

RM Communications Inc.

USING SNAPMAIL

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Using SnapMail

SnapMail is a communication tool included in your hosting package with **RM Communications Inc.** that allows you to collect user data through a subscription form on your website and then send targeted mass emails to your subscribers. You can even create special sub-groups of subscribers based on common information such as country, city, postal code, investor type or interest. The form on your website can be fully customized so that you only gather the information you require. Getting this form just right to suit your needs is a crucial part of the initial setup of your SnapMail account. The initial setup of the subscription form is included in your hosting package, and if you find in the future you need to further refine the data you're collecting, changes to the data scheme can be made at any time.

When a user subscribes to your mailing list by filling out the form on your site, his/her data is automatically written to a database that you can access and manage through your **SnapMail Administration Site**. You can use this site to edit subscriber data, group subscribers into lists based on common points with other subscribers, and send mail to your various mailing lists. If the subscriber decides at anytime that he/she no longer wants to be on your mailing list, there is an unsubscribe link at the bottom of every email sent out via SnapMail. By clicking on this link, the subscriber can remove themselves from your database. It may sound a little complicated, but once you start using it you should find it to be a rather simple and straightforward system.

This guide is intended as a reference to lead you through the various features of SnapMail and to help you maximize the potential of this system, and it is advisable that you read this document before using SnapMail. It is also recommended that you keep a copy of this document on hand for reference when using the system.

Please be advised that there is a known compatibility issue with SnapMail version Aardvark PR15.1 +35 and the internet browser program Microsoft Internet Explorer. When attempting some functions pertaining to the creation of mailing groups, Internet Explorer misinterprets certain JavaScript commands in a way that prohibits some methods of defining groups. This issue will be addressed in a future release of SnapMail currently in development. In the meantime, RM Communications Inc. strongly recommends the use of [Mozilla Firefox](#) while using SnapMail. This multi-functional web browser has proven to be the most stable program available as far as SnapMail is concerned.

Administrative Login

The first thing you will notice about SnapMail is that the **URL** (web address) is not part of your actual website (for example, <http://www.example.com>). Instead, the URL will be something like: <http://www.rmcommunicationsinc.com/SnapMail-example/>

Notice that a username and password are required to enter the site, and that this information will be given to you by support staff at RM Communications Inc. These measures have been put in place to better secure your data and protect it from malicious attacks.

Admin Menu

Once you have successfully logged in, you will see the Admin Menu. This is the homepage for the SnapMail system. From here, you can access the three main portions of the system: **Mailings**, **Subscribers**, and **Setup**.

Mailings Page

On this page you'll find 2 options: **Send**, to create and send a mailing; and **History**, to review mailings that have already been sent.

Send

By clicking on Send, you can now create a new mailing and send it out. This is a four-stage process: **Setup**, **Templating**, **Composing**, and **Previewing**. These steps must be taken in order from left to right, but it's OK to backtrack a bit if you've made a mistake and must go back a step or two.

Setup

Under this tab, the first thing you should notice is that all fields are required. The good news is that the system automatically loads up a set of default information for most of the fields. The two things you should pay special attention to on this page are the **Subject** and **Send Mail to** fields.

The Subject field will be blank by default, and you will have to give it a name before you proceed to the next screen. This name will appear as the subject line for the mailing, so make sure it accurately describes the contents of the email you intend to send. Also, you should note that the Send Mail to field will default to "All subscribers". If you mean to send the mail out to a group of certain subscribers instead of your entire list, it's a good idea to switch it here immediately before going on to the next step.

Templates

A template is a deceptively simple-looking HTML (Hyper-Text Markup Language) document that allows you to send formatted emails to clients who prefer to receive mail that way. When you first login to your SnapMail system, you'll notice that there's a template waiting for you on the Templates page (usually called something like "My Site's Email Template"). This template has been created by the web designers

at RM Communications Inc. to be as spam-filter friendly as possible, giving you the best chance possible of getting your email actually delivered to its recipients.

By choosing the default template and clicking the “Load” button, you’ll be ready to move on to the next step.

The best thing about the templating process is that there’s no limit to the number of templates you can have and use. If you have several different newsletters that you send out on a regular basis to separate lists, or perhaps a special one-time offer, you have the option of setting up unique templates for several purposes.

Compose

On this screen, you’ll see your mail template in a **WYSIWYG editor**. WYSIWYG (pronounced WIZZ-ee-wig) is an acronym for What You See Is What You Get, and as the name would suggest, the editor is essentially showing you how your email will most likely look when it arrives in the recipient’s inbox. Of course, every email system is unique and has its own convoluted set of rules for handling HTML emails, however the design team at RM Communications Inc. has done a lot of research into this matter and are confident that your default mail template will give you the most control over your layout possible.

To change the template and reformat it with the information you want to send, simply copy the text in your draft document, highlight the text you want to change in the template, and paste the new text in its place. Do this for the introduction, heading, and the body of your email, and then the HTML portion of your mailer is ready. If you want to put an image into the mailing, or to link to another file within your email, a more in depth discussion is included later when we look at the SnapMail File Upload System.

SnapMail, however, sends email in a special “multipart” format. Essentially, this means that the mail that gets sent can contain HTML formatting as well as a simple text version of the same message. This is convenient for mail recipients who have set their mail systems to display text only. In order to make sure a text-only version of your mail is also sent, click on “Copy text from HTML Message” at the bottom of the page. This will populate the **Text Version** editor with all the text from the original message. You may need to fine tune the formatting of the text to make it flow better, but you should find this a fairly straightforward task.

Please note that if you don’t want to send a plain text version of the email you should leave the Text Version editor blank. Conversely, if you only want to send a simple text-only email, leave the **HTML Message** editor blank and only fill in the Text Version.

When you have your message formatted and ready to go, you should click on Continue.

Preview

Now that your message is ready to be sent, a wise thing to do is to send a test to yourself to make sure that you have everything formatted properly. If you click the **Send Test** button, you have the option of specifying an email address to send a test mailing to. You also have the option of previewing the message online by clicking on “HTML Message: Click Here”.

Once you are satisfied with the mail, you are ready to send it by clicking the **Send Mailing** button.

Mailing Status

The mailing status page allows you to watch the progress of your mailing as it happens. Let's take a close look at the notice displayed on this page:

"Mailings take place in the background so feel free to close this page, visit other sites, or even turn off your computer."

Essentially, this means that once the mailing process has begun it will continue sending unless the process has been specifically paused or cancelled. Even though you can close the page or navigate elsewhere while your mail is being sent, you might want to leave it open to keep an eye on things just to get a feel for what's going on.

As you watch the mail being sent, you'll see a status bar that periodically refreshes itself to show you how much mail has been sent already. The page will display the total number of mailings that have been sent as well as the percentage of the entire distribution list that number represents. You'll also see a heading that reads **Last 50 notices** and a series of notices that might read something like this:

- 09:39:21 > Mailing Complete.
- Started Mailing #28
- 09:39:19 > Started Mailing MTA. Spawn #1.

From time to time, you might notice the status bar appears stuck at a certain percentage. Occasionally, the mail system might pause while trying to send out a particular piece of mail. However, there is an automatic re-spawn feature built into the system that will force the mail to resend from the point it stopped at after a minute and a half. For reference, see the Last 50 notices.

If you think the screen is not advancing, the best thing to do is to leave the screen open and contact support at RM Communications Inc. If you abandon a mailing that you think is crashed and you close the screen and try to send it again, chances are that all of your subscribers will receive the email at least twice, which could result in irate subscribers.

Mailings History

This page allows you to review mail that you've already sent out, and also gives you the option of reloading a message if you needed to re-send it for some reason.

Subscribers Page

On the Subscribers Page, you have the option to **Manage** your existing list of subscribers, **Import** new subscribers, or create/edit mailing **Groups** (subsets of your master mailing list delineated by certain shared criteria).

Manage Subscribers

This page allows you to do a fair bit with your subscriber data. The default view shows all active (confirmed) subscribers broken up 150 per page sorted in alphabetical order by email address. By selecting different values from the drop-down menus at the top of the page, you can change the view (active, unsubscribed, or pending subscribers), group, and number settings (from 10 to 500 per page), as well the methods by which the information is sorted.

There's also a **quick search** that allows you to search for specific text within any of the data displayed on this particular page view. In other words, if the page is only displaying 10 of the 7,000 entries in your database, the quick search will only search the 10 records displayed, not the entire subscribers list (a search of the entire list is not supported in this version of SnapMail, but should be in the next release). If you need to search the entire list, change the **# per page** value to its maximum (500), run the quick search function, and move onto the next page if the information you're looking for isn't found on the page. If you have an exceptionally large database to search, you might want to consider using the **export subscribers** function (discussed later) to search the entire list using another program. Something as simple as Notepad (a basic text-editing program included in every copy of Windows) should do the trick.

While on this page, you can see all the data collected for your subscribers, and by clicking on the **Edit Icon** to the left of each subscriber's email you can edit the subscriber's data.

There are also 4 options at the top of the page that allow you to **Add Subscribers**, **Remove Subscribers**, **Export Subscribers**, and **Return to Subscribers Page**. The first 3 options launch special pop-up windows that may not be supported in older web browsers. Recent testing has shown that Microsoft Internet Explorer version 6 has difficulties displaying these pop-ups, so you might have to upgrade your software in order to support the scripting that makes SnapMail possible.

Tests have shown that the best browser to use SnapMail in is Mozilla Firefox. To get your copy of Firefox, [click here](#). If you prefer to use Microsoft Internet Explorer, the latest version of that program can be downloaded [here](#). MSIE version 7 still has known issues that should be addressed in the next release of SnapMail.

Add Subscribers

When clicking on this tool, you'll be presented with an inline pop-up window that will allow you to input the data for a new subscriber. There's also a link to the **Import Subscribers** page if you need to import data for multiple subscribers (more on this later).

Remove Subscribers

This tool allows you to remove several subscribers from your list at once. Simply add the email addresses in the Email Addresses window and click on the Remove Subscribers button. SnapMail will then run through this list. If the address is found in your subscribers list, that subscriber's data will be removed from the database immediately. If the address is not found, or if the address is a duplicate (accidentally entered twice), SnapMail will disregard it and go onto the next email address. When the script is done, you will be told how many subscribers were removed from the list.

When you remove an address from the database, all data pertaining to that subscriber will be lost, so be sure you are only removing names that should be coming off the list, such as permanent delivery failures, or subscribers who've requested to be unsubscribed in writing instead of through the auto-unsubscribe feature embedded into each email sent by SnapMail.

Export Subscribers

The Export Subscribers tool allows you to get the subscriber data into another file for use in another application. You'll notice 2 drop-down menus in the pop-up window: **Export Type** and **Export From**.

The Export Type menu allows you to choose what data will be saved. You have your choice of a text file that contains a list of email addresses only, or a CSV (Comma Separated Values) file of all subscriber data (CSV files can be viewed in spreadsheet programs like Excel). After you choose your Export Type and Export From options, click on the **Export Subscribers** button to save the file to your computer.

The Export From menu lets you decide whether to save data from the entire subscriber list or just the subscribers displayed on the current page. Please note that you must choose the list of subscribers to export from the Manage Subscribers page before launching the Export Subscribers tool.

Import Subscribers

On the Import Subscribers page, you have the option of importing mass amounts of subscriber data, either in the form of a list of email addresses or imported from a CSV file. If you have your subscriber data saved in an Excel spreadsheet, you can use the **Save As** dialogue to save the file in CSV format.

When entering CSV data, you'll see a pre-import page where you'll see a sampling of the data about to be imported (the first few lines of the data) lined up in columns with a drop-down menu at the top of each column. The drop-down menus each contain a list of the subscriber fields currently in the database. At this point, you must take the time to specify a subscriber field at the top of each column of data that you wish to import. When you click the "Import" button, any column that has the option "Ignore Column" selected will not be imported. This is not necessarily a bad thing, but it is something you should be aware of.

If the CSV data you are importing has crucial information not currently incorporated into your SnapMail subscriber fields, you'll need to update your subscriber fields before you import the data. For instance, let's say that the subscribers you wish to import all gave you their information at a certain tradeshow, and you'd like to reflect that in the database so you can create a unique group and send a mailing to this group of new subscribers. Since the creation of subscriber fields cannot be done "on the fly" while importing subscriber data, it is advisable to send the CSV list to RM Communications Inc.'s support team so that they can modify the database and the new data to make this happen.

Groups Page

If you want to send out mailings to subgroups of your subscriber list based on certain common attributes, such as location, the Groups Page is where you go to make it happen. It's also where you

want to go to edit existing group information or to delete groups you're no longer using (If you want to create a group based on criteria currently not stored in your subscriber database, you can always request a modification to your current subscriber fields so that you can start tracking related data for future use).

Subscriber data is stored by SnapMail in **Fields**. Each field corresponds to one of the questions the subscriber answered when filling out the subscription form on your website. The creation of groups is all about looking for commonalities within the subscriber data to make targeted sublists, or Groups, of the master mailing list (all subscribers). For instance, if you have First Name as a field, you can setup a group that only consists of subscribers named Steve. Of course, you could also modify this rule to also include subscribers named Stephen or Steven. Now if the special offer you want to send out to subscribers named Steve, Stephen, or Steven is prohibited in a certain territory - for example, the United States - you can further modify the rule to exclude any Steves, Stephens, or Stevens who have indicated that they live in the U.S.

To make this happen, you have to present SnapMail with a set of rules in a way that it will understand the logic necessary to give you what you're looking for. Follow the example for a better understanding of the process. *[Because of a known bug in Internet Explorer, it is highly recommended that you use Firefox as your web browser while creating Groups. This bug will be addressed in the next release of SnapMail.]*

To create the group, start on the Groups Page. Under "Name Group", call the group "Non-US Steves" and click "Add". This takes you to the **Edit Group** page. Under "Add Rule", open the dropdown menu that says "Select a Field to Filter". Choose First Name from this list, and you'll then see a pop-up window asking you to "match subscribers where First Name is/is not" followed by a text field labeled "Value(s)". Make sure the "is/is not" value is set to "is" and enter the name "Steve" into the "Value(s)" field. Then, click the "+" symbol next to the name field twice. Two new name fields will appear below the first field. Enter "Stephen" and "Steven" into these fields, and then click on the "Update" button to save the parameters of this rule. You will then see "First Name is Steve (or) Stephen (or) Steven" listed as an **AND rule**. You'll also see a message below the **Group Rules** box that reads "1 rules match a total of x active subscribers" where x is the actual number of subscribers in the database who have their first name listed as either Steve, Stephen, or Steven. *[Although it's not necessary for you to understand all the logic that goes into relational database management to make SnapMail work effectively for you, you do have to bear in mind that every single group you create must have an AND rule.]*

Now, we're going to modify the rule to exclude American residents. This is done by selecting Country as a new field to filter by in much the same way you chose First Name above. When the pop-up appears, make sure the "is/is not" selector is set to "is not" and then select "United States" from the Value(s) menu. Click on the "Update" button to save the modified rule. The rule is now setup and ready to use.

Now let's assume that you already have another group set up along the same lines, only this group is limited to people named Dave or David who don't live in the U.S., and you decide to make the same offer to everyone on that list, but to simplify things you want to send out a single mailing. There are two

options open to you; you could setup a new group to cover everyone on both lists, or you could modify one of your lists to include all the subscribers on the other list. Let's assume you do not want to modify your existing groups and choose instead to set up a third group combining both lists. To do this, you must go through all the steps we went through above to create the "Non-US Steves", and then choose the "Daves" group from the "select a group to include or exclude" menu. When the new window pops up, make sure the option is set to "include" and click on the add button. You now have a new group of Steves and Daves living outside the United States.

Please note that if you so choose, support staff at RM Communications Inc. can setup new groups for you to use during regular business hours.

Setup

The setup page gives you access to **Configure** your installation of SnapMail, edit your **Subscriber Fields**, and generate a **Subscription Form**.

For the most part, these sections of the site should only be accessed by employees of RM Communications Inc. The next release of SnapMail will incorporate multi-level user permissions, at which point these pages will be password protected.

The setup area gives you control over the site's configuration, allowing you to control such things as who receives special system messages and bounceback notifications, and how the name of your company will be displayed on the site and in mailing headers.

You can also see how your subscriber fields are organized, and you can generate the HTML required to embed the subscription form on your website. However, you cannot actually embed the form on your site from SnapMail. This can only be done by support staff at RM Communications Inc. during regular business hours. The initial setup of your subscriber fields is provided at no charge, and you have total control over what data will be collected and how that data will be organized and configured to assist you in creating the mailing groups you need to use.

Support

The support tool, located in the upper right hand side of the application right by the logout tool, leads to the support menu. The most important aspect of the support menu is the **SnapMail File Upload System** which allows SnapMail users to upload files for use in their mailings, including images to embed in the email and PDF articles to link to. Since the email sent out by SnapMail is text-only, any image you want to include in your mailing must be hosted somewhere on the web so you can use HTML (a text-based markup language for describing internet documents) to link the images into the email. The SnapMail File Upload System not only gives you a place to host your files online, it also tells you where the files are stored so you can use them in your mailings.

Also on the support page, we will periodically post external links to articles related to the marketing side of mass mailings. Finally, there is a link to the SnapMail Support Library. This area is for RM

Communications Inc. support staff only, as you can do things like clear all database values with a single click.

SnapMail File Upload System

To use this tool, all you really need is a file to upload. Usually this file is an image, saved in GIF or JPG format, meant to be embedded in your mailing, but it could be any type of file. You could, for example, upload a PDF file and then include a download link to that file in the body of your email.

To upload a file, it must first reside on the machine you're using to upload the file. Keep in mind that if you want to embed an image in a mailing, the image must already be reduced to the right size. Most standard SnapMail email templates have a display area about 470 pixels wide, so it is advisable to take that into consideration when preparing your images. If you want to align the image to one side with text wrapping around it, it's wise to make your images no wider than 200 pixels.

Once the file is ready to upload, click the **Browse** button to search the contents of your computer's hard-drive in order to locate the file, and click **Submit** to start the actual upload process. When the file has been uploaded, the page will refresh itself and give you the information you need to use the file in your mailing. If the file is a standard web image, you'll see a display of that image for your verification. You'll also see a string of text like this...

The file's permanent URL is:

<http://www.rmcommunicationsinc.com/snapmail-example/img/file20070710132721.jpg>

Use your mouse to highlight this text, then right-click to copy and paste it into another file for future reference. Make sure to copy the filename digitally to ensure there are no mistakes. If you try to write it down on a scrap of paper you're almost guaranteed to make a mistake.

The file has been given a new name based on what time it was uploaded in order that it doesn't overwrite any files already in the same folder. For example, this file is a JPG image uploaded on July 10th, 2007 at 21 seconds after 1:27PM. Having the time broken down in seconds allows you to upload several files in quick succession if necessary. To upload a new file, simply click the **Upload another file** link and start the process all over again.

Using Images in Mailings

You can **insert an image into a new mailing** during the Compose phase of creating a new mailing. In the HTML Message window, use your mouse to place the system cursor at the place you want to place your image, and then click the **Insert/edit image** icon (which looks like a square photo of a tree) from the editing options at the bottom of the HTML Message window. This will pop up a new window that will allow you to specify all the parameters you need to control how your image will appear in the final document. While a basic knowledge of HTML can be an asset at this stage, it is not a necessity.

In the insert/edit image pop-up window, you can set the parameters for the image. The first thing you absolutely must set is the **image URL**. This is the value you copied into a file after uploading the image. Right-click to copy the URL ([Uniform Resource Locator](#)) into the space provided.

Next, you have the option of entering an **image description**. This is what's known as "[alt text](#)", text that explains what the image is. If used properly, this will entice a mail recipient into taking the extra step to download the images to see the email as you want them to see it.

Alignment is the next option. There are many options that you can play with here, but you'll likely find "left" and "right" alignments to be most handy.

The next attribute is a very important one – **dimensions**. You can find the dimensions of the image by locating it in your file explorer on your computer. On most Windows systems, the dimensions of an image will pop-up in a little tooltip box, first width then height, when the cursor hovers over the filename. Enter these values to make the image display correctly. Presently, the SnapMail system cannot determine the dimensions for you, so you have to do a bit of work if you're going to get it right.

Border, vertical space, and horizontal space are attributes you can play around with if you know a fair bit about HTML, but for most of the images you need to send they will not be necessary.

If you've entered all the image attributes only to find out you need to edit the parameters again, simply click highlight the image by clicking on it, and then click on the insert/edit image icon again.

Linking to Files in Mailings

In order to **link to a file**, such as a PDF, within the text of an email, use the **insert/edit link** icon (the chain image to the immediate left of the insert/edit link icon). In the pop-up window, simply enter the URL for the file into the **Link URL** space and click the **Insert** button. Should you find you need to edit the link, highlight the text again and re-click the insert/edit text icon.