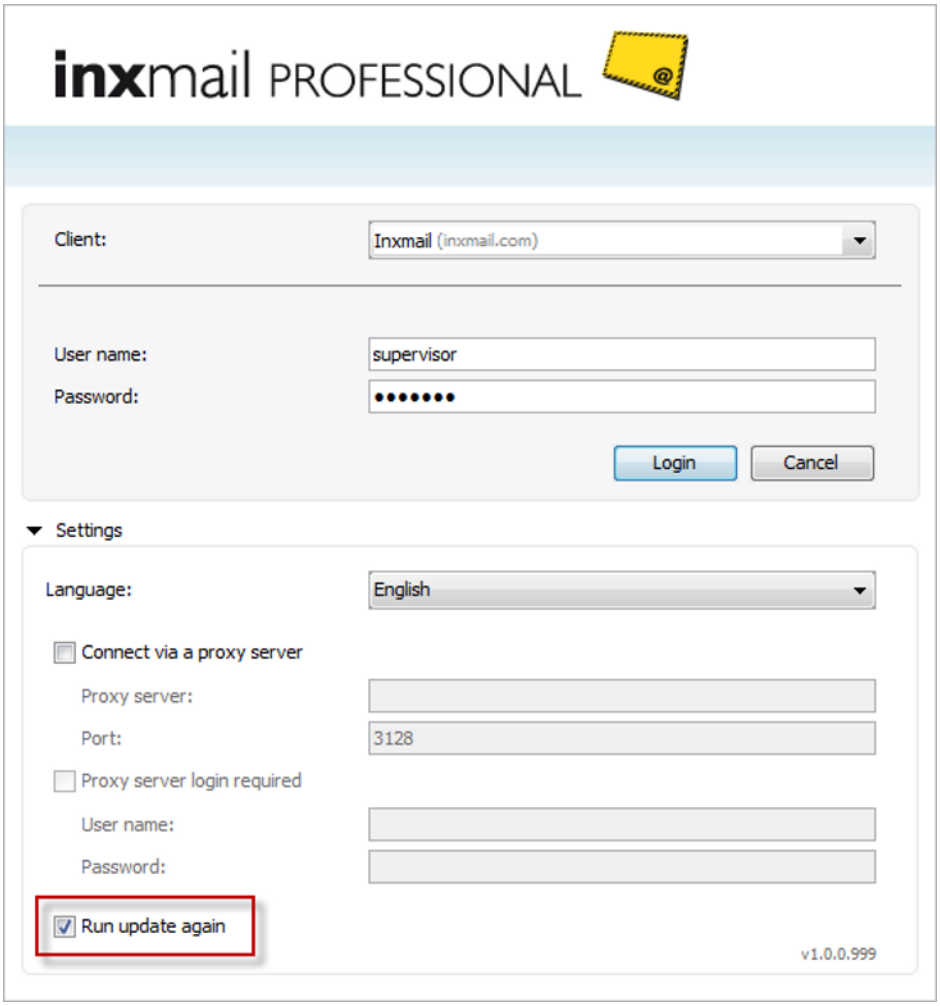


Figure 329: 'Run update again' login dialog box

4. Enable the *Run update again* check box.
5. Click *Login*.
6. The update is run. Once the update has been successfully loaded, the Inxmail Professional user interface is displayed.

✓ The Inxmail Professional Client has been updated.

Note When you log in again, the *Run update again* check box will be disabled.

36 Settings (license customers)

In this chapter, you will learn which settings you **must** make in the software program once it is installed in order that your company can use Inxmail Professional:

- Creating and setting up users and roles (including assigning rights), as well as configuring security settings
- Setting up mail server accounts for sending and receiving email
- Setting up global access rights (Administration), in order that users may access the Administration section on the (*Global settings*) tab
- Setting up global properties (Administration)

These settings are preconfigured for **ASP customers**. You can therefore skip this chapter.

License customers must make these settings. Note that only Inxmail Professional administrators with the following rights can make the settings:

- You have access rights for the (*Global settings*) tab > *Administration* section (*Global access rights (Administration)* page 586).
- You have rights to use the functions of the respective agent (*Overview: Rights* page 566).

Important Note that changes to these settings can impact upon the functionality of Inxmail Professional.

If you are additionally using the optional database synchronisation service Inxmail Professional DBSync, you must make some further settings (*Inxmail Professional DBSync* page 604).

36.1 Users, roles, rights and security

Overview

- *Create new user* page 558
  In order that users may use Inxmail Professional, you must create the users, set them up and then assign the required rights to them (either directly or through role assignment).
- *Create new role* page 561
  To be able to assign rights to users through roles, you must create and set up the roles.
- *Configuring security settings and the log* page 563
  To guarantee the security of login data and define which events are logged for this purpose, you must make security settings.
- *Displaying and filtering the log* page 565
  You can display and filter logging (configured beforehand).
- *Overview: Rights* page 566
  Here you will find an overview of all Inxmail Professional rights.
- *Overview: Standard roles* page 577
  Here you will find an overview of the standard roles that were created automatically during the installation of Inxmail Professional.

36.1.1 Create new user

Step-by-step

1. Click the (*Global settings*) tab > *Users* agent > *Users* tab. Then click the (*Create new user*) button.

   The fields on the *Settings* and *Roles/Rights* tabs are enabled for you to set up the new user.

2. Set up the user data on the *Settings* tab using the relevant fields.

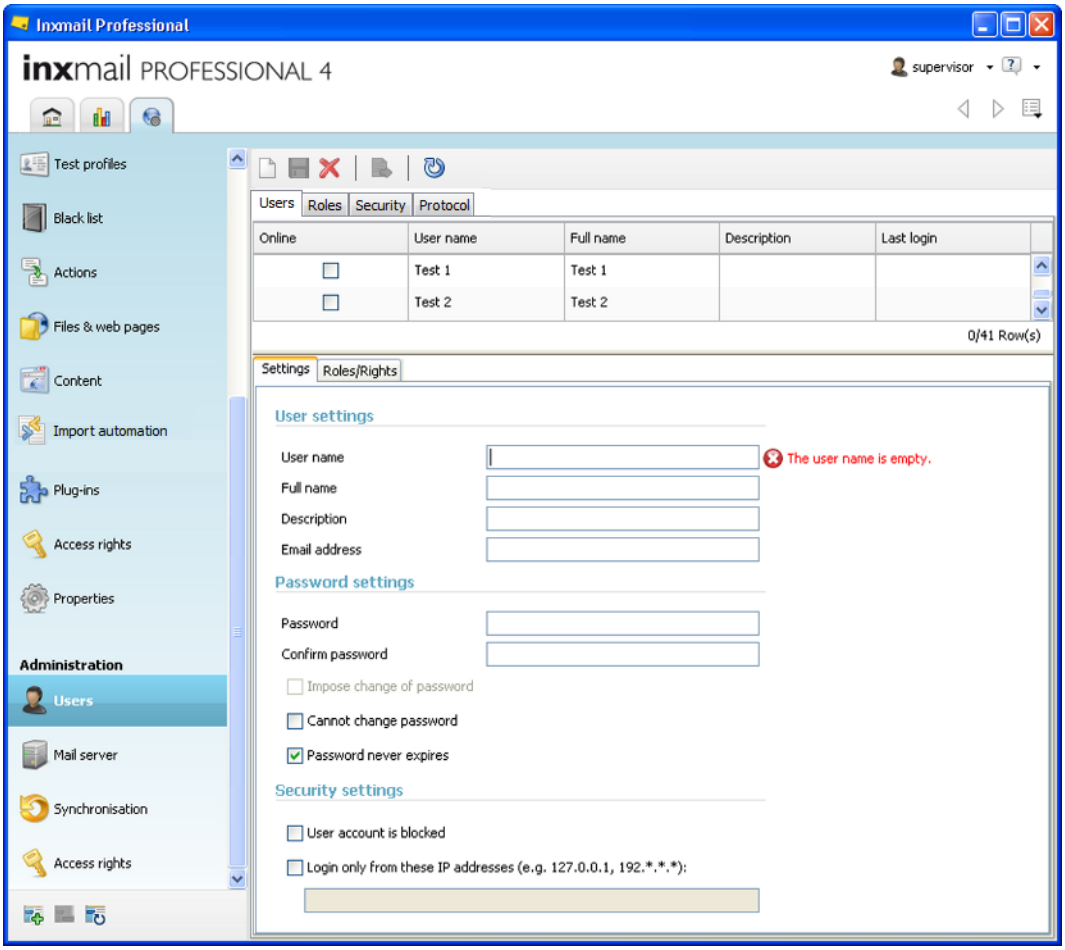


Figure 330: "Users" agent > "Users" tab > "Settings" tab

Field	Description/example
User name	Mandatory field, for example: ‘miller’
Full name	Mandatory field, for example: ‘Mike Miller’
Description	For example, ‘Marketing Manager’
Email address	For example, ‘miller@test.de’
Password	Mandatory field, for example: ‘*****’
Confirm password	Mandatory field, for example: ‘*****’

Field	Description/example
Impose change of password	If this check box is selected, the user will be prompted to change their (existing) password the next time they log in. Note: You are only able to select this check box if the *Password never expires* and *Cannot change password* check boxes (below) are disabled.
Cannot change password	If this check box is selected, the user will be denied the right to change their password themselves. Note: You are only able to select this check box if the *Impose change of password* check box (below) is disabled. Note: Information on how users can change their own password (assuming they have the appropriate right) can be found under *Changing your password* page 40.
Password never expires	If this check box is selected, the user's password will never expire. Note: If a restricted validity period is configured for all passwords on the *Security* tab (*Configuring security settings and the log* page 563), then it will be ignored for the user as a result of selecting this check box. Note: You are only able to select this check box if the *Impose change of password* check box (above) is disabled.
User account is blocked	If this check box is selected, the user account is blocked. Note: This can be necessary, for example, if a user leaves the company, but their Inxmail Professional data is not to be deleted. Note: User accounts can also be automatically blocked due to too many unsuccessful login attempts by the user. Information on unblocking these user accounts can be found under *Unblocking user accounts* page 613.
Login only from these IP addresses	If this check box is selected, you can specify a range of IP addresses from which the user must log in. Note: If a restricted IP address range is configured for the login of all users on the *Security* tab (*Configuring security settings and the log* page 563), then it will be ignored for the user as a result of selecting this check box.

3. Assign rights to the new user on the *Roles/Rights* tab.

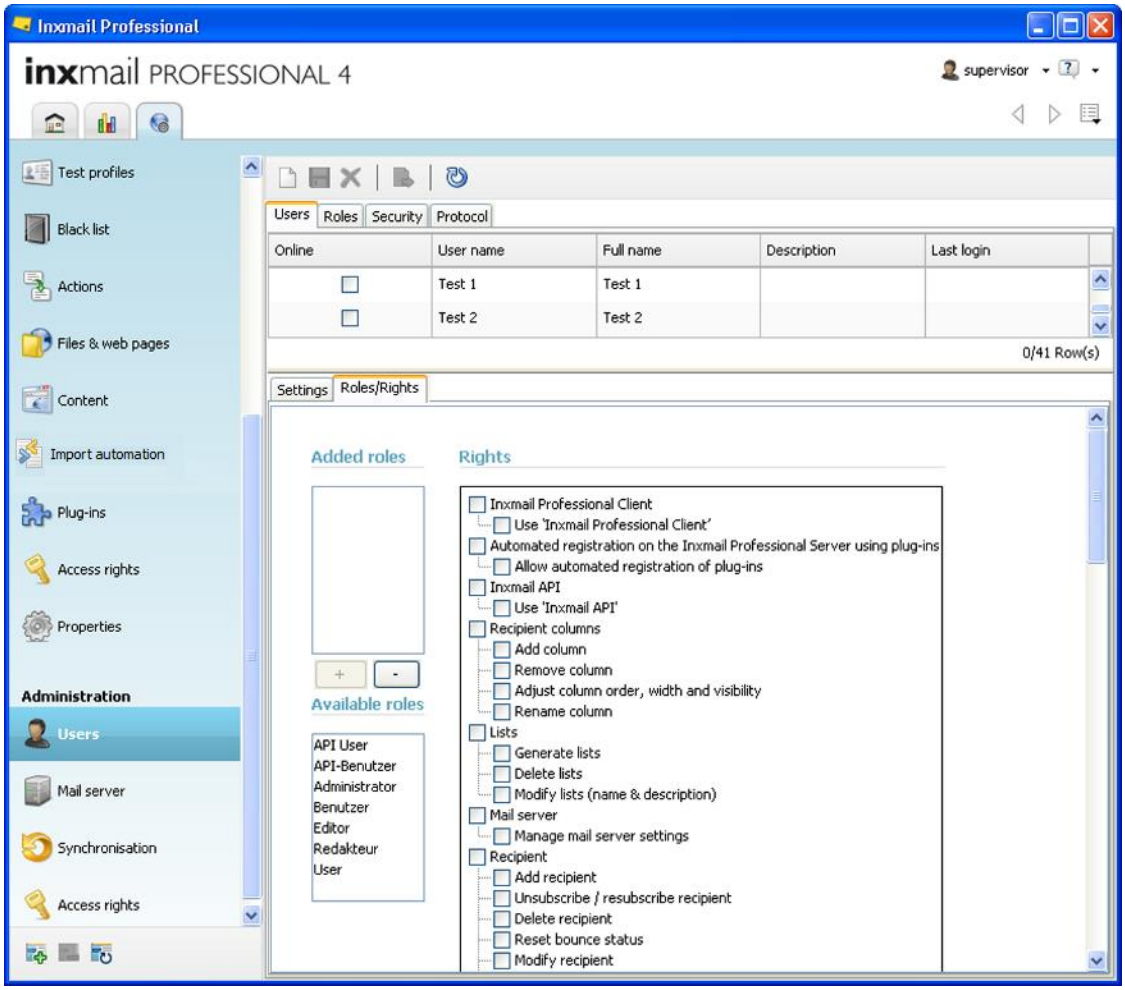


Figure 331: "Users" agent > "Users" tab > "Roles/Rights" tab

You can assign rights to the user either directly or through roles that have particular predefined rights:

- To assign a role to the user, select the relevant role in the *Available roles* section and click the [+] button.
  The role appears under *Added roles*.
  You can assign any number of roles to a user.
  Information on the created roles can be found under *Create new role* page 561.

  Note Bear in mind that when a role is assigned, all rights linked with the role are automatically assigned. These rights are then enabled and will appear greyed out.

- To take a role away from the user, select the relevant role in the *Added roles* section and click the [-] button.
  The role appears under *Available roles*.
- To assign (or withdraw) individual rights to (or from) the user, enable (or disable) the relevant rights in the *Rights* section.

To assign an individual right (for example, 'Add column'), select the check box in front of the right. The higher-level rights package is then automatically also enabled (for example, 'Recipient columns').

To enable a complete rights package (including all subordinate rights), select the check box in front of the rights package.

If you have already added roles for the user (*Added roles* section), then all rights assigned to these roles will appear greyed out in the *Rights* section and cannot be disabled.

4. Save your settings.

✓ You have finished setting up a new user. The new user can now log in to Inxmail Professional with the user name and password you have specified.

Additional information

You can select a created user in the table and then:

- edit the user settings on the *Settings* and *Roles/Rights* tabs.
- delete the user using the (*Delete user*) button.

Related Topics

» *Create new role* page 561

» *Overview: Rights* page 566

36.1.2 Create new role

Step-by-step

1. Click the (*Global settings*) tab > *Users* agent > *Roles* tab. Then click the (*Create new role*) button.

The fields in the *Role settings* and *Rights* sections are enabled for you to set up the new role.

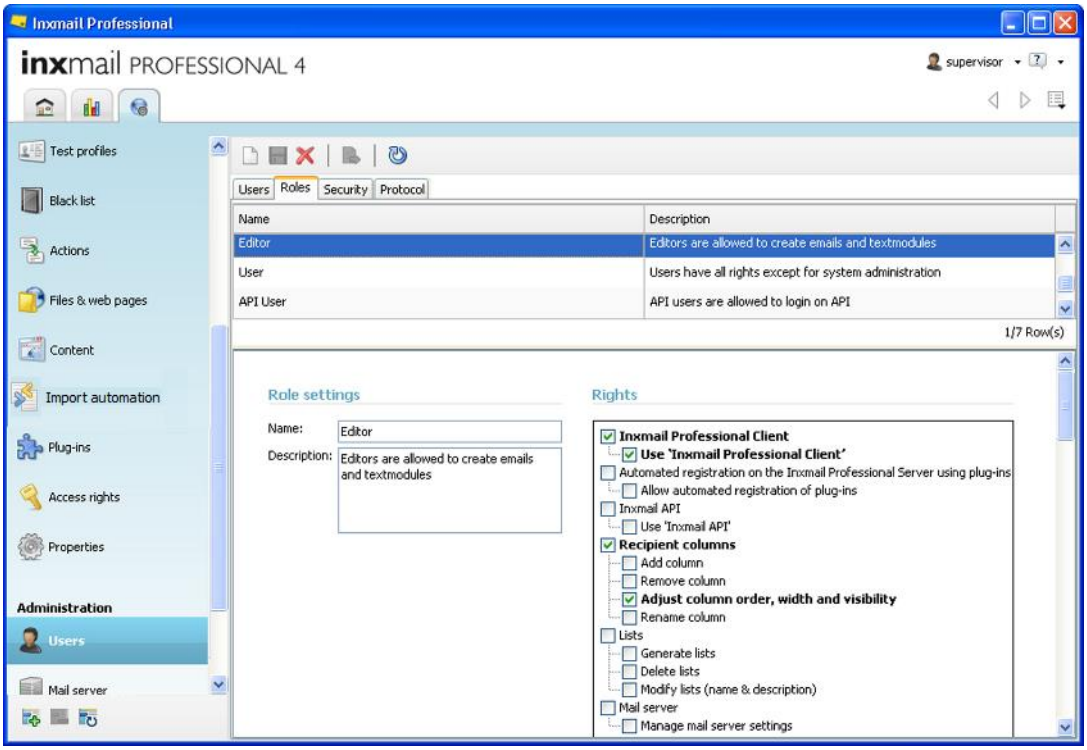


Figure 332: "Users" agent > "Roles" tab

2. In the *Role settings* section, enter a name for the new role and a brief description.
3. To assign rights to the role, enable the relevant rights in the *Rights* section.

   To assign an individual right (for example, 'Add column'), select the check box in front of the right. The higher-level rights package is then automatically also enabled (for example, 'Recipient columns').

   To enable a complete rights package (including all subordinate rights), select the check box in front of the rights package.
4. Save your settings.

✓ You have finished creating a new role.

Additional information

You can select a created role or standard role (*Overview: Standard roles* page 577) in the table and then:

- edit the role settings in the *Role settings* and *Rights* sections.
- delete the role using the ✕ (*Delete role*) button.

Related Topics

» *Overview: Rights* page 566

36.1.3 Configuring security settings and the log

Step-by-step

1. Click the (*Global settings*) tab > *Users* agent > *Security* tab.

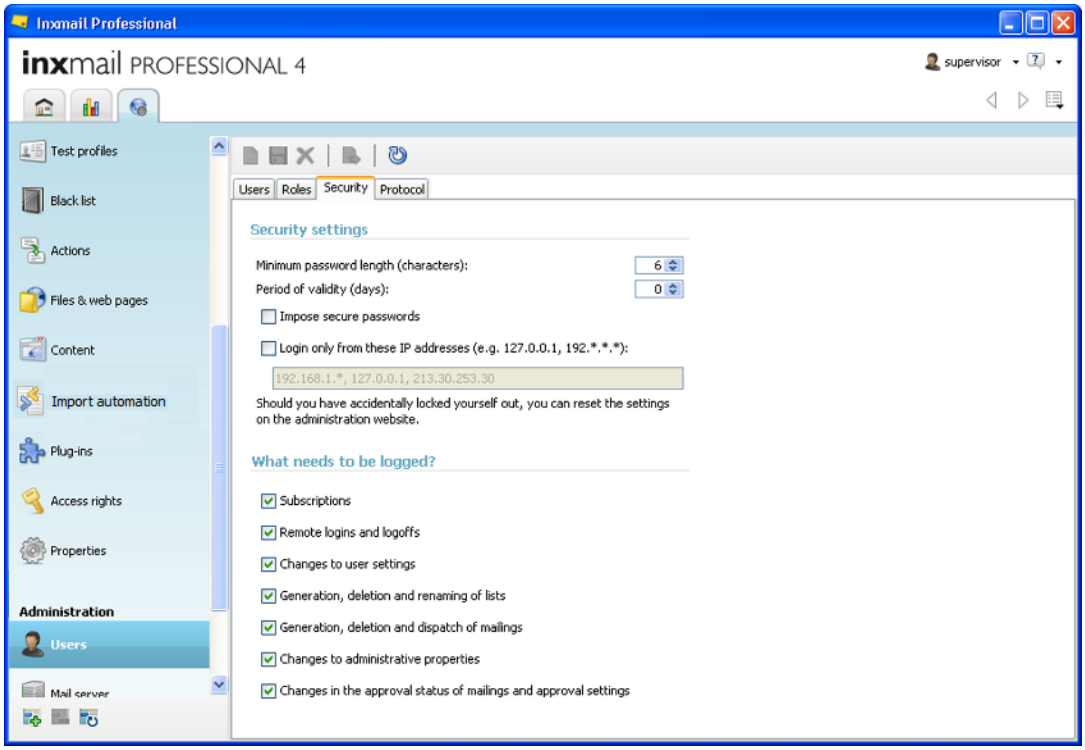


Figure 333: "Users" agent > "Security" tab

2. Configure the security settings in the *Security settings* section using the relevant fields.

Field	Description
Minimum password length (characters)	Minimum number of characters that passwords must contain. Note: If you enter '0', the passwords do not need to be of a minimum length.
Period of validity (days)	Time duration after which the user must change their password. Note: If you enter '0', the passwords will never expire.

Field	Description
Impose secure passwords	If this check box is selected, the minimum password length is automatically set to six characters. In addition, Inxmail Professional will check all passwords created in future for whether they comply with the following guidelines: • The password must not contain the user name. • The password must contain at least one character from each of the following categories: ▪ Upper-case letters from A–Z ▪ Lower-case letters from a–z ▪ Numbers 0–9 ▪ Special characters (for example, !,$,#,%) Note: If you also want users to adjust their existing passwords to conform to these requirements, you should additionally select the *Impose change of password* check box for every user in question on the *Users* tab > *Settings* tab (*Create new user* page 558).
Login only from these IP addresses	If this check box is selected, all users must log in from the specified IP address range. Note: If Inxmail Professional administrators inadvertently lock themselves out due to a too restrictive IP address range, this can only be corrected using the administration web page on the Inxmail Server.

3. Use the relevant fields in the *What needs to be logged?* section to define which events are logged (on the *Users* agent > *Logs* tab):

Field	Description
Logins and logoffs	If this check box is selected, user logins to and logoffs from Inxmail Professional are logged.
Remote logins and logoffs	If this check box is selected, user logins to and logoffs from Inxmail Professional that have occurred over the API interface are logged.
Changes to user settings	If this check box is selected, all changes to user settings (*Users* agent) are logged.
Generation, deletion and renaming of lists	If this check box is selected, the generation, renaming and deletion of mailing lists (*List overview* tab) are logged.
Generation, deletion and dispatch of mailings	If this check box is selected, the generation, deletion and dispatch of mailings (*Mailings* agent) are logged.

Field	Description
Changes to administrative properties	If this check box is selected, all changes to administrative properties (*Properties* agent and *Properties* (Administration) agent) are logged.
Changes to advanced properties	If this check box is selected, all changes to advanced properties of mailing lists or the system list (*Properties* agent and *Properties* (Administration) agent) are logged.
Changes to editorial properties	If this check box is selected, all changes to editorial properties of mailing lists or the system list (*Properties* agent and *Properties* (Administration) agent) are logged.
Changes in the approval status of mailings and approval settings	If this check box is selected, all changes to the approval status of mailings (*Mailings* agent) and to the approval settings (*Properties* agent) are logged.

4. Save your settings.

✓ You have finished configuring the security settings.

36.1.4 Displaying and filtering the log

Step-by-step

1. Click the (*Global settings*) tab > *Users* agent > *Log* tab.
   The log entries are displayed.

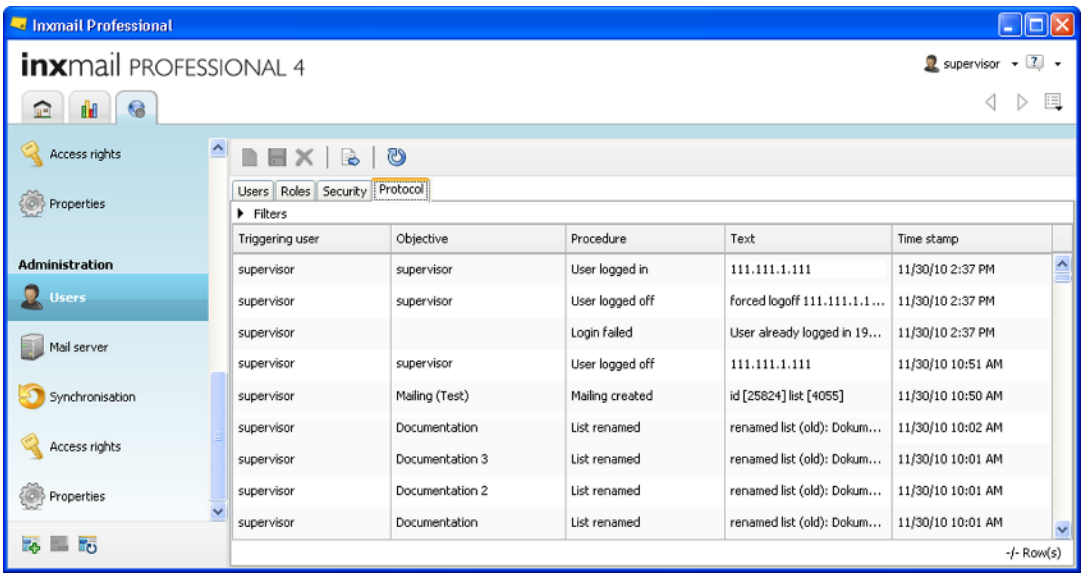


Figure 334: "Users" agent > "Log" tab

2. To define filter settings, proceed as follows:
   a. To expand the filter settings, click the *Filters* button.

b. Use the option buttons (*Do not use a date filter*, *The last … days*, *From… to…*) to define whether a date filter is to be applied.

c. Use the check boxes (*Procedure*, *Triggering user*, *Objective*) to specify whether the log entry table is to be filtered by the table columns.

d. Click the *Apply filter* button.

The log display is updated.

✓ The log entry table now contains only the log entries that match your filter settings.

36.1.5 Overview: Rights

In Inxmail Professional, all rights are assigned to higher-level rights packages.

The rights packages and rights are displayed in the *Users agent* page 53 *Users*:

- on the *Users* tab > *Roles/Rights* tab

  Here you can assign rights to the users directly through a role (*Create new user* page 558).
- on the *Roles* tab

  Here you can assign rights to roles (*Create new role* page 561).

In addition to the rights listed below, the users may need the access right for the relevant tab (for example, the (*Global settings*) tab) or the relevant section (for example, the *Administration* section) in order that they may view these tabs or sections.

Information on these access rights can be found under *Setting up access rights for mailing lists* page 88 and *Global access rights (Administration)* page 586.

Right	Description
Use 'Inxmail Professional Client'	This right is required by **all users** in order to log in to Inxmail Professional or use the software program in general. Exception: 'Technical' users that are used to configure plug-ins or the API interface do not require this right.

Right	Description
Allow automated registration of plug-ins	'Technical' users require this right in order to configure plug-ins.

Right	Description
Use 'Inxmail API'	'Technical' users require this right in order to use the Inxmail Professional API interface.

Right	Description
Add column	Users require this right in order to add columns to the following recipient tables: • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' right.
Remove column	Users require this right in order to remove columns from the following recipient tables: • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' right.
Adjust column order, width and visibility	Users require this right in order to change the order, width and visibility of columns in the following recipient tables: • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' right.
Rename column	Users require this right in order to rename columns in the following recipient tables: • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' right.

Right	Description
Generate lists	Users require this right in order to create new mailing lists.
Delete lists	Users require this right in order to delete mailing lists.
Modify lists (name & description)	Users require this right in order to rename mailing lists.

Right	Description
Manage mail server settings	Users require this right in order to see and configure the *Mail server* agent (on the (*Global settings*) tab > *Administration* section).

Right	Description
Use 'All recipients' agent	Users require this right in order to see and use the *All recipients* agent (on the (*Global settings*) tab).
Use 'Recipients' agent	Users require this right in order to see and use the *Recipients* agent (on the tabs of the individual mailing lists).
Add recipient	Users require this right in order to add recipients to the following recipient tables (manually or by copying and pasting): • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' and 'Modify recipient' rights. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' and 'Modify recipient' rights. Note the following: Even if the 'Add recipient' right is not set, it is still possible to run the recipient import if the 'Export and copy recipients' right is set.
Modify recipient	Users require this right in order to change recipient data in the following recipient tables (manually by double-clicking the relevant column or by copying and pasting data): • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' right.
Unsubscribe/resubscribe recipient	Users require this right in order to manually unsubscribe and resubscribe recipients in the following recipient table: • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right.

Right	Description
Delete recipient	Users require this right in order to delete recipients in the following recipient tables: • Recipient table of a mailing list (on the tab of the mailing list in the *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' right. Note: You do not require this right for the global recipient table containing all recipients. Here you can automatically delete recipients if you have the 'Use 'All recipients' agent' right.
Reset bounce status	Users require this right in order to manually flag recipients who are marked as 'unavailable' as 'available' in the following recipient tables: • Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use 'Recipients' agent' and 'Modify recipient' rights. • Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use 'All recipients' agent' and 'Modify recipient' rights.

Right	Description
Import recipients...	Users require this right in order to import recipient data. It is not necessary to have the 'Add recipient' right to be able to carry out a recipient import.

Right	Description
Use 'Overwrite column values' import option	Users require this right in order to: • be able to select the *Overwrite existing column values* option (last dialog box step) when importing recipient data in the following recipient tables: ▪ Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use Recipients agent' and 'Use Import recipients dialog box' rights. ▪ Global recipient table containing all recipients (on the (*Global settings*) tab > *All recipients* agent) Prerequisite: The users have the 'Use All recipients agent' and 'Use Import recipients dialog box' rights. • be able to select the *Update subscription date* option (last dialog box step) when importing recipient data in the following recipient table: ▪ Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use Recipients agent' and 'Use Import recipients dialog box' rights.
Use 'Change subscribe/unsubscribe' import option	Users require this right in order to: • import recipients to the *Unsubscribed* tab in the following recipient table: ▪ Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use Recipients agent' and 'Use Import recipients dialog box' rights. • be able to select the *Resubscribe this recipient* option (last dialog box step) when importing recipients to the *Subscribed* tab in the following recipient table: ▪ Recipient table of a mailing list (on the tab of the mailing list > *Recipients* agent) Prerequisite: The users have the 'Use Recipients agent' and 'Use Import recipients dialog box' rights.
Export and copy recipients	Users require this right in order to export and copy recipient data. Users also require this right in order to create test profiles from the recipients table (*Creating recipients as test profiles* page 120).

Right	Description
Install plug-in that is not listed as trusted	Users require this right in order to install plug-ins that are not listed as trusted in their system (that is, the plug-ins do not appear in the white list). Prerequisite: The users have the 'Install, configure and uninstall plug-ins' right.
Add and delete plug-ins from lists	Users require this right in order to add plug-ins to mailing lists and remove them.
Install, configure and uninstall plug-ins	Users require this right in order to see the *Plug-ins* agent (on the (*Global settings*) tab) and use the agent to install, configure and uninstall plug-ins.

Right	Description
Use the lists' 'Properties' agent	Users require this right in order to see and use the *Properties* agent (on the tabs of the individual mailing lists).
Edit editorial properties	Users require this right in order to edit the fields in the *Editorial properties* section in the following agents: • on the tabs of the individual mailing lists > *Properties* agent Prerequisite: The users have the 'Use the lists' 'Properties' agent' right. • on the (*Global settings*) tab > *Properties* agent Prerequisite: The users have the 'Use global agents Properties and Properties (Administration)' right.
Edit advanced properties	Users require this right in order to edit the fields in the *Advanced properties* section in the following agents: • on the tabs of the individual mailing lists > *Properties* agent Prerequisite: The users have the 'Use the lists' 'Properties' agent' right. • on the (*Global settings*) tab > *Properties* agent Prerequisite: The users have the 'Use global agents Properties and Properties (Administration)' right.
Use global agents 'Properties' and 'Properties' (Administration)	Users require this right in order to see and use the *Properties* and *Properties* (Administration) agents (on the (*Global settings*) tab).

Right	Description
Edit administrative properties	Users require this right in order to edit the fields in the *Administrative properties* section in the following agents: • on the tabs of the individual mailing lists > *Properties* agent Prerequisite: The users have the 'Use the lists' 'Properties' agent' right. • on the (*Global settings*) tab > *Properties* agent and *Properties* (Administration) agent Prerequisite: The users have the 'Use global agents Properties and Properties (Administration)' right.

Right	Description
Use 'Users' agent	Users require this right in order to see and use the *Users* agent (on the (*Global settings*) tab).

Right	Description
Use 'Actions' agent	Users require this right in order to see and use the *Actions* agent (on the (*Global settings*) tab).

Right	Description
Use 'Black list' agent	Users require this right in order to see and use the *Black list* agent (on the (*Global settings*) tab).

Right	Description
Use 'Email connector' agent	Users require this right in order to see and use the *Email connector* agent (on the tabs of the individual mailing lists).

Right	Description
Use 'Inbox & bounces' agent	Users require this right in order to see and use the *Inbox & bounces* agent (on the (*Global settings*) tab).

Right	Description
Use 'Content' agent	Users require this right in order to see and use the *Content* agent (on the (*Global settings*) tab).
Manage content data source	Users require this right in order to create new content data sources or delete content data sources in Inxmail Professional. Prerequisite: The users have the 'Use Content agent' right.

Right	Description
Use 'Target groups' agent	Users require this right in order to see and use the *Target groups* agent (on the (*Global settings*) tab and on the tabs of the individual mailing lists).
Add target groups	Users require this right in order to create new target groups. Prerequisite: The users have the 'Use Target groups agent' and 'Modify target groups' rights.
Delete target groups	Users require this right in order to delete target groups. Prerequisite: The users have the 'Use Target groups agent' right.
Modify target groups	Users require this right in order to manually change settings for a target group. Prerequisite: The users have the 'Use Target groups agent' right.

Right	Description
Use 'Reports' main tab	Users require this right in order to see and use the (Reports) main tab.

Right	Description
Use 'Files & web pages' agent	Users require this right in order to see and use the *Files & web pages* agent (on the (*Global settings*) tab).
Attach files to emails	Users require this right in order to attach files to emails (for example, to mailings or to subscribe and unsubscribe emails). Prerequisite: The users have the 'Use Mailings agent' right.
Add web page	Users require this right in order to create and edit web pages. Prerequisite: The users have the 'Use Files & web pages agent' right.
Delete file	Users require this right in order to delete uploaded files.

Right	Description
	Prerequisite: The users have the 'Use Files & web pages agent' right.
Delete web page	Users require this right in order to delete web pages created in Inxmail Professional. Prerequisite: The users have the 'Use Files & web pages agent' right.
Embed images in emails	Users require this right in order to insert images into emails (for example, in mailings or email sequences). Prerequisite: The users have the 'Use Mailings agent' right.
Publish web page	Users require this right in order to publish web pages created in Inxmail Professional. Prerequisite: The users have the 'Use Files & web pages agent' right.
Upload file and release for all lists	Users require this right in order to upload files in the following situations and release them for all mailing lists: • Uploading files on the (*Global settings*) tab > *Files & web pages* agent Prerequisite: The users have the 'Use Files & web pages agent' right. • Inserting images into mailings Prerequisite: The users have the 'Use Mailings agent' right. • Attaching files to mailings Prerequisite: The users have the 'Use Mailings agent' right.
Upload file and release for a list	Users require this right in order to upload files and release them for a mailing list: Note: For information on the situations where the files can be uploaded and released, see above ('Upload file and release for all lists' right).
Upload file and do not release	Users require this right in order to upload files but not release them. Note: For information on the situations where the files can be uploaded, see above ('Upload file and release for all lists' right).
Add webspaces	Users require this right in order to create new webspaces in Inxmail Professional. Prerequisite: The users have the 'Use Files & web pages agent' right and the 'Use webspaces' right.
Use webspaces	Users require this right in order to manage and use webspaces. Prerequisite: The users have the 'Use Files & web pages agent' right.

Right	Description
Start display test	Users require this right in order to start a new display test for a mailing. Prerequisite: The 'Display test' optional service was purchased and the users have the 'Use Mailings agent' right.
Start eye tracking test	Users require this right in order to start the eye tracking test. Prerequisite: The 'Eye tracking' optional service was purchased and the users have the 'Use Mailings agent' right.
Edit test mailing list	Users require this right in order to create and edit test mailing lists for sending test emails. Prerequisite: The users have the 'Use Mailings agent' right.
Send mailings	Users require this right in order to send mailings. Prerequisite: The users have the 'Use Mailings agent' right.
Send test emails	Users require this right in order to send test emails. Prerequisite: The users have the 'Use Mailings agent' right.
Bypass approval process	Users require this right in order to bypass the advanced approval process. In other words, users with this right can approve mailings using immediate approval even if the advanced approval process has been defined for these mailings.
Approve mailing	Users require this right in order to start immediate approval for mailings.
Delete mailing	Users require this right in order to delete mailings. This right is enabled by default for users with the 'User', 'Editor' and 'Administrator' roles (*Overview: Standard roles* page 577).

Right	Description
Use 'Email sequence' agent	Users require this right in order to see and use the *Email sequence* agent (on the tabs of the individual mailing lists).

Right	Description
Use 'Split-Tests' agent	Users require this right in order to see and use the *Split-Tests* agent (in the tabs of the individual mailing list).

Right	Description
Use 'Subscriptions' agent	Users require this right in order to see and use the *Subscriptions* agent (on the tabs of the individual mailing lists).

Right	Description
Use 'Synchronisation' agent	Users require this right in order to see and use the *Synchronisation* agent (on the (*Global settings*) tab in the *Administration* section).

Right	Description
Use 'Templates' agent	Users require this right in order to see and use the *Templates* agent (on the (*Global settings*) tab and on the tabs of the individual mailing lists).
Add templates	Users require this right in order to create new user templates and copy existing templates on the *Templates* agent > *User templates* tab. Prerequisite: The users have the 'Use Templates agent' and 'Change templates' rights.
Templates management	Users require this right in order to: • import template libraries (JSP template libraries or newsletter templates) or delete imported template libraries on the *Templates* agent > *Template libraries* tab. • create, rename, copy, paste, edit or delete data sources on the *Templates* agent > *Data sources* tab. Prerequisite: The users have the 'Use Templates agent' right.
Delete templates	Users require this right in order to delete existing user templates on the *Templates* agent > *User templates* tab. Prerequisite: The users have the 'Use Templates agent' right.
Change templates	Users require this right in order to edit existing user templates on the *Templates* agent > *User templates* tab. Prerequisite: The users have the 'Use Templates agent' right.

Right	Description
Use 'Test profiles' agent	Users require this right in order to see and use the *Test profiles* agent (on the (*Global settings*) tab and on the tabs of the individual mailing lists).
Edit test profiles	Users require this right in order to edit test profiles. Prerequisite: The users have the 'Use Test profiles agent' right.

Right	Description
Use 'Modules' agent	Users require this right in order to see and use the *Modules* agent (on the (*Global settings*) tab and on the tabs of the individual mailing lists).
Add modules	Users require this right in order to create new modules and copy existing ones. Prerequisite: The users have the 'Use Modules agent' and 'Change templates' rights.
Delete modules	Users require this right in order to delete modules created in Inxmail Professional. Prerequisite: The users have the 'Use Modules agent' right.
Change modules	Users require this right in order to edit modules created in Inxmail Professional. Prerequisite: The users have the 'Use Modules agent' right.

Right	Description
Use 'Access rights' agent	Users require this right in order to see and use the *Access rights* and *Access rights* (Administration) agents (on the (*Global settings*) tab).
Access to all mailing lists	Users require this right to automatically see and use the *Access rights* agent for all mailing lists created in Inxmail Professional (on the tab of the individual mailing lists). Note: To allocate the right for individual mailings lists, see *Setting up access rights for mailing lists* page 88.
Access to 'Global settings'	If this right is set, the user has access to the (*Global settings*) main tab. This applies even if the user was denied access rights for the Global settings using the *Access rights* agent.

36.1.6 Overview: Standard roles

After installing Inxmail Professional, you will find the following standard roles on the (*Global settings*) tab > *Users* agent > *Roles* tab:

- Administrator
  This role is intended for users who perform administrative tasks in Inxmail.
- User

This role is intended for users who do not perform administrative tasks in Inxmail Professional. Besides functions for creating and sending mailings, they do however require further functions (for example, functions for generating reports or creating target groups).

- Editor

  This role is intended for users who create and send mailings in Inxmail Professional.
- API user

  This role is intended for 'technical' users who use the API interface.

You can change the rights of these standard roles. You can also define new roles and assign rights to these roles (*Create new role* page 561).

There is also the hidden role of 'supervisor'. It is assigned to the 'supervisor' user (*Create new user* page 558).

The supervisor has **all** rights (that is, even more rights than the administrator).

The 'supervisor' role cannot be viewed or changed.

Inxmail GmbH assumes the 'supervisor' role for ASP customers.

For license customers, the company's system administrator takes on this role.

The standard roles have the following rights packages by default:

Rights package	**'Administrator' role**	**'User' role**	**'Editor' role**	**'API user' role**
Inxmail Professional Client	x	x	x	-
Automated registration on the Inxmail Professional Server using plug-ins	-	-	-	-
Inxmail API	-	-	-	x
Recipient columns	x	x	Only the 'Adjust column order, width and visibility' right	-
Lists	x	x	-	-
Mail server	x	-	-	-
Recipients	x	All rights except for the 'Reset bounce status' right	Only the 'Use Recipients agent' right	-
Recipient import	x	x	-	-
Export and copy recipients	X	X	-	-

Rights package	'Administrator' role	'User' role	'Editor' role	'API user' role
Plug-ins	Only the 'Add and delete plug-ins from lists' right	Only the 'Add and delete plug-ins from lists' right	-	-
Properties	All rights except for the 'Edit administrative properties' right	All rights except for the 'Use global agents Properties and Properties (Administration) ' right and 'Edit administrative properties' right	Only the 'Use the lists' 'Properties' agent' and 'Edit editorial properties' rights	-
Users	x	-	-	-
Actions	x	x	-	-
Black list	x	x	-	-
Email connector	x	x	x	-
Inbox & bounces	x	x	-	-
Content	x	x	Only the 'Use Content agent' right	-
Target groups	x	x	Only the 'Use Target groups agent' right	-
Use 'Reports' main tab	x	x	-	-
Files & web pages	x	All rights except for the 'Add webspaces' right	Only the 'Use Files & web pages agent', 'Attach files to emails', 'Embed images in emails', 'Upload file and do not release' and 'Use webspaces' rights	-

Rights package	'Administrator' role	'User' role	'Editor' role	'API user' role
Mailings	x	All rights except for the 'Send mailing without approval' right	Only the 'Use Mailings agent', 'Start display test' and 'Send test emails' rights	-
Start eye tracking test	x	x		
Approve mailing	x	x		
Delete mailing	x	x	x	
Email sequence	x	x	x	-
Subscriptions	x	x	x	-
Synchronisation	x	x	-	-
Templates	x	x	All rights except for the 'Templates management' right	-
Test profiles	x	x	Only the 'Use Test profiles agent' right	-
Text modules	x	x	x	-
Access rights	x	-	-	-
Access rights for 'Global settings'	-	-	-	-

36.2 Mail server

Overview

- *Configuring email receipt* page 581

  To be able to receive emails, you must set up accounts on the POP3 mail server in Inxmail Professional and connect them with the mail server.
- *Configuring email sending* page 583

To be able to send emails, you must set up accounts on the SMTP mail server in Inxmail Professional and connect them with the mail server.

36.2.1 Configuring email receipt

You must set up **at least** the following POP3 mail server accounts to receive emails:

- A News POP3 mail server account for receiving emails that belong to the categories *Replies*, *Spam*, *Autoresponder* or *Complaints*
- A Bounce POP3 mail server account for receiving emails that belong to the categories *Spam (bounces)*, *Soft bounce*, *Hard bounce*, *Unknown bounce* or *Autoresponder bounce*

All emails received in your News POP3 mail server account may be found later on the *Inbox & bounces* agent > *Inbox* tab. All emails received in your Bounce POP3 mail server account may be found later on the *Inbox & bounces* agent > *Bounces* tab.

You can define accounts on any number of POP3 mail servers. Inxmail Professional carries out automatic load balancing between the POP3 mail servers.

Important Do not enter your normal email account. Instead, configure a special account just for Inxmail Professional. Inxmail Professional will remove all emails from this account.

Step-by-step

1. Click the (*Global settings*) tab > *Mail server* agent > *Email receipt* tab. Then click the (*Add new mail server account*) button.

   The fields of the *Mail server settings* tab are enabled for you to set up a new POP3 mail server account.

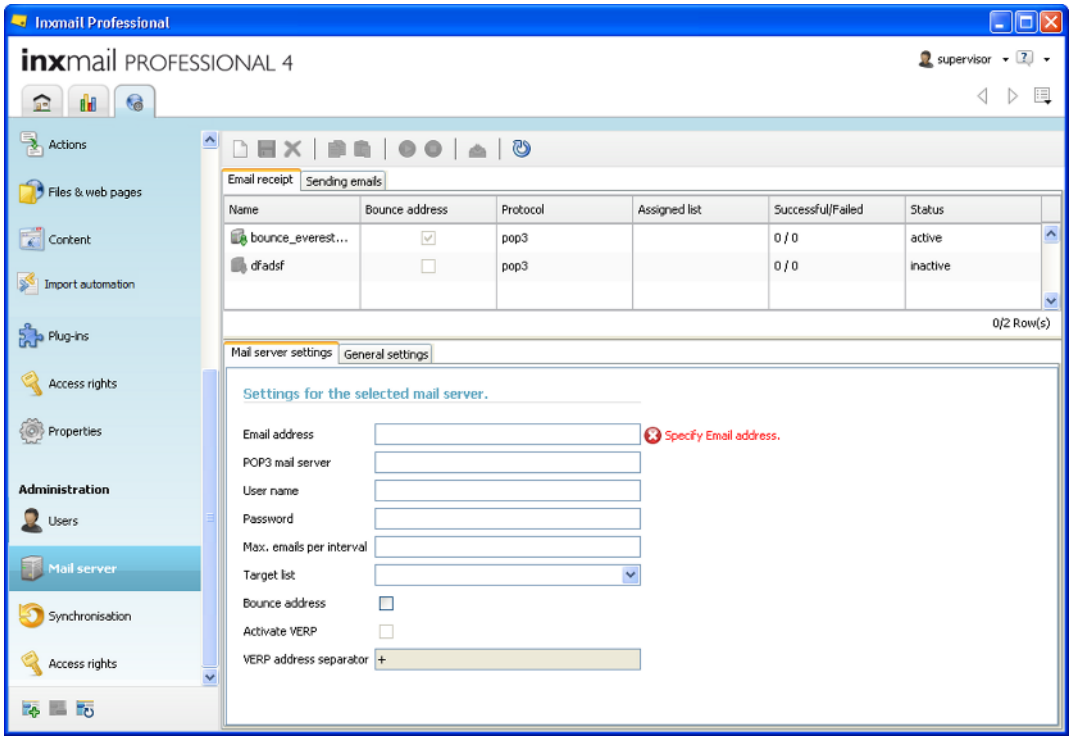


Figure 335: "Mail server" agent > "Email receipt" tab

2. Set up the POP3 mail server account on the *Mail server settings* tab using the relevant fields.

Field	Description
Email address	Mandatory field; email address of the Bounce or News account
POP3 mail server	Mandatory field; DNS name of the POP3 mail server
User name	Mandatory field; user name of the POP3 mail server
Password	Mandatory field; password of the POP3 mail server
Max. emails per interval	Maximum number of emails that can be retrieved from the POP3 mail server in one poll for email (for example, '100' to retrieve a maximum of 100 emails per poll; '0' to always retrieve all emails per connection) Note: If you do not restrict the number of emails to poll, this can result in a high server load and storage problems in the event that the email volume is very high.
Target list	Here you can define a mailing list created in Inxmail Professional to which the account relates.
Bounce address	Here you can define the POP3 mail server account as a Bounce account (enabled field) or as a News account (disabled field)
Activate VERP	Here you can activate VERP so that bounces can be later assigned to individual mailing lists and mailings.
VERP address separator	Character that the POP3 mail server uses as the VERP address separator

3. In addition, on the *General settings* tab, you can make settings that apply to **all** POP3 mail server accounts.

Field	Description
Receipt interval [s]	Here you can define the time interval (in seconds) after which Inxmail Professional will poll for emails from the POP3 mail server (for example, every 60 seconds). Prerequisite: The *Poll automatically for new emails* check box must be selected.
Poll automatically for new emails	If this check box is selected, Inxmail Professional will automatically poll for new emails from the POP3 mail server. Note: If you do not select the check box, emails are only retrieved from the POP3 mail server if you click the (*Poll emails*) button.

4. Save your settings.
   The account appears in the table.
5. To activate the connection to the POP3 mail server, select the POP3 mail server account in the table and then click the (*Activate connection to the mail server*) button.

You can also deactivate the connection to the POP3 mail server. To do this, click the (*Deactivate connection to the mail server*) button.

Upon successful activation, you will see the 'active' entry in the *Status* table column.

✓ You have finished setting up a new POP3 mail server account.

Additional information

In order to have all emails received in your News POP3 mail server account end up on the *Inbox & bounces* agent > *Inbox* tab, you must additionally specify the email address of the News account in the properties of your mailing list.

In order to have all emails received in your Bounce POP3 mail server account end up on the *Inbox & bounces* agent > *Bounces* tab, you must additionally specify the email address of the Bounce account in the properties of your mailing list.

If you click the (*Poll emails*) button, Inxmail Professional will instantly retrieve your bounces and returns from the POP3 mail server.

If no connection to the mail server is activated for a POP3 mail server account, you can select the created account in the table and then:

- edit the account settings on the *Mail server settings* and *General settings* tabs.
- delete the account using the (*Delete*) button.

Related Topics

» *Displaying and filtering returns* page 339

» *Setting up the properties of mailing lists* page 82

36.2.2 Configuring email sending

You can define accounts on any number of SMTP servers. Inxmail Professional carries out automatic load balancing between the SMTP servers.

Step-by-step

1. Click the (*Global settings*) tab > *Mail server* agent > *Sending emails* tab. Then click the (*Add new mail server account*) button.
   The fields in the *Mail account settings* section are enabled for you to set up a new SMTP mail server account.

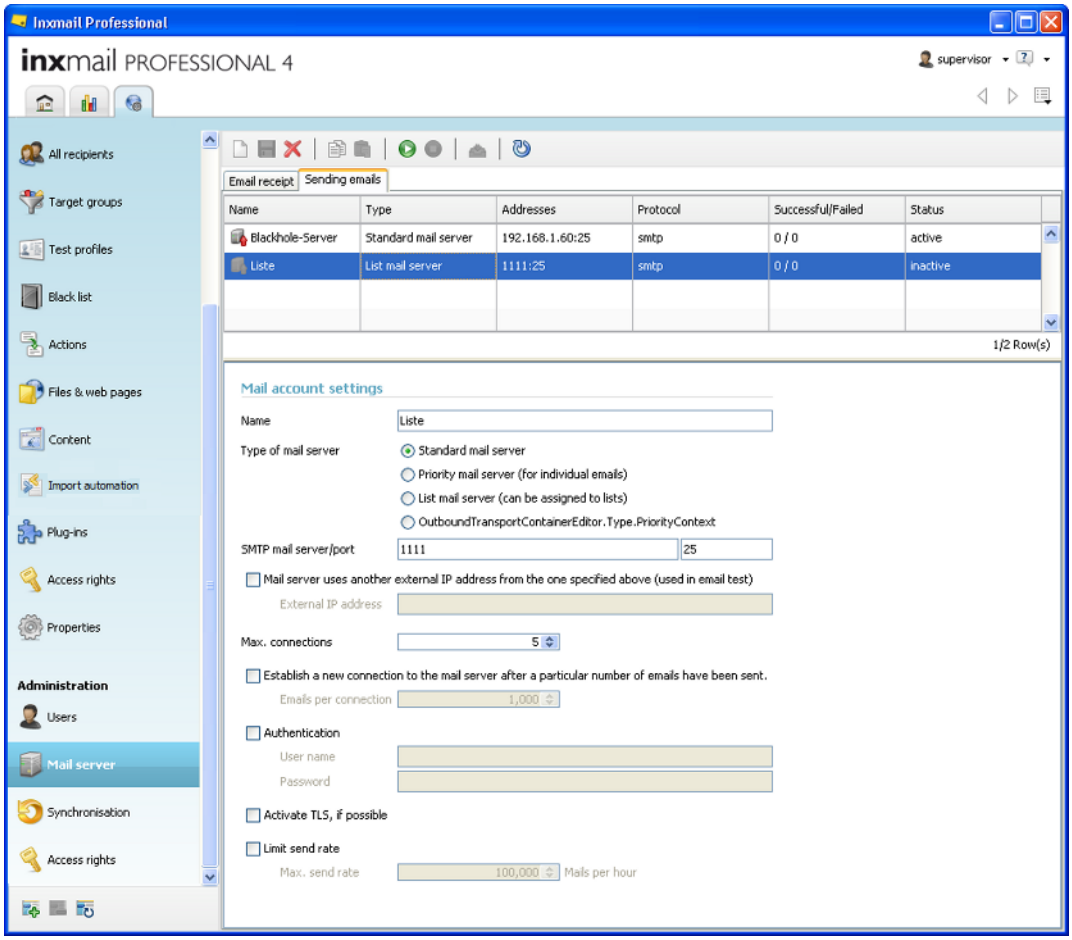


Figure 336: 'Mail server' agent > 'Sending emails' tab

2. Set up the SMTP mail server account in the *Mail account settings* section using the relevant fields.

Field	Description
Name	Name for the account you are creating Note: You can choose any name. If you do not enter a name, Inxmail Professional will use your entries in the *SMTP mail server* field.

Field	Description
Type of mail server	Mandatory field; assignment of the type of SMTP mail server: • Standard mail server This type of mail server sends mailings from all mailing lists. If you do not define a priority mail server, the standard mail server will also be used to send test and confirmation emails. • Priority mail server This type of mail server sends test and confirmation emails. If you do not define a priority mail server, the standard mail servers will be used to send test and confirmation emails. • List mail server This type of mail server sends only mailings from the mailing lists it is assigned to. You can assign one list mail server to every mailing list (*Setting up the properties of mailing lists* page 82). Use the list mail server if, for example, you wish to use a mail server explicitly for sending a mailing list. The list mail server then performs the tasks of the standard mail server and the priority mail server for this mailing list. List mail servers are typically used to send security-critical mailings and for encrypted sending. • List-specific priority mail server This type of mail server sends only test and confirmation emails from the mailing lists it is assigned to. You can assign one list-specific priority mail server to every mailing list (*Setting up the properties of mailing lists* page 82). Use the list-specific priority mail server if, for example, the list mail server assigned to a mailing list delays test emails when a mailing is sent.
SMTP mail server/port	Mandatory field; first field: DNS address of the SMTP mail server (for example, mail.company.de) Second field: port of the SMTP mail server
Mail server uses another external IP address from the one specified above (used in email test)	Host name that the mail server uses when communicating with other mail servers (that is, externally)
Max. connections	Maximum number of connections that the mail server can have to other mail servers at the same time Recommendation: A maximum of five simultaneous connections ensures a good sending speed.
Establish a new connection to the mail server after a particular	Here you can enter connection setup details for SMTP mail servers that only accept a limited number of emails.

Field	Description
number of emails have been sent	
Authentication	Here you can specify the user name and password for SMTP mail servers that require SMTP authentication.
Activate TLS, if possible	This setting is for encrypting the connection from the Inxmail Server to the SMTP mail server using the TLS protocol (if possible).
Limit send rate	Here you can limit the number of emails that can be sent per hour.

3. Save your settings.

   The account appears in the table.

4. To activate the connection to the SMTP mail server, select the account in the table and then click the (*Activate connection to the mail server*) button.

   You can also deactivate the connection to the SMTP mail server. To do this, click the (*Deactivate connection to the mail server*) button.

   Upon successful activation, the *Status* table column displays the 'active' entry.

✓ You have finished setting up a new SMTP account.

Additional information

If no connection to the mail server is activated for an SMTP mail server account, you can select the created account in the table and then:

- edit the account settings in the *Mail account settings* section.
- delete the account using the (*Delete*) button.

36.3 Global access rights (Administration)

36.3.1 Overview

By default, only persons assigned the role of *Supervisor* have access to the *Administration* section on the (*Global settings*) tab. The *Administration* section is not visible for other roles and users.

For other users or roles to be able to see the *Administration* section, you must set up the relevant access rights for them.

Users who have the access right for the *Administration* section automatically have access to the (*Global settings*) tab, and here they can see the *Administration* section.

However, they do not automatically see the agents of the *Administration* section (for example, the *Mail server* agent). For this, you must additionally assign the access rights for the individual agents to the users (*Create new user* page 558 and *Overview: Rights* page 566).

36.3.2 Setting up global access rights (Administration)

Step-by-step

1. Click the (*Global settings*) tab > *Access rights* (Administration) agent.
2. Enable all users and roles that are to have access to the *Administration* section.
3. Save your settings.

✓ You have assigned the access right for the *Administration* section to other users or roles.

36.4 Global properties (Administration)

36.4.1 Overview

You must set up the global properties (Administration) in Inxmail Professional in order that the following functions can be used:

- Quality and display test
- Web page linking and link tracking
- Sending of weekly status emails regarding server usage
- Use of conditions (for example, in mailing texts) that relate to recipient reactions (for example, 'HasClicked', 'HasOpened') (in so far as the recipients have given their consent)
- Block sending to unavailable recipients

36.4.2 Setting up global properties (Administration)

Step-by-step

1. Click the (*Global settings*) tab > *Properties* (Administration) agent.

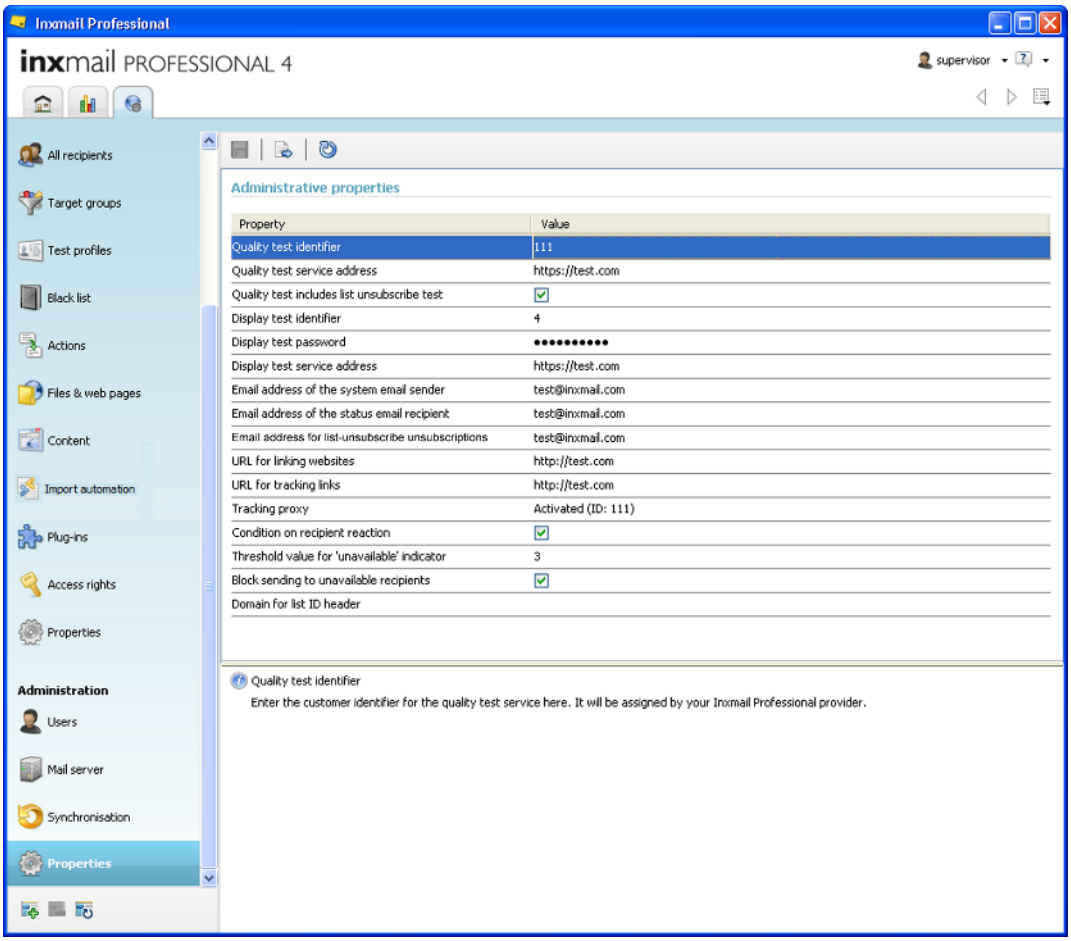


Figure 337: "Properties" (Administration) agent

2. Set up the global properties (Administration) in the *Administrative properties* section using the relevant fields:

Field	Description
Quality test identifier	ID number for the 'Quality test' - an Inxmail Professional service Note: The quality test is available to you as standard if you are an ASP customer. If you are a license customer, you can purchase the quality test (optional) and integrate it in Inxmail Professional. The quality test is used to check your mailing for the following: Content that has spam and phishing characteristics The deliverability of the mailing Whether all links are active Further information on the quality test can be found under *Quality test* page 230. Your ID number can be obtained from your Inxmail Professional provider.
Quality test service address	URL for the quality test call Note: For the anti-spam test contained in the quality test, Inxmail Professional calls a web service from a service provider. It requires the relevant URL for this call. You can obtain the URL from your Inxmail Professional provider.
Quality test includes list unsubscribe test	If this check box is selected, the unsubscription test of the quality test also checks whether a list-unsubscribe header is contained in the mailing (*Quality test* page 230).
Display test identifier	Your ID number for the 'Display test' - an Inxmail Professional service Note: You can purchase the display test (optional) and integrate it in Inxmail Professional. The display test allows you to view your mailing in various external email programs. Further information on the display test can be found under *Quality test* page 230 . Your ID number can be obtained from your Inxmail Professional provider.
Display test password	Password for the display test Your password can be obtained from your Inxmail Professional provider.
Display test service address	URL for the display test call You can obtain the URL from your Inxmail Professional provider.

Field	Description
Email address of the system email sender	Email address that is specified as the sender address for all system and administration emails (emails that can be sent to persons with administrative tasks, for example, notification emails regarding bounces or email connector errors) (example: a no-reply sender address) Example: This sender address is also used for the automated forwarding of bounces and returns (*Setting up automated management* page 340). Make sure you do not enter a sender address that will itself cause bounces or returns (because the person processing the email is on holiday, for example). Use a no-reply address such as 'noreply@company.com', for example. Note: If you do not enter an email address in this field, Inxmail Professional will automatically generate an email address.
Email address of the status email recipient	Email address to which a weekly status email on server usage is to be sent Leave the field empty if you do not require any weekly status emails.
Email address for list-unsubscribe unsubscriptions	Email address of the (news) POP3 receiving mail server account to which all unsubscriptions that were carried out via a list-unsubscribe header are sent. In this drop-down list, you can only select (news) POP3 receiving mail server accounts that are not assigned to any mailing list (*Configuring email receipt* page 581).
URL for linking web pages	Mandatory field; URL is required for the following: • The access of Inxmail Professional internal web pages (for example, web pages that were created with JSP templates; *JSP templates for web pages* page 416) • The [%application-url] (for example, link to the alternative view; *Mailings (advanced editing)* page 364) Note: You can enter the same URL as in the *URL for tracking links* field. Example: http://my.inxmail-server.de:8080/inxmail2
URL for tracking links	Mandatory field; URL is required for the following: • To count how many times a link is clicked (*Mailings (advanced editing)* page 364) • To redirect links in the mailing Example: http://my.inxmail-server.de:8080/inxmail2

Field	Description
Tracking proxy	Here you can activate the tracking of links using a tracking proxy. Prerequisite: You have the appropriate license for a tracking proxy. To do so, click the button, enable the *Yes* option button in the dialog box and enter the ID of the tracking proxy. Note: If you activate the tracking proxy, make sure that the URL refers to the tracking proxy in the *URL for tracking links* field.
Activate condition for recipient reactions	If this check box is selected, conditions that relate to recipient reactions (for example, 'HasClicked' or 'HasOpened'; *Recipient functions* page 529) can be incorporated into mailing texts, target group definitions or actions, for example. Note: You require the consent of your recipients in order to use these condition functions.
Threshold value for 'unavailable' indicator	Definition of the threshold value (number of hard bounces) for unavailable recipients (email addresses) Enter the number of hard bounces for an email address, as of which the recipient is automatically flagged as 'unavailable' (that is, a red dot appears in front of the recipient in the recipient table; *Information in the recipient table* page 92). Note: If you enter the value '0' in this field, email addresses are never flagged as 'unavailable'. Note: Email addresses flagged as 'unavailable' can be automatically excluded from the sending of mailings and emails in Inxmail Professional (*Block sending to unavailable recipients* field). Note: You can manually cancel the 'unavailable' flag for a recipient. To do this, right-click the user in the recipient table and click *Select recipient as available* on the context menu.
Block sending to unavailable recipients	If this check box is selected, recipients flagged as 'unavailable' (see description of the *Threshold value for 'unavailable' indicator* field) are excluded when sending mailings and emails.
Domain for list ID header	All emails sent via Inxmail Professional automatically contain a list ID header in the following format: 'Descriptive list name (optional)' <Mail-ID.List-ID.localhost> This field specifies whether the header contains a particular domain in place of the 'localhost' specification. Note: If you leave this field empty, 'localhost' will be used.

3. Save your settings.

✓ You have finished setting up the global properties (Administration).

37 Settings (optional)

You will learn which settings you **can** additionally make in the software program to ensure Inxmail Professional is configured to meet your requirements in this chapter:

- Adjusting preconfigured settings for the assignment of bounces and returns to categories (for example, to the 'Spam' category)
- Setting up the email connector in order that emails created in a CMS system or an email client may be automatically sent using Inxmail Professional
- Setting up webspaces to be able to save files to webspaces

Important Note that changes to these settings can impact upon the functionality of Inxmail Professional.

37.1 Bounces and returns

37.1.1 Overview

If you have sent mailings, you will almost always receive returns (replies) and bounces (undeliverable emails).

By default, bounces and returns in Inxmail Professional end up on the (*Global settings*) tab > *Inbox & bounces* agent > *Bounces* tab or *Inbox* tab. Inxmail Professional assigns returns and bounces to particular categories (for example, 'Spam', 'Reply', 'Soft bounce' or 'Hard bounce'). You can adjust this assignment function as follows:

- *Upgrade soft bounces to hard bounces* page 592

  If you want bounces in the 'Soft bounce' category to be upgraded to and handled as bounces in the 'Hard bounce' category after a particular number of errors (that is, after a particular number of undeliverable emails for an email address), you must make specific settings.
- *Edit category rules* page 593

  Returns and bounces are assigned to categories using defined category rules. You can change these category rules.

Related Topics

» *Bounces and returns* page 338

37.1.2 Upgrade soft bounces to hard bounces

Note Bear in mind that upgrading soft bounces to hard bounces can slow down email sending by up to 30 per cent.

Step-by-step

1. Click the (*Global settings*) tab > *Inbox & bounces* agent > *Options* tab.

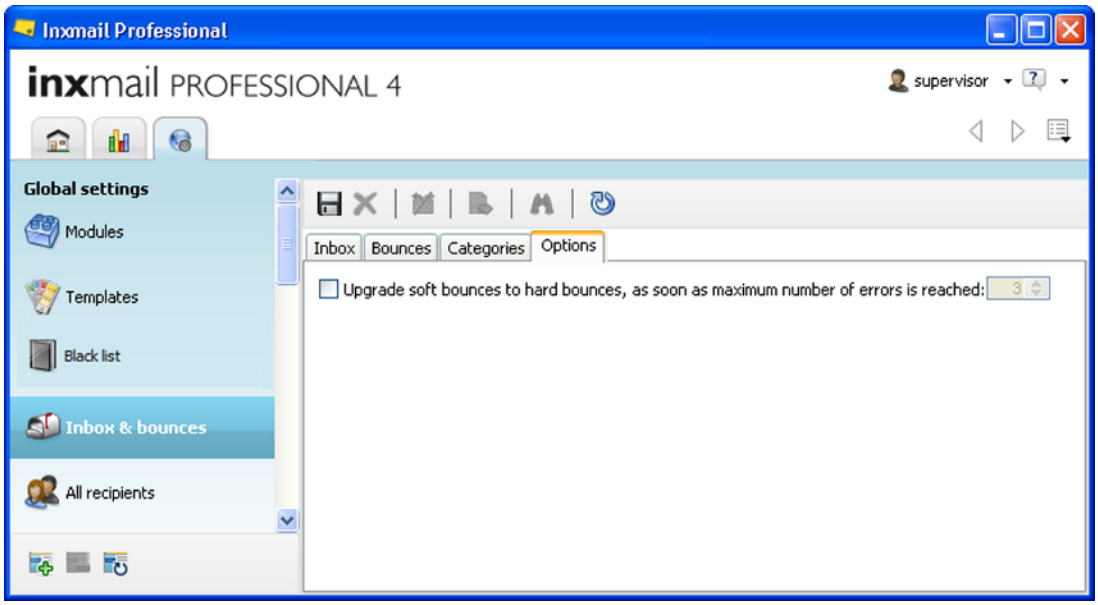


Figure 338: 'Inbox & bounces' agent > 'Options' tab

2. Select the check box.
3. Enter the number of errors (that is, the number of undeliverable emails to an email address) from which Inxmail Professional is to upgrade soft bounces to hard bounces.
4. Save your settings.

✓ Inxmail Professional will, as of now, upgrade soft bounces to hard bounces according to your settings.

37.1.3 Edit category rules

Important Only change the rules if you understand Perl syntax! Syntax errors may cause the *Inbox & bounces* agent to no longer work correctly.

Step-by-step

1. Click the (*Global settings*) tab > *Inbox & bounces* agent > *Categories* tab.
2. In the table, select the category for which you would like to edit the category rules.
3. Click the (*Show/hide rule editor*) button.

The rule editor is displayed.

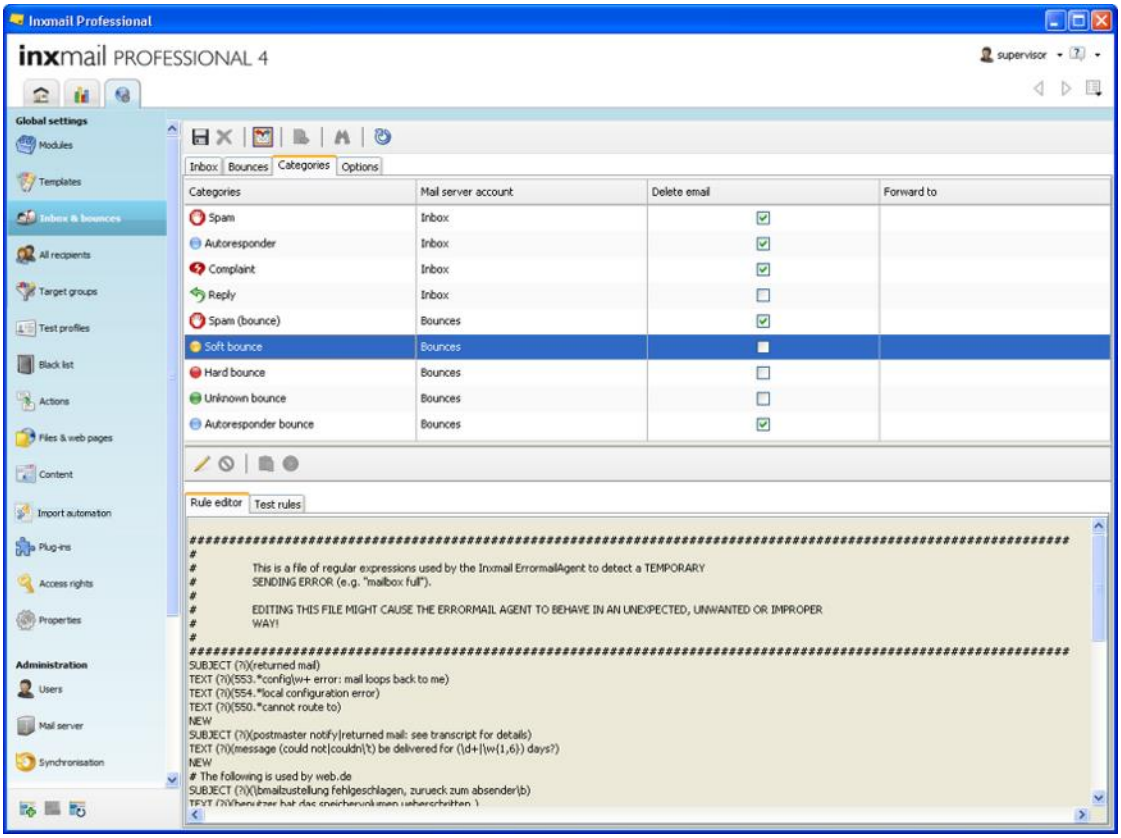


Figure 339: Rule editor

4. On the *Rule editor* tab, click the (*Edit*) button.

   You can cancel the editing of a rule using the (*Cancel*) button.

5. Edit the category rules in the rule editor. Note that information on the type of row appears at the beginning of every row. The following types of row exist:
   - NEW: separates individual rule blocks
   - SUBJECT: relates to the 'Subject' line
   - TEXT: relates to the content of an email
   - HEADER: relates to the email header (is used for the definition of the spam level, for example)
   - DSN (Delivery Status Notification): relates to a field in the email content (is used for bounces that conform to a particular format, for example; cannot be combined in a rule block with SUBJECT or TEXT)

Example

SUBJECT (?i)(out(\W|_|)+of(\W|_|)+(the(\W|_|)+)?of+ice)

SUBJECT (?i)(away note|vacation|holiday|notice of absence)

SUBJECT (?i)(autoresponder|automated response)

TEXT (?i)(autoresponder|automated response)

NEW

TEXT (?i)(autoresponder|automated response)

TEXT (?i)(out(\W|_|)+of(\W|_|)+(the(\W|_|)+)?of+ice)

TEXT (?i)(away note|vacation|holiday|notice of absence)

In the example, the logical linking reads as follows:

((1st row OR 2nd row OR 3rd row) AND 4th row) OR (6th row OR 7th row OR 8th row)

Therefore, the category applies if one of the first three SUBJECT rules and also the (upper) TEXT rule applies **or** one of the three (lower) TEXT rules applies.

Note 'Spam' and 'Spam bounce' categories: If you want mailings with low spam characteristics to be assigned to the 'Spam' or 'Spam (bounce)' category, you can, for example, lower the spam level from '8' (default) to '4' in the relevant category rule.

6. To test your changes to the category rules, click the *Test rules* tab and then proceed as follows:

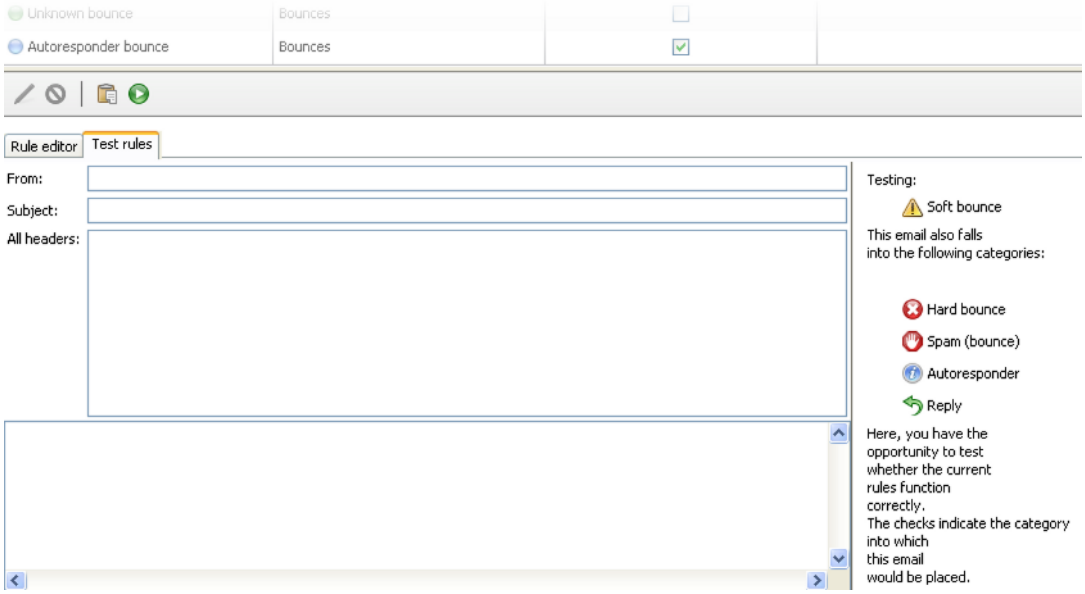


Figure 340: Test rules

a. On the *Inbox* or *Bounces* tab, select an email for performing the test.

b. To transfer this email over for the test, click the *Categories* tab > *Test rules* tab. From there, click the (*Insert selected email*) button.
The email data is inserted into the entry fields on the *Test rules* tab.

c. To start the test, click the (*Start test*) button.
You will see the result of the test displayed in the section to the right of the entry fields.

7. If you want to apply your changes for the category, save your settings.

8. If you want to discard your changes, click the (*Cancel*) button on the *Rule editor* tab.

✓ As of now, Inxmail Professional will assign returns and bounces in accordance with the changed category rules.

37.2 Email connector

37.2.1 Overview

If you use the email connector, users can create emails in a CMS system or an email client. The users then send the emails to a particular email address in Inxmail Professional. Inxmail Professional automatically forwards the email as a mailing to defined recipients.

You can also specify that the email connector forwards recipients' replies to the sent mailings (for example, to all other mailing list recipients).

To be able to use the email connector, the following settings are necessary:

- *Set up a mailing list* page 596

  The Inxmail Professional email connector is always assigned to a mailing list, so you must first create a mailing list including recipient data. Then you must assign the mailing list to a POP3 mail server account (to whose address the users can send emails from the CMS system).

  Note ASP customers cannot set up the Inxmail Professional POP3 mail server account required for the mailing list themselves. If you are an ASP customer and wish to use the email connector, get in touch with your Inxmail Professional contact person to have this set up for you.

- *Set up the email connector* page 598

  To be able to use the email connector for the current mailing list, you must set up and activate the email connector.

- *Set up, display and filter the log* page 600

  To display which emails the email connector has or has not processed, you must set up logging for the email connector and then call it up.

Related Topics

» *Using the email connector* page 509

37.2.2 Set up a mailing list

Prerequisites

The following agents are displayed on the tab of the mailing list (*Adding/deleting additional agents to mailing lists* page 80):

- *Email connector* agent
- *Mailings* agent

Step-by-step

1. Create a new mailing list on the (*List overview*) tab and define the mailing list recipients to whom the email connector is to send the mailings (*Creating and setting up mailing lists* page 76).

2. Add the *Email connector*, *Mailings* and *Subscriptions* agents to the mailing list (*Creating and setting up mailing lists* page 76).
3. Save your settings.
4. If you are a license customer, set up a new POP3 mail server account for email receipt on the (*Global settings*) tab > *Mail server* agent > *Email receipt* tab (*Configuring email receipt* page 581).
   Make sure you do the following:

   Note ASP customers cannot set up the Inxmail Professional POP3 mail server account required for the mailing list themselves. If you are an ASP customer and wish to use the email connector, get in touch with your Inxmail Professional contact person to have this set up for you.

   a. In the *Target list* field on the *Mail server settings* tab, enter the mailing list (created beforehand) to whose recipients the email connector is to forward the mailings.
   b. Check on the *General settings* tab whether the *Poll automatically for new emails* check box is selected. If it is not, enable it.
5. Save your settings.

✓ You have finished setting up the mailing list required for the email connector. As soon as you activate the email connector (*Set up the email connector* page 598), Inxmail Professional forwards all emails received in the POP3 account as a mailing to the mailing list recipients.

37.2.3 Set up the email connector

Step-by-step

1. Click the tab of the mailing list > *Email connector* agent > *Settings* tab.

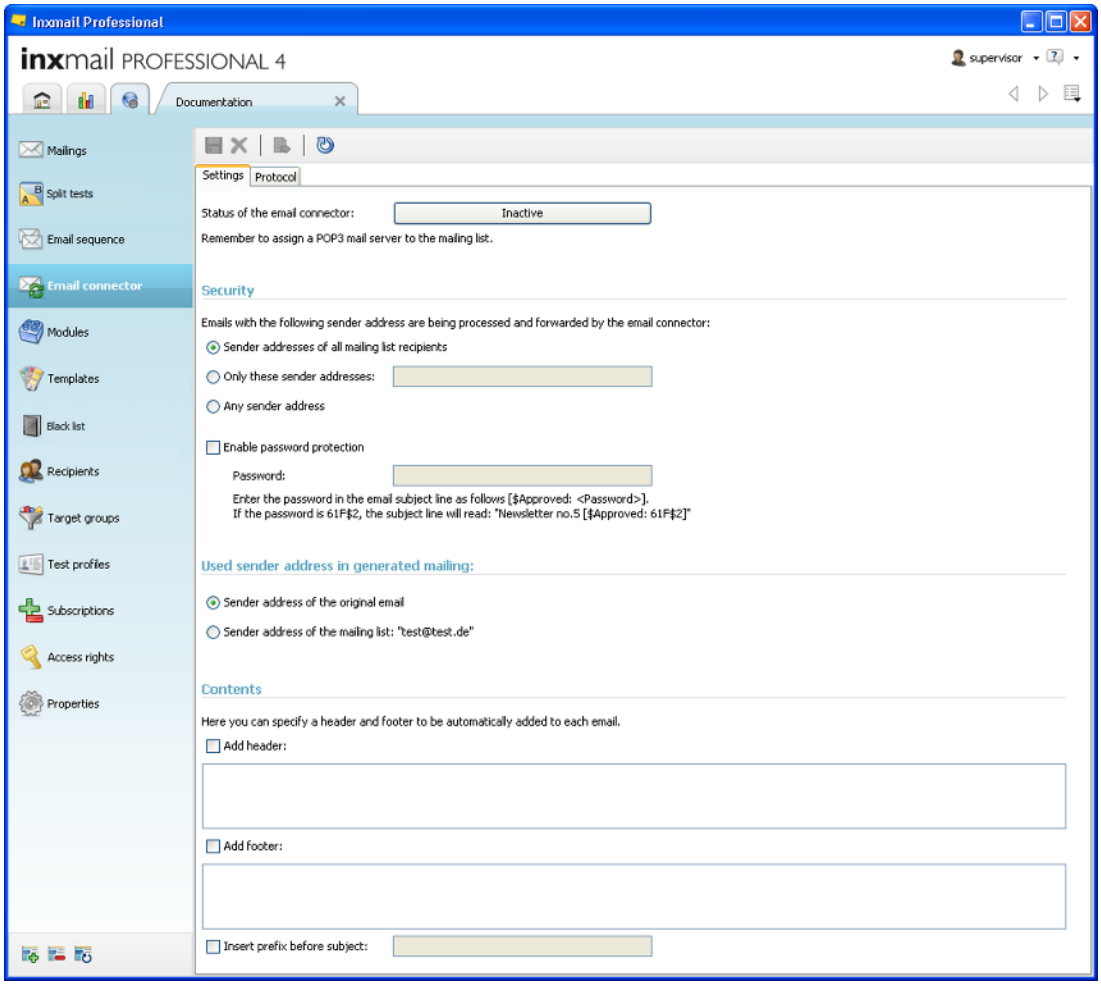


Figure 341: "Email connector" agent > "Settings" tab

2. To activate the email connector, click the *Inactive* button.

   If you have not yet set up a POP3 mail server account for the mailing list (*Set up a mailing list* page 596), an error message is displayed.

3. Use the following fields in the *Security settings* section to specify the persons (that is, sender addresses) from which the email connector forwards emails (for example, replies to mailings) to the mailing list recipients:

Field	Description
Sender addresses of all mailing list recipients	If this option button is selected, the email connector forwards emails from all mailing list recipients.
Only these sender addresses	If this option button is selected, the email connector forwards emails only from the email addresses specified in the entry field. Note: Separate the email addresses with a comma.

Field	Description
Any sender address	If this option button is selected, the email connector forwards emails from all persons (including persons to whom the mailing has been forwarded by a recipient for information only, for example).
Enable password protection	If this check box is selected, the email connector accepts only emails whose subject contains the password defined in the entry field (for example, the email subject must contain '[$Approved: r&tzfb2]' for the defined password 'r&tzfb2'). Note: This way, you can ensure that no unauthorised persons send emails when the *Any sender address* option button is selected.

4. Use the following fields in the *Used sender address in generated mailing* section to set up the sender address for the mailings sent by the email connector:

Field	Description
Sender address of the original email	If this option button is selected, the original sender address of the (forwarded) email is used.
Sender address of the mailing list 'xxx'	If this option button is selected, the sender address configured for the mailing list is used (*Setting up the properties of mailing lists* page 82).

5. Use the following fields in the *Contents* section to specify whether Inxmail Professional should add texts to the header and footer and/or to the subject before forwarding the mailings:

Field	Description
Add header, Add footer	If these check boxes are selected, you can specify texts that Inxmail Professional then inserts in the header or footer of the mailings before forwarding them (for example, a personalised salutation in the header, a copyright notice or unsubscribe link in the footer). Note: You can also use a placeholder here for personalisation purposes (*Mailings (editing)* page 189).
Insert prefix before subject	If this check box is selected, you can specify a prefix that Inxmail Professional then inserts in the subject of the mailing before forwarding it (for example, your company name).

6. Save your settings.

✓ You have activated and set up the email connector. Inxmail Professional will now forward all emails received in the POP3 account (linked with the mailing list) to the mailing list recipients.

37.2.4 Set up, display and filter the log

Step-by-step

1. Click the tab of the mailing list > *Email connector* agent > *Log* tab.

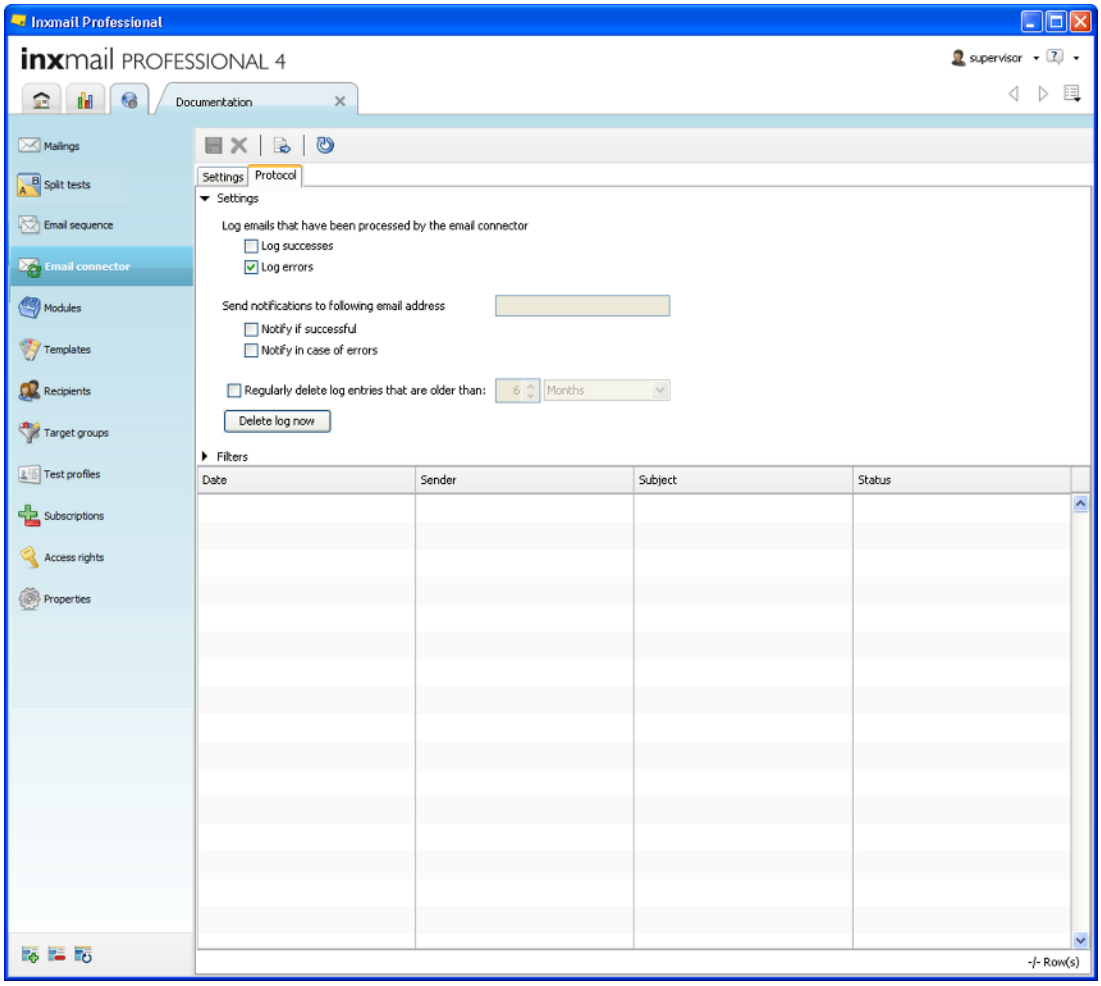


Figure 342: "Email connector" agent > "Log" tab

2. Use the following fields to specify whether Inxmail Professional should log which emails the email connector has or has not processed:

Field	Description
Log successes	If this check box is selected, the emails that were successfully processed by the email connector will be logged on the current tab.
Log errors	If this check box is selected, Inxmail Professional creates a log entry if the email connector could not process an email. This allows you to check whether your email was actually sent as a mailing by the email connector.

3. Use the following fields to specify whether Inxmail Professional should send automatic notifications when mailings are successfully or incorrectly sent by the email connector:

Field	Description
Send notifications to following email address	Email address to which Inxmail Professional sends the relevant notifications
Notify if successful	If this check box is selected, Inxmail Professional sends notifications when mailings are successfully sent.
Notify in case of errors	If this check box is selected, Inxmail Professional sends notifications when mailings are unsuccessfully sent.

4. Specify whether Inxmail Professional should regularly delete the log entries for the email connector. In the *Regularly delete log entries that are older than:* field, you can additionally specify the interval of days, weeks, months or years at which the entries should be deleted.

   You can also delete the log entries manually. To do this, click the *Delete log now* button.

   A dialog box appears.

   Specify in the dialog box whether Inxmail Professional should delete all log entries for the email connector or only log entries that were created a particular number of days, weeks, months or years ago.
5. Save your settings.
6. To filter the log entries, proceed as follows:
   a. To expand the filter settings, click *Filters*.
   b. Use the option buttons (*Do not use a date filter*, *Last … days*, *From… to…*) to define whether a date filter is to be applied.
   c. Use the *Status* check box and the list box to specify whether emails are to be filtered by their (email connector processing) status.
   d. Click the *Apply filter* button.

      The log display is updated.

✓ You have set up logging for the email connector. The log entry table now contains only the log entries that match your filter settings.

37.3 Webspaces

37.3.1 Overview

A webspace is a storage location on a server where authorised users can upload files (for example, images, texts).

You can have Inxmail GmbH set up a new webspace for you (inxshare).

Alternatively, you can use your own webspace (that is, a WebDAV, FTP or FTPS server) in Inxmail Professional. For this, you must add this webspace and set it up in Inxmail Professional.

Related Topics

» *Using webspaces* page 460

37.3.2 Add new webspace

Step-by-step

1. To open the *Set up new webspace* dialog box, click the (*Add new webspace*) button on the (*Global settings*) tab > *Files & web pages* agent > *Webspaces* tab.
   A dialog box appears.

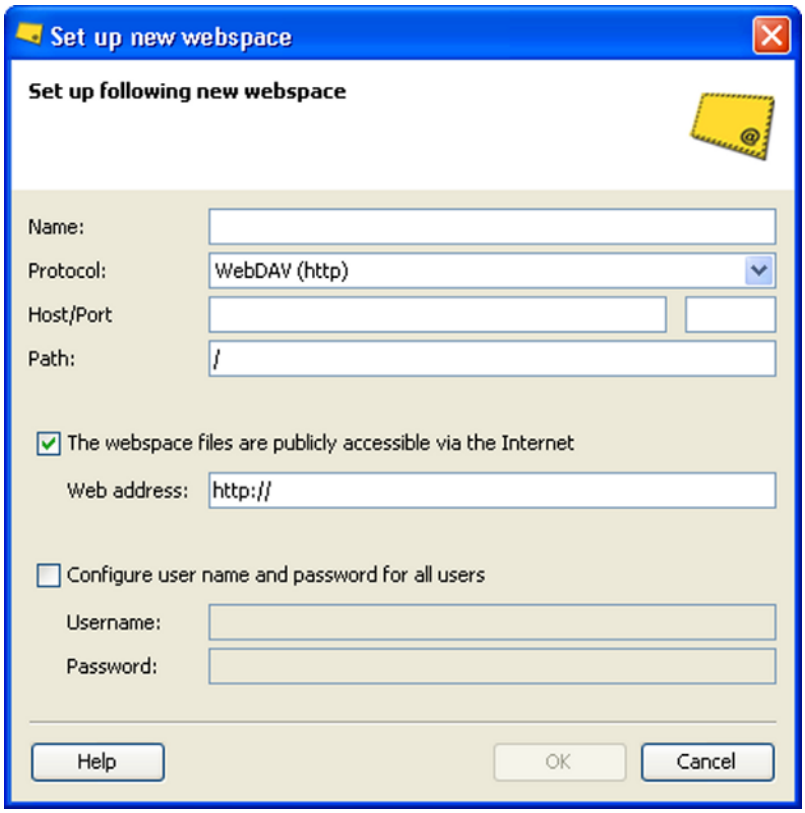


Figure 343: 'Set up new webspace' dialog box

2. Set up the webspace in the dialog box using the relevant fields.

Field	Description
Name	Webspace name Note: If you do not enter a name, Inxmail Professional will automatically use the host name as the webspace name.
Protocol	The protocol used when uploading files to/downloading files from the webspace
Host/Port	(Mandatory field) Host field: host of the webspace Port field: port of the webspace Note: You only need to enter a port if you are not using a standard port.

Field	Description
Path	Webspace path which authorised users can access (that is, either the entire webspace or only a directory of the webspace) • Entire webspace: '/' • A particular directory: '/pics'
The webspace files are publicly accessible via the Internet	Select the check box if you want users to be able to reference images stored on the webspace in their mailings. Enter in addition the web address of the webspace (for these linked images can only be displayed in the recipients' web browser if the check box is selected).
Configure user name and password for all users	If you would like all authorised users to be automatically logged in when they access the webspace (that is, no password query appears when the webspace is accessed), select the check box and enter the user name and password for the webspace. If the check box is disabled, users must always log in with the user name and password for the webspace.

3. Confirm your entries by clicking *OK*.

✓ The webspace appears in the table. Authorised users can now use the webspace.

Additional information

You can select a created webspace in the table and then:

- edit it using the (*Edit*) button.
- make a copy using the (*Copy*) and (*Paste*) buttons.
- delete it using the (*Delete*) button.

  The webspace is deleted from Inxmail Professional. However, the uploaded data will remain on the webspace.

38 Integration of additional applications (optional)

You will learn which optional applications you can integrate in Inxmail Professional (note that some are subject to additional charges) in this chapter:

- Inxmail Professional API interface for connecting other IT systems to Inxmail Professional and synchronising data
- DBSync, an Inxmail Professional database synchronisation service for synchronising recipient data in Inxmail Professional with that from SQL databases (unidirectional)
- Own plug-ins or plug-ins already developed (by Inxmail GmbH or its partners) to enhance the functionality of Inxmail Professional

For further information on these applications and on ordering, contact us at customer-care@inxmail.de.

In addition, you will learn which settings you must make for the integration of these applications.

38.1 Inxmail Professional API

The API interface, which can be integrated optionally, is the Inxmail Professional programming interface for Java, NET and PHP. It enables you to connect Inxmail Professional to your existing IT landscape, for example, to the following systems:

- CMS (for example, Typo3, RedDot)
- CRM system (for example, CAS genesisWorld, Microsoft Dynamics CRM)
- ERP system (for example, SAP)
- eCommerce shops (for example, Oxid eSales, XtCommerce)

The API interface enables data exchange between Inxmail Professional and your system. Therefore, you can synchronise recipient data, for example. Using fully automated processes, you can use the data from your system to create mailings in Inxmail Professional, fill them with content and send them.

You must have programming knowledge (Java, NET or PHP) to use the API interface.

Related Topics

Information on installing and using the API interface can be found in the Inxmail Professional API interface manuals for Java, .Net and PHP5. You can download them at http://community.inxmail.de by selecting *Software Downloads* > *Inxmail API*.

38.2 Inxmail Professional DBSync

38.2.1 Overview

DBSync is an Inxmail Professional database synchronisation service that can be integrated optionally. It allows you to synchronise recipient data from several SQL databases of your choice with Inxmail Professional (unidirectional). This way, every new customer created in your customer database can be immediately included in your email marketing activities without the need for any programming.

Information on installing Inxmail Professional DBSync can be found in the manual for the DBSync service. You can download it from the Inxmail Community (http://community.inxmail.de) by selecting *Software Downloads* > *Inxmail DBSync*.

For Inxmail Professional to synchronise the recipient data, you must set up your DBSync sources (SQL databases) in Inxmail Professional.

38.2.2 Setting up the DBSync source

If you are using DBSync as an ASP customer, the following settings are already preconfigured.

If you are using DBSync as a license customer, you must make these settings. Note that only Inxmail Professional administrators with the following rights can make the settings:

- You have access rights for the (*Global settings*) tab > *Administration* section (*Global access rights (Administration)* page 586).
- You have rights to use the functions of the *Synchronisation* agent (*Overview: Rights* page 566).

Prerequisites

The *Synchronisation* agent is displayed on the (*Global settings*) tab (*Adding/deleting additional agents to mailing lists* page 80).

Step-by-step

1. Click the (*Create new sync source*) button on the (*Global settings*) tab > *Synchronisation* agent > *Sync sources* tab.

The fields on the *Sync sources* tab are enabled for you to set up the new DBSync source.

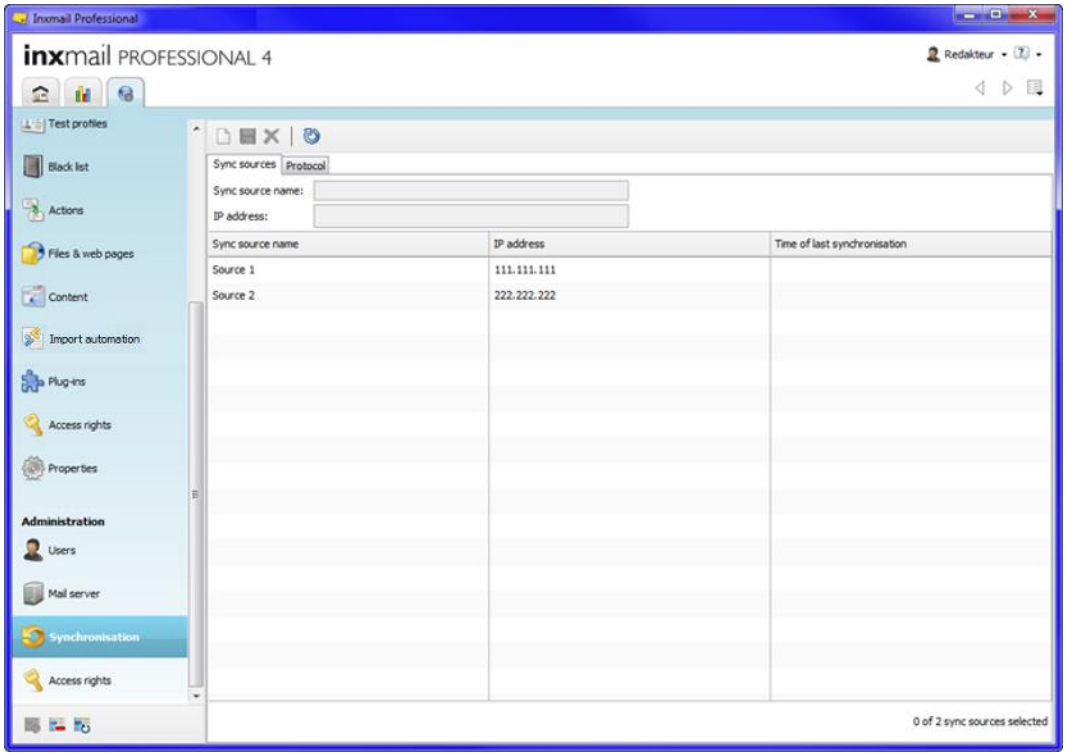


Figure 344: "Synchronisation" agent > "Sync sources" tab

2. To connect the relevant SQL database, enter a name for the synchronisation source and the IP address.
3. Save your settings.

✓ The new synchronisation source appears in the table. As of now, the DBSync service will detect if data in the synchronisation source changes and will automatically synchronise the data in Inxmail Professional.

Additional information

On the *Log* tab, you can track when the last 200 synchronisations took place.

38.3 Plug-ins

38.3.1 Overview

To enhance the functionality of Inxmail Professional, you can optionally integrate plug-ins as agents in Inxmail Professional.

To use a plug-in, users will require all rights used by the plug-in. Otherwise, users will receive an error message as soon as they click the plug-in agent.

You can either develop your own plug-ins that fulfil your company-specific requirements or you can install and configure already existing plug-ins (for example, plug-ins for geomarketing reports, connections to web analytics tools or social networks such as Twitter).

Information about existing Inxmail Professional plug-ins and ordering options can be found at http://community.inxmail.de under *Plug-in Store*.

Information on the technical requirements for creating plug-ins can be found at http://community.inxmail.de under *Technical know-how* .

Note that you will require particular rights in order to develop plug-ins (*Overview: Rights* page 566 > 'Inxmail API' rights package).

Note We would be pleased if you could send us the plug-ins you have developed, as we can then make them accessible to other customers at http://community.inxmail.de. Information on how Inxmail GmbH can support you in marketing your plug-ins can be found at http://community.inxmail.de under *Marketing and Distribution*.

In order to use plug-ins in Inxmail Professional, the following settings are necessary:

- *Installing a plug-in* page 607
  To be able to use plug-ins in Inxmail Professional, you must install them.
- Depending on the plug-in, you may then have to make the following settings:
  - *Specifying access (plug-in-proxy)* page 610
  - *Configuring the plug-in* page 611
- *Uninstalling a plug-in* page 612
  To remove plug-ins integrated in Inxmail Professional, you must uninstall them.

Related Topics

» *Using plug-ins* page 510

38.3.2 Installing a plug-in

Step-by-step

Open the *Install plug-in* dialog box as follows:

1. Click the (*Global settings*) tab > *Plug-ins* agent.

The table displays all plug-ins that are already installed.

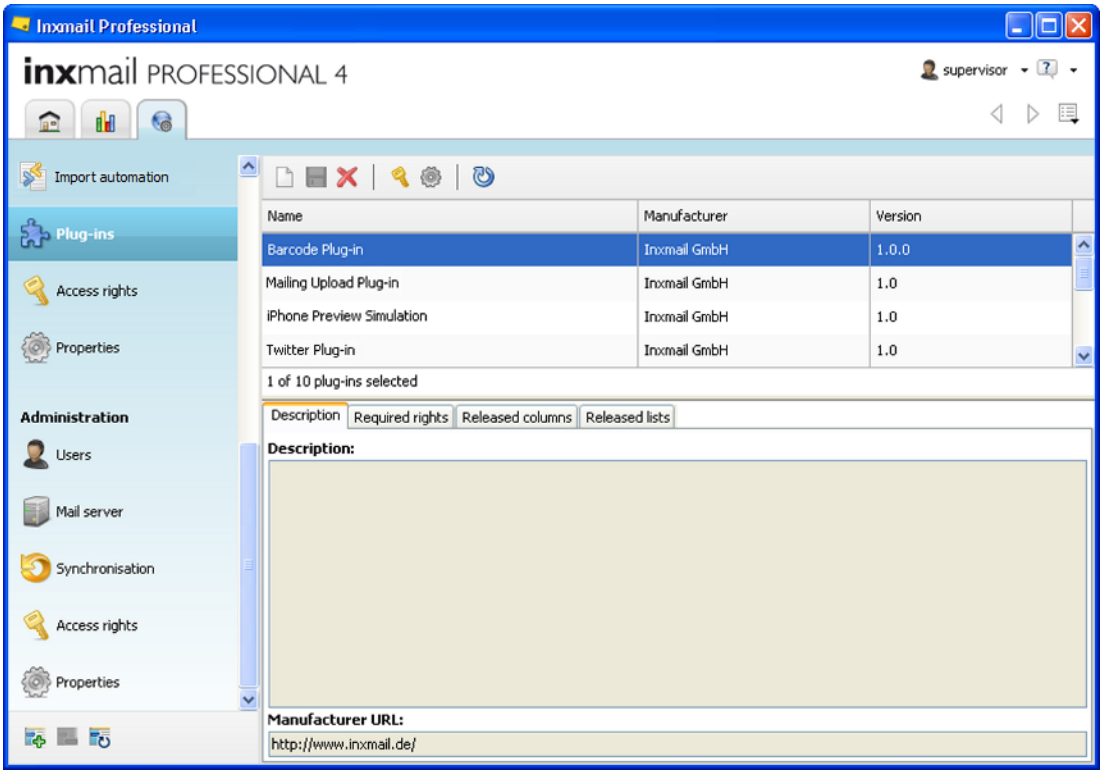


Figure 345: "Plug-ins" agent

2. Click the (*Install plug-in*) button.

   A dialog box appears.

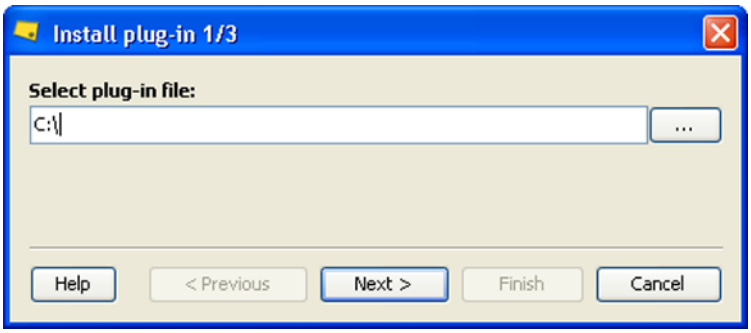


Figure 346: "Install plug-in" dialog box 1/3

3. In the dialog box, select the plug-in's .ipd file to be installed.
4. Click *Next*.

The dialog box shows all rights that the plug-in requires when run (for example, the 'Modify recipient' right if the plug-in changes recipient data when it is run).

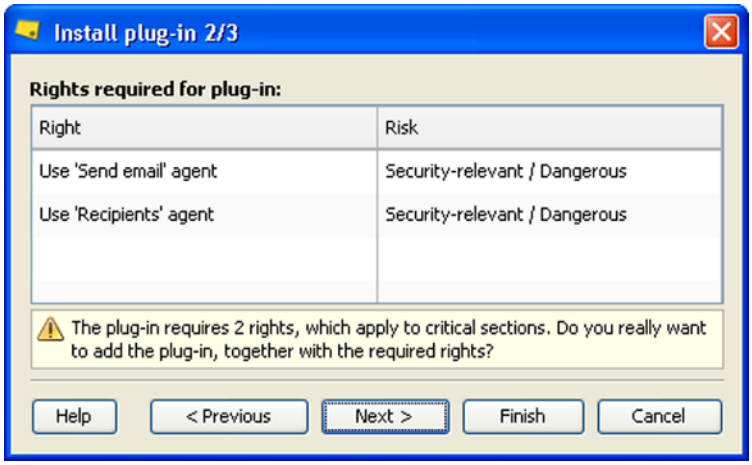


Figure 347: "Install plug-in" dialog box 2/3

The *Risk* column in the table shows whether the plug-in requires rights that affect critical areas (for example, because the rights enable changes to recipient data or mailings).

5. Click *Next* to confirm that the plug-in may be installed with the displayed rights.
6. Alternatively, click the *Finish* button if the *Next* button is greyed out. In this case, the next dialog step is not necessary for the plug-in.
7. The dialog box shows all mailing lists or sections of the (*Global settings*) tab to which the plug-in can be added.

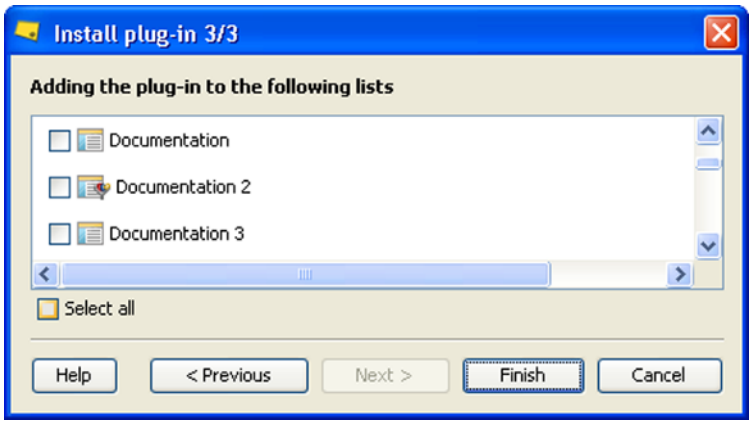


Figure 348: "Install plug-in" dialog box 3/3

The *.ipd file specifies to which mailing lists or sections you can add the plug-in.

In addition, the file specifies whether the plug-in is automatically added as an agent in the mailing lists or sections through the installation (or whether you can subsequently add the plug-in as an agent; *Creating and setting up mailing lists* page 76).

8. Enable the mailing lists or sections to which you would like to add the plug-in.
9. Click *Finish*.

The table displays the newly installed plug-in with the following information.

- The table shows the plug-in name, the manufacturer and the version number of the plug-in.

- Beneath the table on the *Description* tab, you will see a description of the plug-in and the URL of the manufacturer's website.
- On the *Required rights* tab, you will see the rights that the plug-in requires or rather that you assigned beforehand in the dialog box.

10. If the plug-in must access columns of the recipient table when run, click the *Released columns* tab beneath the table and enable the relevant columns.

    Which columns of the recipient table (if any) the plug-in must access can be seen in the *Information on the released columns* section on the *Released columns* tab.

    If this section is not displayed, the plug-in does not have to access any columns.

11. If the plug-in must access mailing lists or sections of the (*Global settings*) tab when run, enable them on the *Released lists* tab.

    Which mailing lists or sections (if any) the plug-in must access can be seen in the *Information on the released lists* section on the *Released lists* tab.

    If this section is not displayed, the plug-in does not have to access any mailing lists or sections.

12. Save your settings.

✓ You have finished installing the plug-in.

Additional information

If the plug-in cannot be installed, an error message appears. Which plug-ins can or cannot be installed is controlled by the white list and the black list on the Inxmail Professional Server:

- White list: All plugs-in that appear in the white list file are listed as trusted and can be installed.
- Black list: All plugs-in that appear in the black list file cannot be installed.
- Plug-ins that are neither on the white list nor on the black list are handled as non-trustworthy plug-ins. However, you can still install these plug-ins if the 'Plug-ins' rights package is assigned to you.

If you are a license customer, you can change the white list and the black list. More information on this can be found in the installation manual for the Inxmail Professional Server. You can download it at http://community.inxmail.de by selecting *Software Downloads* > *Inxmail Server*.

If you are an ASP customer, we perform changes to these settings for you.

38.3.3 Specifying access (plug-in-proxy)

Whether you have to specify plug-in access via a proxy server after installing the plug-in will depend on the plug-in.

Step-by-step

1. To open the *Configuring plug-in access* dialog box, select the plug-in in the table on the (*Global settings*) tab > *Plug-ins* agent. Then click the (*Specify access)* button.

A dialog box appears.

Figure 349: "Configuring plug-in access" dialog box

2. In the dialog box, select one of the following proxy server settings under *Plug-in proxy*:
   - *Do not use proxy* (if you do not require a proxy server to connect to the Internet)
   - *Same proxy as for Inxmail server connection* (to transfer your proxy server settings from the Inxmail Professional login section)
   - *Same proxy as for Internet connections* (to transfer your Internet proxy server settings from the user menu; *Configuring an Internet proxy* page 41)
   - *Specify other proxy settings...* (to configure another proxy server)
3. If you selected the *Specify other proxy settings...* option, enter the following additional information in the dialog box:
   - In the *Proxy server:* and *Port:* fields, enter the HTTP address and port number of the proxy server respectively.
   - If you are required to complete an extra login to access the proxy server, select the *Proxy server login required* check box and enter the user name and password for the proxy server in the fields below.
4. Confirm your entries by clicking *OK*.

✓ You have finished setting up the proxy server for plug-in access.

38.3.4 Configuring the plug-in

Whether you have to configure the plug-in after installing it will depend on the plug-in. The newly installed plug-in does not require configuration if the (*Configure plug-in*) button is greyed out. You can only change the configuration settings of the plug-in if the plug-in is currently not started (*Using plug-ins* page 510).

Step-by-step

1. To open the *Configure plug-in* dialog box, select the plug-in in the table on the (*Global settings*) tab > *Plug-ins* agent. Then click the (*Configure plug-in*) button.

A dialog box appears.

2. Make the configuration settings for the plug-in in the dialog box and then click *Close*.

✓ You have finished configuring the plug-in and can now use it in mailing lists.

38.3.5 Uninstalling a plug-in

Step-by-step

1. Select the plug-in in the table on the (*Global settings*) tab > *Plug-ins* agent. Then click the (*Uninstall plug-in*) button.

   A message box appears.

2. Confirm the prompt by clicking *Yes* to uninstall the plug-in.

✓ Inxmail Professional removes the plug-in agent from all mailing lists (that is, possibly also from mailing lists to which you do not have access).

39 Further tasks (license customers)

You will learn which administration tasks can arise when using Inxmail Professional at your company and how to perform them in this chapter:

- Unblocking user accounts that were automatically blocked after too many unsuccessful login attempts
- Resetting passwords
- Restoring deleted mailings or web pages
- Adding recipients to the black list in order to exclude them from Inxmail Professional

39.1 Unblocking user accounts

39.1.1 Overview

Prerequisites

ASP customers who cannot access the (*Global settings*) tab > *Administration* section cannot perform this task.

In the case of license customers, only Inxmail Professional administrators with the following rights can perform the task:

- Access rights for the (*Global settings*) tab > *Administration* section (*Global access rights (Administration)* page 586)

Rights to use the functions of the *Users* agent (*Overview: Rights* page 566)For security reasons, Inxmail Professional blocks user accounts if users try to log in with an incorrect password ten times in succession. This block is automatically released after 30 minutes.

So that users do not have to wait 30 minutes for their account to be automatically unblocked, you can manually unblock user accounts.

39.1.2 Unblock user account

Step-by-step

1. Click the (*Global settings*) tab > *Users* agent > *Users* tab. Then select the user in the table.

On the *Settings* tab, you will see a note to the effect that this user account is blocked due to too many unsuccessful login attempts.

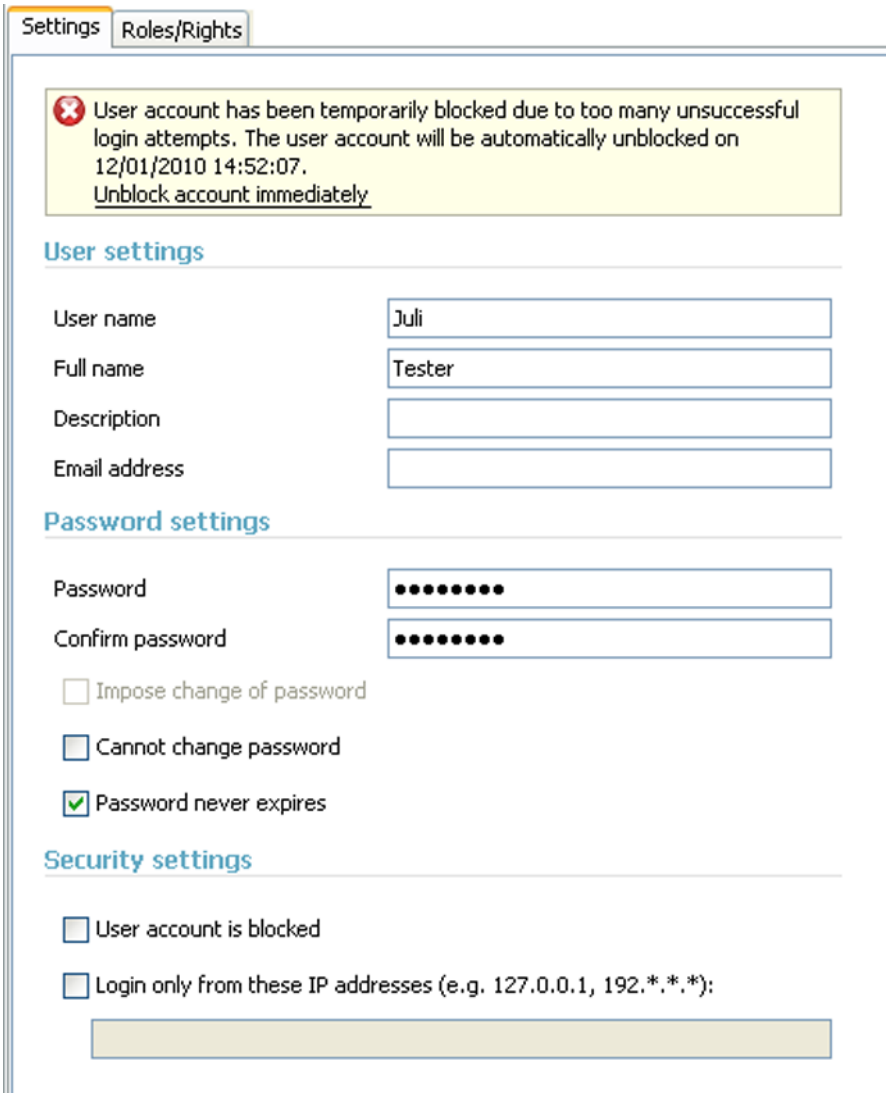


Figure 350: Blocked user account

2. Click the *Unblock account immediately* link within the note.
3. The note disappears and the user account is unblocked.

✓ The user can now log in again with their old password.

Related Topics

In addition to unblocking the user account, you can reset the user's password (*Resetting passwords* page 614).

39.2 Resetting passwords

Prerequisites

ASP customers who cannot access the (*Global settings*) tab > *Administration* section cannot perform this task.

In the case of license customers, only Inxmail Professional administrators with the following rights can perform the task:

- Access rights for the (*Global settings*) tab > *Administration* section (*Global access rights (Administration)* page 586)

Rights to use the functions of the *Users* agent (*Overview: Rights* page 566)If users have forgotten their Inxmail Professional password, you can manually reset it.

Step-by-step

1. Click the (*Global settings*) tab > *Users* agent > *Users* tab. Then select the user in the table. The settings for the user appear in the fields on the *Settings* and *Roles/Rights* tabs.
2. In the *Password* field under Password settings, change the user's password (for example, to 'initial'). Repeat the entry of the changed password in the *Confirm password* field.
3. If the user should be prompted to change the (initial) password you have specified the next time they log in, select the *Impose change of password* check box.

   Note You are only able to select this check box if the *Password never expires* and *Cannot change password* check boxes are disabled for the user.

4. Save your settings.

✓ You have finished resetting the password for the user.

39.3 Restoring deleted mailings or web pages

39.3.1 Overview

ASP customers who cannot access the (*Global settings*) tab > *Administration* section cannot perform this task.

In the case of license customers, only Inxmail Professional administrators with the following rights can perform the task:

- Access rights for the administration interface of the Inxmail Professional Server

If users have deleted mailings or web pages in the *Mailings*, *Email sequence* or *Files & web pages* agent, you can restore them (within 30 days of deletion).

39.3.2 Restore deleted mailings or web pages

Note You can restore deleted mailings only within 30 days of deletion.
You can restore only mailings or web pages that were deleted in the *Mailings*, *Email sequence* or *Files & web pages* agent. Mailings of deleted mailing lists cannot be restored.

Step-by-step

1. Open the web-based administration interface of the Inxmail Professional Server.

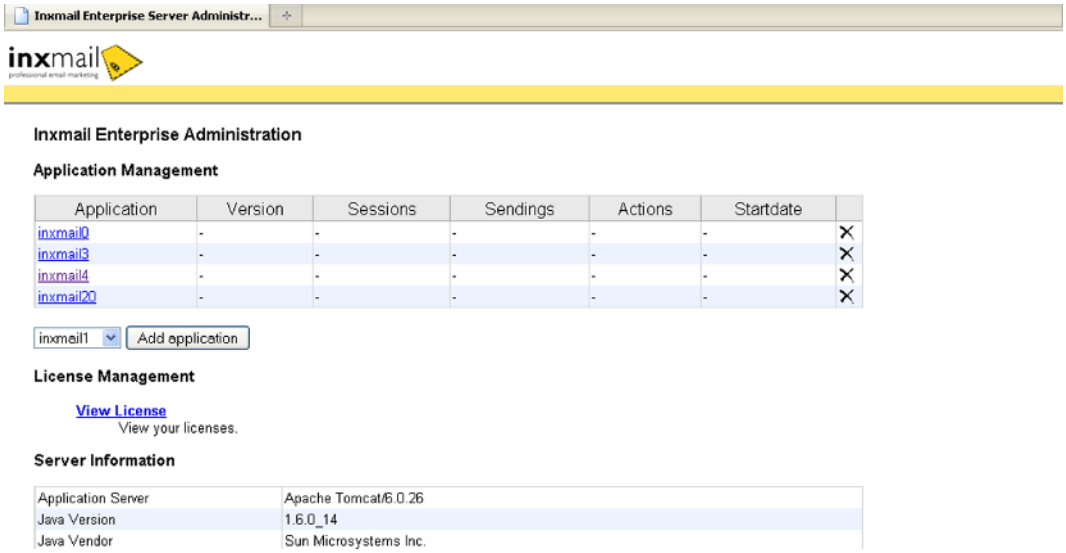


Figure 351: Overview page

You open the administration interface in your web browser. For the URL you need to enter the IP address or name of the computer on which you have installed the Inxmail Professional Server, as well as the name of the administration application 'inxadm' (for example, http://192.168.1.140/inxadm).

The administration interface is available in English only.

Further information on starting the administration interface can be found in the installation manual for the Inxmail Professional Server. You can download it from the Inxmail Community (http://community.inxmail.de) by selecting *Software Downloads* > *Inxmail Server*.

2. In the administration interface, click the Inxmail Professional administration application (for example, 'inxmail4').

The *Administration Tools* page is displayed.

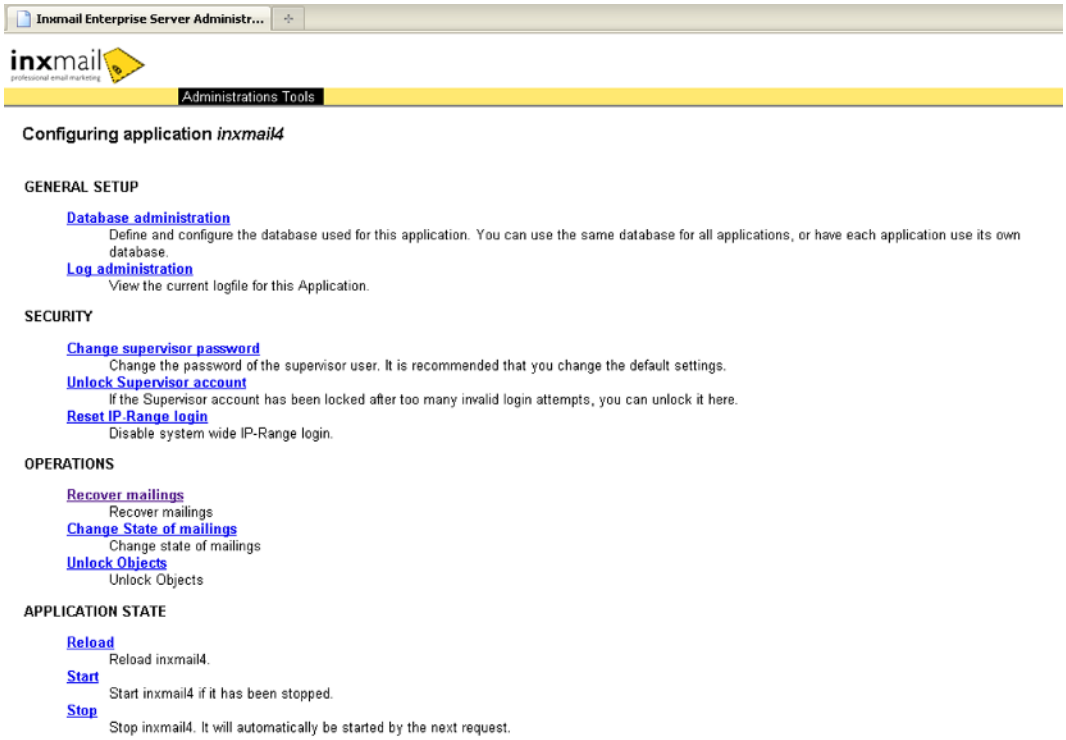


Figure 352: Page to configure an application

3. Under *Operations*, click *Recover mailings*.

   All mailings, email sequences and web pages deleted in the last 30 days are displayed in the table.

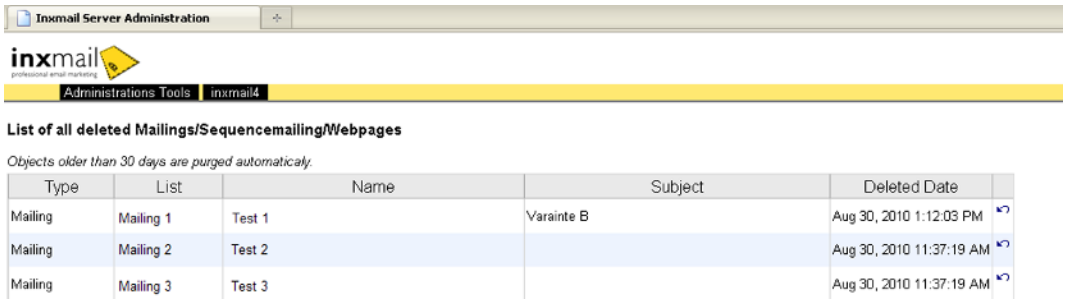


Figure 353: Administration interface of the Inxmail Professional Server 3

4. In the row of the entry being deleted, click the button.

   The *Restore* functionality is enabled by default, but can be disabled.

✓ You have restored the deleted mailing.

   For the mailing to be displayed in the relevant mailing list, the user must click the (*Refresh*) button.

Additional information

The following rules apply for the restoring of mailings:

- Mailings that were deleted in the *Mailings* agent and had a scheduled sending time prior to deletion will lose this sending time when restored.

- Mailings with the 'Approved' status will retain the 'Approved' status.
- A restored email sequence mailing will be inserted (after the refresh) always at the last position of the sequence in the *Email sequence* agent. This sequence must be set to 'inactive' for the restore. A message notifies you of this.

39.4 Adding recipients to the black list

39.4.1 Overview

Only Inxmail Professional administrators with the following rights can perform the task:

- Access rights for the (*Global settings*) tab (*Global access rights (Administration)* page 586)
- Rights to use the functions of the *Black list* agent (*Overview: Rights* page 566)

Important Bear in mind that when recipients are added to the black list, the data of these recipients may be automatically deleted from **all** recipient tables. This cannot be undone.

You can add recipients to the black list if you want their email addresses to be generally excluded from Inxmail Professional (for example, after abuse complaints).

If recipients on the black list subscribe to your mailing lists, they are not entered into the recipient table and receive no mailings. Similarly, when importing recipient data, no email addresses on the black list are added to the recipient tables.

39.4.2 Delete recipient from recipient table and enter recipient in the black list

Step-by-step

1. Open a recipient table (*Opening a recipient table* page 91).
2. Hold down the CTRL key and select the recipients in the recipient table whom you would like to mark accordingly.
3. Click the (*Edit recipient*) button and select *Add recipient to the black list*.

   A message box appears.

Figure 354: "Add recipient to the black list" message box

4. Confirm the message by clicking *Yes*.

✓ The data of these recipients will be deleted from **all** recipient tables in your Inxmail Professional system. In addition, an entry for each selected recipient will be created on the (*Global settings*) tab > *Black list* agent.

39.4.3 Create new entry (in the black list)

Step-by-step

1. Click the (*Global settings*) tab > *Black list* agent.
   In the table you will see all recipients who are already included in your black list.
2. Click the (*Create new entry*) button.
   A new row is created for the entry in the table.
3. Enter the relevant email address or the address range in the *Email* column.

Important Bear in mind that when entire address ranges (for example, *@company.de) are entered, the data of all recipients who have a corresponding email address in Inxmail Professional will be automatically (and irreversibly) deleted.

Enter the email address or the address range as follows:

Email address/address range	Effect
name@company.com	The 'name@company.com' email address will be blocked.
info@*	All email addresses with 'info@' will be blocked.
spam*	All email addresses beginning with 'spam' will be blocked.
*.tv	No email addresses from Tuvalu will be allowed.
@company.	Email addresses of this company will be blocked.

✓ You have added the recipient to the black list.

Additional information

You can select a blacklisted recipient in the table and then delete the recipient using the (*Delete entry*) button.

The following is logged on the *Log* tab:

- If recipients are placed on the black list
- If recipients on the black list try to subscribe to your mailing lists (prerequisite: the *Log blocked addresses* check box is selected)

40 Shortcuts

Note If you use an operating system other than Windows, use the corresponding shortcuts (for example, for Macintosh, use the Cmd key instead of the Ctrl key.

Shortcut	Function	Description
Alt+F1	About Inxmail Professional dialog box	Opens the About Inxmail Professional dialog box (*User menu* page 40)
Enter	Open	Opens the object* currently selected in a table
Del	Delete	Deletes the object* currently selected in a table
Esc	Cancel	Cancels the current process
F1	Direct help	Opens the help topic that is relevant for the current software page
F2	Rename/edit	Calls up the function to rename or edit the object* currently selected
F3	Search: Go to the next match of the search resulat	If the search function of the *All recipients/ Recipients* agent has found two or more matches and the search dialog box has been closed (*Searching and replacing recipient data* page 113), then the system goes to the row of the next match. **Note**: To be able to use this shortcut, the focus** needs to be set in the recipient table.
F5	Refresh	Refreshes the current view
F6	Show/hide	Shows/Hides the following elements: • in a mailing: shows/hides the quick preview in the *Editing* workflow step • in the *All recipients/ Recipients* agent: calls up the function to show/hide the columns in the recipient table (*Showing/hiding columns* page 122) **Note**: To be able to use this shortcut, the focus** needs to be set in the mailing or the recipient table.

Shortcut	Function	Description
Ctrl+1	Enable/disable (Always show only one element expanded) button	In a mailing, which is based on a template: Enables/disables the button (*Always show only one element expanded*) in the *Editing* workflow step
Ctrl+a	Select all	Selects all elements (for example, all lines of a table) **Note**: To be able to use this shortcut, the focus** needs to be set, for example, in the table.
Ctrl+b	Add recipients to the black list	In the *All recipients/ Recipients* agent, calls up the function to add recipients to the black list (*Adding recipients to the black list* page 618) **Note**: To be able to use this shortcut, the relevant recipient(s) need to be selected in the recipient table.
Ctrl+b	Format text with the bold font style	In a mailing: In the *Editing* workflow step, formats the currently selected text with the bold font style
Ctrl+c	Copy	Copies the currently selected objects*
Ctrl+e	Export recipients	In the *All recipients/ Recipients* agent, calls up the function to export recipient data (*Exporting recipients* page 107)
Ctrl+End	Go to the last line	Goes to the last line of a table **Note**: To be able to use this shortcut, the focus** needs to be set in the table.
Ctrl+End	Move test profile right to the bottom	In the Test profiles agent, moves the currently selected test profile to the last line of the table
Ctrl+Ins	Add new (template) element	In a mailing, which is based on a template: In the *Editing* workflow step, calls up the function to add a new (template) element
Ctrl+f	Search	Calls up the search function (for example *Searching and replacing recipient data* page 113)

Shortcut	Function	Description
Ctrl+F6	Show/hide	In a mailing, which is based on a template: In the *Editing* Shows/hides the structure tree **Note**: To be able to use this shortcut, the focus** needs to be set in the mailing editor.
Ctrl+h	Search and replace	Calls up the function 'Search and Replace' (for example *Searching and replacing recipient data* page 113) **Note**: To be able to use this shortcut, you first need to click the column in which you want to search and replace data.
Ctrl+i	Import recipients	In the *All recipients/* *Recipients* agent, calls up the function to import recipient data into Inxmail Professional (*Importing recipients (from an import source)* page 95)
Ctrl+i	Format text with the italic font style	In a mailing: In the *Editing* workflow step, formats the currently selected text with the italic font style
Ctrl+k	Manage list association	In the *All recipients/* *Recipients* agent, calls up the function to manage the list association of the currently selected recipient (*Managing list association* page 119)
Ctrl+l	Create new list	In the (*List overview*) or (*Cockpit*) tab, calls up the function to create a new mailing list (*Creating standard mailing lists* page 77)
Ctrl+Minus	Collapse (template) elements	In a mailing, which is based on a template: Collapses all (template) elements in the *Editing* workflow step
Ctrl+n	Create/add new object*	Calls up the function to create a new object* (for example *Creating a new mailing* page 184) or to add an object* (for example *Webspaces* page 601)
Ctrl+P	Print	Calls up the function to print (for example, to print an already created report in the *Reports* agent)

Shortcut	Function	Description
Ctrl+Down arrow	Move test profile down	In the *Test profiles* agent, moves the currently selected test profile one line down
Ctrl+Up arrow	Move test profile up	In the *Test profiles* agent, moves the currently selected test profile one line up
Ctrl+Plus	Expand (template) elements	In a mailing, which is based on a template: Expands all (template) elements in the *Editing* workflow step
Ctrl+Position one	Go to the first line	Goes to the first line of a table **Note**: To be able to use this shortcut, the focus** needs to be set in the table.
Ctrl+Position one	Move test profile right to the top	In the *Test profiles* agent, moves the currently selected test profile to the first line of the table
Ctrl+s	Save	Saves all changes
Ctrl+t	Create recipient as test profile	In the All recipitens/ Recipients agent, calls up the function to create the currently selected recipients as test profiles (*Creating recipients as test profiles* page 120)
Ctrl+Tab Ctrl+Shift+Tab	Next main tab Previous main tab	In the layer of the main tabs, goes to the next main tab (that is, rightwards) In the layer of the main tabs, goes to the previous main tab (that is, leftwards) **Note**: On the Apple Macintosh, you use the shortcuts ALT+Cmd+Right arrow key and ALT+Cmd+Left arrow key
Ctrl+Shift+b	Insert line break	In a mailing: Inserts a line break (HTML tag </br>) in the *Editing* workflow step
Ctrl+Shift+p	Insert paragraph	In a mailing: Inserts a paragraph (HTML tag) in the *Editing* workflow step
Ctrl+Shift+s	Format text with the strikethrough font style	In a mailing: In the *Editing* workflow step, formats the currently selected text with the strikethrough font style

Shortcut	Function	Description
Ctrl+v	Paste	Pastes the previously copied objects*
Ctrl+w	Close	Closes the elements of the surface in the following order: • currently opened dialog box • currently opened tab • Inxmail Professional
Ctrl+x	Cut	Cuts the objects* currently selected
Ctrl+z	Undo	Undoes all changes since the last storage
Tabr	Move the mouse cursor	In the currently opened surface of Inxmail Professional, sets the focus** to the next element

Tab. 70: ab. 30-1: Shortcuts in Inxmail Professional

* Objects are, for example, mailings, mailing lists, modules, templates, target groups or recipients.

** To set the focus of the software on a table, click, for example, any line of the

table. To set the focus of the software in a mailing, click, for example, any position in the mailing editor.

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professional email marketing

Imprint

Editor:	Inxmail GmbH
Address:	Wentzingerstr. 17, 79106 Freiburg, Germany
Telephone:	+49 761 296979-0
Telefax:	+49 761 296979-9
Email:	info@inxmail.de
Internet:	www.inxmail.de
Author:	Inxmail GmbH

About Inxmail:

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+49 761 296979-0

info@inxmail.de

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