e dialog®

precisioncentral 7.0 RELEVANCE ENABLING TECHNOLOGIES

Campaign Builder 7.0 User's Guide

Wednesday, October 07, 2009

Copyright

Burlington, MA 65 Network Drive Burlington, MA 01803 Tel: 781 863 8117 Fax: 781 863 8118	**London, UK** 247 Tottenham Court Rd, Third Floor London W1T 7QX Tel: +44 (0) 20 3219 6200 Fax:+44 (0) 20 7659 2100
New York, NY 352 7th Avenue New York, NY 10001 Tel: 212 631 7560 Fax: 212 631 7559	**Seattle, WA** 10885 NE 4th Street Suite 290 Bellevue, WA 98004 Tel: 206 682 7777 or 800 360 6245 Fax: 206 682 4859

Web

http://www.e-dialog.com

E-mail

U.S. Sales & Info mailto:MaxROI@e-dialog.com

UK Sales & Info mailto:EuroSales@e-dialog.com

Human Resources mailto:positions@e-dialog.com

Public Relations mailto:press@e-dialog.com

London Office mailto:londonuk@e-dialog.com

Documentation Comments and Corrections

Please send all comments, corrections, suggestions, etc., regarding this document to ***Technical Publications*** mailto:TechnicalPublications@e-dialog.com"

Contents

Introducing Campaign Builder

In This Chapter

About Campaign Builder

e-Dialog Campaign Builder™ provides a comprehensive campaign management solution that enables you to create and send highly relevant e-mails: easy configuration and set-up, powerful custom publishing tools, seamless audience selection, and superior proofing functionality.

Campaign Structure

Campaign Builder uses a three-tiered campaign structure:

Campaigns

Campaigns contain mailings.

Mailings

Mailings contain cells and always belong to one campaign. By cloning and editing mailings, you can ensure that all mailings within a campaign maintain the same look and feel.

Cells

Cells are where e-mails are configured. Audiences, content, links, symbols, proofing, and deployment all happen within a cell. Each cell belongs to a single mailing and a single campaign.

Once a cell has been mailed, it cannot be modified and reused. Instead, create a clone (identical copy) of the cell, make modifications, and mail the new cell.

This three-tiered campaign structure allows you to:

- Organize and separate automated campaigns that have hundreds of mailings and cells
- Clone mailings and/or cells for ongoing campaigns

Process Overview

Although Campaign Builder offers flexibility in the campaign building process, you generally follow a step-by-step process that includes the following:

1 ***Create a Campaign*** (on page 25).

2 ***Create Mailings within a Campaign*** (on page 29).

3 ***Create Cells within a Mailing*** (on page 31).

You use the tabs in Campaign Builder to complete each of the following steps to create cells.

a) ***Configure Cells*** (on page 35). (Configuration Tab)

b) ***Define the Target Audience*** (on page 45) for a cell. (Audience Tab))

c) ***Create Content*** (on page 55) for a cell. (Content Tab)

d) ***Modify Links and Set Up Reporting Options*** (on page 71) (Links Tab)

e) ***Define Dynamic Content to Merge*** (on page 75) into a cell, including rules that specify what content to merge in what circumstances. (Symbols Tab)

f) ***Create the Audience Export File*** (on page 89), which is the data file that includes the list of e-mail recipients for a cell. (Export Tab)

g) ***Proof the e-mails*** (on page 95) that include sample audience and merged content. In this step, you send live proofs of e-mails to internal and external proofers. (Proof Tab)

Send the Final e-mail (on page 107). (Execute Tab)

About This Release

Campaign Builder 7.0 contains the following new features:

♦ **Grid Publisher**

e-Dialog Grid Publisher™ helps you manage the organization of complex mailing setups. Conceptually, a grid is table-driven logic that is more powerful than a String Case or Content Case symbol and much easier to manage than the IF-THEN-ELSE logic in custom symbols. More information.

♦ **Quick Test**

e-Dialog Quick Test™ provides the means to quickly and easily test audience response to a cell by sending several different test versions of the cell to small test audiences and acting on the results. A version of a cell consists of a set of one or more symbols: strings and/or content objects. When you have enough test results to choose the "winning" version of the cell, you can mail that version to the remainder of the full audience, knowing that you have sent the most relevant, actionable message possible, maximizing your email marketing revenue.

Note: These features are not supported in Campaign Builder 6. If you open a Quick Test or Grid cell, Campaign Builder returns the message "This cell is only supported under Precision Central 7.0'". Click OK to return to the campaign list.

System Requirements

Precision Central 7.0 requires:

♦ Microsoft Windows or Apple Macintosh OS X*

♦ Adobe Flash Player 9.0.28 or newer

Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.

♦ One of the following Web browsers:

§ ***Internet Explorer 7*** (http://www.microsoft.com/downloads/) on Windows

§ ***Firefox 3*** (http://www.mozilla.com/en-US/firefox/) on Windows and Macintosh OS X*

* The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Customization for Your Organization

e-Dialog configures Precision Central applications to meet your organization's specific preferences. Also, to accommodate the different access needs of individual users, e-Dialog sets up individual profiles based on user name. Your Professional Services Account Team helps to configure these preferences during your initial set-up process.

For example, your organization may want to provide certain employees with the ability to upload new audiences and assign these audiences to new users. On the other hand, others may only have the ability to upload a new audience solely for their own use. Or, some employees may not be able to send final e-mails, while other are allowed to do so.

Note: As a result of the modular approach, some of the functionality described in this document may not apply to you.

Starting Campaign Builder

To start Campaign Builder:

1 Log in to Precision Central.

2 Select **Campaign Management > Campaign Builder.**

You can make Campaign Builder your default Precision Central application. See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

Navigating in Campaign Builder

Note: Do not use the browser's **Back** button to navigate in Campaign Builder, because you may lose information when going from one screen to another. Instead, use the bread crumb navigation and tab navigation.

Bread Crumb Navigation

At the top of each screen in Campaign Builder, there are links that indicate the current page's position relative to the Campaign List page. These links provide "bread crumbs" that let you easily return to a previous page or step. Angle brackets separate pages. For example:

To return to an earlier page, click the page title.

Tab Navigation

When you are working on cells, Campaign Builder provides tabs that correspond to the steps to create a cell. Before you complete any of the steps, the tabs appear like this:

Dark blue indicates the currently selected tab. When you complete each step, the stripes are replaced with light blue and a check mark appears in the tab. When you have completed all the steps, the tabs appear like this:

Setting Date/Time Preferences

To specify the way the date and time appear in Campaign Builder:

1 In the upper right corner of the screen, click **User Profile.**

2 In the Campaign Builder Preferences section, choose a time zone from the CB Default Timezone drop-down.

The list of time zones includes those supported by Microsoft Windows.

3 Choose the date format from the CB Date Format drop-down:

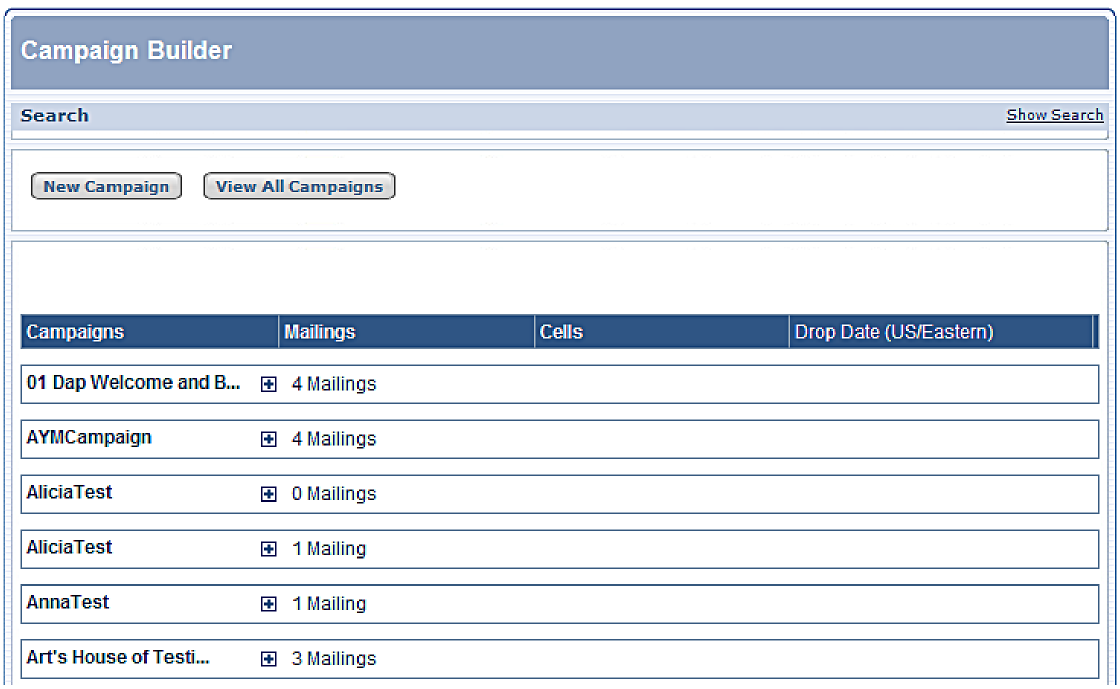
4 Click **Save Profile.**

Working with Campaigns, Mailings, and Cells

In This Chapter

Viewing a List of Campaigns

The default screen in Campaign Builder displays a list of campaigns.



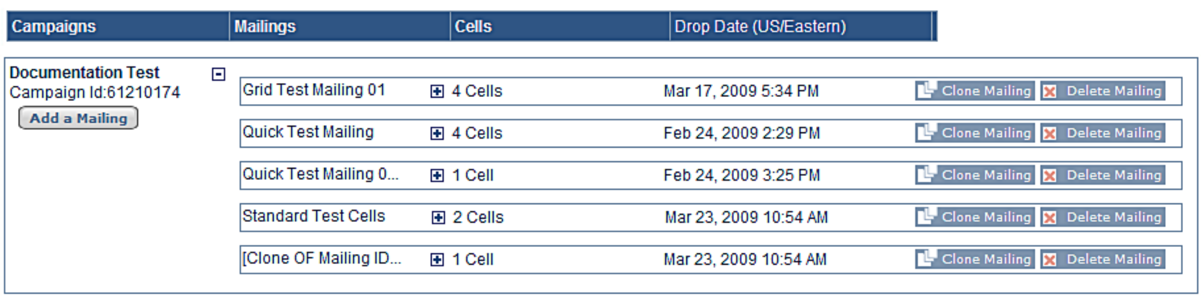
Control or Column	Description
Show Search	Displays the panel to filter the list of campaigns according to search criteria. See ***Searching for Campaigns, Mailings, and Cells*** (on page 17)
	Creates a new campaign. See ***Create a Campaign*** (on page 25) for detailed instructions.

View All Campaigns	Displays a list of all campaigns in the database.
Campaigns	Click a campaign name to open the ***Campaign Setup Screen*** (on page 26).
Mailings	Displays the total number of mailings in the campaign. Click the plus sign to display a ***list of mailings*** (on page 14).
Cells	Displays the total number of cells in a mailing (visible only when you expand a mailing.
Drop Date (time zone)	Date and time on which a mailing was sent or is scheduled to be sent (visible only when you expand a mailing as described in Expanding and Collapsing Items)

Viewing a List of Mailings

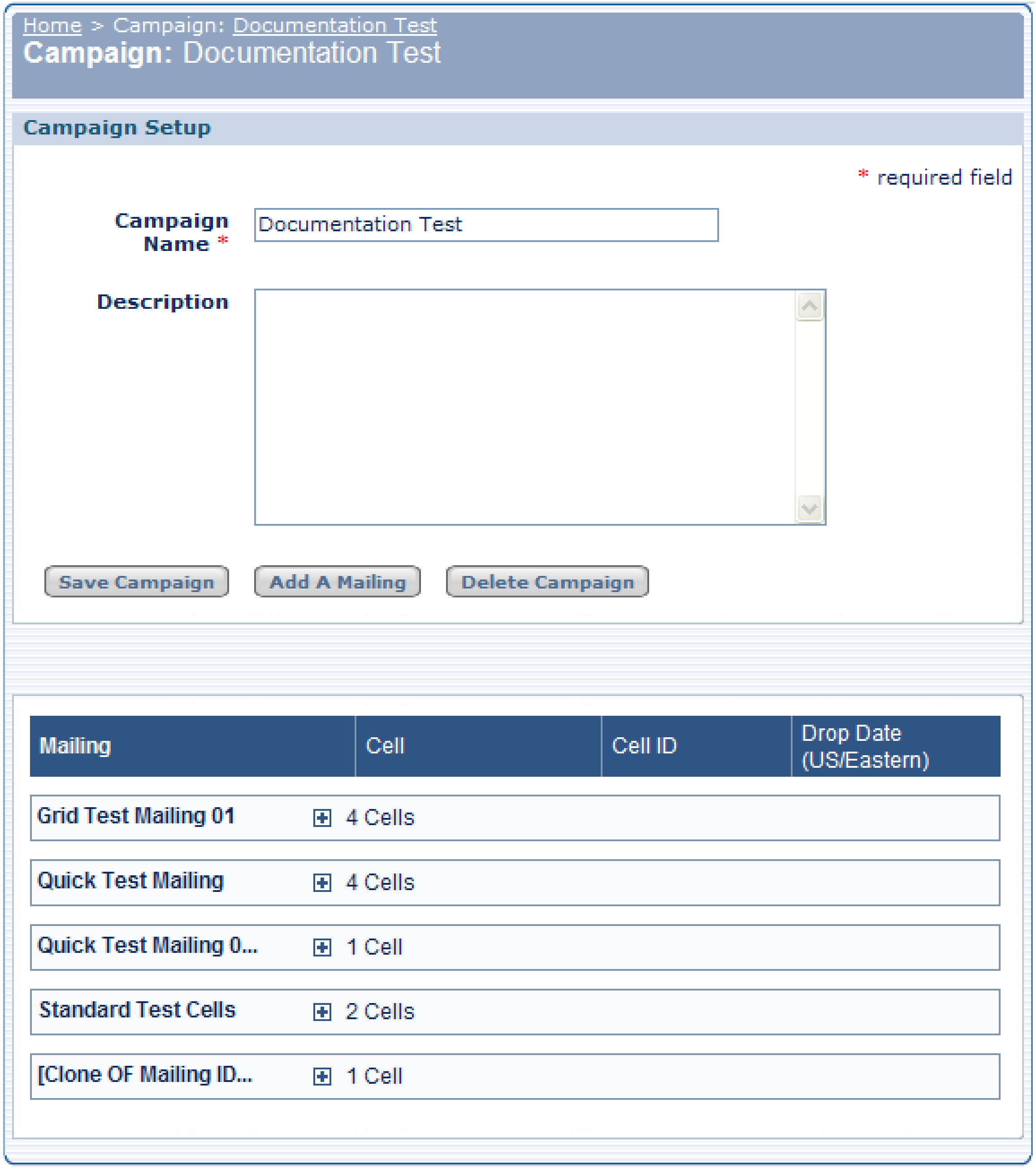
To view a list of mailings:

- In a ***list of campaigns*** (on page 13), click the plus sign to expand a campaign, producing a list that includes **Clone** and **Delete** controls.



You can click a plus sign to ***view a list of cells*** (on page 15) within a mailing.

- In a ***list of campaigns*** (on page 13), click the name of the campaign. The ***Campaign Setup*** (on page 26) screen includes a list of mailings that includes the **cell identifier** and **drop date.**

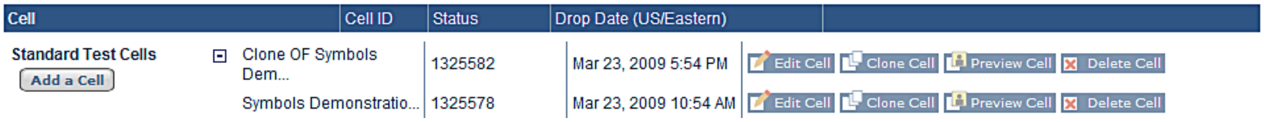


You can click a plus sign to ***view a list of cells*** (on page 15) within a mailing.

Viewing a List of Cells

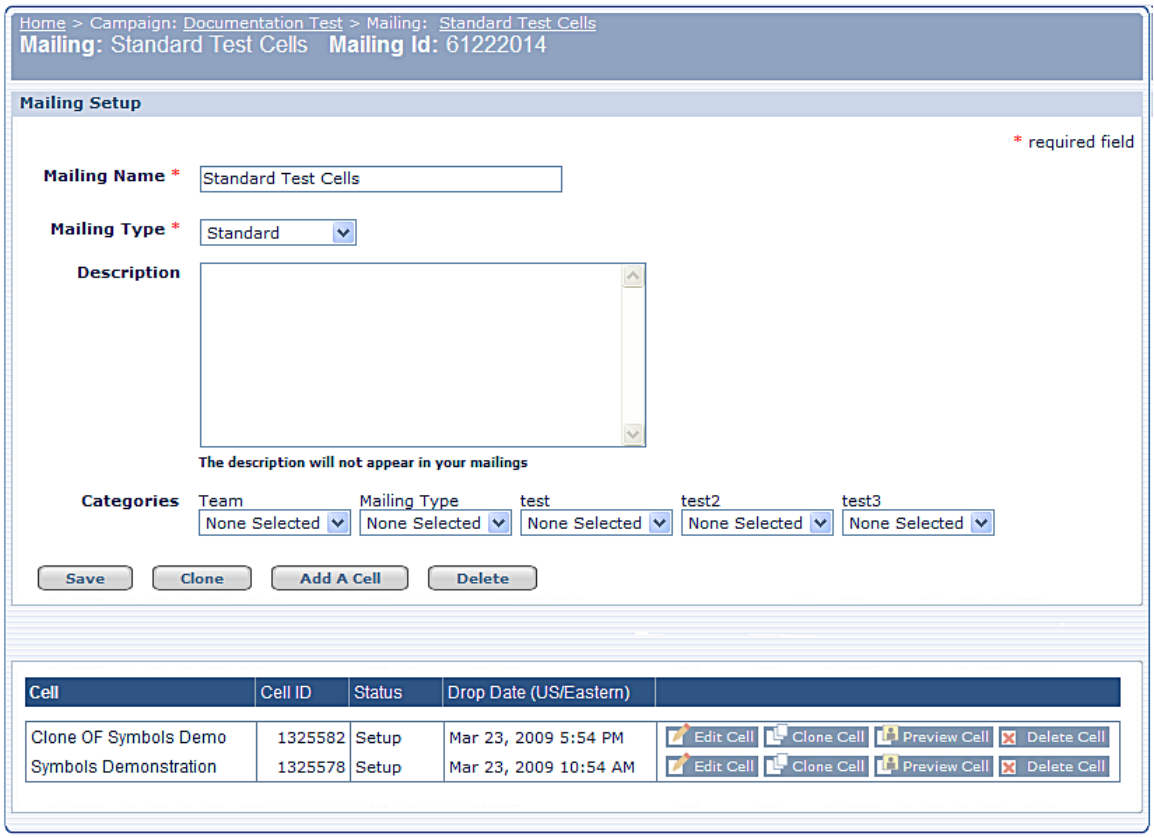
Lists of cells include Edit, Clone, Preview, and Delete controls. To view a list of cells:

- In a ***list of mailings*** (on page 14), click the plus sign to expand a mailing, producing a list of cells that includes the cell identifier, cell status, and drop date.



Click a cell name or Edit Cell to open the cell. Campaign Builder opens to the ***Configuration Tab*** (on page 35).

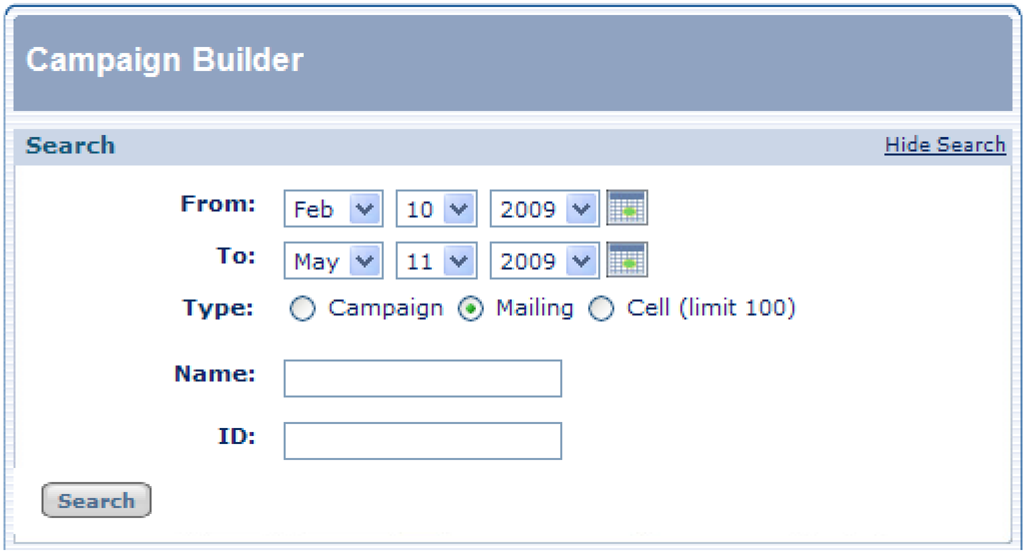
- In a ***list of mailings*** (on page 14), click the name of a mailing. The ***Mailing Setup screen*** (on page 29) includes a list of mailings that includes the cell identifier, cell status, and drop date.



Click a cell name or Edit Cell to open the cell. Campaign Builder opens to the ***Configuration Tab*** (on page 35).

Searching for Campaigns, Mailings, or Cells

When viewing a list of campaigns, you can search for campaigns, mailings, or cells. You can combine the search functions except that searching for an item by identifier overrides the time period and type criteria. If you do not get the results you expected, ensure that you selected the correct item type, that the date range is valid, and that the name or ID is entered properly.



When searching for campaigns, clearing the search fields and clicking **Search** does not display the default campaign list. Use the **View All Campaigns** button to return to the original view.

Searching by Time Period

To find items added within a certain time period by Name, specify a **From** date and a **To** date and click **Search.**

The From and To date fields include calendar controls. Click the calendar icon to display a calendar similar to the one shown here.

To navigate to another month, click the left or right arrow next to the month's name.

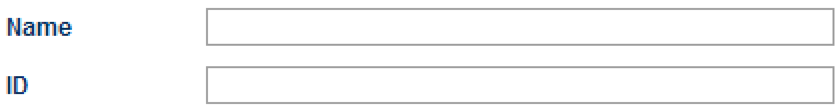
Click the day that you want to appear in the From or To field.

Searching by Type

In the Campaign List screen select the type of item you wish to find.

Searching by Name or Identifier

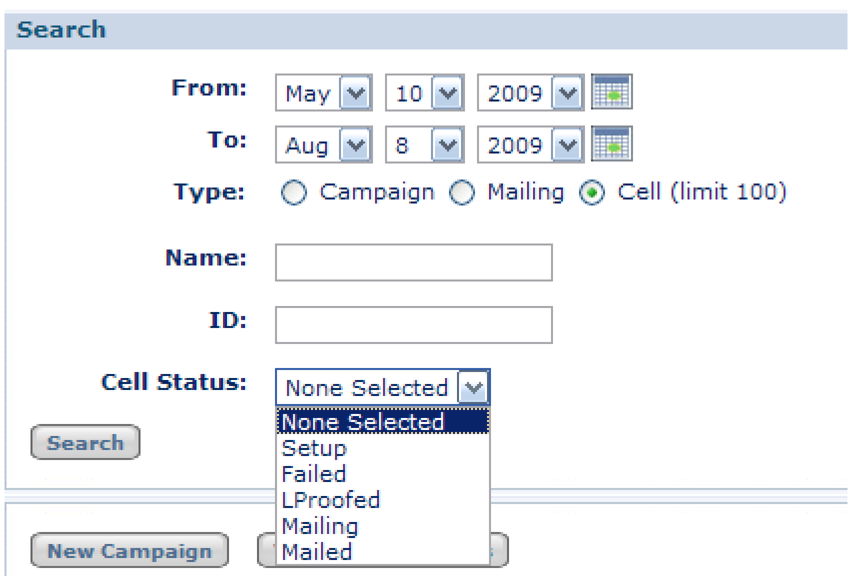
To search for a specific item, enter the **Name** and/or **ID** (identifier number).



The name search is case-insensitive and matches partial strings. For example, searching for **AS** returns names that include "as," such as "**Mas**ter" and "Se**as**on." Searching by identifier overrides the time period and type criteria. If the Name and ID conflict, the search result set is empty.

Searching by Cell Status

You can find cells by their current status. For example, you can look for cells that are currently mailing.



Select **Cell** as the **Type**, select the status from the **Cell Status** drop-down, and then click **Search**.

Note: If you select Campaign or Mailing as the Type, Campaign Builder ignores the Cell Status value.

When you search for cells whose status is Mailing, Campaign Builder displays information about the cell, including the number and percentage of e-mails that have been merged and mailed.

Campaign Name	Mailing Name	Cell Name	Add Date (US/Eastern)	Status
test	test 090616	test 20090623	Jun 20, 2009 11:52 AM	Status: Mailing

Merger	Mailer
200000 Merged 06/23/09 11:07am-11:09am 100% complete	40000 Mailed 06/23/09 11:08am-01:48am (est) 20.0% complete

The status indicators for a currently mailing cell are color-coded as follows:

- Gray - Action is complete
- Green - Action is in process

  The text "(est)" indicates that the completion time is estimated.
- Teal - Action is pending

  A merger can be pending when the export status is not "SUCCESS" or when no rows have been merged yet. The mailing is pending when the merger is pending or in process, but before any e-mail is sent.

Campaign Name	Mailing Name	Cell Name	Add Date (US/Eastern)	Status
test	test 090616	test 20090623	Jun 20, 2009 01:00 AM	Status: Mailing

Merger	Mailer

Opening Items

To open a campaign, mailing, or cell click its name.

Opening campaigns

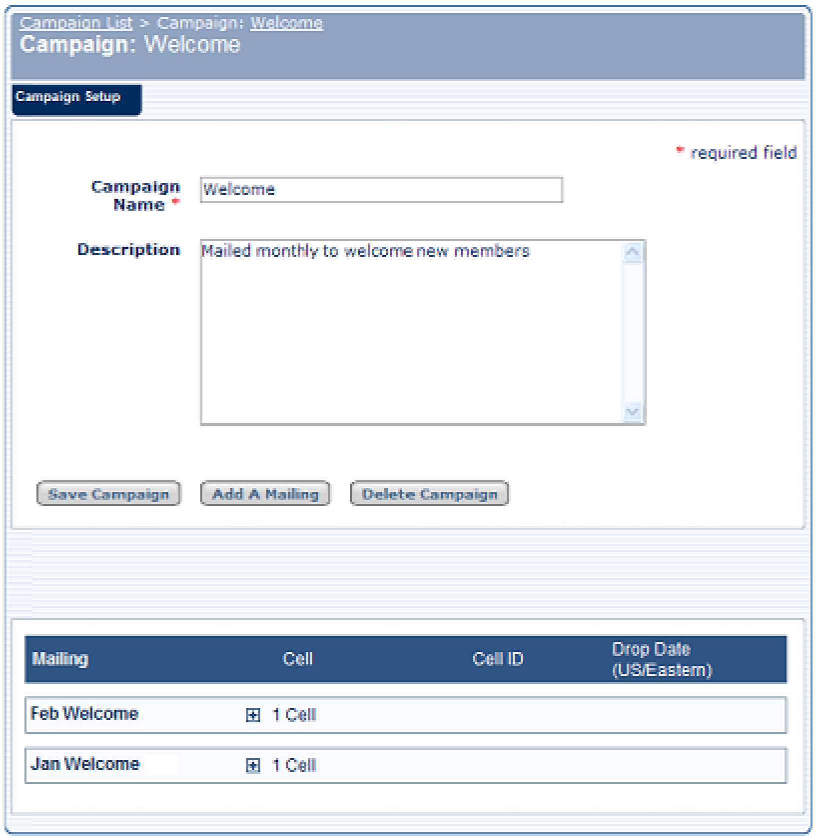
To open a campaign:

1. Go to the Campaign List page.
2. Click the campaign name to open.

   For example, click **Welcome** to open the following campaign:

Welcome	⊞ 2 Mailings

Campaign Builder opens the Campaign Setup dialog. Existing mailings are listed at the bottom of the dialog.



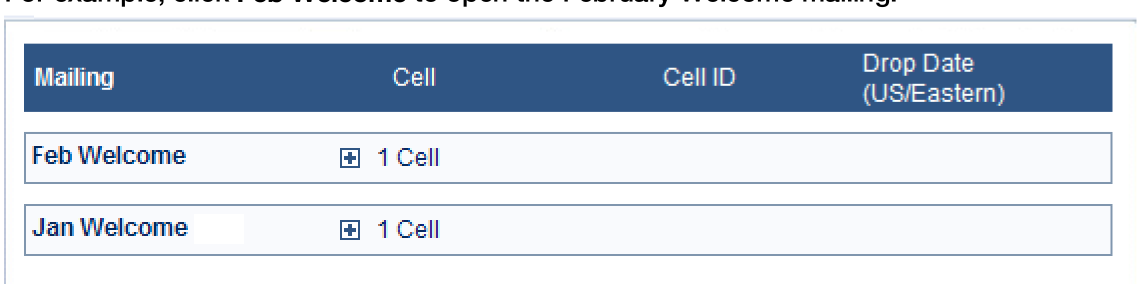
Opening mailings

To open a mailing:

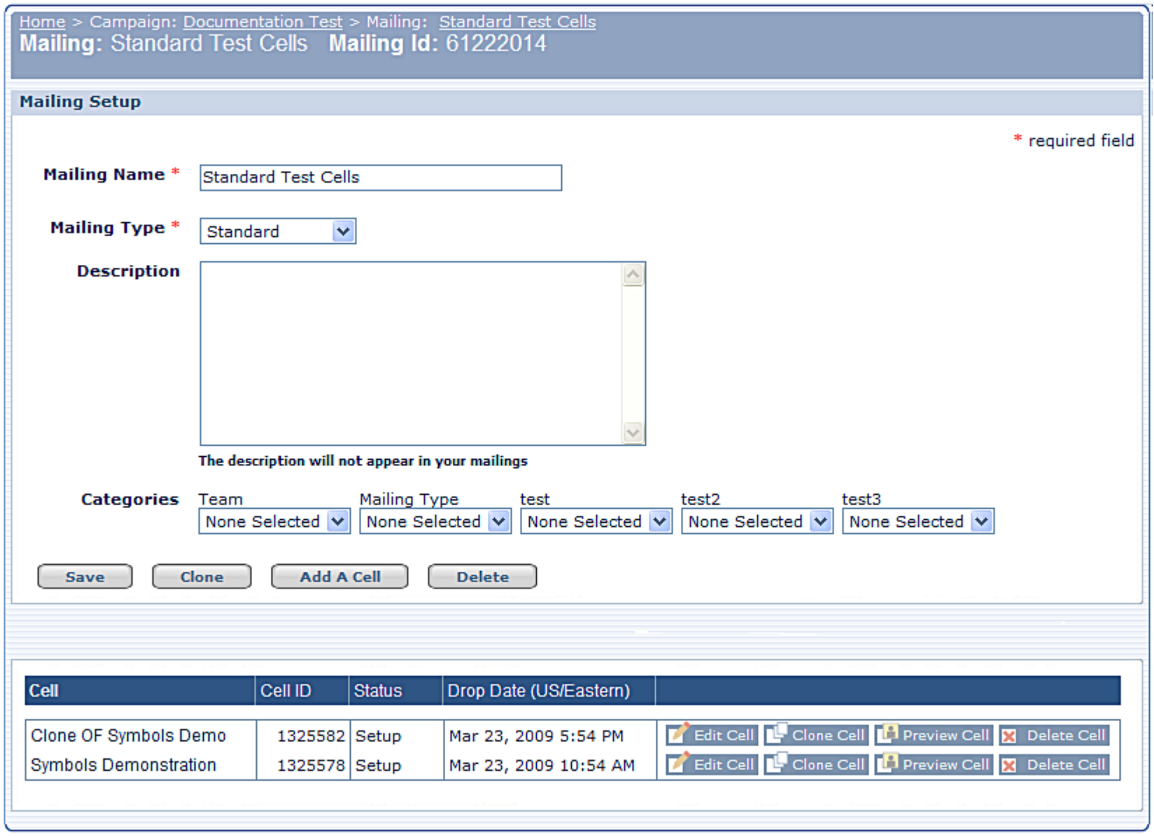
1 Open the campaign that contains the mailing.

2 Click the name of the mailing to open.

For example, click **Feb Welcome** to open the February Welcome mailing:



Campaign Builder opens the Mailing Setup dialog. Existing cells are listed at the bottom of the dialog.



Opening cells

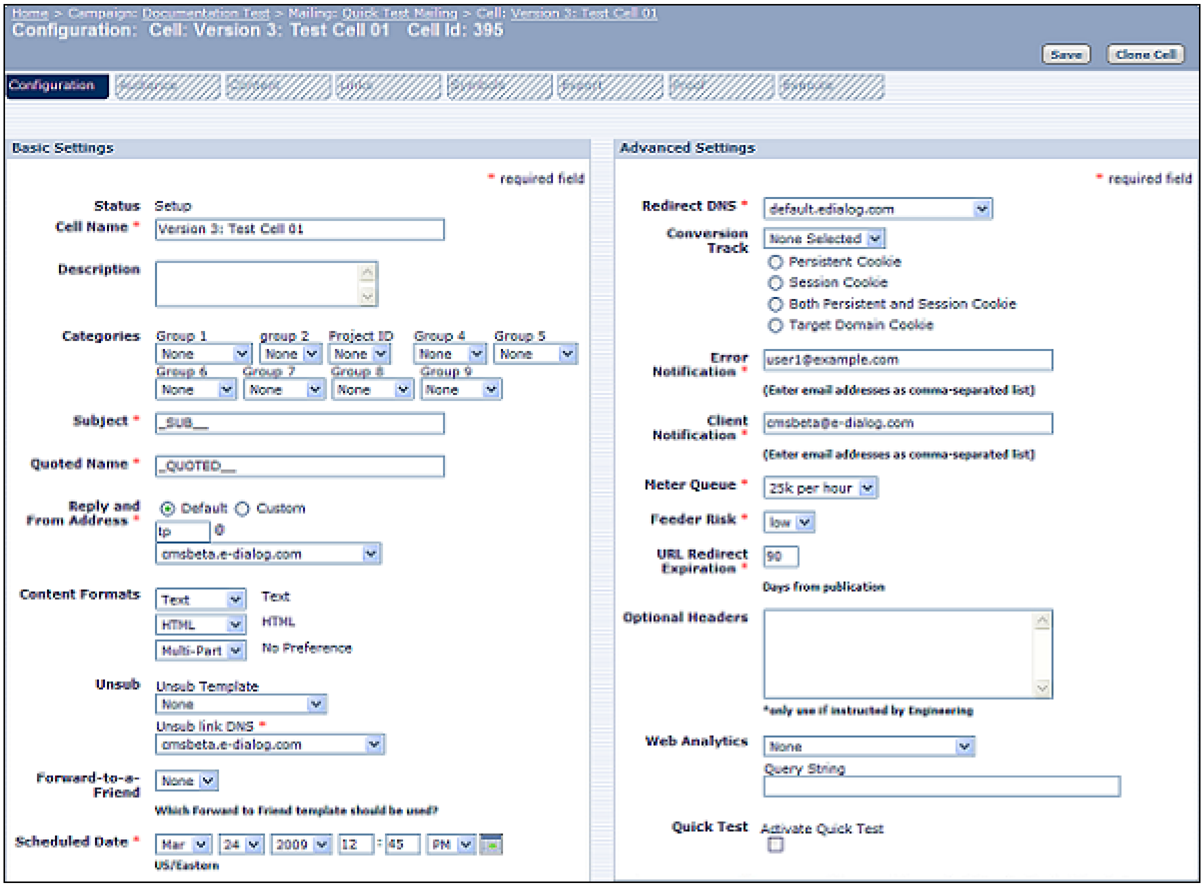
To open a cell:

1 Open the mailing that contains the cell.

2 Click the name of the cell to open it.

For example, to open the February Welcome cell, click **Feb Welcome**:

Campaign Builder opens the Configuration: Cell dialog to the Configuration Tab.



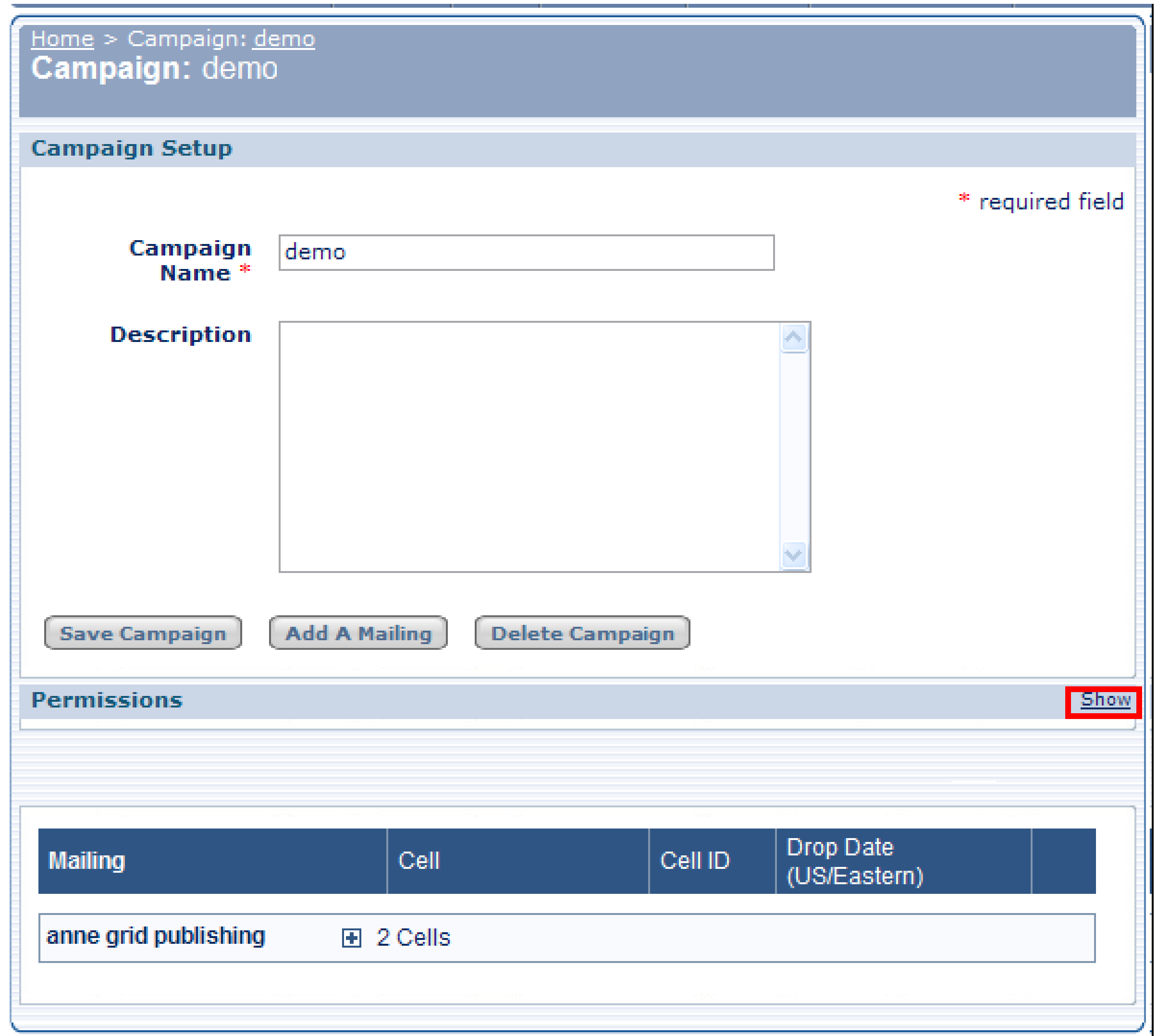
Restricting Visible Campaigns

You can restrict visibility of a campaign so that only some users can search for and see the campaign.

To set campaign level search permission:

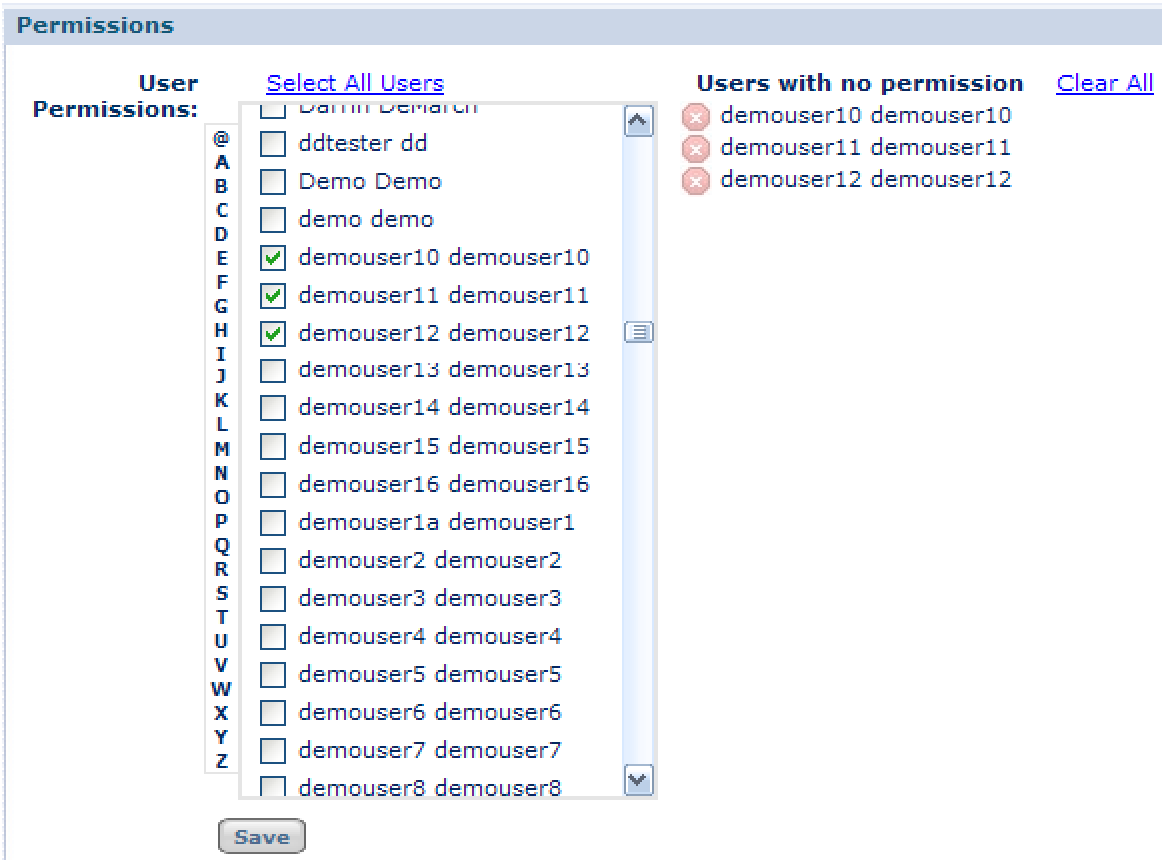
1. Start Campaign Builder.
2. Open a campaign.

3 On the Campaign Setup page, click **Show** in the Permissions bar.



4 Select the users that you don't want to be able to see the campaign by clicking 3. the check box next to their name.

If the list of users is very long, click a letter to the left of the list of users to navigate quicklyto users whose last name begins with that letter.



5 Click **Save.**

Create a Campaign

In This Chapter

Campaign Setup Screen

The Campaign Setup screen appears as follows:

* Indicates a required field.

Creating a Campaign

The first step in using Campaign Builder is to create a campaign.

1 On the Campaign List screen click **New Campaign.**
The ***Campaign Setup Screen*** (on page 26) appears.
2 Enter the Campaign Name.
This name is required. It identifies the campaign and appears on the Campaign List screen.
3 Enter a Description.
The description appears when you view a campaign. It is not required.
4 Click **Save Campaign.**
If you are adding a new campaign, you cannot add mailings until you click **Save Campaign.**

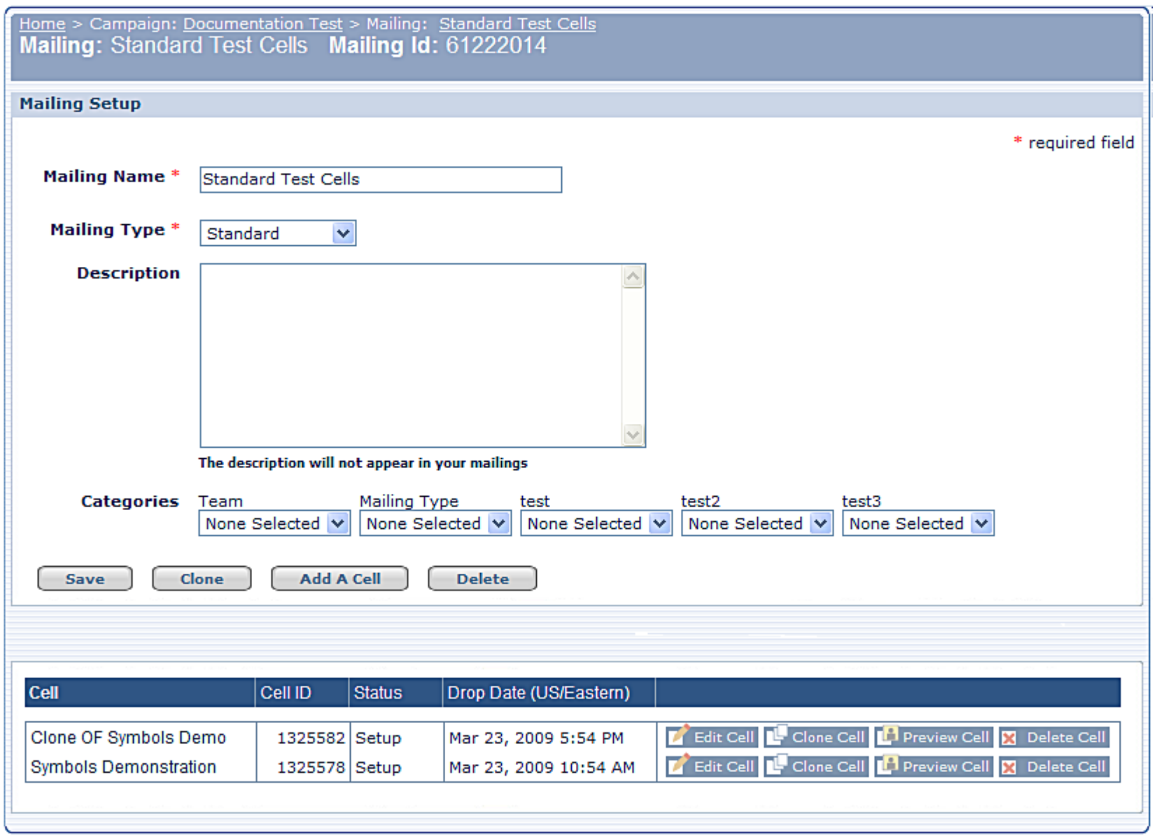
The next step is to ***Create Mailings within a Campaign*** (on page 29).

Create Mailings within a Campaign

In This Chapter

Mailing Setup Screen

The Mailing Setup Screen appears as follows:



* Indicates a required field.

Creating a Mailing

When you have created a campaign, you then create mailings within the campaign.

1 On the Campaign: *campaign name* screen, click **Add a Mailing.**

The ***Mailing Setup Screen*** (on page 29) appears. The name of the mailing that you are working on appears after **Mailing:** .

2 Enter the Mailing Name.

This name is required. It identifies the mailing and appears in reports.

When naming your mailings, be descriptive and use consistent naming conventions across mailings so that you can easily identify them in eReports. For example, a retailer sending out weekly product promotion notifications might want to use "Weekly Newsletter – MP3 10% off" one week and "Weekly Promotion – Computers" the next week instead of the less descriptive "Weekly Promotion" across all such mailings.

3 Select the Mailing Type.

The Mailing Types are **Standard** and **Insight Trigger**. A standard mailing can contain only standard cells. Insight Trigger mailings automatically send e-mail to a dynamically generated audience list on a user-defined schedule. See Working With Insight Triggers for more information.

Mailing Type is a required field. You cannot change it after the mailing is saved.

4 Enter a Description for the mailing

5 Select the Categories to use.

Categories allow you to assign attributes to mailings so that you can easily examine the relative performance of various types of mailings in eReports. Campaign Builder supports up to five categories.

Categories are created by e-Dialog for your organization's specific needs. For example, you might use a category called Type that includes Promotion, Newsletter, Press Release, and Seminar Invitation.

While creating a mailing, you assign a selection from one or more of the categories to that campaign. You can select only one value for each category.

6 Click **Save.**

If you are adding a new mailing, you cannot add cells until you click **Save.**

The next step is to ***Create Cells within a Mailing*** (on page 31).

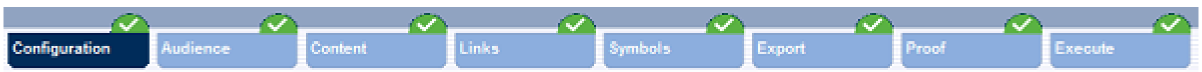
Create Cells within a Mailing

In This Chapter

Creating a Cell

When you have created a mailing, you then create cells within that mailing. On the Mailing: *mailing name* screen, click **Add A Cell.** When you are working on cells, Campaign Builder provides tabs that correspond to the steps to create a cell. Before you complete any of the steps, the tabs appear like this:

Dark blue indicates the currently selected tab. When you complete each step, the stripes are replaced with light blue and a check mark appears in the tab. When you have completed all the steps, the tabs appear like this:



Each tab is described in a separate section of this document:

Tab	Action
Configuration	***Configure Cells*** (on page 35)
Audience	***Define the Target Audience*** (on page 45)
Content	***Create Content*** (on page 55)
Links	***Modify Links and Set Up Reporting Options*** (on page 71)
Symbols	***Define Dynamic Content to Merge*** (on page 75)
Export	***Create the Audience Export File*** (on page 89)
Proof	***Proof the e-mails*** (on page 95)
Execute	***Send the Final e-mail*** (on page 107)

Notes

- For the most part, the tabs are intended to be used in order from left to right, but this is not a strict requirement. For example, once you have saved the Configuration tab, you can open the Audience, Content, Links, and Symbols tabs in any order.
- Some tabs are unavailable until you have saved other tabs. For example, you cannot access the Proof and Execute tabs until you have completed the Export tab.
- Once a cell has been executed (mailed), it cannot be modified and reused. Instead, create a clone (identical copy) of the cell, make modifications, and mail the new cell.
- e-Dialog recommends using separate mailings for Quick Test cells.

Viewing the Status of a Cell

You can quickly check the status of a cell.

1 Go to the Mailing: *mailing name* page.

2 Locate the cell whose status you want and look at the value in the **Status** column.

The possible values for Status are the following:

Status	**Description**
New	Still in the process of being created.
Proof Mailing	Has been submitted to the Proof recipients for review and is in the process of mailing. You cannot edit the cell again until the proofs have completed mailing.
Proof Mailed	Proofs have been sent to the Proof recipients. If you edit the cell at or beyond the Proofing status, you must re-send the mailing to the Proof list for approval. If there are no further changes, you are ready to send the mailing.
Scheduled	Has been approved by the Proofing list and marked as "OK to Send." This mailing is in queue for delivery at the drop date/time you specified. If you specified the drop date/time as the current time, the mailing is in the Scheduled status for a brief time.
Mailing	In the process of being sent by e-Dialog's mail servers. This happens when: § Sending the campaign immediately by setting the drop date/time to the current time. In this case, the campaign begins mailing when you click **OK to Send.** § The drop date/time is reached for mailings scheduled in the future.
Mailed	Has been completely sent. Once mailed, you can perform no further actions. This campaign becomes view-only. At this point, a report on the mailing is available in eReports.
On Hold	There is an issue with this campaign, which could be related to errors in content or configuration issues.
Cancel Requested	Has been slated for cancellation. It typically takes less than five

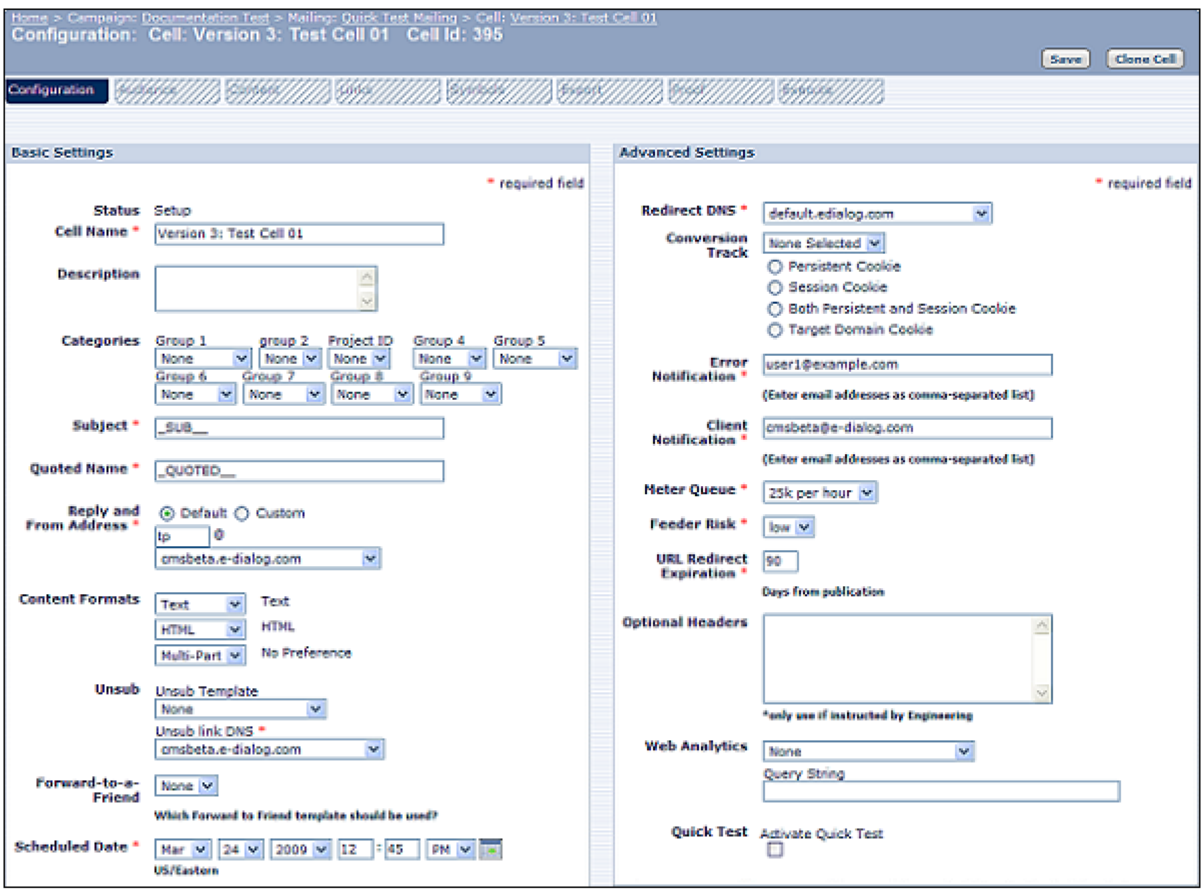
	minutes for the system to cancel the mailing and to give it a Canceled status.
Canceled	Has been canceled. Once canceled, the mailing becomes view-only and cannot be rescheduled. However, you can clone the campaign to use its content again.
Quick Test Processing	The e-mail engine is configuring test cells, splitting the export file, and/or building file samples for the newly created cells.
Phase 1 Complete	The Quick Test is ready to send the chosen version to the remainder of the audience.
Quick Test Finished	The Quick Test has finished. (Applies to master cell only.) The status of the "winning" version (cloned cell) changes from Setup to Mailing to Mailed.
Quick Test Failed	There was an unexpected error, most likely in the merge process. Contact support.

Configure Cells

In This Chapter

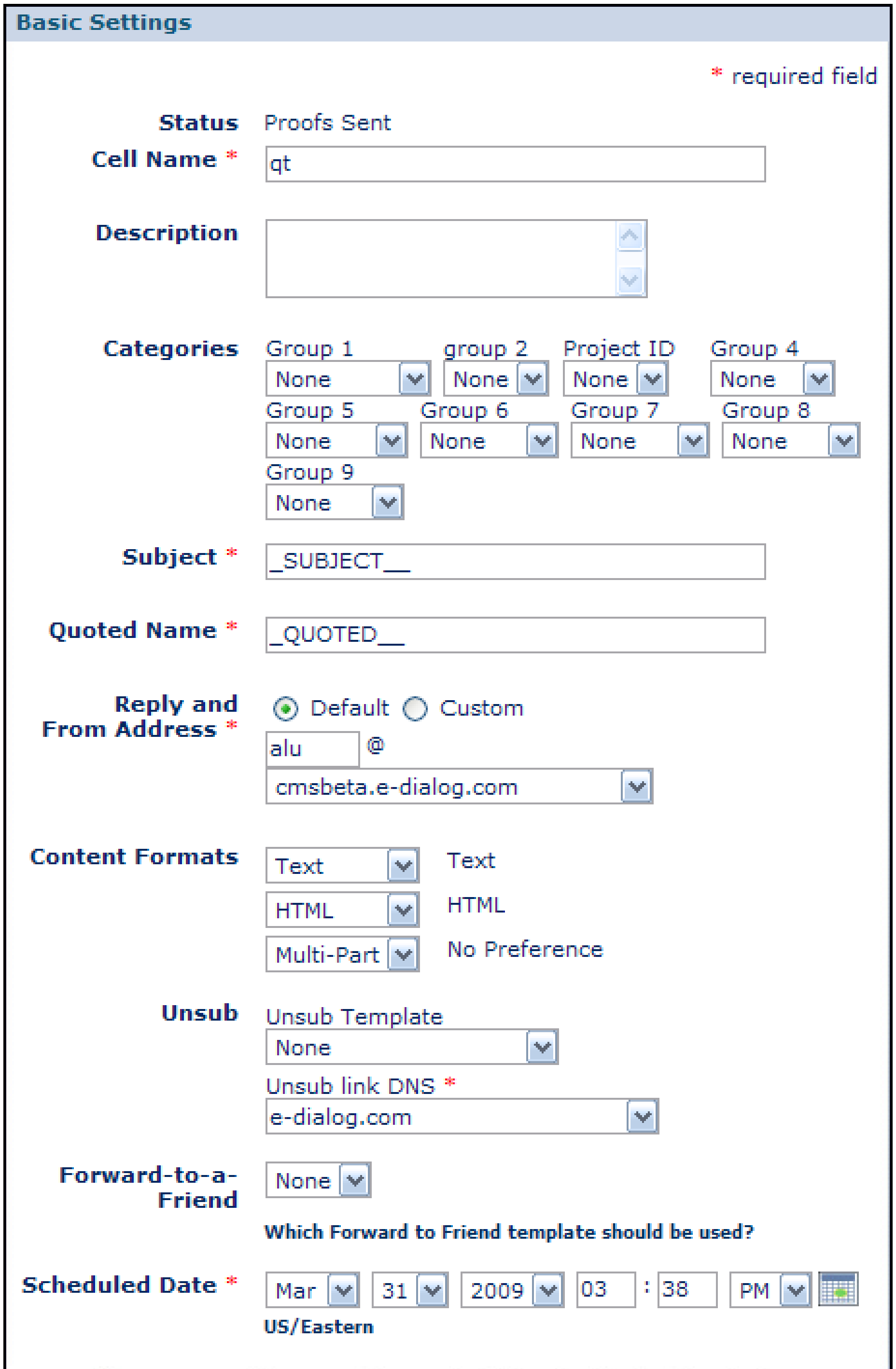
Configuration Tab

To create a cell, you provide both Basic and Advanced configuration information for the cell in the Configuration Tab.



* Indicates a required field.

Basic Settings



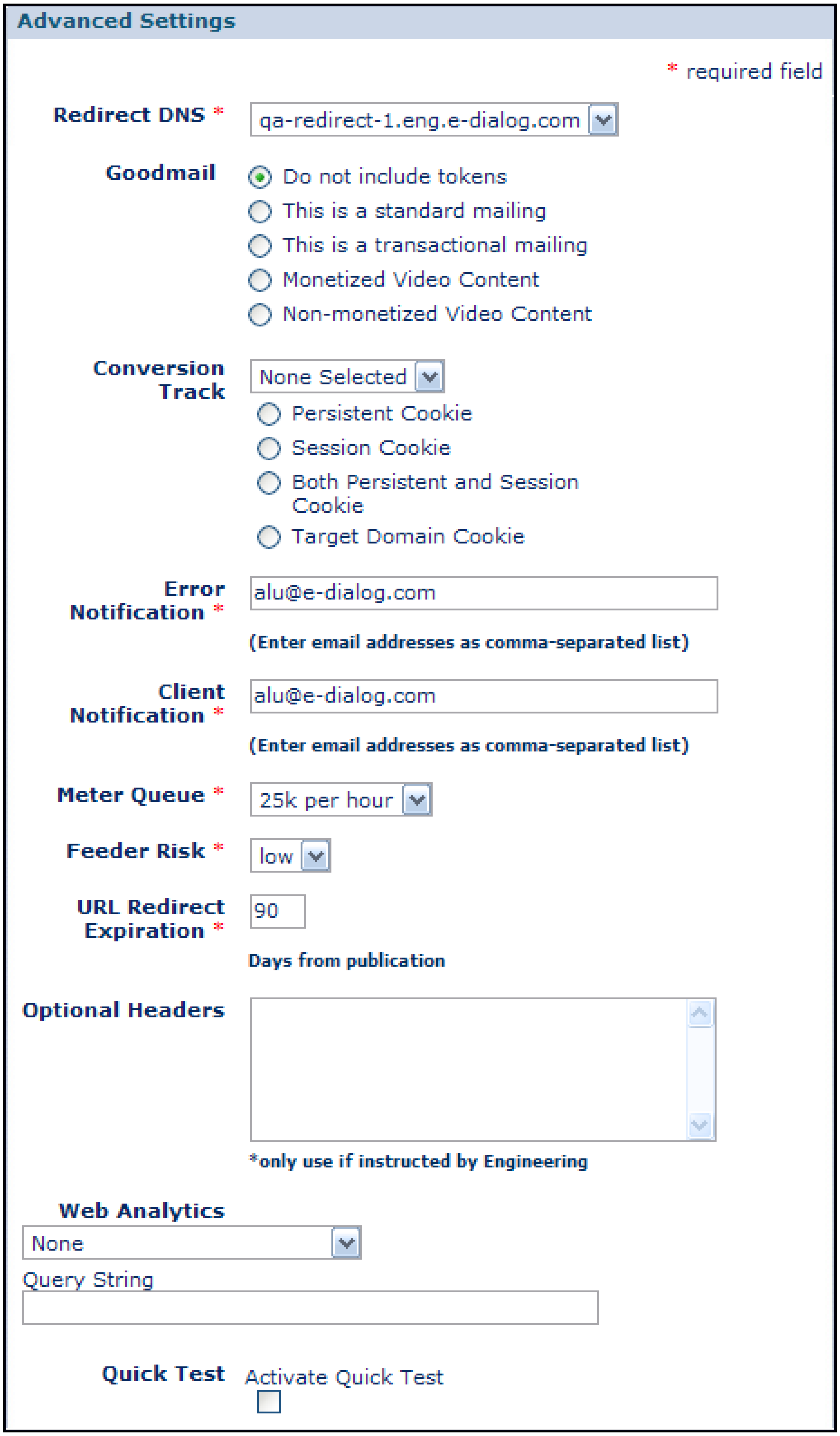
Setting	Description
Status	Indicates the status of the cell with respect to live proofing

	and mailing (read-only). ♦ Setup - In the process of setting up the cell. ♦ Lproofed - L Proof has been sent. ♦ Lproof Mailing - L Proof is in the process of being sent. ♦ Mailed - Final e-mail has been sent. ♦ Mailing - Final e-mail is in the process of being sent. ♦ Quick Test Processing - The back end is configuring test cells, splitting the export file, and/or building file samples for the newly created cells ♦ Phase 1 Complete - The initial quick test has been processed, and is ready to send the chosen version to the remainder of the audience ♦ Quick Test Finished - Processing has finished and the quick test is complete ♦ Quick Test Failed - There was an unexpected error, which most likely means there was a problem with the merger about which you should contact support
Cell Name *	The cell name appears in lists and reports but does not appear in any part of a mailing sent to an audience. Cell names cannot contain a pound sign (#).
Description	The cell description is for the benefit of other Campaign Builder users and does not appear in reports or in any part of a mailing sent to an audience.
Categories	Categories (user-defined fields) allow you to assign a set of attributes to a cell so that you can easily compare the relative performance of cells and mailings in eReports. Categories are created specifically for your organization's needs. For example, you might use a category called Type that includes Promotion, Newsletter, Press Release, and Seminar Invitation. While creating a mailing, you assign a selection from one or more of the categories to that campaign. You can select only one value for each category.
Subject *	The subject of the e-mail message can be a string or a symbol. Limit subject lines to fewer than 60 characters because some e-mail clients may truncate the text after 60 characters. You can enter more than one subject line and you can use symbols in the subject. **Note:** Use the _DEBUG__ symbol to safely provide a legend within the subject line to determine what a particular message contains. Example: `_DEBUG__Dear _FIRSTNAME__, Free Lunch!` All proofing rounds include the value of DEBUG, however,

	the final e-mail does not contain DEBUG. The merger removes this value when the final e-mail is sent.
Quoted Name *	The quoted name is the text that appears next to the actual e-mail address in the From: area of the delivered e-mail header. It can be a string or a symbol. It identifies the sender in a more general way than the actual e-mail address. For example, in Microsoft Outlook 2003 a default message header looks like this: `eDialog Campaign Builder [noc@e-dialog.com]` where `eDialog Campaign Builder` is the quoted name.
Reply and From Address *	The reply and from address is the actual e-mail address in the From: area of the delivered e-mail header. In other words, if the reader of the message clicks the Reply button, this is the address to which the reply is sent. The reply and from address for your organization may be integrated with the e-Dialog Response Management function. Check with your account team to determine whether or not this function is available to your organization.
Content Formats	The Content Formats fields override the e-mail format (MIME type) preferences stored in the master database for all cell recipients. For example, you can choose to send a Multi-Part message to all Text recipients who may have upgraded to an HTML-compatible e-mail application. Do not, however, choose to send an HTML-only message to recipients with a text preference. The message would appear as HTML code in a text-only e-mail client. These fields do not guarantee that the message will be sent in the specified format. The merger actually chooses the format based on factors such as available content, domain name, etc. that are not stored within the master database.
Unsub Template	The unsub template to send the user to when they click the unsub link. Select a template from the drop-down control. If you are unsure which template to use or need a new template created, contact your e-Dialog Account Team.
Unsub link DNS	An unsubscribe link allows a recipient to click to a page to opt-out from the e-mail subscription list. Choose the fully qualified domain name to be used in your unsubscribe link and automatically placed in your content at merge time. **Note:** To adhere to e-Dialog's opt-out policies, you must include an unsubscribe link in every e-mail you send. For example, an Unsub link DNS value of `cmsbeta.e-dialog.com` appears in the e-mail as: `http://unsub.myname.com/r/JFZ9IT/QR/G90T/CM/XZE70/LTAHNV11HUAA8RGMR`

	The corresponding intrinsic symbol is `_UNSUBLINK__`.
Forward-to-a-Friend	A forward-to-a-friend template allows an e-mail recipient to easily forward the message to another person. Choose a Forward to a Friend template from the drop-down control. If you are unsure which template to use or need a new template created, contact your e-Dialog account team. The corresponding intrinsic symbol is `_FTFLINK__`.
Scheduled Date *	To schedule the mailing of a cell, select the date and time. **Note:** This field appears in standard cells only. A standard cell does not deploy automatically. You must manually ***send the final e-mail*** (on page 107) by the scheduled date/time. Otherwise, the cell automatically resets itself to the current date/time the next time you access it. The date and time correspond to your preferences. See ***Setting Date/Time Preferences*** (on page 12) for details.

Advanced Settings



Advanced Settings

* required field

Redirect DNS * qa-redirect-1.eng.e-dialog.com

Goodmail
- Do not include tokens
- This is a standard mailing
- This is a transactional mailing
- Monetized Video Content
- Non-monetized Video Content

Conversion Track None Selected
- Persistent Cookie
- Session Cookie
- Both Persistent and Session Cookie
- Target Domain Cookie

Error Notification * alu@e-dialog.com

(Enter email addresses as comma-separated list)

Client Notification * alu@e-dialog.com

(Enter email addresses as comma-separated list)

Meter Queue * 25k per hour

Feeder Risk * low

URL Redirect Expiration * 90

Days from publication

Optional Headers

*only use if instructed by Engineering

Web Analytics

None

Query String

Quick Test Activate Quick Test

Setting	Description
Redirect DNS*	The drop-down menu contains a list of available domain names and CNAMES (aliases) to use for URL redirection. Check with your account team if you are unsure which one to use. Also known as URL forwarding, domain redirection, and domain forwarding, URL redirection is a technique for making a web page available under multiple URLs. When an e-mail recipient clicks a link within the cell content of the e-mail, the recipient's browser: 1 Transparently opens the Redirect DNS URL, passing reporting information to e-Dialog. 2 Places an e-Dialog cookie on the reader's system (if enabled) 3 Opens the actual Web page associated with the link A CNAME (canonical name) is a DNS record type that specifies an alias of one name to another. Using a CNAME allows a message to look more branded. For example, instead of `ezsitedesigner_demo.ed10.net`, you might specify a CNAME of `ezsoftware`. Consult your account team for additional detail about CNAMES and DNS.
Goodmail	Campaign Builder provides integration with ***Goodmail Systems*** http://www.goodmailsystems.com/, a third-party service that ensures that e-mail arrives in a recipient's in box, rather than being treated as junk mail or filtered by spam filters. Contact your account team for more information.
Conversion Track	Conversion Track is e-Dialog's method for tracking the revenue generated by a campaign. Conversion Track associates the customer and mailing information from a mailing with transaction information at the client site. e-Dialog offers several types of conversion tracking. Contact your account team to find out which types of conversion tracking are enabled for your organization. To choose a conversion tracking type: 1 Select the appropriate item from the drop-down menu. 2 Select the lifetime of the cookies placed by URL redirection (see Redirect DNS above). A cookie is a block of text information sent by a Web server to a Web client (usually a browser) and then sent back unchanged by the client each time it accesses that server. ♦ **Persistent Cookie** - Sets a cookie with a specific lifetime (number of days). The default value is one year. ♦ **Session Cookie** - Set a cookie that is removed at the end of the browser session. ♦ **Both Persistent and Session Cookie** - Sets both types of

	cookies. The tracking code uses whichever one it finds. ♦ **Target Domain Cookie** - Used when a client mails to multiple brands for which there are CNAMES configured. The redirect looks for the domain of the target URL and attempts to set the cookies in that domain. This is not configurable. Both session and persistent cookies are written.
Error Notification *	Enter the e-mail address(es) where mailing process error notifications are sent. Delimit e-mail addresses with commas and no spaces.
Client Notification *	Enter the e-mail address(es) where mailing process status and success notifications are sent. Delimit e-mail addresses with commas and no spaces. For example, these notifications include: ♦ Proofs are mailed, sent after a proof round has been sent ♦ Proofs are mailed for Final, sent after the proofs are sent during a final round ♦ All mail sent, last message in a job sent to the bursters ♦ Processing complete, reporting data has been loaded ♦ On demand refresh, eReport for that mailing has been refreshed
Meter Queue *	You can use Meter Queues to regulate the delivery speed of one or more mailings. The queue names indicate the maximum send rate (number of messages deployed per hour). This allows you to prevent your Web site from being overrun by responses from the mailing. It also helps to avoid deliverability issues. Meter queues are shared across all your mailings and cells. Thus, sending more than one mailing on the same meter queue means the mailings share the maximum send rate. **Notes** ♦ Meters regulate the number of mailings per hour; they do not guarantee that number. ♦ A meter sends its messages all at once at the top of the hour. It is not spread out across the hour. ♦ If there are multiple audiences within a cell, the meter starts mailing from the beginning of the export file, which corresponds to the first audience, then works down the export file. ♦ Proofs and seeds are not metered. ♦ Once a metered mailing has begun, it cannot be changed except in extreme circumstances.

	♦ Meter queues do not work well with very small message sizes.
Feeder Risk *	The risk level determines what IP launches the message. A client may already have a private IP, meaning that only their mail is deployed from a particular IP address. Many clients share a handful of IPs (a queue). New clients and risky mailings are deployed from the B queue. Account teams should have direction on which queue to use.
URL Redirect Expiration *	This field specifies the number of days to keep the URL redirection in effect (see URL Redirect above). The default is 90 days. You can specify any amount up to 9999.
Optional Headers	This field is very rarely used. It provides a way to add information to the full e-mail message header that is not displayed by default in most e-mail client applications and thus not generally seen by e-mail recipients.
Web Analytics	Select the web analytics package that you use to analyze your Web site traffic. This causes the specified query string to be appended to every URL in the cell content so that your Web site can pass it to the analytics vendor. You can optionally arrange to have e-Dialog track the Web site traffic resulting from your cell content with the following vendors analytics ♦ ***Coremetrics*** (http://www.coremetrics.com/) ♦ ***Omniture*** (http://www.omniture.com/) Contact your account team for more information.
Quick Test	Configures the cell as a Quick Test as described in ***Configuring a Quick Test Cell*** (on page 137).

Define the Target Audience

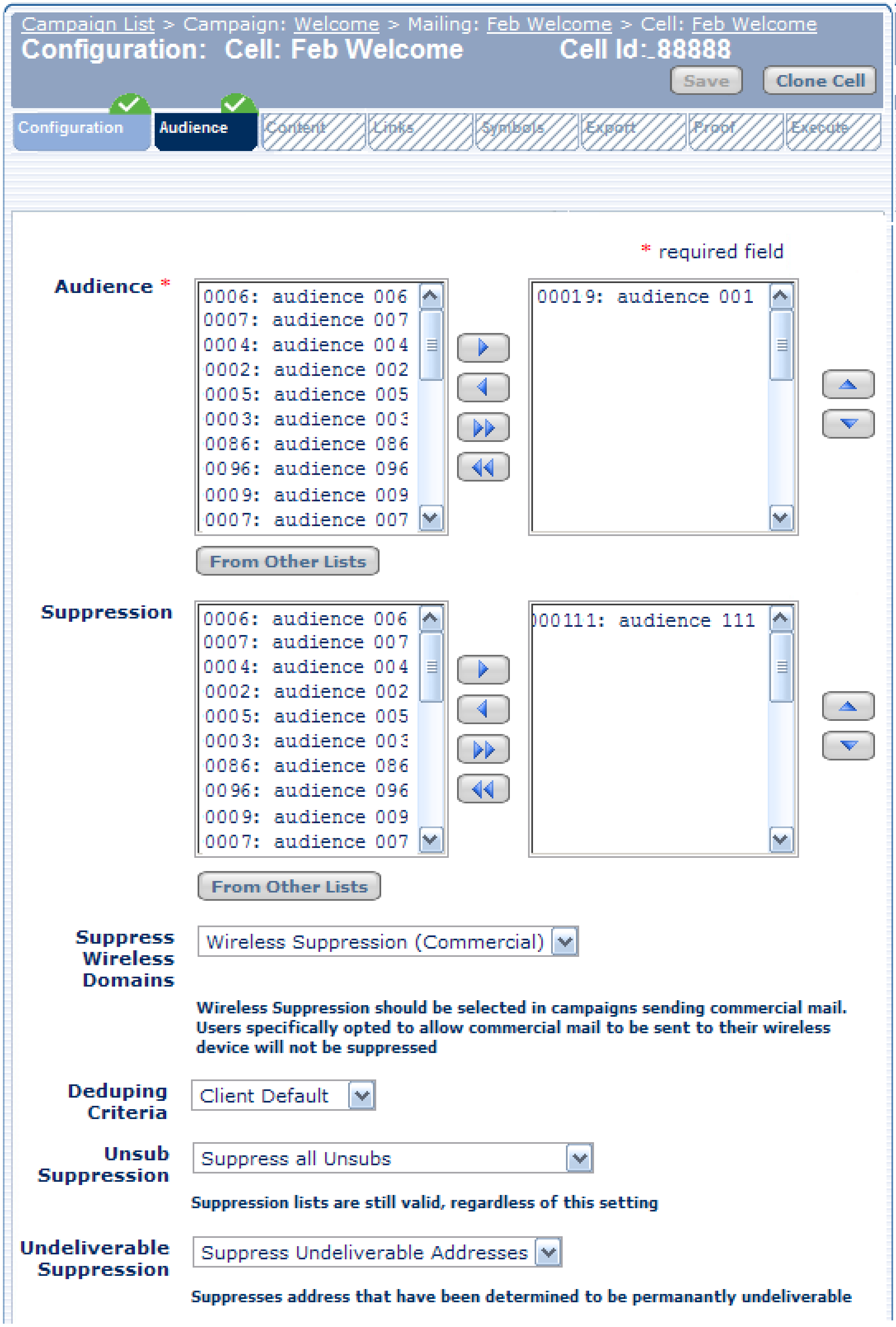
In This Chapter

Audience Tab

This section describes the Audience Tab for a standard cell. If you are creating an Insight Trigger cell, see ***Insight Audience*** (on page 118).

When you have provided configuration information for a cell, you then define the target audience for the cell in the Audience Tab by:

- Selecting one or more audience lists
- Suppressing a subset of the recipients in the audience lists
- Removing duplicates from the audience lists


Campaign List > Campaign: Welcome > Mailing: Feb Welcome > Cell: Feb Welcome
Configuration: Cell: Feb Welcome
Cell Id: 88888
Save
Clone Cell
Configuration
Audience
Content
Links
Symbols
Export
Proof
Execute
* required field
Audience *
0006: audience 006
0007: audience 007
0004: audience 004
0002: audience 002
0005: audience 005
0003: audience 003
0086: audience 086
0096: audience 096
0009: audience 009
0007: audience 007
00019: audience 001
From Other Lists
Suppression
0006: audience 006
0007: audience 007
0004: audience 004
0002: audience 002
0005: audience 005
0003: audience 003
0086: audience 086
0096: audience 096
0009: audience 009
0007: audience 007
00111: audience 111
From Other Lists
Suppress Wireless Domains
Wireless Suppression (Commercial)
Wireless Suppression should be selected in campaigns sending commercial mail. Users specifically opted to allow commercial mail to be sent to their wireless device will not be suppressed
Deduping Criteria
Client Default
Unsub Suppression
Suppress all Unsubs
Suppression lists are still valid, regardless of this setting
Undeliverable Suppression
Suppress Undeliverable Addresses
Suppresses address that have been determined to be permanantly undeliverable

* Indicates a required field.

If you have access to the Advanced Export options, contact your account team for instructions.

Creating Audience Lists

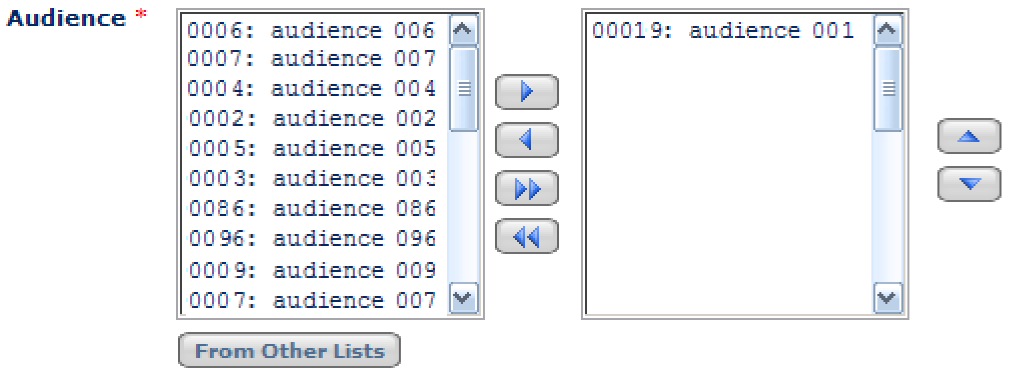
You can create audience lists by:

- Using e-Dialog Data Director™
- Building new lists from e-Dialog Insight Builder™ queries
- Having your Account Team help you set up an automated procedure to load audience data into your database

For example, if your Web site's online enrollment forms and related databases are hosted by e-Dialog, your audience lists can be automatically updated with new "opt-in" addresses as they are added.

If you have multiple users and accounts in Campaign Builder, you can control which audience lists can be created by and/or are available to all users or only certain users.

Selecting e-mail Recipients to Include

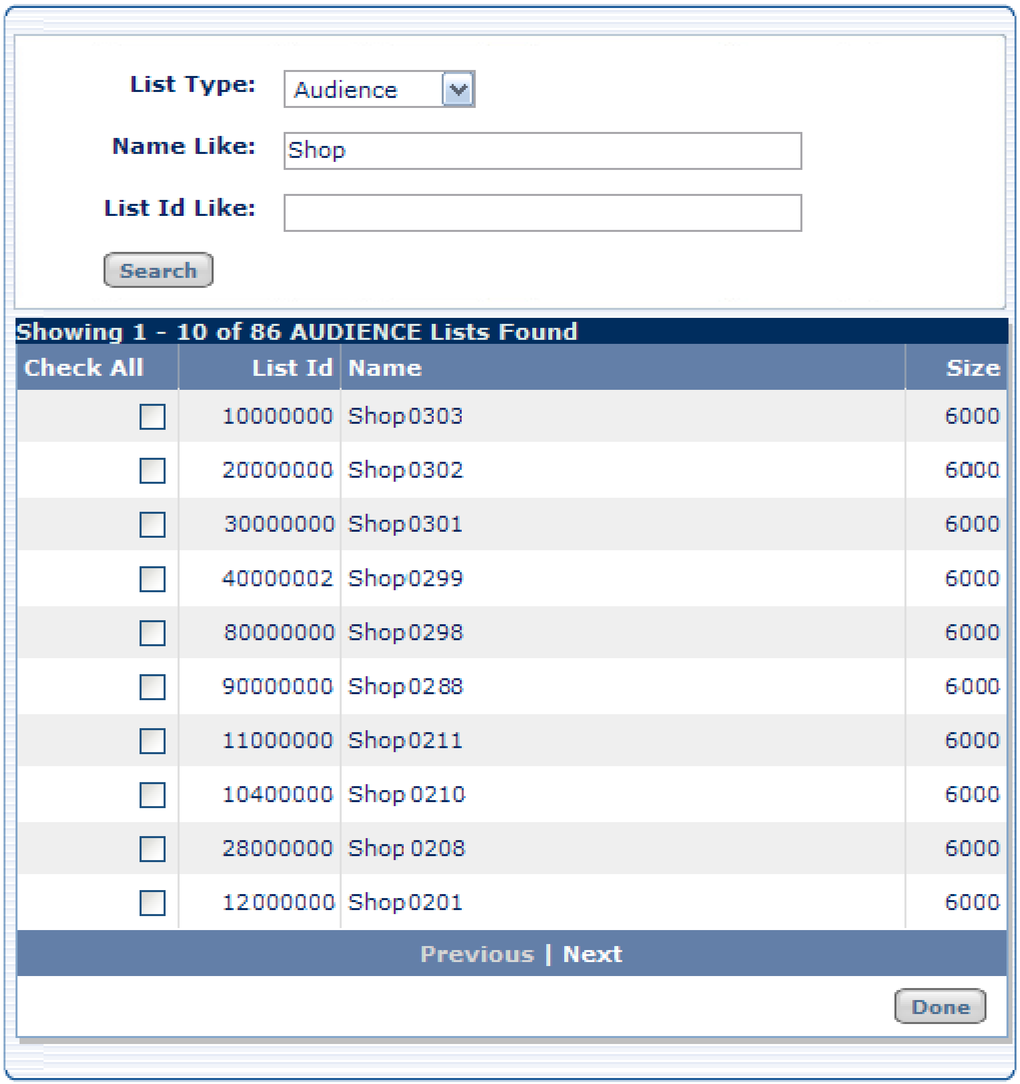


Certain audience lists and the **From Other Lists** button may not be available, depending on your profile. See Authorization and Security Profiles for more information.

The number in brackets [ ] next to the audience lists represents the total number of recipients that belong to each audience. These numbers are automatically updated on a regular basis and may be inaccurate if an audience list has changed since the most recent update.

To specify the target audience for the cell, do any of the following:

- Click to add one or more selected lists to the target audience.
- Click to remove one or more selected lists from the target audience.
- Click to add all available lists to the target audience.
- Click to remove all lists from the target audience.
- If there are more lists in the database than can be displayed in one pane, click **From Other Lists** to choose from all available lists.
- To narrow your search, filter on the name or list identification number. The search is case-insensitive and matches partial strings.



Setting Audience List Priority

Campaign Builder sends the cell to the audience lists in the order in which they appear in the right-hand pane. This sets the priority of the lists.

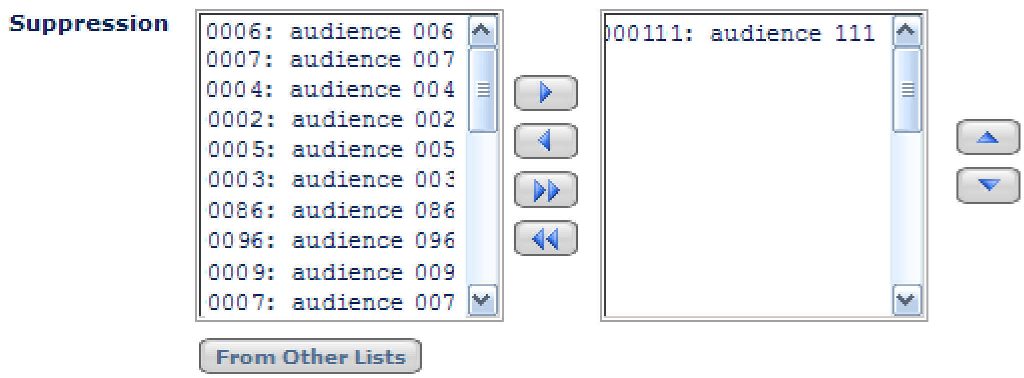
- Click to increase the priority of a list.
- Click to decrease the priority of a list.

In addition, use priority to:

- De-dupe (remove duplicate) recipients who are part of multiple audience lists
- Determine which audience list gets credit for a de-duped name (for reporting purposes)

For example, Ken@acme.com may be a member of both audience 1 and audience 2. If the audience 1 is given higher priority, Ken@acme.com only receives the e-mail once and is counted as a member of audience 1 for reporting purposes.

Selecting e-mail Recipients to Exclude



The **Suppression** section of the Audience tab allows you to choose one or more audience lists to exclude from the set of e-mail address to which to send the cell.

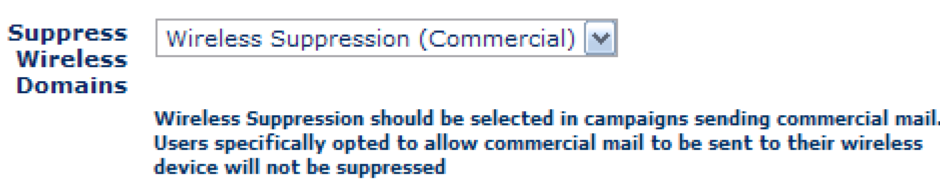
To specify which lists to exclude from the target audience, do any of the following:

- Click to exclude one list from the target audience.
- Click to remove one list from the exclusion list.
- Click to exclude all lists to the target audience.
- Click to remove all lists from the exclusion list.
- If there are more lists in the database than can be displayed in one pane, click **From Other Lists** to choose from all available lists.

  The From Other Lists button may not not be available depending on your profile. See Customization for Your Organization for more information.

Preventing Sending e-mail to Wireless Devices

You can avoid sending e-mail to recipients who do not want to have commercial e-mail sent to their wireless device.



- **Wireless Suppression (Commercial)** - Avoid sending e-mail to recipients who have specified that they do not want to receive commercial e-mail on their wireless device.
- **Don't Suppress (transactional)** - Send e-mail to recipients who have specified that they do not want to received commercial e-mail on their wireless device, because they have recently completed a transaction with the client, such as making a purchase.

Note: All e-mail addresses to whom you attempt to send a cell are included in eReports regardless of wireless suppression.

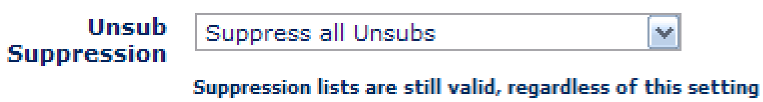
Preventing Sending e-mail to Duplicate Recipients

To avoid sending more than one e-mail to the same recipient, select the appropriate criterion from the drop-down menu.

The criteria to use is client-specific. For example, a client might determine and eliminate duplicates based on e-mail address.

Preventing Sending e-mail to Unsubscribed Recipients

When a recipient receives an e-mail and unsubscribes (opts-out), that recipient's data remains in your database. It is marked as an "unsub." Each cell can specify how to handle unsubs in the chosen audience lists. It cannot, however, override the suppression lists chosen in the ***Suppression section*** (on page 51).



To specify how to handle unsubs, select the appropriate value from the Unsub Suppression drop-down list.

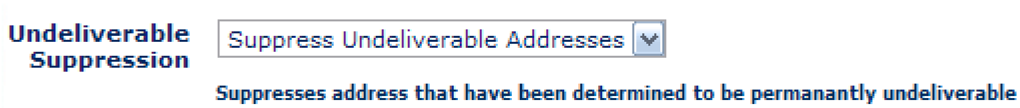
Value	Description
Suppress all Unsubs	Prevents sending the cell to any recipient marked as an unsub. Use this option for all promotional campaigns.
Suppress Global Unsubs and Domains	Prevents sending the cell to specific domains in addition to recipients marked as unsubs. You can maintain a list of domains to avoid, for example, competitors.
Suppress Master Unsubs	Prevents sending e-mail to recipients who are identified as unsubscribed.
No Suppression	Sends the cell to all recipients in the chosen audience lists, regardless of whether or not they are marked as unsubs.

	Use this option only in compliance with e-Dialog and ***CAN-SPAM Act*** (http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm) policies. For example, if an unsub makes a purchase on your Web site, you can send that unsub a transactional message.

Note: All e-mail addresses to whom you attempt to send a cell are included in eReports.

Preventing Sending e-mail to Undeliverable Addresses

You can specify whether to attempt to send e-mail to addresses marked as undeliverable.



- **Suppress Undeliverable Addresses** - Select **Suppress Undeliverable Addresses** for all normal promotional campaigns.
- **Don't Suppress** - There may be instances (for example, transactional messages) where you want to select **Don’t Suppress** instead. This lets you retry delivery to previously undeliverable addresses. If you select **Don't Suppress**, e-mail addresses are included in eReports.

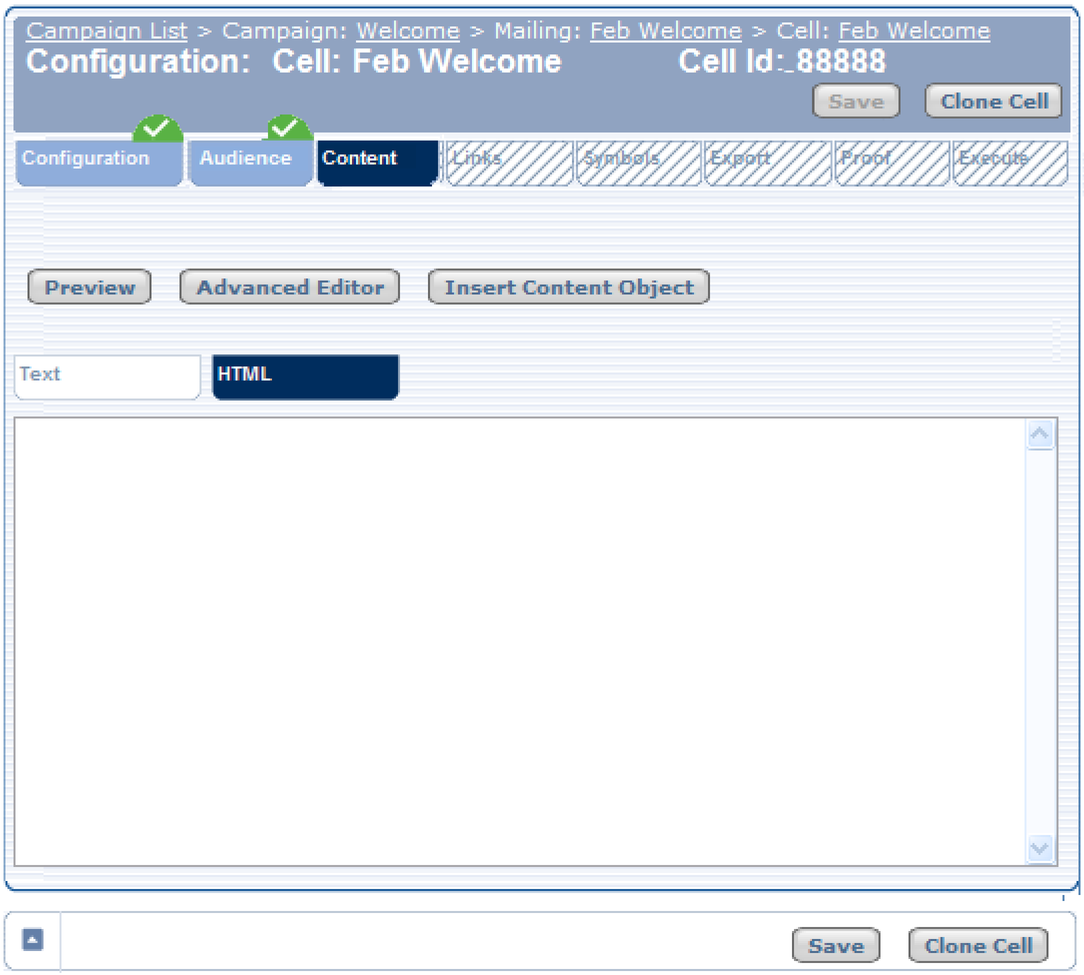
Note: All e-mail addresses to whom you attempt to send a cell are included in eReports.

Create Content

In This Chapter

Content Tab

When you have specified the target audience, you then define the content of the message in the Content Tab.



Click this...	To do this...
Preview	Display a preview window as described in ***Previewing Cell Content*** (on page 69). At any point during the content definition process, you can click **Save** and then click **Preview** to see how the mailing appears
Advanced Editor	Open a Web-based WYSIWYG (What You See Is What You Get) editor for your HTML content only. See ***Using the Advanced Editor*** (on page 62) for instructions.
Insert Content Object	Select a content object from the Content Library to insert in the cell content. When you insert the content object, it overwrites any existing content in the cell.

Text	Switch the content pane to the plain text version of the message.
HTML	Switch the content pane to the HTML version of the message.
Save	Save the cell to the database.
Clone Cell	Creates an identical copy of the cell and: ♦ Names the copy "Clone Of " the original cell name ♦ Sets the status of the cloned cell to Setup

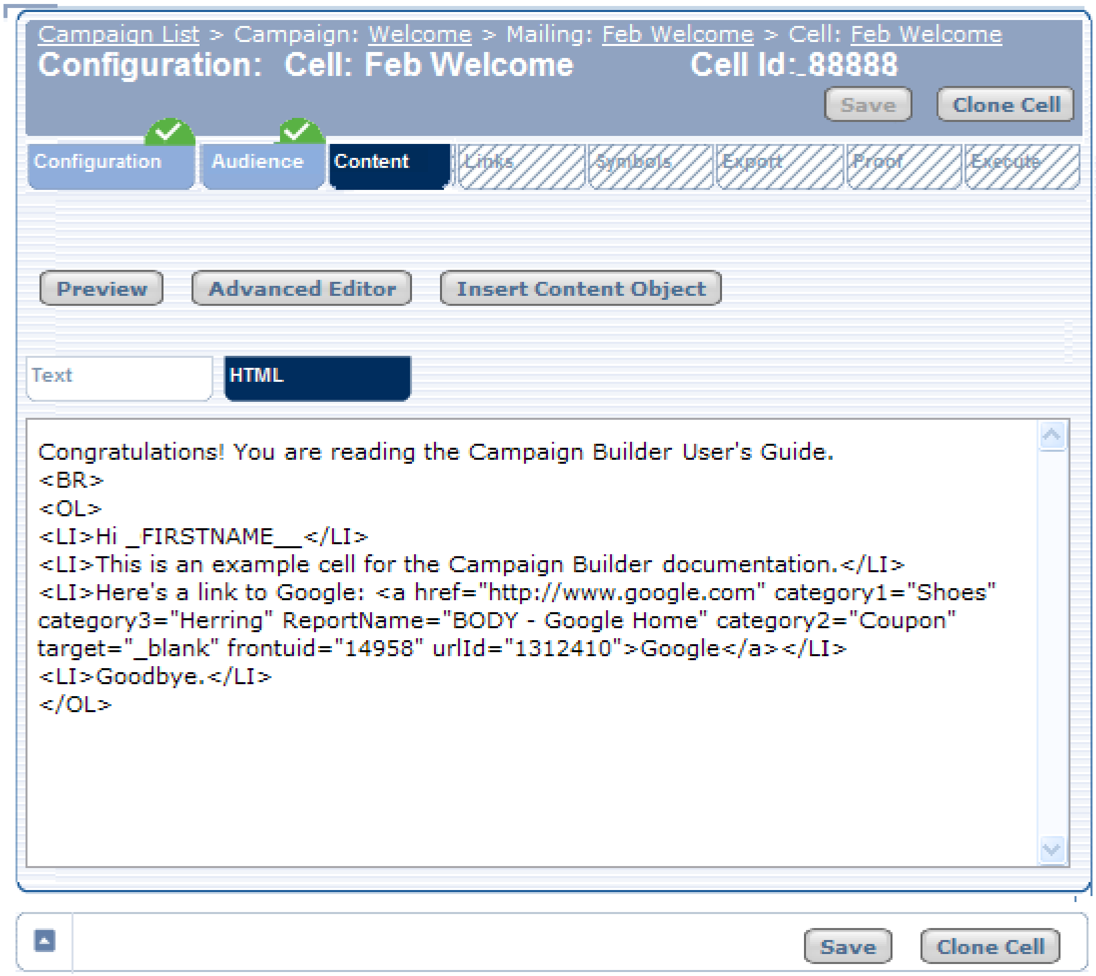
Entering HTML Content

To create HTML content for the cell:

1 Use the software of your choice to create the HTML code, including:

- The built-in Advanced Editor as described in ***Using the Advanced Editor*** (on page 62)
- A third-party visual editor (for example, Microsoft® FrontPage® or Macromedia® Dreamweaver®)
- A plain text editor

2 When you have created your HTML code, copy and paste the code into the HTML input field:



3 Check your layout by clicking **Preview** just above the content input field. See ***Previewing Cell Content*** (on page 69) for more information.

Using valid HTML code

See ***Guidelines for HTML Content*** (on page 59).

Using links in HTML content

Campaign Builder automatically adds attributes such as `ReportName=""` and `verified=""` to your Anchor (<A>) tags after you save your HTML code. This allows e-Dialog to track activity such as clicks and conversions on your links. These extra attributes do not appear in the processed content of the e-mail.

You can manually edit these attributes but keep in mind that Campaign Builder automatically updates the `ReportName` attribute when you make changes to report names in the ***Links Tab*** (on page 71). Removing these attributes can cause unexpected results, such as losing a report name you have already defined or generating an error when you save the content.

Reusing HTML content

1. Clone the old mailing or cell as described in ***Working With Campaigns, Mailings, and Cells*** (on page 13).
2. Edit the unprocessed content to create your new e-mail.

Do not place the HTML code from a previously mailed campaign or from a proof into Campaign Builder. This content has been processed and is different from the original content. For example, certain elements, such as redirects and open detect images cause errors when saved as new content in another cell.

Guidelines for HTML Content

The following guidelines are intended to help you to create HTML code that renders consistently across most major e-mail clients.

Specifying formatting

- Do not use `<BODY>` tags to control formatting. Body tags are stripped out or ignored by most Web based e-mail clients.
- Use inline styles to control HTML typeface:

  .
- Use the tag instead of <div>, <span>, or <p> tags.
- Do not use fractional font sizes such as 12.5px.
- Add a
 tag after your last word and before .
- Avoid placing images inside <font> tags.

Using JavaScript

Do not use JavaScript.

- Ensure there are no `<script type=javascript>` bits of code in the template.
- Remove or comment out all `onMouseover`, `onMouseout` calls.

Using cascading style sheets (CSS)

- Avoid using CSS.

  If you must use CSS, use it sparingly and only to format text. Inline styles render consistently across major e-mail clients. Inline styles in font tags can be an effective method for controlling the appearance of your text. For example:

  ```
  <font style="font-family:Arial,
  Verdana,Helvetica,sans-serif;
  font-size:12pt;
  font-color:#000000">
  Insert copy here.
  </font>
  ```
- Do not use styles to control:
  - Table borders and padding
  - Image float positioning

Using tables

- Limit the width of your HTML tables to 600 pixels to minimize horizontal scrolling, especially in web based e-mail clients.
- Define <table> elements with:
  `border=0 cellpadding=0 cellspacing=0.`
- Only define width in the <table> tag.
- Define <td> elements with:
  `valign=top align=left.`
- Avoid defining height properties.
- Avoid defining width in <td> tags. Instead, let a spacer image control width.
- Do not define <td> elements with a class. Instead, let a spacer image and inline style control margin and font style.
- Avoid using   in empty <td> elements. Instead, use a spacer image.

Specifying unsubscribe and forward-to-a-friend links

- Use the following syntax for unsubscribe and forward to friend links:

```
To unsubscribe, <a href="_UNSUBLINK__" style="font-color: #000000"
target="_blank">click here</a>.

To forward this e-mail to a friend, <a href="_FTFLINK__" style="font-color: #000000"
target="_blank">click here</a>.
```

Note: The font color can be anything you choose.

- Style a hyperlink either by styling the anchor tag as shown above, or by surrounding the display text with a styled <FONT> tag.

Including images

- Define height and width properties for all images.
- Do not resize images in HTML.
- Treat photo realistic images as jpg.
- Treat lines, text, shapes, and solid color imagery as gif.
- Link images by placing the image tag in place of the display text.
- Set the border size to 0.
- Include an <alt> tag to display text if the image is missing.

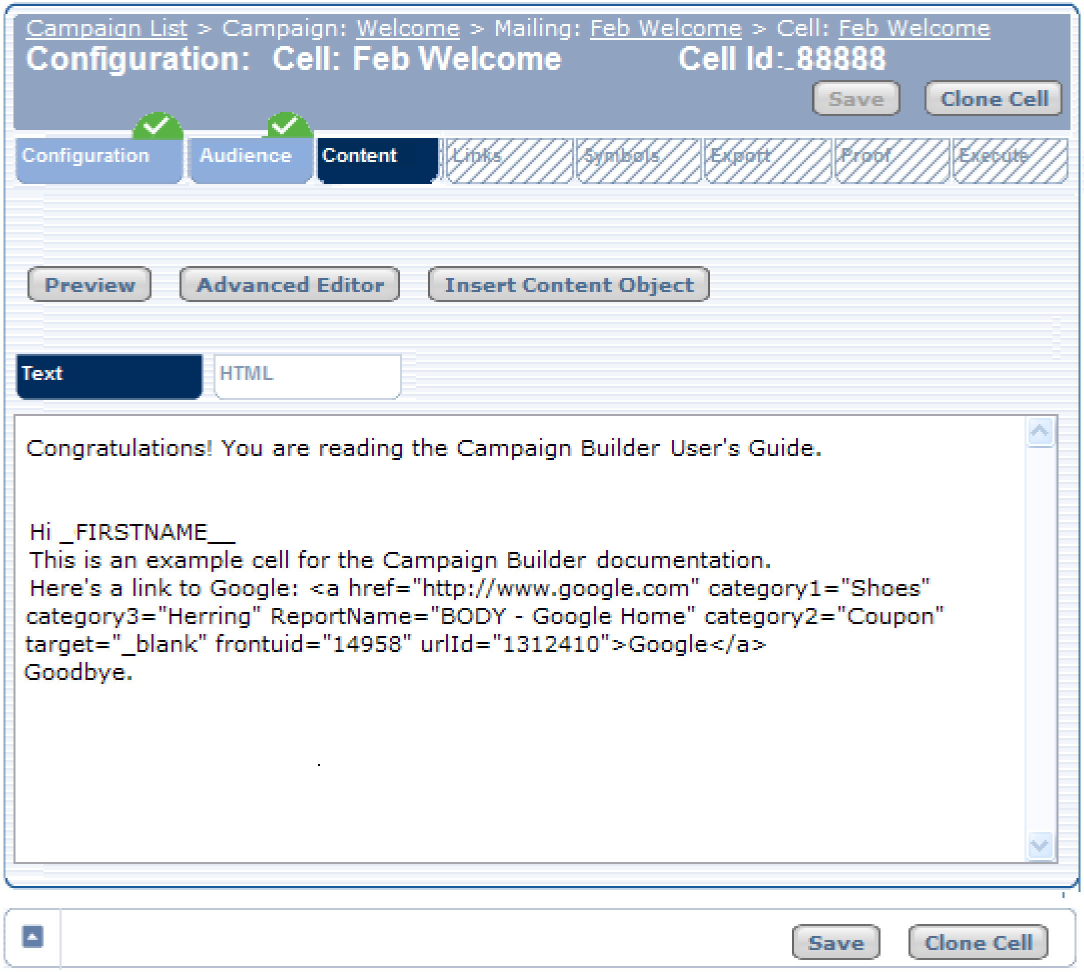
Using the spacer image

- Use the spacer image, which is a transparent 1x1 pixel image, to set width and height properties.

Entering Text Content

1. Use the software of your choice to create the text content, including:
   - The built-in Advanced Editor as described in ***Using the Advanced Editor*** (on page 62)
   - A third-party word processor application, ensuring that you save the content as plain text
   - A plain text editor such as Notepad
2. Ensure that you text content follows the ***text content guidelines*** (on page 61).

3 When you have created your text content, copy and paste the text into the Text input field:



4 Check your layout by clicking **Preview** just above the content input field. See ***Previewing Cell Content*** (on page 69) for more information.

Guidelines for Text Content

The following guidelines are intended to help you to create text content that renders consistently across most major e-mail clients:

Use supported character sets

In general, you should use only ASCII characters in text content for maximum compatibility with e-mail clients. Replace non-ASCII characters (for example, superscript symbols such as ™) with ASCII equivalents. For example, replace ™ with (TM).

For international e-mail requiring multi-byte character sets, contact your Account Team.

Organize the content

Text based e-mail clients do not support any copy formatting or HTML code (other than the <A> tag for links). Instead, you can use a string of asterisks or dashes to visually organize the copy and improve the appearance of the layout. For example:

SPECIAL OFFER - 30% OFF

Use hyperlinks in text

To insert a hyperlink in the Text layout, use the same syntax as for HTML without any formatting or anchor tags attributes, as follows:

```
<a href="http://images.ed4.net/images/htdocs/placeholder.htm">
http://images.ed4.net/images/htdocs/placeholder.htm</a>
```

Although the Text format does not support display names, using this syntax with the URL as the display name allows you to give these links report names in the Links Tab. You can then use the report names for tracking purposes in text e-mail clients that do display hyperlinks.

e-Dialog recommends that you avoid placing hyperlinks in the middle of sentences or paragraphs in your text copy. Below are examples of proper and improper link placement:

Proper link placement

Link placed on its own line:

HTML	Text
The stereo is on sale for $199. Buy it now! Also, check out our great deals on CDs.	The stereo is on sale for $199. Buy it now at: http://www.stereo.sale.@sample.com Also, check out our great deals on CDs.

Improper link placement

Link placed in the middle of a sentence:

HTML	Text
The stereo is on sale for $199 when you purchase speakers. There is also a great deal on CDs.	The stereo is on sale at http://www.stereo.sale@sample.com for $199 when you purchase speakers. There is also a great deal on CDs.

Using the Advanced Editor

To create content, you can use either the Content Library Editor or the Advanced Editor.

To start the Advanced Editor:

1 Do one of the following:
   a) Click **New** to create a content item while viewing the Content Library content list.
   b) Click the content item to edit while viewing the Content Library content list.
   c) Click Clone while editing a content item in Content Library.
   d) In Campaign Builder, navigate to the Content Tab.

2 Click **Advanced Editor.**

To create content using the Advanced Editor:

1 Select the type of content to create, either Text or HTML.
2 Enter the copy.
3 To enter a link in text content, click .
4 To incorporate HTML tags in HTML content, use the ***buttons on the toolbar*** (on page 63).
   Although you can enter HTML tags manually, the buttons on the toolbar ensure that your HTML contains closing tags for each opening tag and that the tags do not contain typos. For a brief description of a button, hover over it with the mouse.
5 Click **Apply Changes.**

Notes

- The Advanced Editor inserts a space character into an empty table data element in HTML content. In other words, it changes `<td></td>` to `<td> </td>` which may affect the formatting of your message.
- When you change the border size of an image, the image editor automatically resets the border color to black. You can control the border color by specifying a style.

Advanced Editor Toolbar Buttons

The following tables show the toolbar buttons:

Copy formatting

Use the following button to apply styles to text.

Bold	Italic	Underline	Insert special character
Font family Font family	Font size Font size	Text color	Text background color

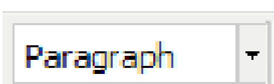
The special characters you can enter include the following:

	&	"	¢	€	£	¥	©	®	™	‰	µ	·	•	…	′	″	§	¶	ß
‹	›	«	»	‘	’	“	”	‚	„	<	>	≤	≥	–	—	¯	‾	¤	¦
¨	¡	¿	ˆ	˜	°	−	±	÷	⁄	×	¹	²	³	¼	½	¾	ƒ	∫	∑
∞	√	≈	≠	≡	∏	¬	∩	∂	´	¸	ª	º	†	‡	À	Á	Â	Ã	Ä
Å	Æ	Ç	È	É	Ê	Ë	Ì	Í	Î	Ï	Ð	Ñ	Ò	Ó	Ô	Õ	Ö	Ø	Œ
Š	Ù	Ú	Û	Ü	Ý	Ÿ	Þ	à	á	â	ã	ä	å	æ	ç	è	é	ê	ë
ì	í	î	ï	ð	ñ	ò	ó	ô	õ	ö	ø	œ	š	ù	ú	û	ü	ý	þ
ÿ	Α	Β	Γ	Δ	Ε	Ζ	Η	Θ	Ι	Κ	Λ	Μ	Ν	Ξ	Ο	Π	Ρ	Σ	Τ
Υ	Φ	Χ	Ψ	Ω	α	β	γ	δ	ε	ζ	η	θ	ι	κ	λ	μ	ν	ξ	ο
π	ρ	ς	σ	τ	υ	φ	χ	ψ	ω	←	↑	→	↓	↔	◊	♣	♥	♦	

When you use the HTML Source Editor to edit text, enable Word wrap to be able to see the content without scrolling; this has no effect on the content.

Paragraph formatting

Use the following buttons to apply styles to paragraphs.

 Align left	 Align center	 Align right	 Align justify
 Paragraph format			

HTML Lists

Use the following buttons to create and modify lists.

 Bulleted list	 Numbered list

Actions

Use the following buttons to perform common actions.

 Undo most recent action	 Redo most recently canceled action	 Edit HTML source	 Print
 Preview content in a browser	 Toggle between full screen and partial screen display		

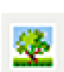
Links

Use the following buttons to create and remove links.

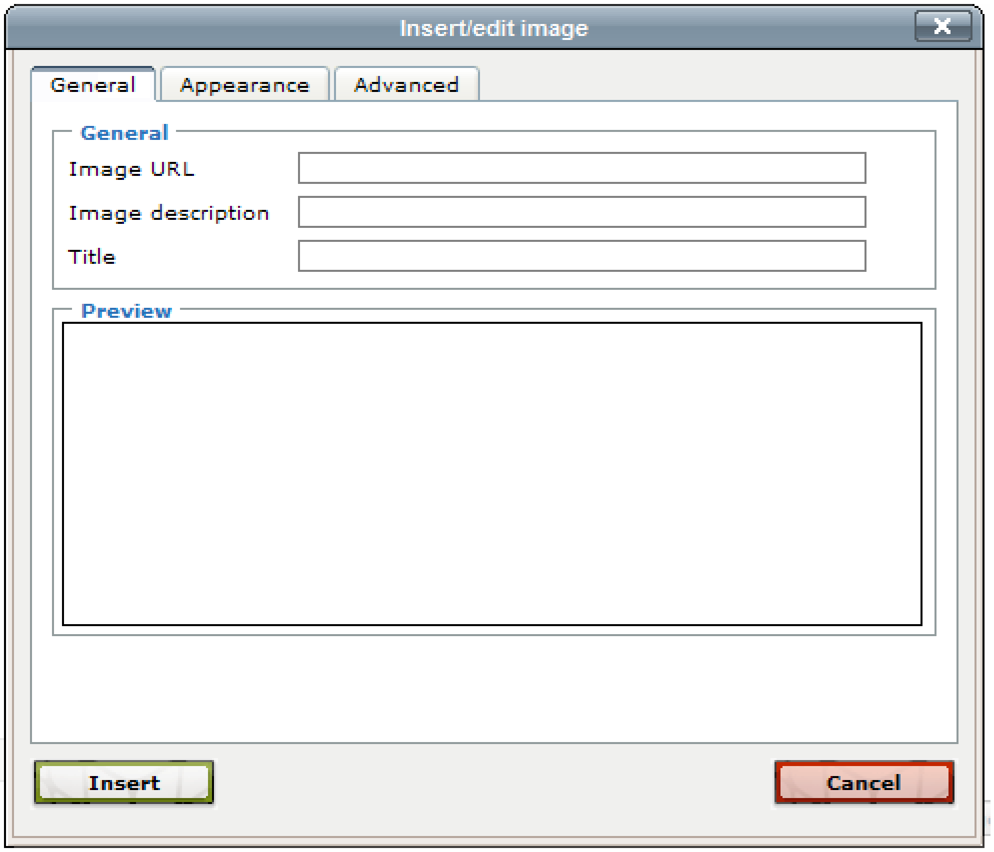
 Insert or edit a link	 Remove the link from the selected text

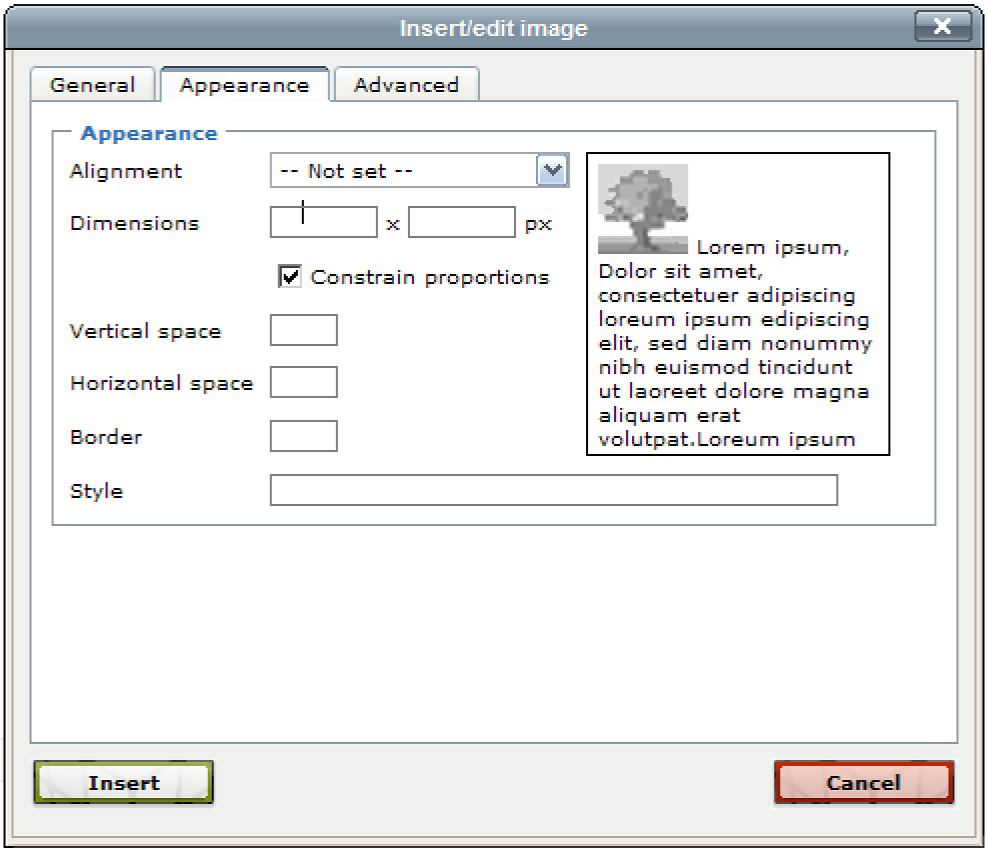
When you insert a link, you specify the URL, the report name, and the categories to associate with the link. The report name is the report that tracks the effectiveness of the link in eReports. You can also disable reporting on the link.

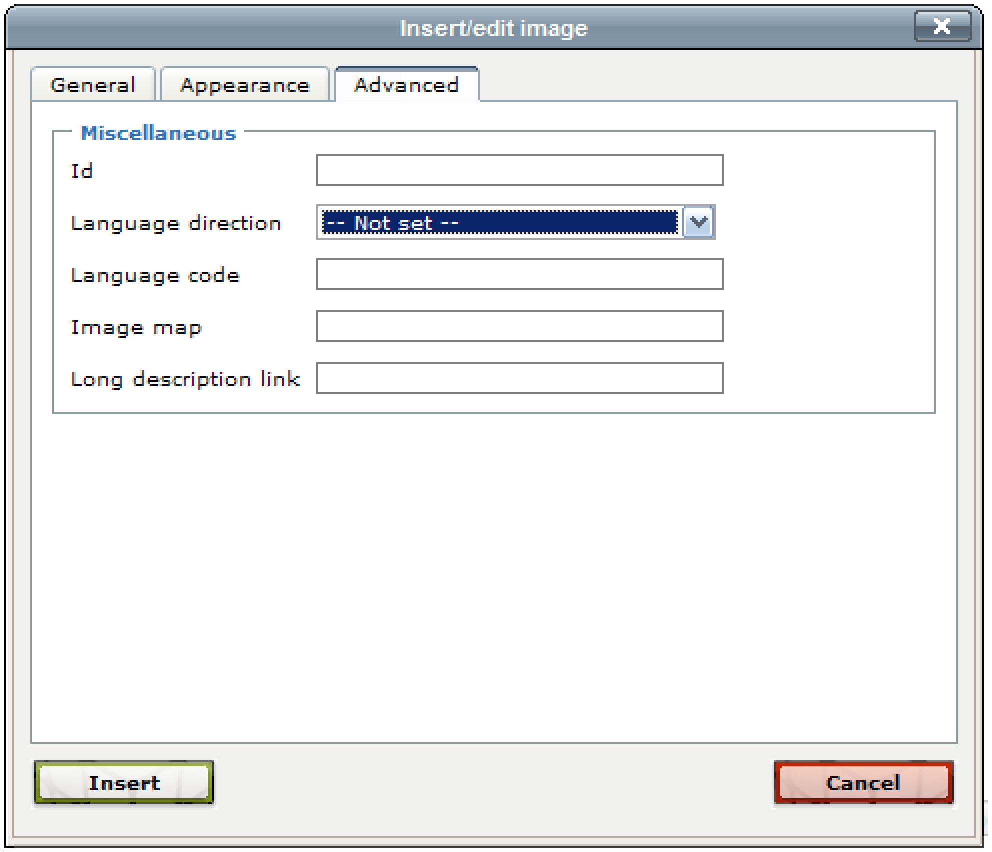
Images

 Insert or edit an image

You can specify the appearance of the image, including alignment, size, the amount of space around the image, whether there is a border around the image, and how text appears around the image.




Insert/edit image
General
Appearance
Advanced
Appearance
Alignment
-- Not set --
Dimensions
x
px
Constrain proportions
Vertical space
Horizontal space
Border
Style
Lorem ipsum, Dolor sit amet, consectetuer adipiscing loreum ipsum edipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.Loreum ipsum
Insert
Cancel



Tables

Use the following buttons to create and modify tables.

Insert a new table	Set table row properties	Set table cell properties
Insert a row before the current row	Insert a row after the current row	Delete the current row
Insert a column before the current	Insert a column after the current	Delete the current column

column	column	
 Split merged table cells	 Merge table cells	

When you insert a table, you can specify the number of columns and rows as well as the appearance of the table.

Splitting merged table cells restores the table structure to its previous state, but does not return cell contents to the previous state.

Previewing Cell Content

To view the content as it appears to an e-mail recipient in the new browser window:

1 Click **Preview**.

2 Click **Text** or **HTML** to view either part of a Multi-Part cell.

3 Check **Hide Images from HTML part** to replace images with placeholder icons.

Campaign Builder displays the content without substituting values for symbols. You can see what the content looks like with sample data merged into it when you ***proof the e-mail*** (on page 95).

Using Symbols in Cell Content

Symbols in Campaign Builder personalize the e-mail you send by merging recipient-specific data into each message. For example, you can use symbols to address a customer by first name, offer a coupon relevant to the customer's interests or purchasing history, and so forth.

When you enter a symbol in cell content, it automatically:

- Becomes merged (replaced by data) when proofing or sending the cell. The source of the data depends on the symbol data type.
- Appears in the cell's ***Symbols Tab*** (on page 75) where it cannot be deleted unless removed from the content. See ***Define Dynamic Content to Merge*** (on page 75) for more information about the symbols tab.

Symbol syntax

All symbols begin with a **single underscore** (_) followed by a string of characters, followed by **two underscores** (__). For example:

```
Dear _FIRSTNAME__,
```

after merging would look something like:

```
Dear Fred,
```

or if the default value is used:

```
Dear Valued Customer,
```

A symbol consisting of a a pound sign (#) followed by a nine-digit number is a content object identifier and is replaced with an object from the Content Library at merge time. For example:

`_#282441300__`

Symbols appear without underscores in the Symbols Tab. For example, the symbol FIRSTNAME appears in content as `_FIRSTNAME__` but the Symbols Tab displays the symbol name as `FIRSTNAME`.

Note: To adhere to e-Dialog's opt-out policies (and the ***CAN-SPAM Act*** (http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm)), you must include an unsubscribe link in every e-mail you send. Use the intrinsic symbol `_UNSUBLINK__` to place the unsub link (see ***Basic Settings*** (on page 36)) in your cell content.

Using Content Object Symbols

The Content Library contains blocks of reusable content, called Content Objects, that you can use in your mailings. There are several ways to do this:

- Click **Insert Content Object**, select a content object, and click **Insert.**
- If you know the nine-digit Content Object identification number, use it as a symbol with the first digit preceded by a pound sign (#). For example:
  `_#282441300__`
- Define a symbol in the ***Symbols tab*** (on page 75) and use it in the content. See ***Specifying Symbol Data Type*** (on page 77) for instructions on how to:
  - Create a symbol of type **String Constant** or **String Case** and enter the symbol number the same way (preceded with a pound sign).
  - Create a symbol of type **Content Constant** or **Content Case** and use the Content Object icon to choose a object from the Content Library.
    
  - Create a symbol of type **Custom** that uses rules to include Content Objects.

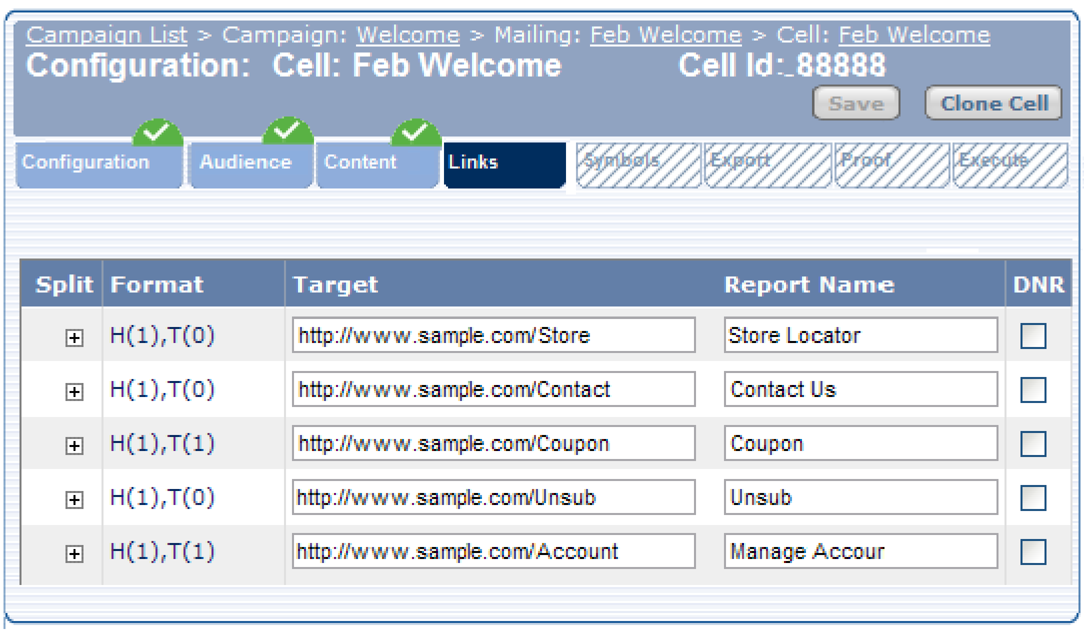
See the Content Library 7.0 User's Guide for more information about using content objects.

Modify Links and Set Up Reporting Options

In This Chapter

Links Tab

When you have created the content for the cell, you then verify and manage the links in the Links Tab.



Campaign Builder automatically locates any URL links contained in your message content and displays them in the Links Tab.

Notes

- To ensure that Campaign Builder recognizes a link, enclose it in the proper href="" tags in the source HTML code. If a link is not coded properly, it does not appear on the Links Tab.
- A pound sign (#) in both the Format and Target fields represents an in-page link.

Modifying Links

Selecting links

You can apply changes to multiple links by selecting the check box in the first column for each link to change. The Format column indicates which format (text or HTML) of the e-mail each link appears in. To have each format of an e-mail appear on a separate line, click the **+** in the second column.

Changing links

1. To change the URL of a link, edit the URL in the Target column.
2. Click **Save.**

   Campaign Builder changes the URL in the content of the selected version(s) of the e-mail.

Setting Up Reporting

The Links Tab groups URLs by category, which allows you to run reports based on URL categories that you define. URLs are rolled up under the same target and report name.

1. Determine in which report the activity for each link is to be included.

   You can include all links with the same URL in one report. However, you may find it more useful to generate separate reports for links depending on where they appear in the e-mail. For more information, see ***Generating One or Separate Reports on Target Links*** (on page 72).
2. Enter the name for the report for each link in the Report Name column.

   The report name identifies a link in eReports. Generally, you want to use names that easily identify a link. For example, instead of http://sample.com/20081225/abcdef, you might name the report `BODY - Sample Holiday Offer`.
3. To exclude a link from reports, check the **DNR** checkbox for that link.

   DNR stands for "do not report."
4. Click **Save.**

Working with image maps

An image map is an image that can contain one or more clickable links: for example, an image of a golfer's body where the torso links to information on shirts and the feet link to information on shoes. If your HTML code or template contains an image map, you can add the report names on the Links Tab. However, you may not be able to easily distinguish one link in an image map from another. For this reason, e-Dialog recommends that you minimize the number of image maps in your mailings.

If you need to use image maps with reporting, you can use the Report Name attribute to add name and report URLs in the image map.

Generating One or Separate Reports on Target Links

It is common for mailings to have the same link in multiple formats. For example, **www.sample.com** might appear twice in the HTML version and once in the Text version. For reporting flexibility, eReports offers two options for reporting these links, depending on your goals. Until you become more familiar with eReports, use the default or slight variations of the default.

Option 1: Generating separate reports for target links

This option is the default. It works best if the location of a target link within the e-mail is important. Using this option lets you include the exact context of the link's appearance in eReports. For example, you might want to measure whether the www.sample.com link at the top of the page performed better than the same link at the bottom of the page. You might also want to track the link separately in the HTML and Text formats.

To accomplish this, make the report names different for each occurrence of a link in different locations or types of e-mail. Campaign Builder does this by default. When you send the mailing, Campaign Builder automatically marks these links as separate for reporting purposes.

Option 2: Generating one report for target links

This option works well if there are numerous identical uses of the same link within the content and you do not need to track which placement or wording drove the click-through.

For example, you might want to know what percentage of recipients clicked through to your Web page when there are five home page URLs in HTML and Text formats. You are not concerned whether "click below for further details" or "find out more by clicking here" received more clicks. You are primarily interested in how many recipients clicked through to your home page.

To accomplish this, make all report names for the same target link the same. By default, the report names for the target links are different. When you send the mailing, Campaign Builder automatically groups all links with the same report name into one report.

You can also combine Option 1 and Option 2 elements, based on your marketing needs.

Define Dynamic Content to Merge

In This Chapter

About Symbols

Symbols in Campaign Builder provide a way to personalize the e-mail you send by merging recipient-specific data into each message you send. For example, you can use symbols to address a customer by first name, offer a coupon relevant to the customer's interests or purchasing history, and so forth. ***Using Symbols in Cell Content*** (on page 69) explains how to do this.

Symbols also provide a way to make last minute changes to the content and business logic of a cell. This does not require that you re-export the data unless the changes include data columns that were in the previous export. Campaign Builder warns you when it is necessary to re-export the data.

A symbol can merge data from any of several sources:

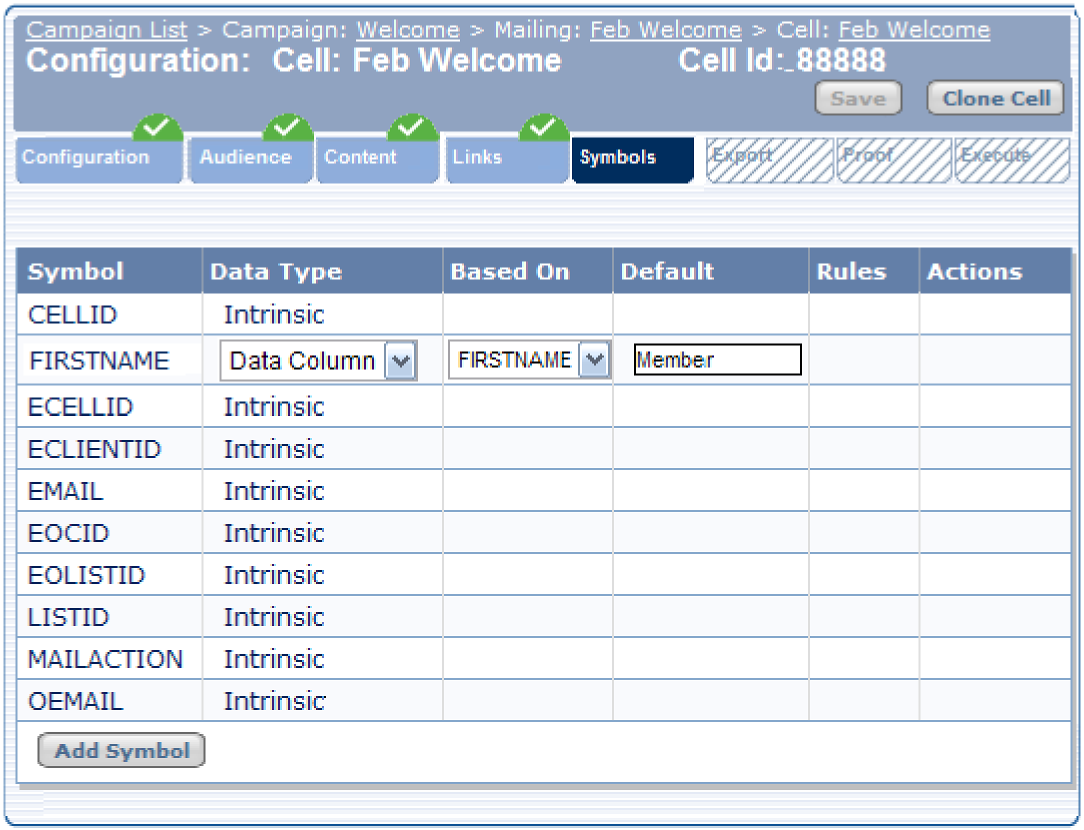
- String data stored within the cell itself
- Columns in the Master Database (recipient-specific data)
- Objects from the content library

See ***Specifying Symbol Data Type*** (on page 77) for detailed information about how symbols work.

Symbols Tab

The Symbols Tab provides a way to manage all the symbols in a cell. The list of symbol names that appears in the Symbols Tab includes:

- Certain intrinsic symbols needed by Campaign Builder
- All symbols used in the ***Configuration tab*** (on page 35) settings
- All symbols used in the cell content (see ***Using Symbols in Cell Content*** (on page 69))
- Symbols added explicitly using the **Add Symbol** button



Adding a Symbol

To add a symbol:

1. Click **Add Symbol.**
2. Enter the symbol **name.**
3. Select the **data type.** See ***Specifying Symbol Data Type*** (on page 77) for details
4. Select the **Based On** column if applicable. See ***Specifying the Based On Column*** (on page 86) for details.
5. Specify the **Default** value if applicable. See ***Specifying Symbol Default Value*** (on page 87) for details.
6. Click **Edit Rule** and specify the rules if applicable. See ***Using Case Symbols*** (on page 79) and ***Using Quick Test Symbols*** (on page 84) for details.
7. Click **Save.**
8. Click **Back.**
9. Click **Save.**

Note: Adding a symbol in the Symbols Tab does not insert the new symbol into the content; it only makes the symbol available for use in the content.

Specifying Symbol Data Type

Each symbol listed in the Symbols tab has a data type that indicates the type of information that is substituted for the symbol when you mail the cell. Use the drop-down control to choose a data type that is suitable for the custom symbols you want to use in your e-mail. (The data type of ***intrinsic symbols*** (see "Using Intrinsic Symbols" on page 81) is always **Intrinsic.**)

The data types are:

- **Content Case** - Large block of text or image that varies according to a rule
- **Content Constant** - Large block of text or image that is the same for each recipient
- **Custom** - Custom content that varies by recipient
- **Data Column** - Value from data in the master database
- **Grid Object** - Binds a grid object to a call
- **Grid Symbol** - Value from data in a grid object
- **Plugin Symbol** - Created specifically for your organization, merges data from a source other than the Master Database, for example articles from your web site; symbol type names in the drop-down list indicate the data gathering technique, for example Article Lookup
- **Quick Test Content** - Large block of text or image that varies by Quick Test version number
- **Quick Test String** - Short text that varies by Quick Test version number
- **String Case** - Short text that varies according to a rule
- **String Constant** - Short text that is the same for each recipient

The following are general rules to distinguish between data types:

- **String vs. Content**: Use string data types to merge just a few words or less. Use content data types for blocks of content or images stored in the Content Library.
- **Constant vs. Case**: Constant is the same for all recipients (the entire mailing audience). Case is rule based.

All symbols require a **default value** as described in ***Specifying Symbol Default Value*** (on page 87). Other required fields vary according to the data type. Some data types are based on profile information columns from the database. Some allow you specify rules.

The following table provides an example of each data type:

Symbol	Data Type	Based On	Default	Rules	Actions
MAP	Content Case	CITY	12345	EDIT RULE	DELETE
LOGO	Content Constant		23456		DELETE
OFFER	Custom		20 Percent Off		DELETE
FIRSTNAME	Data Column	FIRSTNAM E	Valued Customer		DELETE
GRID01	Grid Object		Team Data		DELETE
TEAM	Grid Symbol		Team Data.TEAM		DELETE
CELLID	Intrinsic				DELETE*

ARTICLE	Plugin **Note:** The name of the type is not Plugin; instead it is descriptive, for example Article Lookup.				DELETE
LOCATION	String Case	CITY	your town	EDIT RULE	DELETE
OURPHONE	String Constant		1-800-555-5555		DELETE
PRODUCT	Quick Test Content			EDIT RULE	DELETE
SUBJECT	Quick Test String			EDIT RULE	DELETE

* DELETE generally indicates that the symbol is not used in the cell content. Certain intrinsic symbols such as CELLID cannot be deleted even if not used in the cell content.

In the previous table, the symbols are used as follows:

Symbol	**Merges...**
MAP	An image of a map of the city, which is stored in the Content Library with an ID of 12345, based on the value of CITY in the Master Database for each recipient.
LOGO	An image of the logo, which is stored in the Content Library with an ID of 23456. The image is the same in each e-mail.
OFFER	Content based on customization for your organization.
FIRSTNAME	The first name for each recipient, based on the value in the Master Database. If there is no value in the Master Database for the recipient, merges "Valued Customer."
GRID01	Not intended for merging. Binds a grid object to a cell. See ***Using Grid and Grid Object Symbols*** (on page 84).
TEAM	Content based on the data in the associated grid object. See ***Using Grid and Grid Object Symbols*** (on page 84).
CELLID	The cell ID. This is not visible in the e-mail.
ARTICLE	The article that you want to appear in the e-mail.
LOCATION	The name of the recipient's city based on business rules. Merges "your town" if there is no value for CITY in the Master Database for the recipient.
OURPHONE	The phone number (1-800-555-5555) into each e-mail.
PRODUCT	Content object identifier based on the Quick Test version number. See ***Using Quick Test Symbols*** (on page 84).
SUBJECT	

Using Case Symbols

The Content Case and String Case symbol data types represent values that vary according to the value of the **Based On** data column. The mapping of Based On values to symbol values is called a rule. If you have multiple case symbols using the same Based On column, the rule applies to all of those symbols. As a very simple example, the symbols tab shown here has two String Case symbols, both based on the **SEX** column. Defining a rule for the **APPEARANCE** column defines a rule for the **ATTIRE** symbol at the same time.

Symbol	Data Type	Based On	Default	Rules	Actions
APPEARANCE	String Case	SEX	stunning	EDIT RULE	DELETE
ATTIRE	String Case	SEX	wedding attire	EDIT RULE	DELETE
EOCID	Intrinsic				
Add Symbol					

Note: Plugin symbols, which let you merge content from a source other than the Master Database, can also require you to specify rules. For example, if you use a plugin symbol named Article Lookup, you might specify that one article appears in the e-mail to females and a different article appears in the e-mail to males.

To define a rule:

1 Click **EDIT RULE** in the Rules column.

A rule definition is shown as a table.

Edit Rule

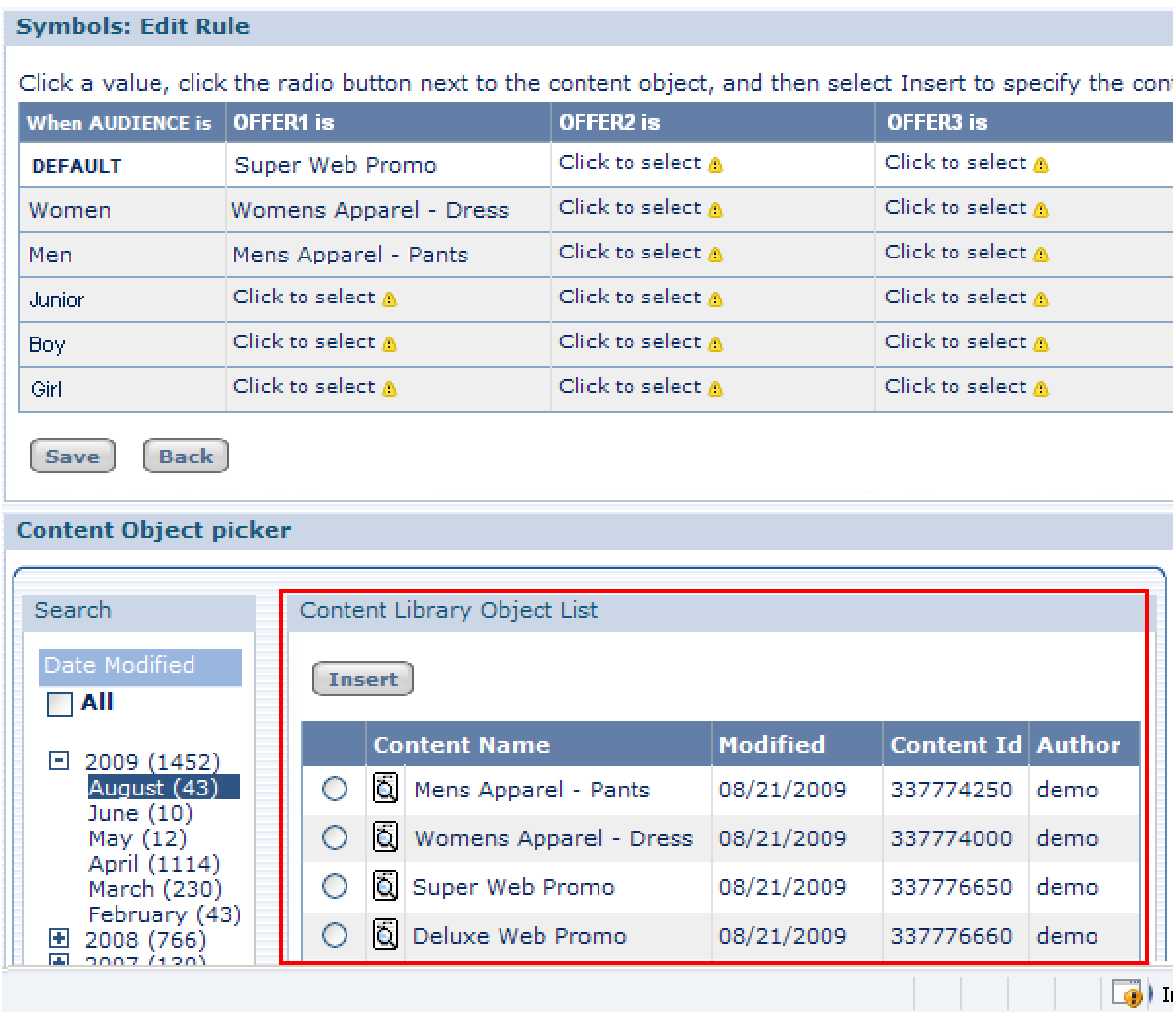
When SEX is	APPEARANCE	ATTIRE
DEFAULT	stunning	wedding attire
F	beautiful	wedding dress
M	handsome	tuxedo
Save Back		

- § The first column represents possible values for the **Based On** data column, in this case **SEX**, which has the possible values M and F.
- § The other columns represent the specific symbols that are based on that column, in this case **APPEARANCE** and **ATTIRE**.
- § Each row represents the text to merge whenever a specific value (or no value) appears in the data. In this case, an e-mail to a female customer would say "Look beautiful in a wedding dress from us!" An e-mail to a male customer would say "Look handsome in a tuxedo from us!" If the sex of the customer was unknown, the e-mail would say "Look stunning in wedding attire from us!"

2 For each row, enter the text or select the content object to merge when that value appears. To select a content object:

a) Click **Click to select.**

The Content Picker appears on the Edit Rule page:



b) If necessary, use the Search pane to find the content object you want to use.

c) Click the radio button next to a content object to select it.

d) Click **Insert**.

3 Click **Save**, and then click **Back** to return to the Symbols Tab.

Note: If you find that you have many case symbols sharing a Based On column and/or many possible column values, consider using a grid. See the Grid Publisher 7.0 User's Guide for more information.

Using Constant Symbols

Constant symbols are published identically for every e-mail recipient.

- **String Constant** - A string of text. For example, the label "Newsletter, Week 4."
- **Content Constant** - A content object. For example, the header graphic for the newsletter.

In the symbols tab, the Default column defines the value of a constant symbol. There is no non-default case.

Using Intrinsic Symbols

To use an intrinsic symbol in a cell, enter the symbol name (with underscores) in the ***Content tab*** (on page 56) of the cell. The symbol appears in the Symbols tab with the data type Intrinsic.

If you use the Add Symbol button in the Symbols Tab, you can enter the name of an intrinsic symbol but this creates a symbol of a non-intrinsic data type. You cannot assign the data type Intrinsic to a symbol created this way. If you use the name of an intrinsic symbol with a non-intrinsic data type, you cannot use the intrinsic symbol in the cell content.

The following are intrinsic symbols:

Intrinsic symbol	**Description**
_#BASE36(<content>)__	BASE36 encodes the value within the (). The value may also be a merge field.
_#BR__	Tag for HTML. Line feed for text.
_#CELLNAME__	Cell name.
_#DROPDATE__	Drop date in (SQL) format YYYYMMDDHH24MISS.
_#LF__	Line feed. ASCII character 10.
_#MAILINGNAME__	Mailing name.

_#URLENCODE(<content>)__	URL encodes the value within the (). The value can also be a merge field.
_#URLENCODE(<content>)__	URL encodes the value within the (). The value can also be a merge field.
_#VM__	Virtual MIME type. A single character: t | a | h
CELLID	CellID.
CID	Unique identifier of e-mail recipient.
CLIENTID	ClientID
COMPFIRSTLASTNAME	Computed first/last name. If the value seems invalid, the default value is merged into the cell content.
COMPFIRSTNAME	Computed first name. If the value seems invalid, the default value is merged into the cell content.
COMPFULLNAME	Computed full name. If the value seems invalid, the default value is merged into the cell content.
DATEDAYABBRNAME	Day name abbreviated. Example: Sun
DATEDAYFULLNAME	Full day name. Example: Sunday
DATEDAYFULLNUM	Full day number. Example: 05.
DATEDAYNUM	Day number in date. Example: 30
DATEMONTHABBRNAME	Month abbreviated. Example: Jun
DATEMONTHFULLNAME	Full month name. Example: June
DATEMONTHFULLNUM	Full month number. Example: 06.
DATEMONTHNUM	Month number. Example: 6.
DATEYEARABBRNUM	Year number abbreviated. Example: 05.
DATEYEARFULLNUM	Full year number. Example: 2005.
DROPDATE	Date when the mailing is schedule to be sent, in the format YYYYMMDDHH24MISS.
ECELLID	BASE36 encoded cellid.
ECID	BASE36 encoded cid.
ECLIENTID	BASE36 encoded detectexpires value.
EDETECTEXPIRES	BASE36 encoded detectexpires value.
EDSECUREI	For internal use only.
EDUSERHASHKEY	For internal use only.
EEMAIL	BASE64 encoded _EMAIL__ value.
EFIRSTNAME	BASE64 encodeded _FIRSTNAME__ value.
EFULLNAME	BASE64 encoded _FULLNAME__ value.

EGROUPID	For internal use only.
EINSTANCEID	For internal use only.
ELASTNAME	BASE64 encoded _LASTNAME__ value.
ELISTID	BASE64 encoded _LISTID__.
EMAIL	Recipient's e-mail address.
EMAILGROUPID	For internal use only.
EMIME	For internal use only.
EOCID	BASE36 encoded _OCID__.
EOEMAIL	BASE64 encoded _OEMAIL__.
EOLISTID	BASE36 encoded _IRIGINALLISTID__.
FORMAT	Format of the current row. One of: T | A | H | M.
FTFCELL	Whether the cell is original or has been forwarded to a friend.
FTFLINK	Abbreviation of actual link.
HOSTEDLINK	For internal use only.
INSTANCEID	For internal use only.
INVALID	Used to abort a merger.
ISPKEY	For internal use only.
LISTID	List that the e-mail recipient is part of for reporting purposes.
MAILACTION	For internal use only.
MAILINGID	MailingID.
MAILTAG	For internal use only.
OCID	Original CID. Only different for proofs and clones.
OECID	Original _ECID__.
OELISTID	Original _ELISTID__.
OEMAIL	Original _EMAIL__. Only different for proofs and clones.
ORIGINALLISTID	Original _LISTID__.
REDIRECTDNS	Domain Name to use to redirect the link.
TIME12HOUR	Hour portion of time in 12 hour format. Example: 5.
TIME24HOUR	Hour portion of time in 24 hour format. Example: 17.
TIMEAMPMLC	am or pm value of time in lowercase. Example: pm.
TIMEAMPMUC	AM or PM value of time in uppercase. Example: PM.

TIMEMINUTE	Minute portion of time. Example: 30.
TIMESECOND	Second portion of time. Example: 30.
TRANSACTIONID	For internal use only.
UNSUBDNS	Domain name to use for unsub link.
UNSUBLINK	Abbreviation of actual unsub link.
UNSUBVERSION	For internal use only.

Using Data Column Symbols

A **Data Column** symbol is replaced at merge time with data values from the master database. No modifications are made to the data values.

The column names and semantics in the Master Database are unique to your organization. If you are unfamiliar with the columns in the Master Database, ask your Account Team for a description of your profile. Alternatively, if you have exported your data file, you can examine it to see a list of the columns. See ***Viewing Data and Sample Files*** (on page 99).

Using Grid and Grid Object Symbols

Grid Object Symbols

In order to use a grid within a cell, you must create one symbol of type "Grid Object" whose purpose is to:

- bind a grid object to a cell
- (optionally) define the symbol that represents the key value of the grid

The grid object symbol itself is not intended to be used in the cell content but can be if you have a specific need to do so.

Grid Symbols

The symbols whose values are controlled by grid have the data type "grid symbol" and are used in the cell content.

See the Grid Publisher 7.0 User's Guide for detailed information about Grid and Grid Object symbols.

Using Quick Test Symbols

Quick Test symbols are very similar to ***Case*** (on page 79) symbols with respect to the Symbols tab. The difference is that the values substituted at merge time depend on TESTVERSION (the Quick Test version number), rather than a database column value.

For example, in the illustration below, CONTENT01, CONTENT02, and INTRO are Quick Test symbols.

The Quick Test symbol data types are available only when the cell has Quick Test enabled. See ***Conducting a Quick Test*** (on page 135) for more information.

Using Custom Symbols

Custom symbols are essentially a form of extended Content Case symbols with additional rules. They are created by your e-Dialog Account Team according to your requirements.

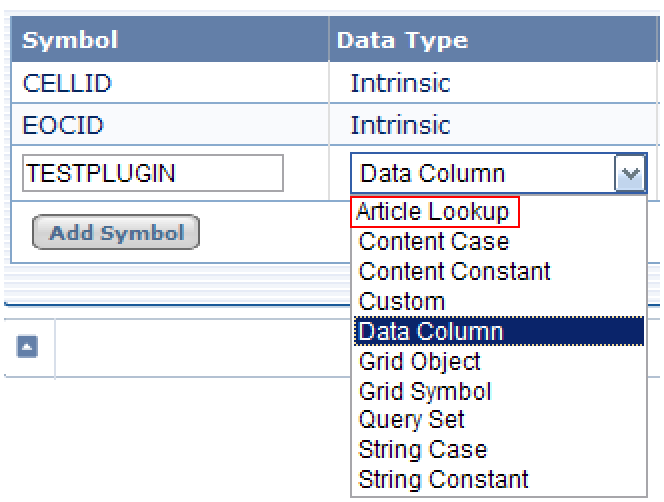
Using Plugin Symbols

Plugin symbols are created specifically for your organization by e-Dialog and are named individually. Plugin symbols let you merge content from a source other than the Master Database. Some examples of plugin symbols that e-Dialog has created for clients include:

Symbol	Description
Ad/Article Lookup	Lets you specify which ad or article to merge into the e-mail.
Article Select Case	Lets you specify the rules to use to merge different articles for different audience segments.
URL Encode	Lets you enter a URL and merges the encoded URL. For example, if you enter http://www.e-dialog.com, the e-mail will contain the URL http%3A//www.e-dialog.com.

To create plugin symbols for your organization, you work with your e-Dialog account team to identify your needs, how to meet those needs, and any pricing requirements.

Any plugin symbols that are available to your organization appear in the Data Type drop-down. In the following example, Article Lookup is a plugin symbol:



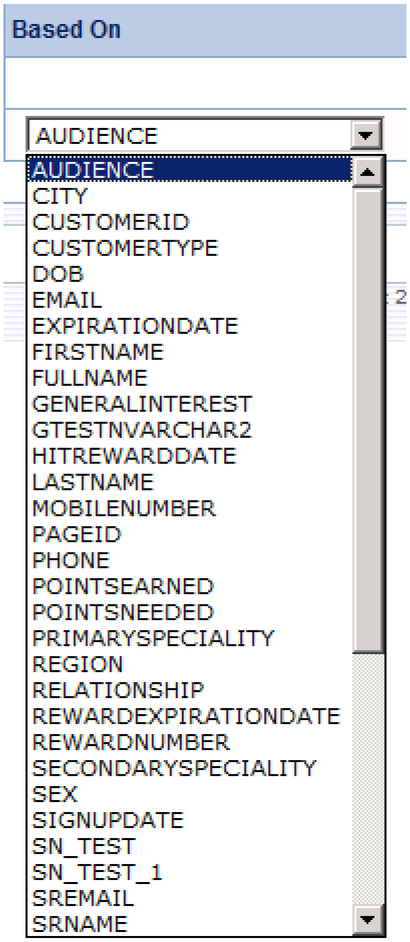
The way you specify the default value is specific to the plugin symbol. Some plugin symbols also require you to specify rules by clicking **Edit Rule.**

Specifying the Based On Column

The Data Column, String Case, and Content Case data types allow you to select a data column on which to base symbol substitution.

Data Type	Based On
Intrinsic	
Content Case	AUDIENCE
Content Constant	
Custom	
Data Column	AUDIENCE
String Case	AUDIENCE
String Constant	

The **Based On** field lists the available data columns:



For example, to change the e-mail subject depending on the target audience for an e-mail, create a symbol and choose AUDIENCE in the **Based On** field.

Specifying Symbol Default Value

The Default field is available for the following symbol data types:

Data Column, Content Case and String Case

Usually, there is a database value available for each symbol sent to each e-mail recipient. For example, if the greeting of an e-mail contains the instrinsic symbol _FIRSTNAME__, each recipient gets an e-mail that contains his or her first name. However, if the client data does not include a recipient's first name, the symbol is replaced with the default value that you specify.

For example, you can specify `Valued Customer` in the **Default** field for _FIRSTNAME__. Whenever the data column has no value, the greeting appears as "Dear Valued Customer,".

For Content Case (and Content Constant) symbols, you can choose a content object from the Content Library by doing the following:

1 Click the content object icon  to open the Content Library.
2 If necessary, use the Search pane to find the content object you want to use.
3 Click a content object to select it.
4 Click **Done**.

Content Constant and String Constant

The values substituted for these symbols are defined here. There is no non-default case.

Custom

For Custom data types, click the drop-down and choose one of the custom values created by your Account Team.

Grid Object Symbol

A grid object associated with the cell is defined here. There is no non-default case. The value of the symbol is automatically set to the grid name.

Grid Symbol

The values controlled by the grid objects associated with the cell are defined in these symbols. There is no non-default case. The value of the symbol is automatically set to the grid name, followed by a period, followed by the grid column name.

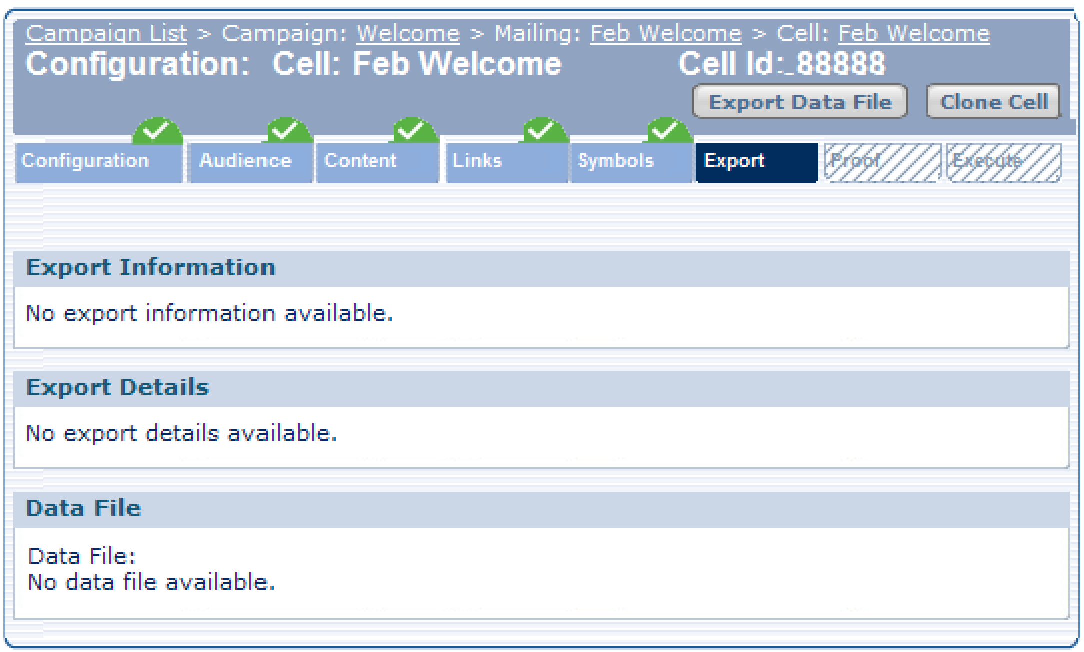
String content based on the Quick Test version number. See ***Using Quick Test Symbols*** (on page 84)FILE10550

Create the Audience Export File

In This Chapter

Export Tab

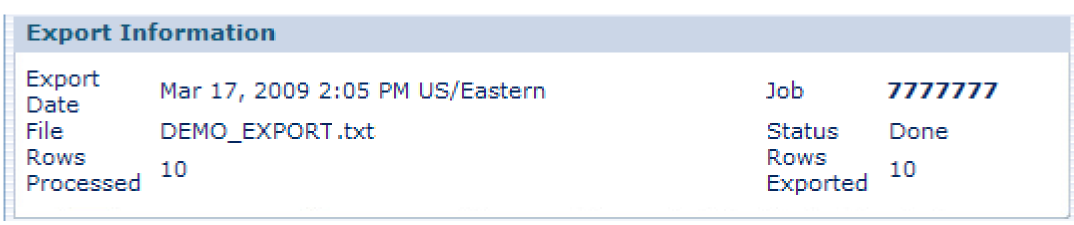
When you have specified the target audience(s) for a mailing, you use the Export Tab to create the data file (also referred to as the "export file") that Campaign Builder uses to insert values, such as an e-mail recipient's first name, in each e-mail. Initially, the Export Tab looks like the image below. Click **Export Data File** to begin the export.



The amount of time it takes for Campaign Builder to create the export file depends on the size of the audience list. When the export is finished, the Export Tab looks like this:

Understanding Export Information

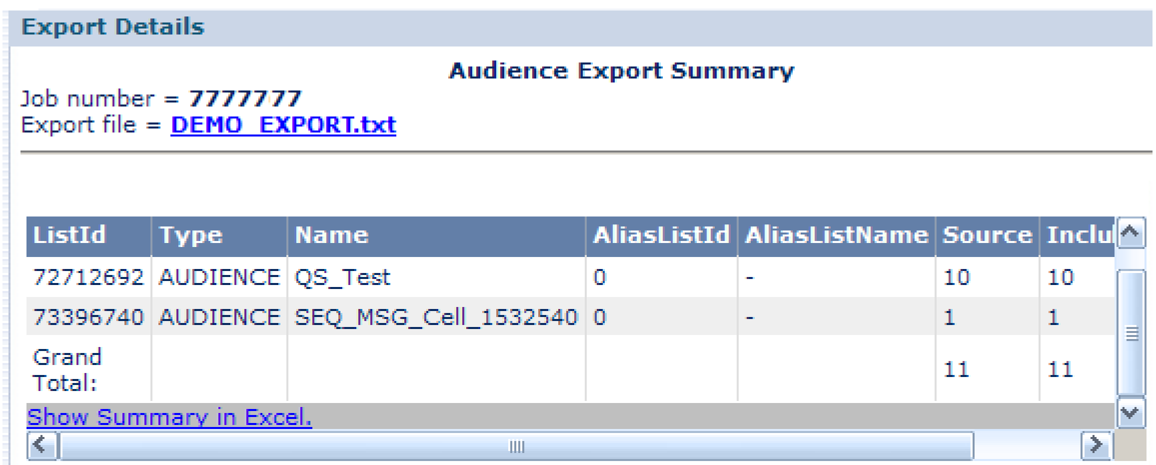
Export Information provides a brief overview of the details associated with the export data file, as follows:



Field	Description
Export Date	Date and time the export was started
Job	Export Job number associated with your file
File	File name
Status	Status of export. possible values are: Done, Work in Progress, and Failed.
Rows Processed	Number of rows done processing at any given point during the export
Rows Exported	Number of rows done exporting at any given point during the export

Understanding the Audience Export Summary

The Export Details section provides more detailed information about the export file:



To view columns to the right and rows below those currently displayed, use the scroll bars.

Note: Click the **Show Summary in Excel** link to download this export report to an Excel document.

Lists

This section details information about values in each column for audience, seed, and proof lists.

Column	Description
List ID	ID of the list
Type	Kind of list: seed | proof | audience
Name	Name of the list
Alias List ID	This is only applicable in rare cases when multiple List IDs are aliased as a single list for reporting purposes. This can be stripped

	out when sending to clients.
Alias List Name	This is only applicable in rare cases when multiple List IDs are aliased as a single list for reporting purposes. This can be stripped out when sending to clients.
Source	Initial number of e-mail addresses in the audience list. Typically, the data team has already removed certain types of invalid e-mail addresses, records with data that does not fit the column type restrictions in the client schema, and duplicate records; as a result, they are not be included in th Source number.
Include	Number of people included in the export file that e-Dialog attempts to mail to. Due to bad data and delivery issues, this might not be equivalent to the actual number mailed.
Unique CID	Number of unique CIDs across audiences. This number is only meaningful in the Total row, because it is different from the Include column only if there are CIDs that are found in multiple audiences within a given campaign.
Dupe	Number of duplicate records across audiences, plus records deduped by cell-level dedupe criteria, plus records eliminated by join conditions or WHERE criteria. This column can also include records that are in an existing audience list but not in the master database. If the dupe column contains negative numbers, the JOIN table may contain multiple records for a given CID; you need to add WHERE criteria to avoid getting multiple records for a CID.
Suppress	Suppression through suppression lists, cross-client global unsubs, cross-client global domain suppression and client domain suppression
MobileSuppress	Number of recognized mobile users who are being suppressed. (Mobile users should only receive transactional messages; this is configurable in the cell.)
Unsub	Number of CIDs in the list who have unsubscribed. Some clients manage Unsubs via suppression lists, in which case the unsubs do not appear in this column. These CIDs are not mailed unless configured specially in the cell for some types of transactional messages.
Undel	Records that have been flagged as undeliverable (not mailed unless configured in cell).
Formats	All the formats are listed. Indicates how many users are configured to receive each format of this e-mail.

Suppression Lists

This section matches each suppression list with each audience and indicates how many CIDs were suppressed by each suppression list for each audience.

Column	Description
List ID	ID of the suppression list
Name	Name of the suppression list
Audience ID	List ID of the audience that the suppression list is being scrubbed against
Audience Name	List Name of the audience that the suppression list is being scrubbed against
Suppress Count	Number of records suppressed from the listed audience by the listed suppression list

Proof the e-mails

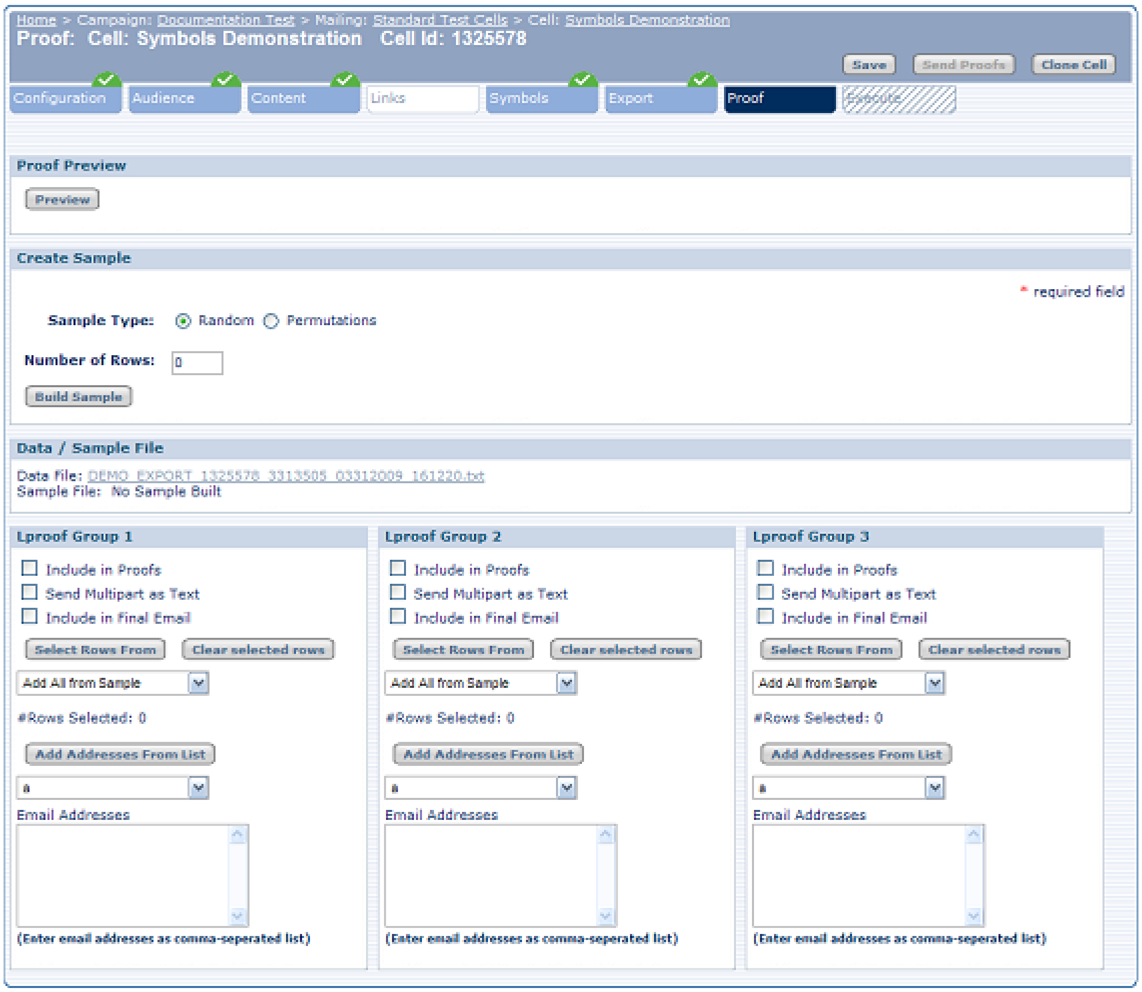
In This Chapter

Proof Tab

When you have created the audience export file, you go to the Proof Tab to:

- Preview an e-mail before viewing or sending proofs
- View and send "one-up" proofs of an e-mail before sending the live proofs
- View and send live proofs (L Proofs) of an e-mail before sending the final version

Note: Proof mailings are for testing and proofreading purposes only. They are not reflected in the data used by eReports and Insight Builder for the mailing. Actions taken by recipients of proof mailings, such as unsubscribing, do not affect the database.



One-up proofs and live proofs present content **precisely** as it will appear in the final e-mail. You can see how symbols resolve, which allows you to verify that the logic involved in dynamic content is working correctly. This helps to ensure that the content appears exactly as expected for each target audience.

One advantage of proof mailings is the ability to test various message formats. For example, you can force a MIME type by selecting a row of data that is set to receive HTML format and sending that row a live proof Text format instead.

One-up and live proofs use a sample file consisting of a subset of the rows in the data file. These sample rows are used to construct proof mailings, which are sent (along with other data) to a particular group of users.

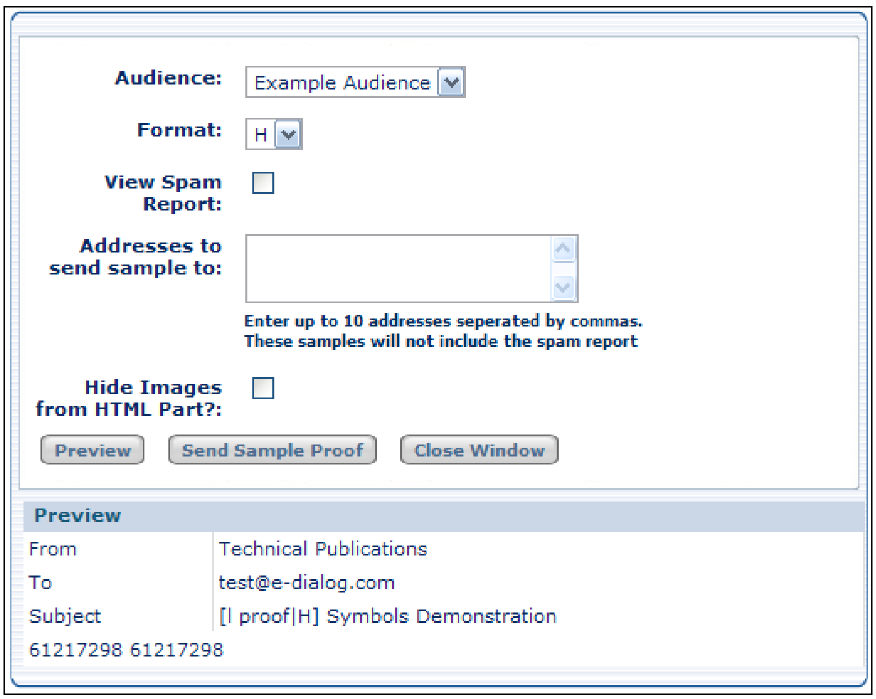
In a standard cell, the data file used to build the sample file consists of the audience lists specified in the ***Audience Tab*** (on page 45) of the cell. In an Insight Trigger cell, the data used to build the sample file comes from your selections in the Lproof Audience pane of the the ***Insight Audience*** (on page 118) tab. This is because the actual audience data does not exist until the Insight Builder query executes for the first time.

Previewing the e-mail

You can use the Preview button to see how the e-mail appears to recipients with all symbols resolved.

1 Click **Preview.**

The preview is displayed in a new window.



2 Select the **Audience** for which you want to view the Lproof from the Audience drop-down.

3 Select the type of e-mail you want to view from the **Format** drop-down.

Select **H** for HTML, **T** for text, or **A** for AOL.

4 To view the spam report, check the **View Spam Report** check box.

5 To send the Lproof to e-mail addresses that are not included in the target audience, enter them in the **Addresses to send sample to** text box.

Delimit the addresses with commas, without spaces between the addresses.

6 Click **Preview** to preview the Lproof and, if applicable, see the spam report.

7 Click **Send Sample Proof** to send the Lproof to the e-mail addresses in the Addresses to send sample to text box.

8 Click **Close Window** when you are done.

Creating a Sample File

A sample file is a subset of your full export file that you can use for proofing purposes. A sample file can contain:

- a specific number of sample rows selected at random from the export file (Random)
- permutations of a set of columns in the export file (Permutations)

Creating a random sample

To create a sample file containing randomly selected rows:

1 Click **Random.**

2 Enter the number of rows.

3 Click **Build Sample.**

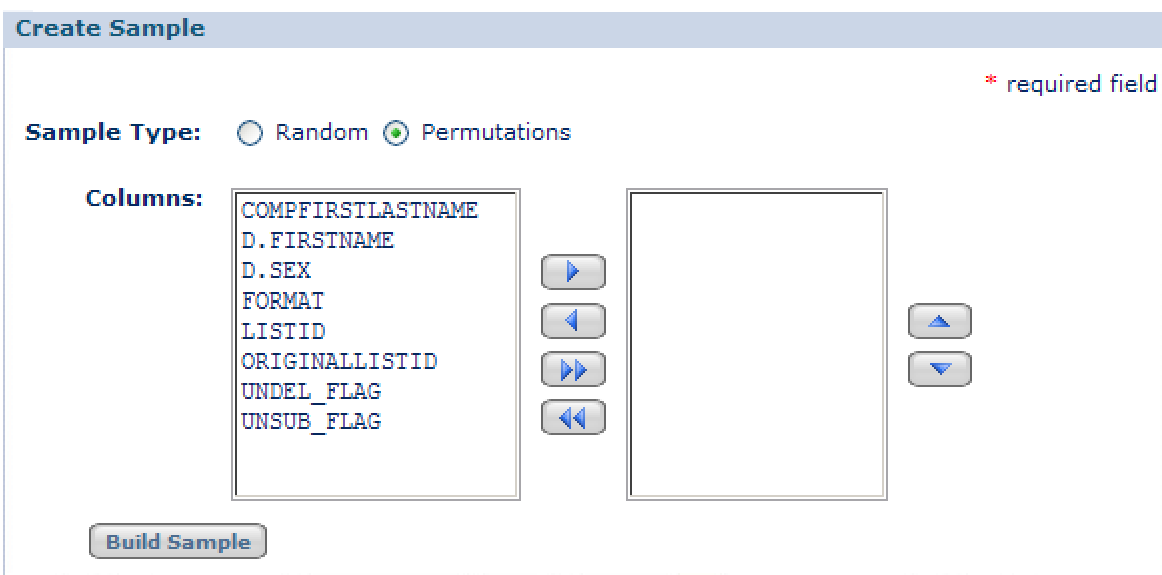
While Campaign Builder builds the sample, the message "Building Sample" appears at the top of the Proof Tab.

4 Click **Save.**

Creating a sample that includes all permutations

To create a sample file that that includes permutations of a set of data columns:

1 Click **Permutations.**



2 Move the columns that you want to include in the sample data file from the left-hand list to the right-hand list.

The available columns include the defaults shown here plus any data columns used in the **Based On** fields of the symbol definitions in your content (see ***Specifying the Based On Column*** (on page 86)).

Use the single arrows to move one column name. Use the double arrows to move all column names. Use the up and down arrows to move column names within the list of column names to include.

The number of permutations you send is *n*! (*n* factorial) where *n* is the total number of rows (values) in all selected columns. For example, if you have three values in the `FORMAT` column and two values in the `LISTID` column, the number of permutations is 5! = 1 x 2 x 3 x 4 x 5 = 120. However, e-Dialog limits the number of permutations to a maximum of 75.

3 Click **Build Sample.**

While Campaign Builder builds the sample, the message "Building Sample" appears at the top of the Proof Tab.

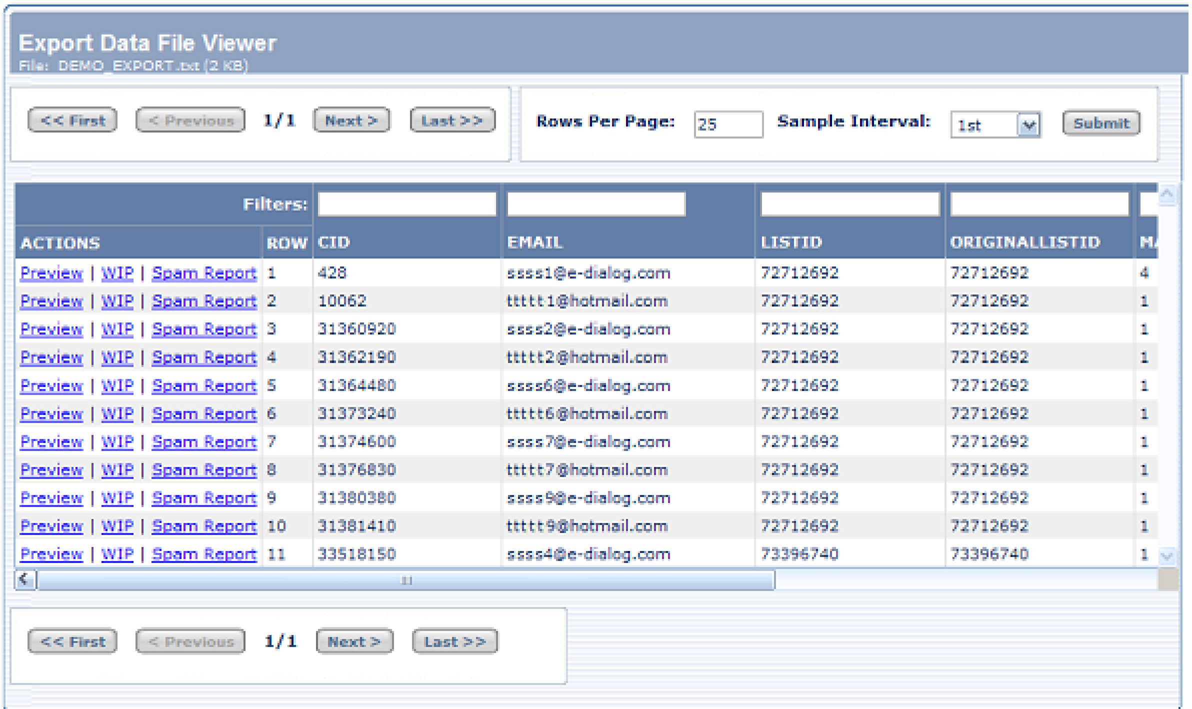
4 Click **Save.**

Viewing Export and Sample Files

When you have exported the data file or the sample data file, you can view it by clicking the name of the file.

You can view the export file for three weeks after the cell is mailed. After that point, the file is no longer available for viewing.

The dialog shown below appears in a new browser window. Because the Data File screen is very wide, the following image displays only the left-hand columns of the data file table.



Three actions are available. Use:

- **Preview** to view or ***send a one-up proof*** (on page 101)
- **WIP** to view a work in progress (not ready for one-up)
- **Spam Report** to ***view the Spam Assassin score*** (on page 101)

To specify which rows to display:

1 Click **<< First** to go to the first page of data.

2 Click **< Previous** to go to the previous page of data.

The value that appears between the << Previous and Next >> buttons indicates the current page and the total number of pages. For example, 10/22 indicates that page 10 is currently display and that there are 22 pages total.

3 Click **Next >** to go to the next page of data.

4 Click **Last >>** to go to the last page of data.

5 Enter a number to specify the number of rows of data to display on each page.

The default value of 25 displays 25 rows per page.

6 Select a value from the Sample Interval drop-down.

The sample interval specifies at which row to start displaying data file information in the data file table. For example, if there are 30 rows in the data file and you select 25th, the table contains rows 25, 26, 27, 28, 29, and 30.

7 Click **Submit.**

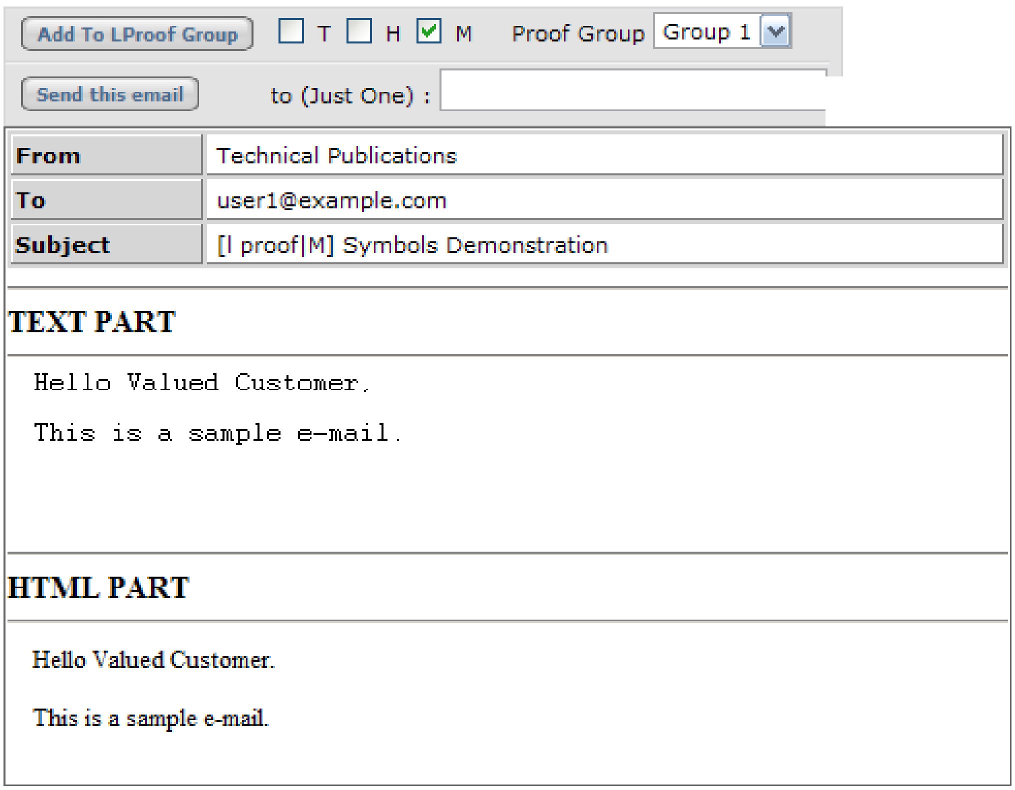
You can reduce the number of rows displayed based on string matching within the data in any column in the data file. For example, to view all of the rows whose e-mail address contains "test" enter `test` in the field above the EMAIL column and click the **Set Filter** box. The filter would match:

- **te**st@e-dialog.com
- someone@mail_**te**st.com

If you use more than one column, the rows you display in the table meet all filter criteria.

Sending a One-Up Proof

The one-up proof page displays an e-mail message exactly as it would appear for a recipient with all symbols merged into the cell content. When finished, click the browser's **Close** button.



Add To LProof Group	adds the row to the messages sent to a specific Lproof group
Send this email	send the one-up proof to a specific e-mail address

Viewing the Spam Report

You can see the spam report and how the e-mail appears with the content for an e-mail recipient merged into the the cell. The spam report is a summary Spam Assassin report. Messages with a score less than 5 are most likely to be judged as acceptable by most spam filters. If the message scores greater than 5, look at the itemized scores for ways to reduce the score of the message.

1 In the row for which you want to see the sample e-mail, click **Preview** or **Wip.**

The spam report and sample e-mail appear in a separate window.

```
Content preview:  Congratulations! You are reading the Campaign Builder 6
  User's Guide. Hi Valued Customer This is an example cell for the
  Campaign Builder 6 documentation. Here's a link to Google:
  http://redirect1.e-dialog.com/r/M9/OS/2AFI/B7/WSAZX/28/t Goodbye. [...]

Content analysis details:   (2.9 points, 5.0 required)

 pts rule name              description
---- ---------------------- --------------------------------------------------
 0.3 HTML_60_70             BODY: Message is 60% to 70% HTML
 0.0 HTML_MESSAGE           BODY: HTML included in message
 2.6 HTML_IMAGE_ONLY_08     BODY: HTML: images with 400-800 bytes of words
 0.0 NO_RECEIVED            Informational: message has no Received headers
```

From	e-Dialog Technical Publications <brogoff@e-dialog.com>
To	foo@e-dialog.com
Subject	[proof|M] Example Cell 01

TEXT PART

```
Congratulations! You are reading the Campaign Builder 6 User's Guide.

Hi Valued Customer
This is an example cell for the Campaign Builder 6 documentation.
Here's a link to Google: http://redirect1.e-dialog.com/r/LQ/ID/6JOVH2/JY/WSAZX/SN/t
Goodbye.


[[LQ-PK8J9-ID-6JOVH2-JY-M-M2-20080915-d75b00ae5c2ea22fe3]]
```

HTML PART

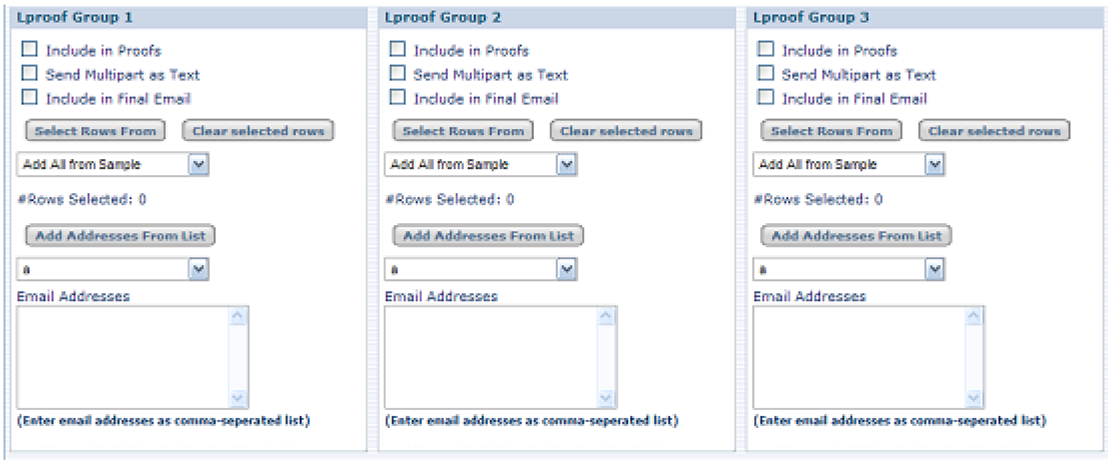
Congratulations! You are reading the Campaign Builder 6 User's Guide.

1. Hi Valued Customer
2. This is an example cell for the Campaign Builder 6 documentation.
3. Here's a link to Google: Google
4. Goodbye.

2 After reviewing the e-mail, click the browser's Close button.

Understanding Lproof Groups

The Proof Tab allows you to set up three different groups of e-mail addresses to receive Lproofs. You must send a proof to at least one address to complete the Proof tab and move on to the Execute tab.



You can use the same or different sets of sample data for each group. You can assign your own meanings to the group numbers. However, e-Dialog recommends that you organize the groups as follows:

Group 1: e-Dialog internal proofreaders

Group 2: Client proofreaders

Group 3: Seeds

Note: Seeds are e-mail recipients who are not included in the target audience, but who want to receive the LProof e-mail before the final e-mail. An example of a seed is the CEO of a client.

For each sample group that you want to use:

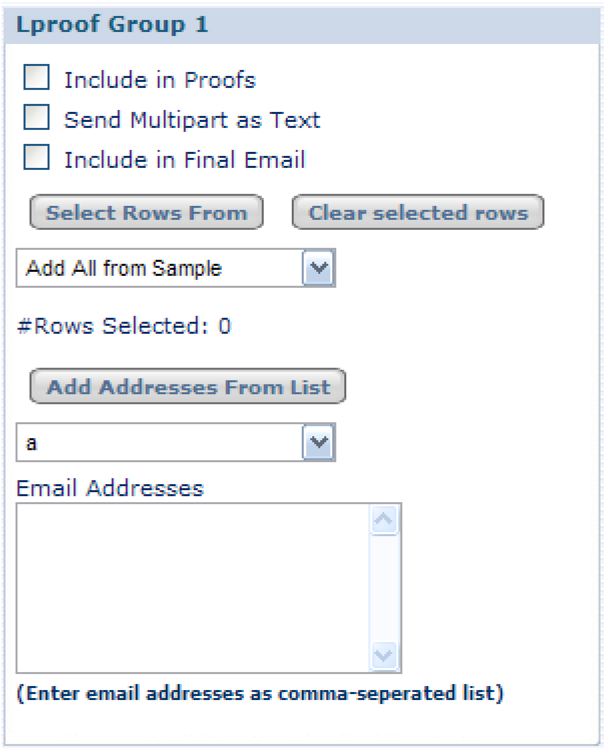
1 Create a sample data file.

2 View the sample data file.

3 Include some or all of the rows from the sample data file in an Lproof group.

When you have set up more than one Lproof group, you can copy sets of sample data rows from one Lproof group to another.

Sending Live Proofs



1 For each group, do the following:

a) Check or uncheck **Include in Proofs** to include or exclude this particular group from the L Proof recipients.

b) Check **Send Multipart as Text** to send any sample rows that were Multipart as text. This is useful when there are no text recipients, but you want to proof the text portion of the Multipart message.

c) Check **Include in Final Email** to ensure that this particular group gets the final e-mail.

2 Select one of the following options from the **drop-down list** under **Select Rows From:**

§ Add All from Sample - adds all rows from the sample data file

§ All From Group 2 - adds all rows from Group 2

§ All From Group 3 - adds all rows from Group 3

§ None Selected - does nothing

3 Click **Select Rows From** to add rows from the source selected in the drop-down.

You can click **Clear selected CIDs** to remove all rows from the group

4 Select a proof/seed list from the **drop-down list** under **Add Addresses From List** to add rows from a proof/seed list to the list of LProof recipients.

Proof/seed lists are created outside of Campaign Builder. You can have specific proof/seed groups for each campaign.

5 Click **Add Addresses From List** to add e-mail addresses from the selected proof list.

6 Enter any other e-mail addresses to which you want to send the Lproof in the **Email Addresses** text area.

Separate e-mail addresses with commas.

7 Click **Save.**

8 Click **Send Proofs** to send the Lproofs to the groups you specified.

The confirmation screen appears.

9 Click **OK to Proof.**

Note: Always take one last look at the content, check the box, and then click OK to proof.

10 If a message about custom publishing rules appears, review these rules and check with your account team to ensure that you are following all rules appropriately.

Campaign Builder returns to the Configuration Tab.

As the proofs are mailed, the following e-mails are sent to the Client Notification addresses specified in ***Advanced Settings*** (on page 40):

- Status
- Warnings
- Spam Assassin (see ***Viewing the Spam Report*** (on page 101))
- URLs found in proofs

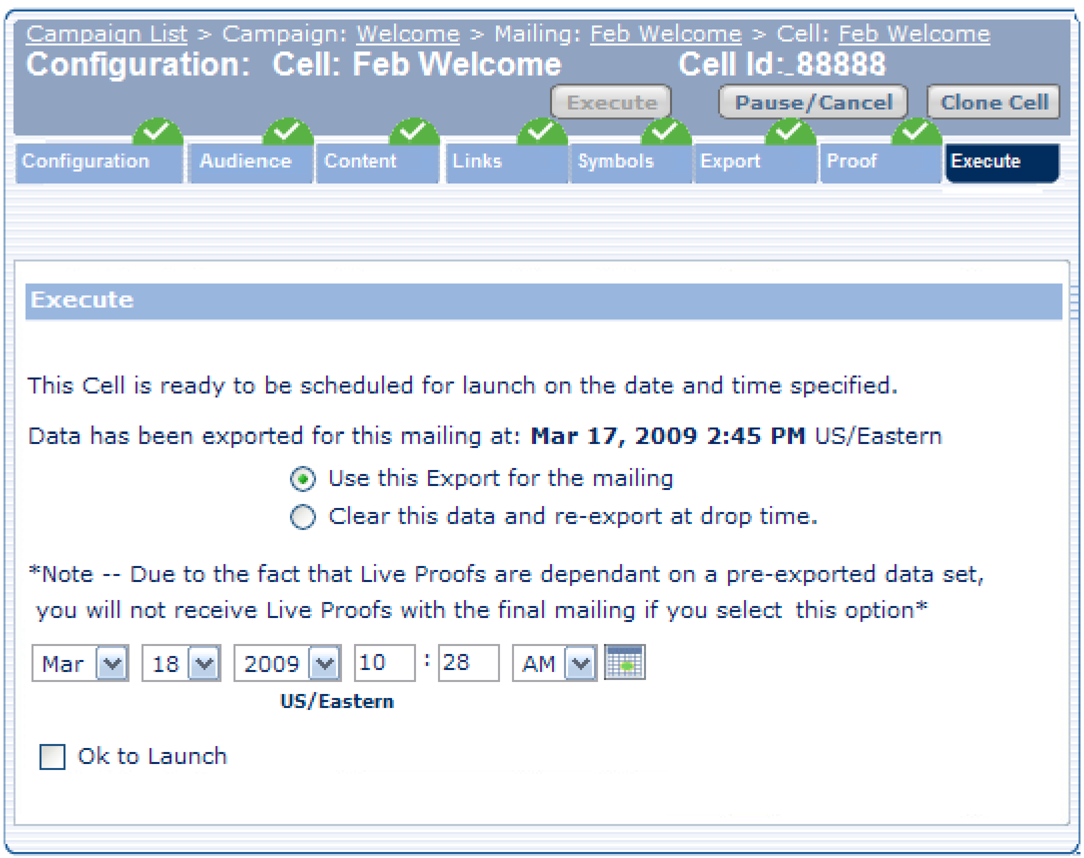
Send the Final e-mail

In This Chapter

Execute Tab

This section describes the Execute Tab for a standard cell. If you are creating an Insight Trigger cell, see the ***Execute Trigger*** (on page 120) tab.

When you have proofed a cell and determined that the content is correct, you go to the Execute Tab to send the final e-mail.



Sending the Final e-mail

To send the final e-mail:

1 Specify the data file to use.

You can use the data file you created in the Export Tab to send the cell or create a new data file just prior to sending the cell. If it is likely that the client audience list has changed since you exported the data file, create a new data file. e-Dialog requires that you export a new data file if the existing data file is three days old or older.

§ To use the data file you created in the Export Tab, click **Use this Export for the mailing.**

§ To create a new data file just prior to sending the cell, click **Clear this data and re-export at drop time.** Ensure that you allow sufficient time to create the new data file before sending the cell.

Note: Re-exporting at drop time does not allow you to repeat the proof process and thus increases the risk of errors in the mailing.

2 (optional) Change the date and time to send the cell.

The date and time that appears in the Execute Tab is the one you set in the Scheduled Date section of the Configuration Tab.

To change the date and time to send the cell, click the calendar control, and then click the date and time you want to use.

When you change the date in the Execute Tab, you have to click Execute to have the change take effect.

3 Approve sending the cell using the data file specified, at the date and time specified by clicking **Ok to Launch.**

4 Send the cell by clicking **Execute.**

Note: Clicking Execute sends the cell at the date and time specified, not immediately.

Campaign Builder returns you to the ***Mailing Setup*** (on page 29) page.

After You Execute

- Once a metered mailing has begun, you can change it to full speed. However, if a non-metered mailing has begun you can not apply a meter queue; you must cancel and restart the mailing.
- You can pause and resume the actual deployment of e-mail messages.
- You can cancel the actual deployment of e-mail messages. Contact your e-Dialog Account Team about returning the cell to Setup mode.
- Once a cell has been executed (mailed), it cannot be modified and reused. Instead, create a clone (identical copy) of the cell, make modifications, and mail the new cell.

If you return to the Execute tab after a cell has been executed, the data file radio button is set to **Use this Export for the mailing** regardless of what was selected when you executed the cell. This may be misleading but makes no difference because you cannot execute the cell again.

Understanding Reports

A mailing generates a set of reports that are sent to the Error Notification and/or Client Notification e-mail addresses as specified in ***Advanced Settings*** (on page 40). These reports include:

- All mail is sent
- Processing is complete
- On Demand Refresh

Working With Insight Triggers

In This Chapter

About Insight Triggers

Insight Trigger mailings automatically send e-mail to a dynamically generated audience list on a user-defined schedule. The audience list is created by executing an Insight Builder query that can be based on *any data available to Insight Builder*, including audiences, campaign results, and profiles. For example, you can send:

- A welcome message immediately after a customer registers on your site
- A special offer when a customer abandons a shopping cart on your site
- A promotional message on a specific day followed by the same message three days later to anyone having opened (or not opened) the first message, and another fours days later
- A sequence of messages that varies in content according to accumulated data from previous messages

To avoid sending the same triggered message to the same e-mail address multiple times, you define an **Insight Trigger Bucket** in Insight Builder. You use the data collected in that bucket in the query that generates the dynamic audience list. The Trigger Bucket is a cumulative record of all the e-mail addresses that have received a particular triggered message over the life of the mailing. The Trigger Bucket records the results of all previous executions of the triggered cell in optional *rollover ranges* based on specific days or ranges of consecutive days relative to the current date.

Configuration Process Overview

The basic Insight Trigger configuration process consists of the following steps:

1.	Create a Trigger Bucket.	**a** Open Trigger Manager. **b** Create a Trigger Bucket. See ***Creating a Trigger Bucket*** (on page 112) for a detailed description. The trigger bucket appears in the Insight Builder New Query tab **Actions** button.
2.	Create a query in Insight Builder.	**a** Open Insight Builder. **b** Create a query as described in ***Creating an Insight Builder Query*** (on page 121). You can postpone this step until you reach the ***Insight Audience*** (on page 118) step in ***Creating a Triggered Cell*** (on page 117).
3.	Create an Insight Trigger Mailing.	**a** Open Campaign Builder.

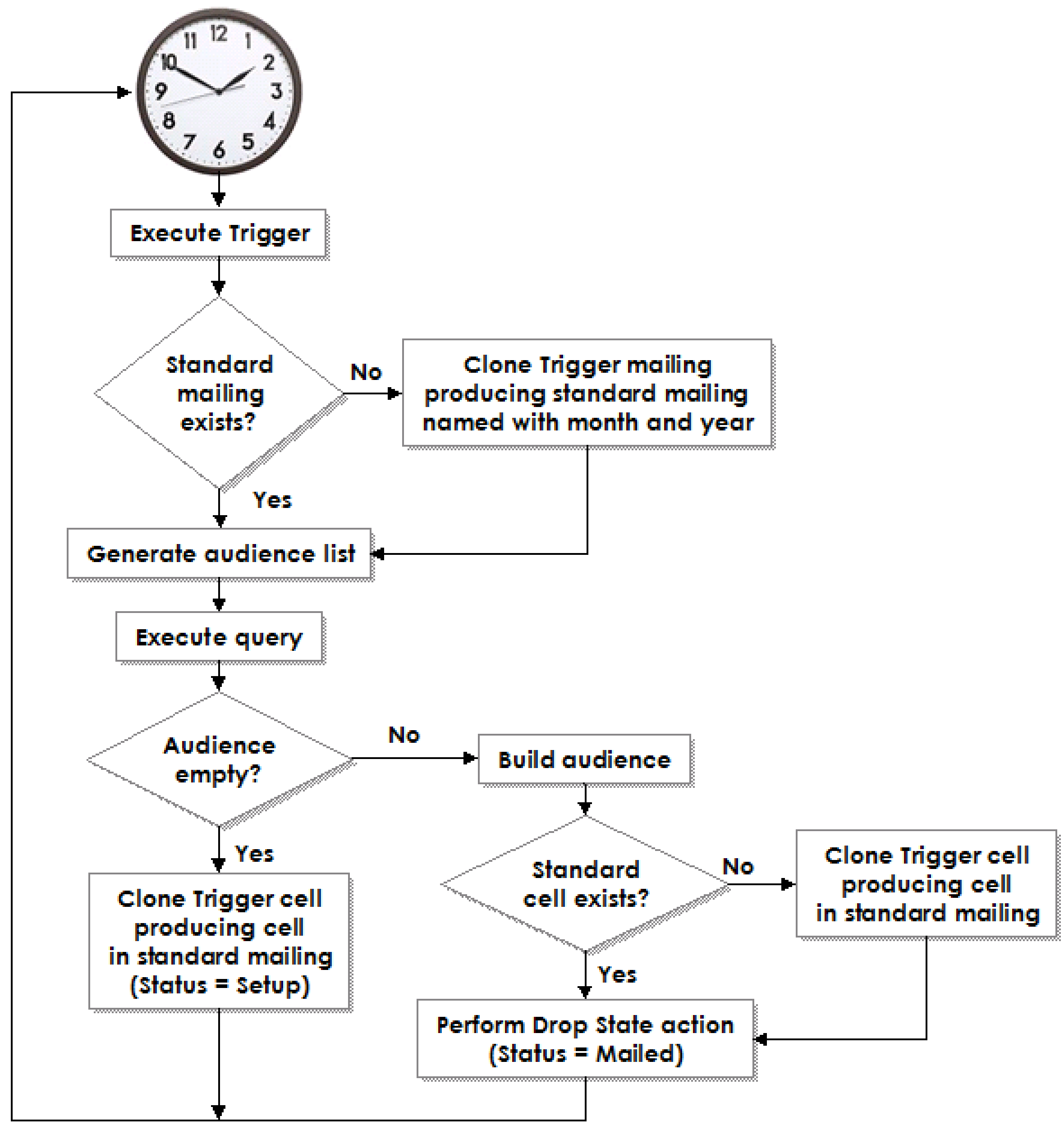
		b Create an Insight Trigger mailing. See ***Creating an Insight Trigger Mailing*** (on page 116) for a detailed description. **c** Create an **Insight Trigger cell** within the new mailing. See ***Creating a Triggered Cell*** (on page 117) for a detailed description.

You can use multiple queries and multiple mailings to create more sophisticated Insight Triggers.

Trigger Mechanism Overview

An Insight Trigger mailing contains a triggered cell that is very similar to a standard cell *except* that the triggered cell itself is never executed. Instead, the triggered cell provides a template for a series of cloned standard cells, which are executed (unless the audience list is empty).

Every 24 hours (on specified week days and time of day)



Notes

- The trigger mechanism is based on a 24-hour clock. It checks the time continuously and executes triggers at their appointed times.
- When Campaign Builder 7.0 clones the triggered mailing to create a new standard mailing, it names the mailing by appending a hyphen followed by the month and two-digit year to the trigger mailing name
- When Campaign Builder 7.0 clones the triggered cell to create a new standard cell, it gives the new cell the same name as the triggered cell. Thus, consecutive empty audience results can produce a long list of identically-named cloned cells beneath the triggered cell.
- The Drop State action performed is the one specified in the Insight Trigger cell:
  - Mail
  - Mail with Lproof
  - Lproof
  - Setup

  See ***Execute Trigger*** (on page 120) for more information about drop states

  Every 24 hours at 1:00 a.m. Eastern Time, Insight Builder updates the rollover range counts in all Trigger Buckets. Thus, multiple Insight Triggers that query the same Trigger Bucket within the same Insight Builder 24-hour cycle get the same range counts.

Every month Campaign Builder automatically:

1. Clones the Insight Trigger mailing, producing a standard mailing
2. Names the clone by appending the month and year to the original name
3. Transfers automatic execution to the new mailing

Creating an Insight Trigger

Creating a Trigger Bucket

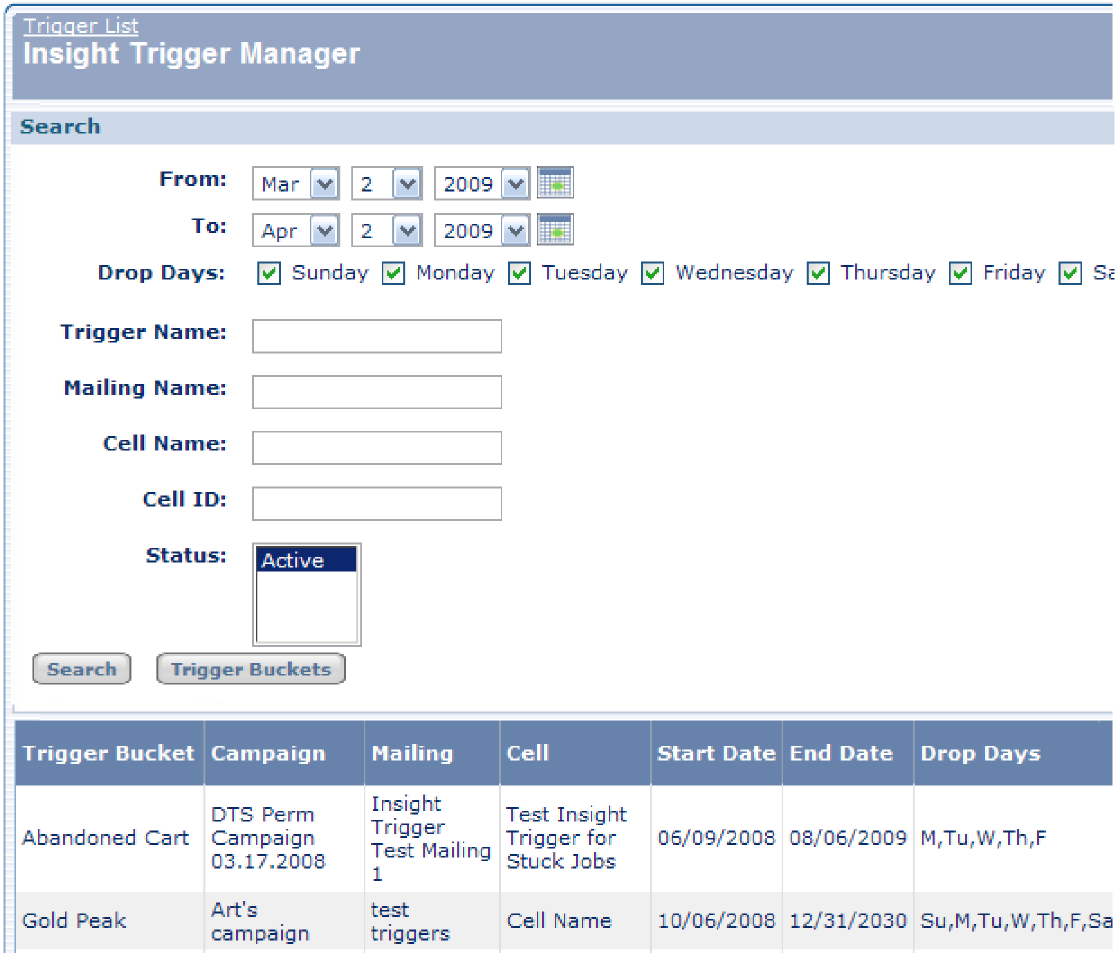
An Insight Trigger Bucket provides an ongoing record within Insight Builder of the people that have received a particular triggered message. You can use the Trigger Bucket in any Insight Builder query for any purpose. For example, the triggered message can query the Trigger Bucket to avoid sending the same e-mail to the same recipients repeatedly, or it can send the same e-mail to certain recipients on a schedule.

To create an Insight Trigger Bucket

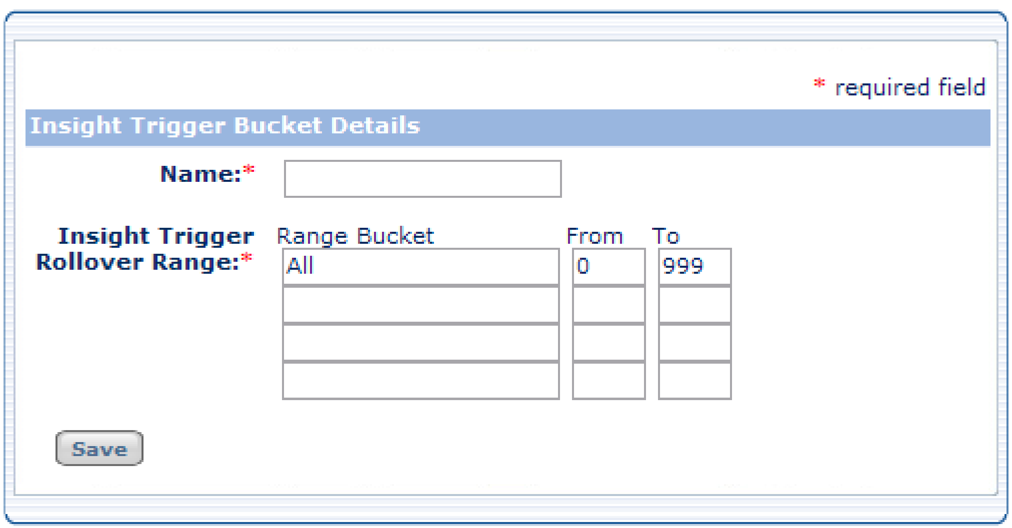
1. Log in to Precision Central.
2. Select **Utilities > Trigger Manager.**

   The Trigger Manager allows you to search for existing Trigger Buckets and to create new ones. For more information about the Trigger Manager, see ***Using the Trigger Manager*** (on page 124).

3 Click **Trigger Buckets.**



4 Fill in the **Insight Trigger Bucket Details** dialog.



5 Click **Save.**

A confirmation screen appears reminding you that once this bucket is created it **cannot be removed** without contacting your Account Team.

Once you confirm that you want to save this Bucket, the Trigger Manager immediately creates a Profile and associated Buckets in Insight Builder.

New Trigger Buckets do not appear in the Trigger Manager list until they are linked to a triggered cell.

Insight Trigger Bucket Details

The following table lists the fields in the Insight Trigger Bucket Details dialog:

Field	**Description**
Name	The name of the Trigger Bucket that you want to appear in Insight Builder. A Trigger Bucket can be used by multiple Insight Triggers so name it accordingly.
Insight Trigger Rollover Range	The Rollover Range consists of a set of Range Buckets, that group recipients according to how long ago each recipient was sent a particular triggered message. When viewed in Insight Builder, these range buckets display only counts. However, when used in Insight Builder queries, these range buckets provide audience lists.
All	The default Range Bucket **All** logs all the recipients (unique e-mail addresses) to whom the triggered message was sent with the last 999 days (approximately two years and nine months). If the goal of your trigger is to simply prevent recipients from receiving the same message more than once, make sure to use the EXCLUDES ALL field in your query (in addition to an audience list):  This query excludes all recipients to whom the message has been sent at any point in time.
Range Bucket	Use a descriptive name for each Range Bucket. This is the description that appears in the Trigger Bucket itself and queries that use Range Buckets. If a Range Bucket will be used by more than one query, you can include all or part of the Trigger Bucket name in the Range Bucket name for readability purposes. See ***Sequence of Messages*** (on page 128) for an example of how this works. **Note:** Date intervals represented by rollover ranges are relative to the current date with respect to the execution of an Insight Builder query based on them. Thus, the set of recipients in each rollover range may change every day. In other words, a recipient record is always included in the All range (until its age exceeds 999 days) but moves from user-defined range to range as its age advances.
From and To	These two fields define the number of consecutive days grouped in each Range Bucket. You can use any numeric value from 0 to 999 where zero represents less than one day (24 hours).

For example, if you want your first bucket to group all recipients that were sent the triggered message in the previous 30 days, enter 0 in the **From** field and 30 in the **To** field. If you want the second bucket to contain the the recipients who were sent the triggered message more than 30 days ago, enter 31 in the **From** field and 999 in the **To** field.

Range Bucket	From	To
All	0	999
0 to 30 days old	0	30
31 days and older	31	999

Before any e-mail is sent, the resulting Insight Trigger bucket contains the following ranges, each with 0 recipients:

- All (0)
- 0 to 30 days old (0)
- 31 days and older (0)

To prevent recipients from receiving the message more than once, use the following Insight Builder query for the trigger cell:

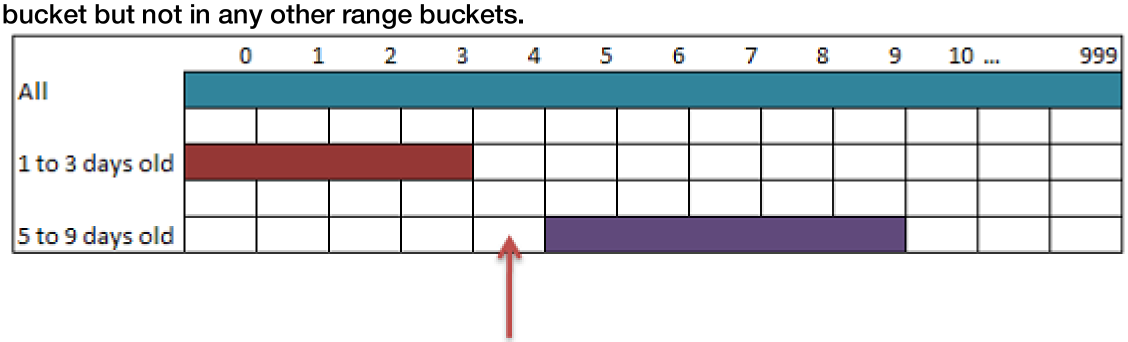
EXCLUDES All

Gaps Between Rollover Ranges

If a recipient falls into a gap between rollover ranges, it is included in **All** but not in any other range. For example:

Range Bucket	From	To
All	0	999
1 to 3 days old	0	3
5 to 9 days old	5	9

Recipients that are exactly four days old or greater than nine days old are included in the **All** range bucket but not in any other range buckets.

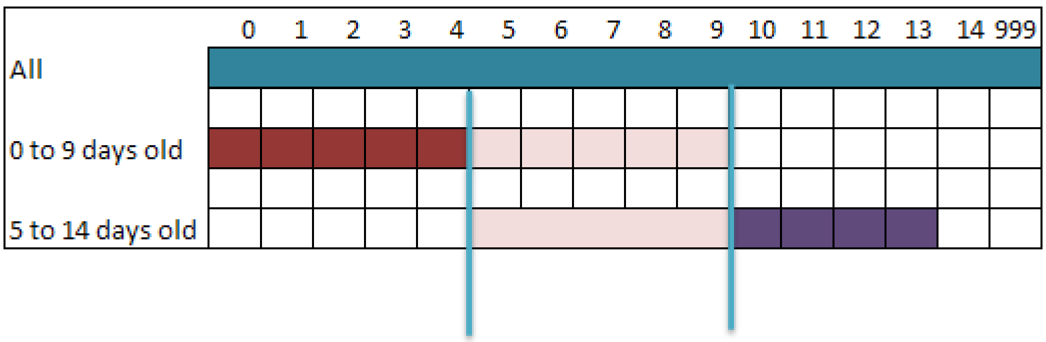


Overlapping Rollover Ranges

If a message is recorded in more than one rollover range, it is included only once in All. For example:

Range Bucket	From	To
All	0	999
0 to 9 days old	0	9
5 to 14 days old	5	14

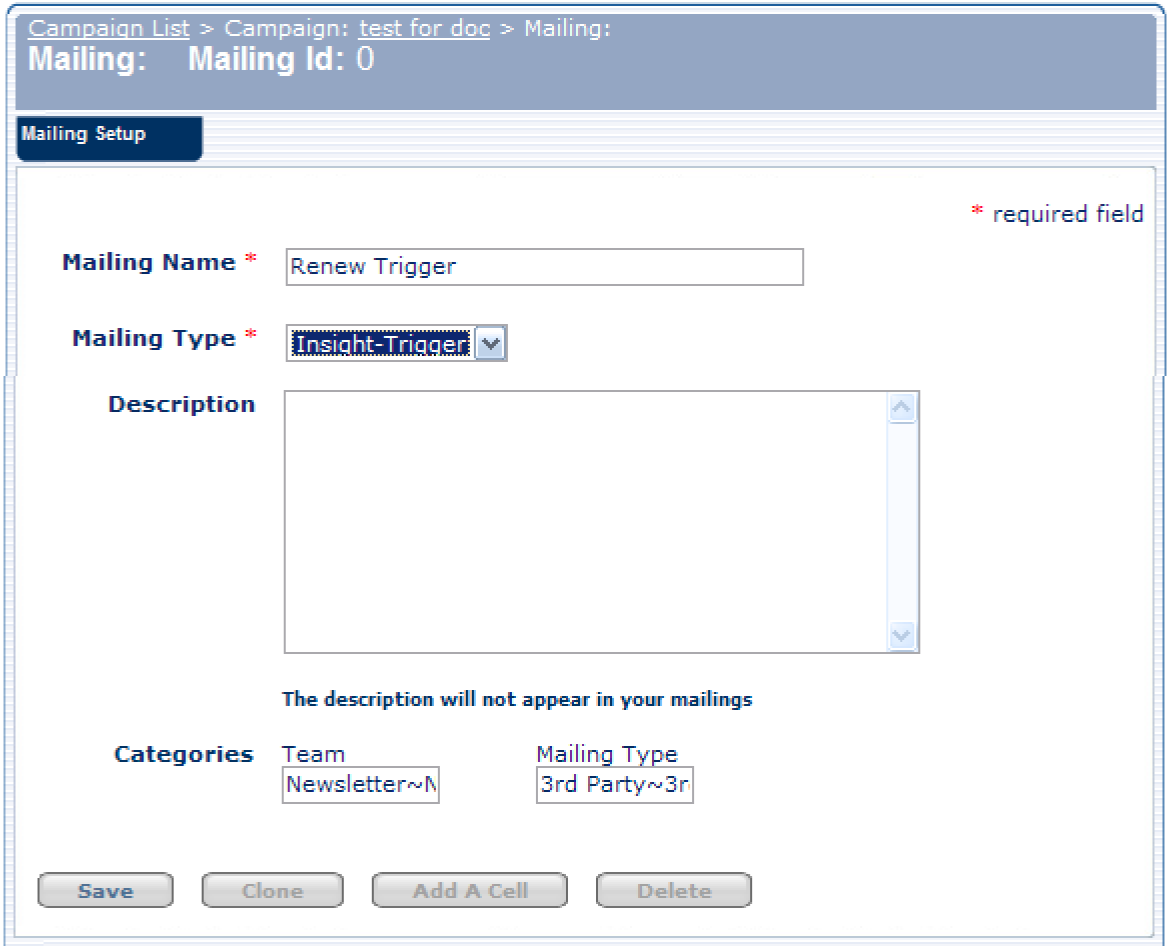
Messages that are between five and nine days old are recorded in two user-defined range buckets but are included in the **All** range bucket only once.



Creating an Insight Trigger Mailing

1 Create a new mailing as described in ***Creating a Mailing*** (on page 29).

2 In the Mailing Type drop-down list select **Insight Trigger.**



Once the Insight Trigger mailing type is created, you can create triggered mail cells under it, just as you would a standard mail cell in Campaign Builder. Once you have created a triggered cell, you cannot change the Mailing Type back to Standard.

The mailing is automatically cloned each month, as described in ***Trigger Mechanism Overview*** (on page 110).

Creating a Triggered Cell

Once the Insight Trigger mailing is created, you can create triggered mail cells under it, just as you would a standard mail cell. On the Mailing: *mailing name* screen, click **Add A Cell** as described in the ***Creating a Cell*** (on page 31) section of the Campaign Builder 7.0 User's Guide.

During the cell creation process, three tabs are different in a triggered cell, as shown below.

Standard Cell Creation Tabs	**Insight Trigger Cell Creation Tabs**
Configuration	Configuration
Audience	Insight Audience

Content	Content
Links	Links
Symbols	Symbols
Export	Export
Proof	Proof
Execute	Execute Trigger

The remaining tabs (Content, Links, Symbols, Export, and Proof) are the same as those in a standard mail cell.

Configuration

The Basic Settings are the same as a normal cell except that there is no Scheduled Date. The Advanced Settings are the same.

Specifying the Insight Audience

The Insight Audience tab is different from the Audience tab in a standard cell. The sections are that are different are highlighted in grey:

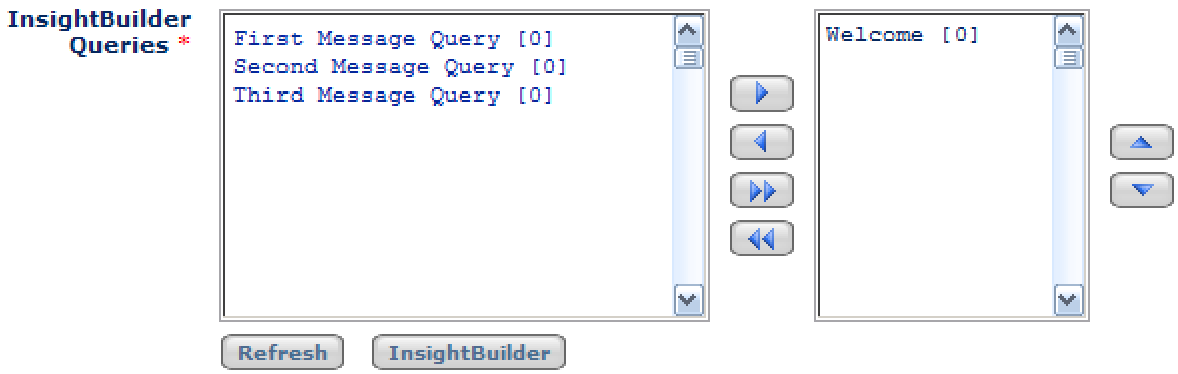
Standard Cell	**Insight Trigger Cell**
Audience	
	InsightBuilder Queries
	Lproof Audience
Suppression	Suppression
Suppress Wireless Domains	Suppress Wireless Domains
Deduping Criteria	
Unsub Suppression	Unsub Suppression
Undeliverable Suppression	Undeliverable Suppression

This section describes the sections that are different in a triggered cell. For descriptions of the other sections, see ***Define the Target Audience*** (on page 45) section of the Campaign Builder 7.0 User's Guide.

Specifying Insight Builder Queries

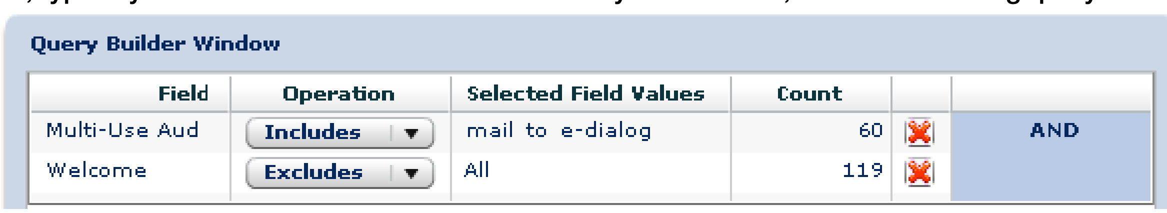
To build the audience dynamically:

1 Move one or more existing Insight Builder queries from the left-hand pane or click **Insight Builder** to open Insight Builder (as described in ***Creating an Insight Builder Query*** (on page 121)).



Each time the Trigger runs, it executes the selected queries and generates a new audience list, which determines who should receive the triggered message. If you select multiple queries for a single trigger, the generated audience list contains the union of the results of the queries.

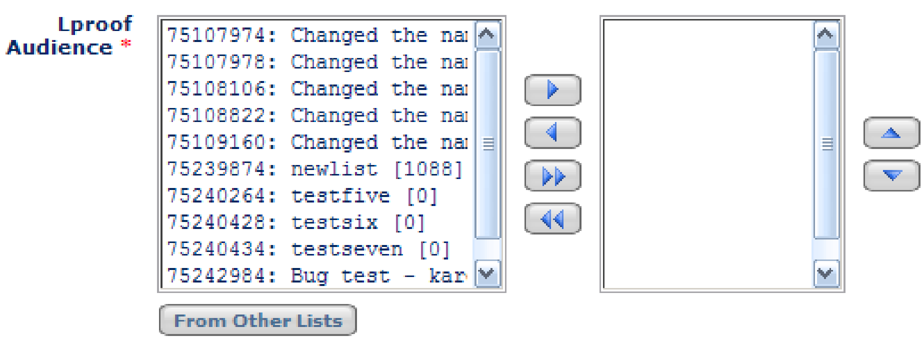
Note: Ensure that at least one query used by a triggered message includes an existing audience list, typically one associated with a data feed from your Web site, as in the following query:



Specifying the Lproof Audience

To specify recipients of Lproofs:

1 Move one or more existing audience lists from the left-hand pane to the right-hand pane.



These are the same audience lists that appear in the Audience pane of a standard cell. They have two purposes:

§ Receive the cell for proofreading purposes when the trigger executes in the **Lproof** or **Mail with Lproof** drop state as specified in the ***Execute Trigger*** (on page 120) tab.

§ Provide a target audience to use when building a sample data file in the ***Proof tab*** (on page 120).

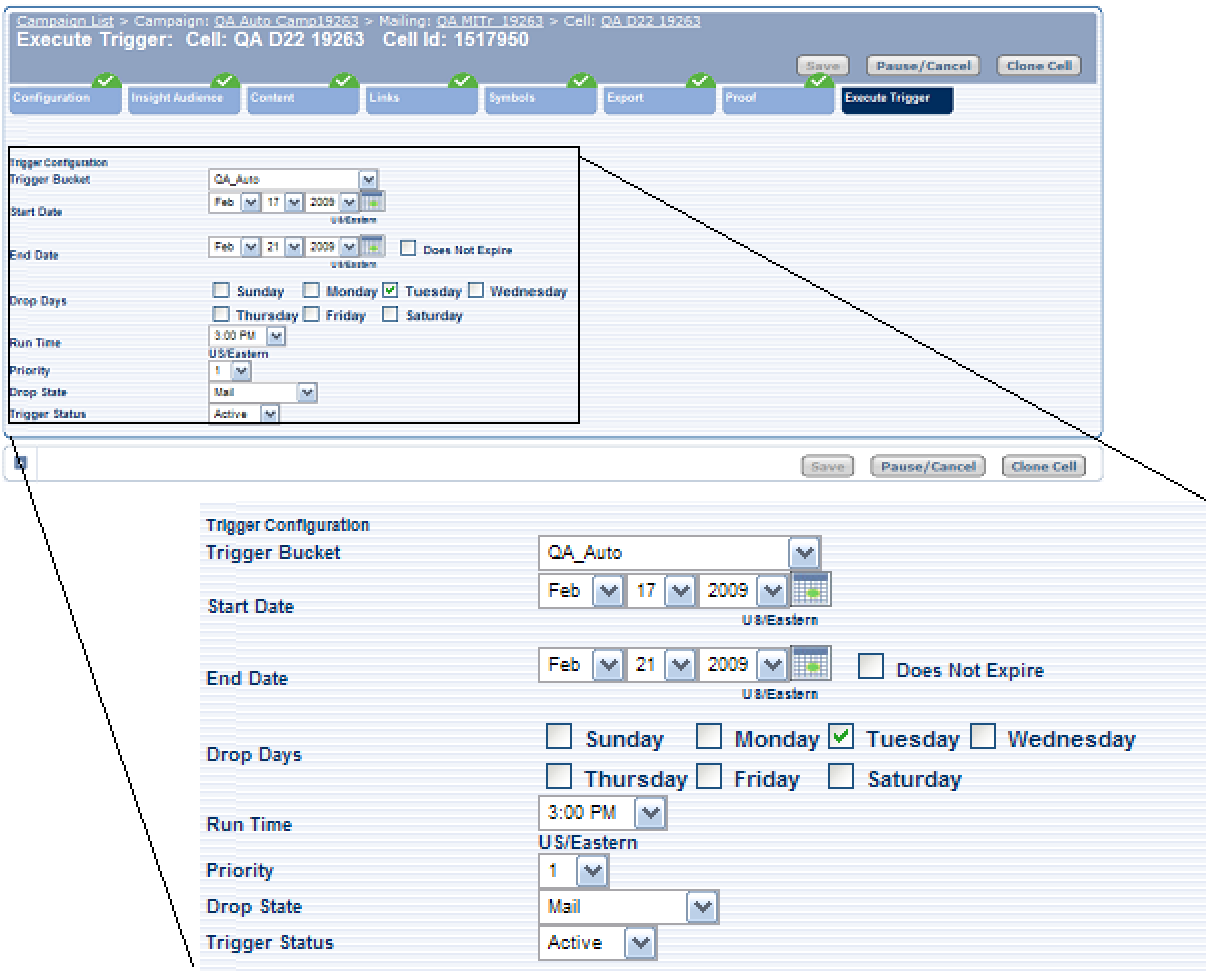
Note: The Lproof Audience does not receive the e-mail proofs sent from the Proof tab.

Proof

The Proof tab in a triggered cell has the same purpose as the Proof tab in a standard cell: to send live proofs (L Proofs) of an e-mail before sending the final version. The difference is that the data used to build the sample file comes from your selections in the Lproof Audience pane of the the ***Insight Audience*** (on page 118) tab. This is because the actual audience does not exist until the Insight Builder query executes for the first time.

Execute Trigger

The Execute Trigger Tab provides a way to configure the schedule for the trigger.



Field	Description
Trigger Bucket	Binds the triggered cell to a specific trigger bucket.
Start Date	Specifies the day you want the trigger to start executing.
End Date	Specifies the day you want the trigger to stop executing. You can check the **Does Not Expire** box to make the trigger continue indefinitely.

Drop Days	Specifies the days of the week during which the trigger should execute.
Run Time	Specifies the time of day to execute the trigger.
Priority	Provides a way to resolve conflicts that can occur when two or more triggers execute at the same time.
Drop State	Specifies the action to perform when the trigger executes an active cell: ♦ Setup ♦ Lproof ♦ Mail ♦ Mail with Lproof In Setup state, no e-mail is sent.
Trigger Status	Specifies the state of the cell with respect to execution. Only active cells send e-mail. ♦ Setup ♦ Active ♦ Inactive ♦ Pause

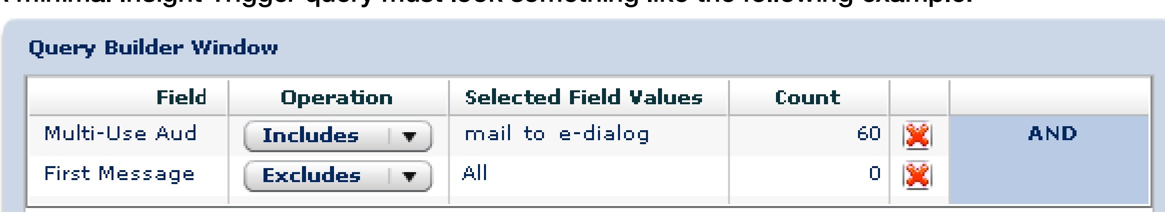
Creating an Insight Builder Query

An Insight Trigger can use any Insight Builder query and an Insight Builder query can be based on any data available within Insight Builder. However, for a query to make sense within the context of an Insight Trigger, it must be based on:

- One or more audience lists, typically including data feeds from Web sites
- One or more ***Trigger Buckets*** (on page 112)

To create an Insight Builder query:

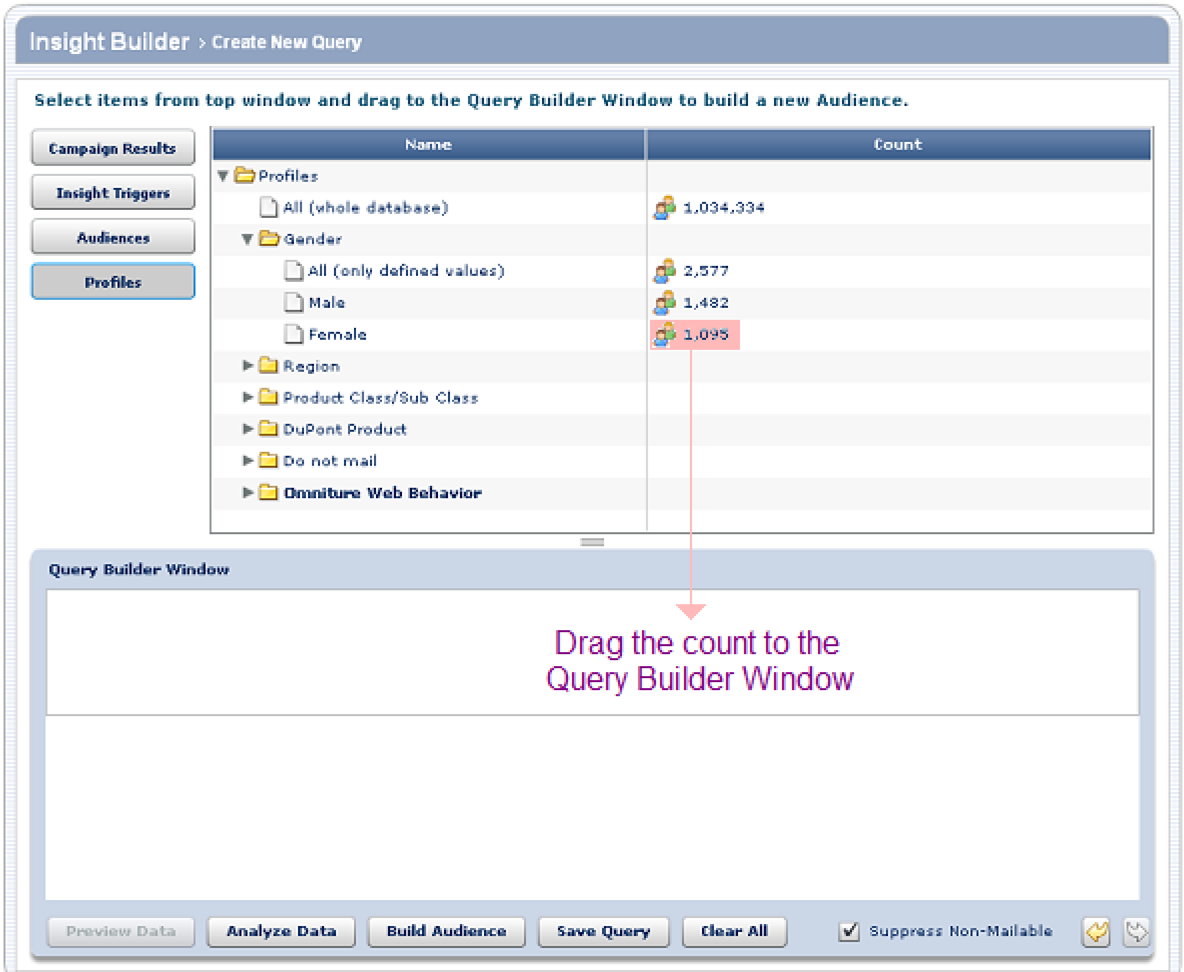
1. Open Insight Builder.
2. Click the **Audiences** icon to open a list of existing audiences.
3. Choose **at least one target audience** field.
4. Click the **Actions** icon in Insight Builder to display a list of existing Trigger Buckets.
5. Choose **at least one Trigger Bucket** rollover range field.
6. Drag and drop your chosen target audience and Trigger Bucket fields into an **AND statement block.** See ***Understanding Insight Builder Drop Zones*** (on page 122) for information about drop zones and query logic.
7. A minimal Insight Trigger query must look something like the following example:



Note: Failure to include a target audience field and a trigger bucket field in the query can produce unexpected and undesirable results. For example, a query that contains an EXCLUDES ALL field with no target audience field creates a dynamic audience list that contains every e-mail address in the Master Database.

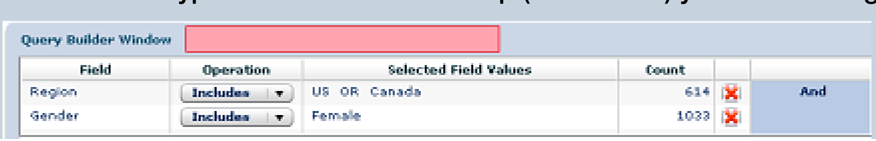
Understanding Insight Builder Drop Zones

When you drag a field to the Query Pane, you drag the count, as indicated in the area shaded red in the following figure:



You position the field in the Query Builder Window to specify the logical relationship between your initial criteria and any additional criteria.

Tip: When you drag a count to the Query Builder Window, the area highlighted in the following figure indicates the type of Boolean relationship (AND or OR) you are creating.



Specifying an AND relationship

An AND relationship indicates that both criteria must be true.

To specify an AND relationship:

1 Select a count from a different field from the existing criterion.

For example, if the existing field is Gender, select a count from Region.

Note: Unless a field allows multiple values, it does not make sense to specify an AND relationship between values of one field. For example, one cannot be both male and female; specifying gender equals male AND gender equals female yields an audience of 0. However, if one can select multiple teams as favorites, specifying favorite team equals Red Sox AND favorite team equals Cubs does not result in an audience of 0.

2 Drag the count to the area shaded in red in the following figure.

Specifying an OR relationship

An OR relationship indicates that either criterion must be true.

To specify an OR relationship between values of the same field:

1 Select a count from the same field as the existing criterion.

For example, if the existing field is Region, select another count from Region.

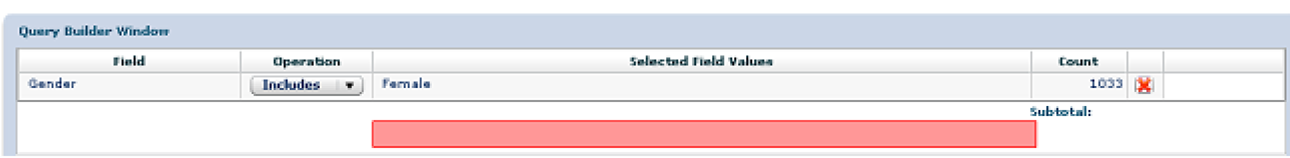
2 Drag the count to the area shaded in red in the following figure.

To specify an OR relationship between different fields:

1 Select a count from a field different from the existing field.

For example, if the existing field is Region, select a count from Gender.

2 Drag the count to the area shaded in red in the following figure.



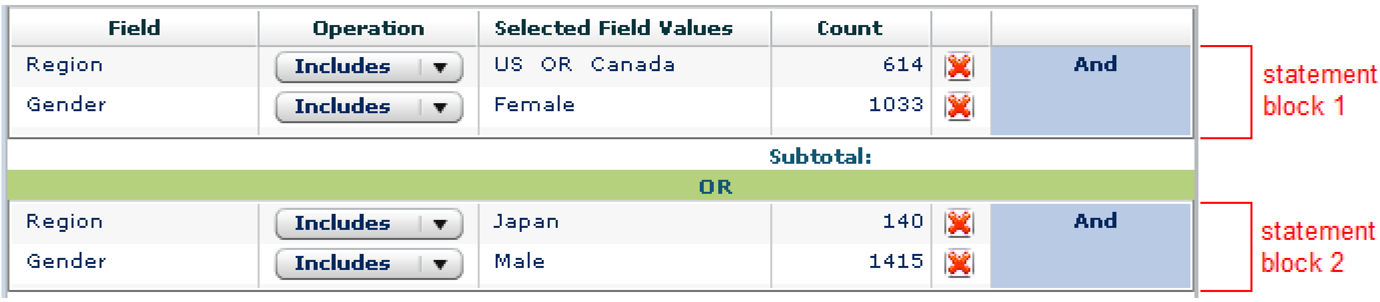
Specifying multiple relationships

You can specify more complex relationships by creating statement blocks. Each block can specify multiple criteria. For example, you might want to find female customers from the U.S. or Canada, and male customers from Japan.

The first statement block finds all customers from the U.S. or Canada who are female.

The second statement block finds all customers who are from male from Japan.

The following illustrates the two statement blocks:

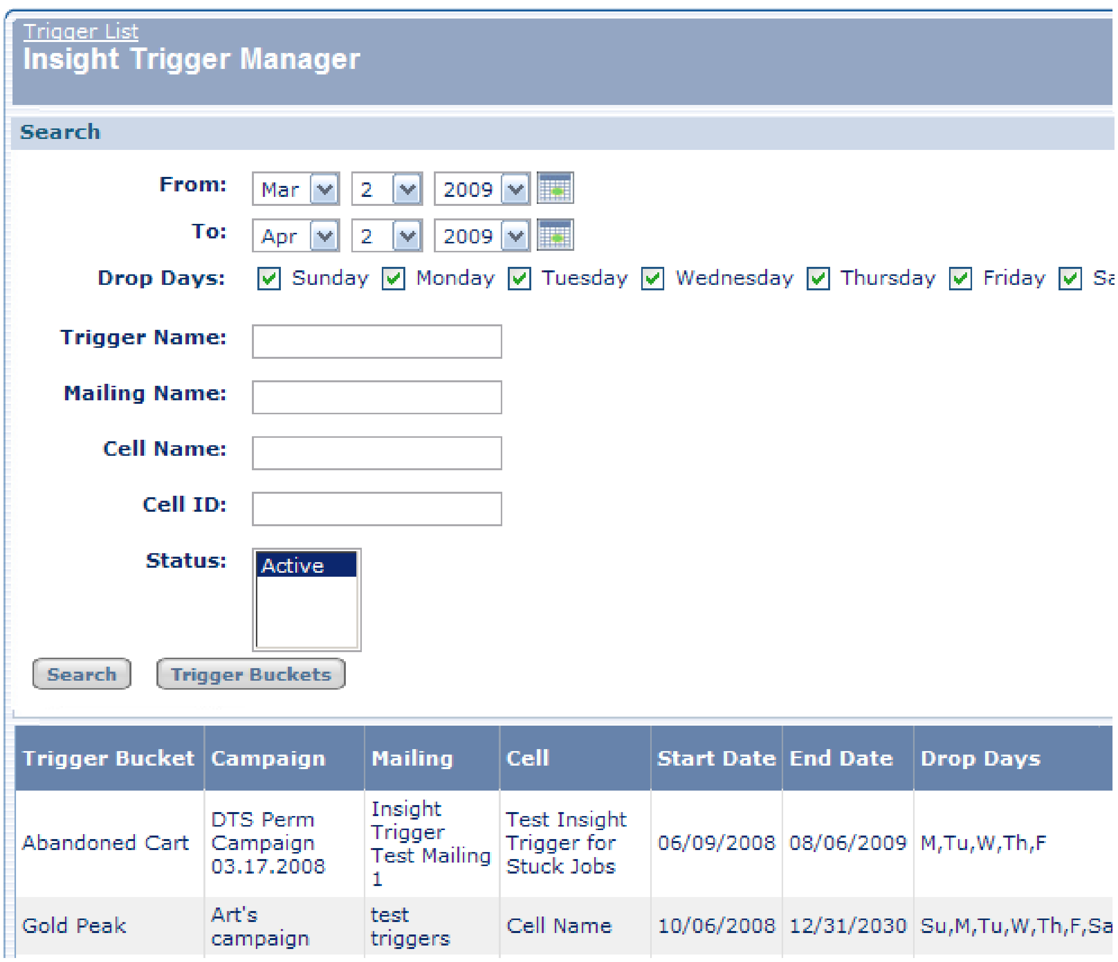


Using Trigger Manager

Trigger Manager allows you to search for existing Trigger Buckets and to create new ones.

Finding an Insight Trigger

To find a specific Insight Trigger, fill in one or more fields in the **Filter By** area and click **Search.**



Field	Description
Trigger Active Date ♦ From ♦ To	These date fields specify the beginning and end of the range of days that include the Last Run Dates of the triggers you want to find.
Trigger Name	Specify all or part of a name of the trigger to find. For example, specify "trigger" to find This_**Trigger** and **trigger**_A.
Mailing Name	Specify the name of the Campaign Builder mailing to narrow the search to that mailing.
Cell Name	Specify the name of the trigger cell to find or a substring. For example, specify "trigger" to find This_Trigger and Trigger_A.
Cell ID	Specify the cell ID.
Drop Days	Click the check boxes to find triggers that have at least one Drop Day within the specified set of days. For example, to find triggers whose Drop Days include Wednesday or Thursday, select only those days. To find triggers whose Last Run Date occurs only on weekdays, deselect Sunday and Saturday.
Status	Specify the status of the triggers to find. The status of a cell is specified in the cell's ***Execute Trigger*** (on page 120) tab.
Search	Executes the search and refreshes the result set.
Trigger Buckets	Creates a new trigger bucket as explained in ***Creating a Trigger Bucket*** (on page 112).

Editing Triggers and Getting eReports

On the right-hand side of the trigger result set, there are links for Edit and eReports.

Trigger Bucket	Campaign	Mailing	Cell	Start Date	End Date	Drop Days	Run Time	Status	State	Last Run Date	
Abandoned Cart	Campaign 03.17.2008	Insight Trigger Test 1	Test Insight Trigger	06/09/2008	08/06/2009	M,Tu,W,Th,F	10:00	Active	WIP		Edit | eReports
Gold Peak	Art campaign	test triggers	Cell Name	10/06/2008	12/31/2030	Su,M,Tu,W,Th,F,Sa	17:00	Active	WIP	11/02/2008 17:09	Edit | eReports
Auto	QA Auto Camp19263	QA MIT	QA D22 19263	02/17/2009	02/21/2009	Tu	15:00	Active	VALID	02/17/2009 15:09	Edit | eReports

Editing a Trigger

To edit a trigger:

1 Go to the Trigger List.

2 Click **Edit** for the Insight Trigger cell you want to edit.

You can then modify the Insight Trigger cell in Campaign Builder. See ***Creating a Triggered Cell*** (on page 117) and the ***Create Cells within a Mailing*** (on page 31) section of the Campaign Builder 7.0 User's Guide for more information.

Getting eReports on a Trigger

To view reports about a Trigger in eReports:

1 Go to the Trigger List.

2 Click **eReports** for the Insight Trigger cell you want to report on.

eReports displays the Insight Trigger data.

Insight Trigger metrics are grouped by month in eReports.

3 Select a report type of **Mailing / Audience** to see the results for each trigger run.

See the Introducing eReports and related documentation for more information.

Insight Trigger Examples

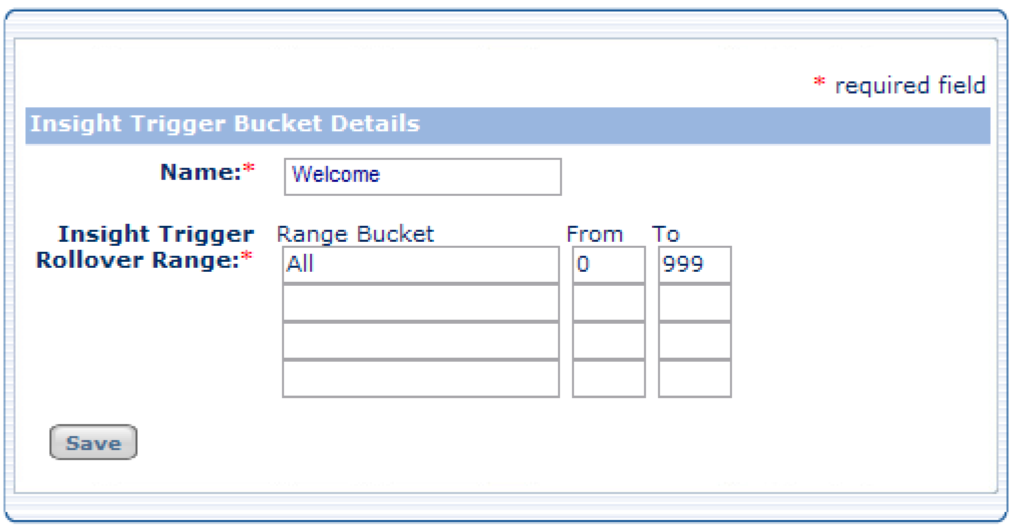
One-Time-Only Message

This is a simple example of how to avoid e-mailing the same recipient more than once when new recipients are being added to the audience on a regular basis. In other words, it is a one-time-only mailing. A typical use case for this type of trigger is a "Welcome" message for newly registered members. (Follow-up messages would come from a different triggered cell.)

1 Create the Trigger Bucket

a) Start Trigger Manager.

b) Create the following Insight Trigger bucket:

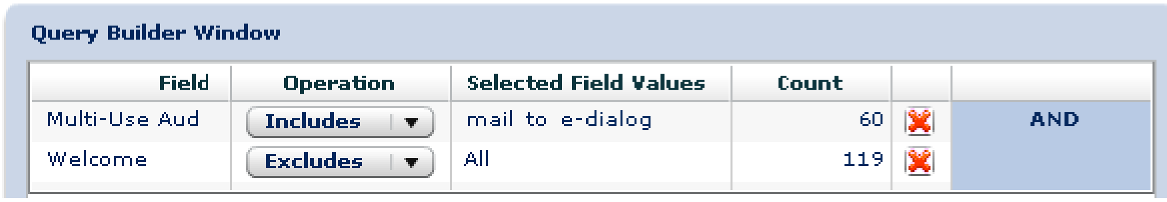


2 **Create the Insight Builder query**

a) Start Insight Builder.

b) Create the query.

You create the query for the message using an audience list and the **All** range. The EXCLUDES operator causes the first message to be sent immediately and prevents it from being sent more than once.

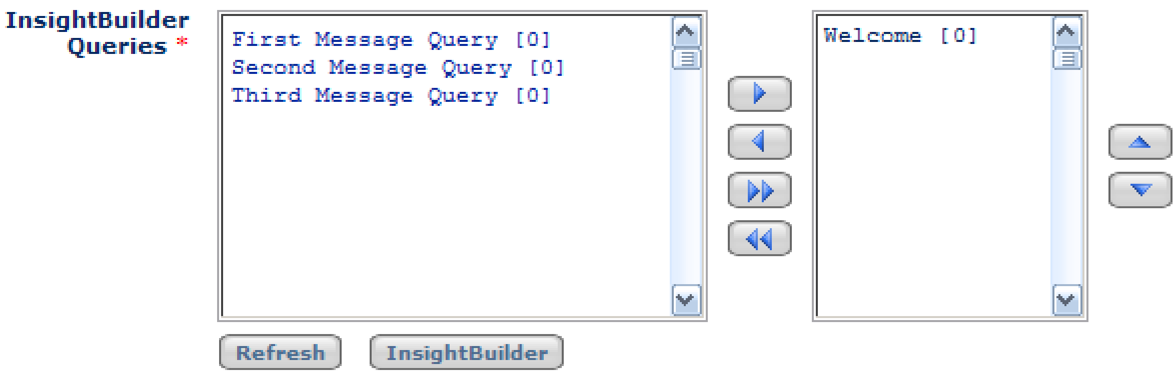


3 **Specify the Insight Audience**

a) Start Campaign Builder.

b) Create or edit the cell.

c) In the triggered cell's Insight Audience tab, select the **Welcome** query.



4 **Execute the trigger**

a) In Campaign Builder, go to the Execute Trigger Tab

b) Select **Welcome** as the Trigger Bucket.

Chronology

The following illustrates how the Insight Trigger bucket changes over the course of time:

Day	Status	Existing recipients	New recipients to whom e-mail is sent	Total recipients in Trigger Bucket
	Your Insight Trigger bucket contains only the All field and is initially empty	0		
0	The trigger runs; the query finds that 1000 recipients have signed up	1000	1000	1000

1	The trigger runs; the query finds that 300 new recipients have signed up	1000	300	1300
2	The trigger runs; the query finds 200 new recipients have signed up	1300	200	1500

The cycle continues until 999 days have passed or the triggered cell terminates when the End Date specified in the ***Execute Trigger tab*** (on page 120) is reached.

Sequence of Messages

This is an example of how to send a sequence of three messages consisting of three Insight Trigger cells.

1 The first message goes out whenever a new recipient is added to the audience list.
2 The second message goes out 30 days after the first message to any recipient who has not opened the first message.
3 The third message goes out 30 days after the second message to any recipient who has not opened the second message.

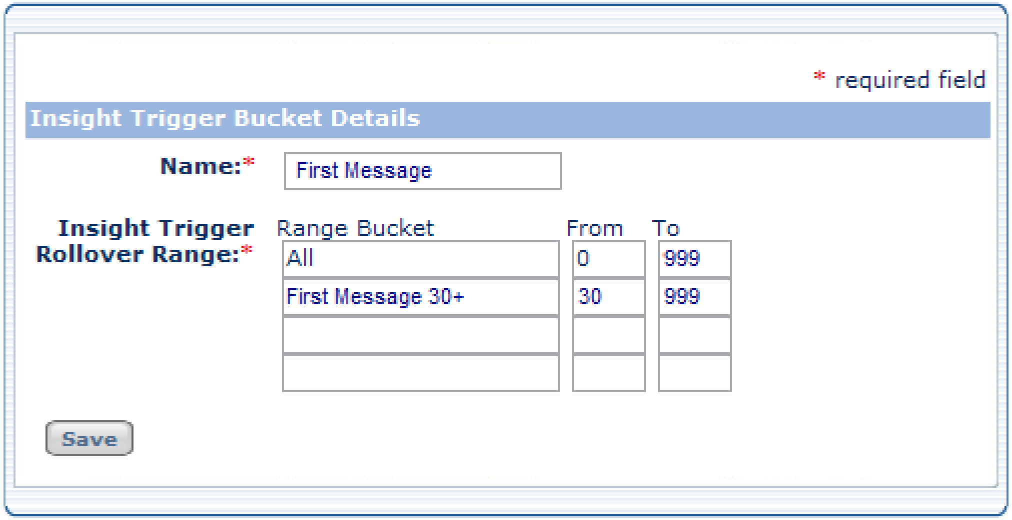
Each Insight Trigger cell:

- Has its own Trigger Bucket
- Uses a query that builds an audience based on the previous cell's Trigger Bucket
- Continues to execute until 999 days have passed or the End Date specified in the ***Execute Trigger Tab*** (on page 120) is reached

First Message

1 Create the Trigger Bucket
   a) Start Trigger Manager.

b) Create the following Insight Trigger bucket:



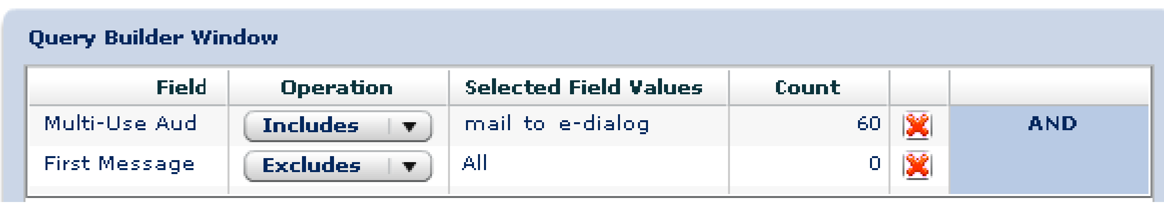
A recipient moving into the **First Message 30+** range is the event that sends the second message.

2 **Create the Insight Builder query**

a) Start Insight Builder.

b) Create the query.

You create the query for the first message using only the **target audience** and the **All** range.



§ The INCLUDES field is the initial target audience.

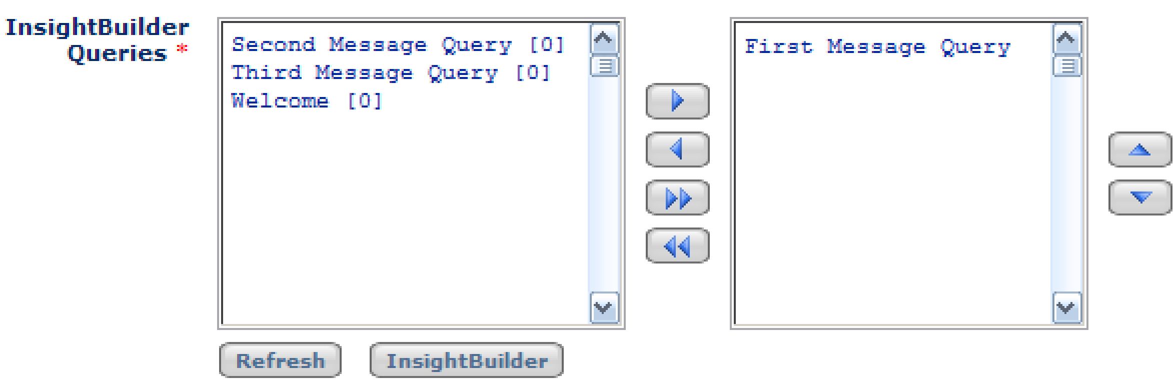
§ The EXCLUDES field prevents the message from being sent to a recipient more than once.

3 **Specify the Insight Audience**

a) Start Campaign Builder.

b) Create or edit the cell.

c) In the triggered cell's Insight Audience tab, select the **First Message Query**.



4 **Execute the trigger**

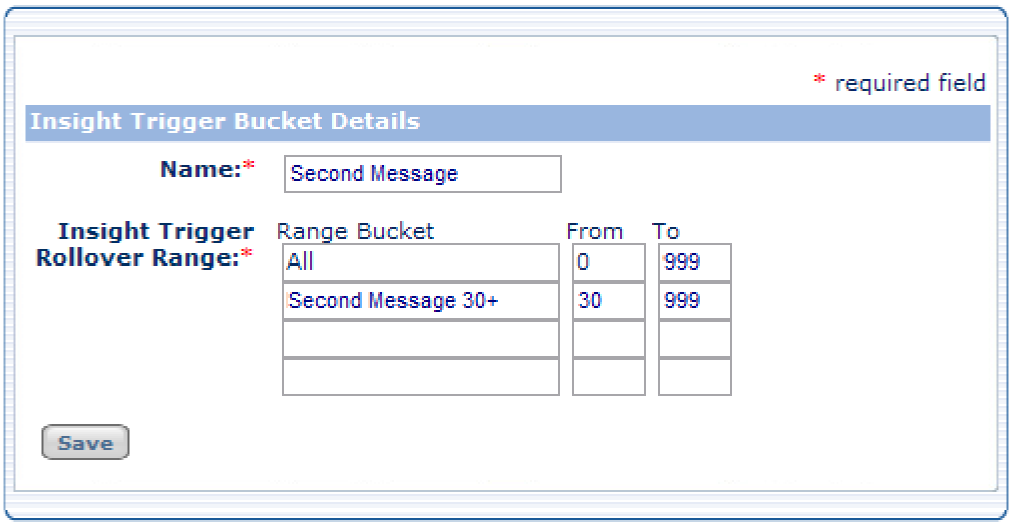
In the Execute Trigger tab, select the **First Message** Trigger Bucket.

Second Message

1 Create the Trigger Bucket

a) Start Trigger Manager.

b) Create the following Insight Trigger bucket:



A recipient moving into the **2nd Message 30+** range is the event that sends the third message.

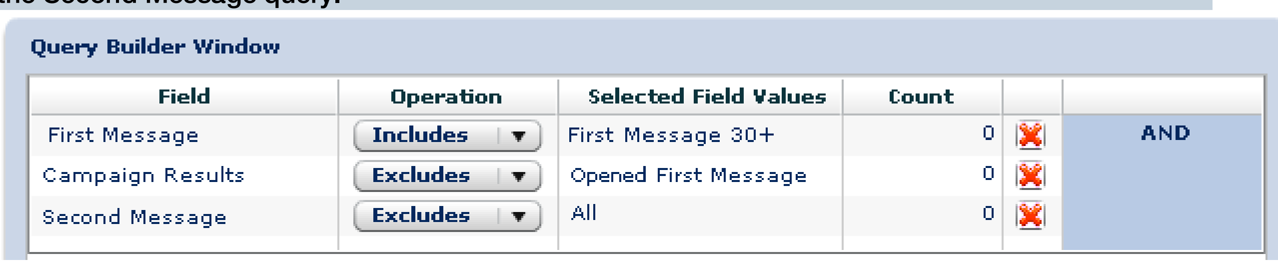
2 **Create the Insight Builder query**

a) Start Insight Builder.

b) Create the query.

The query for the Second Message is based on the **1st Message 30+** rollover range from the First Message trigger bucket.

The First Message query must execute once (creating Campaign Results) before you can create the Second Message query.



§ The INCLUDES operator causes the **second** message to be sent to recipients of the **first** message after 30 days have passed.

§ The first EXCLUDES operator prevents the message from being sent to recipients who opened the first message at any point in time.

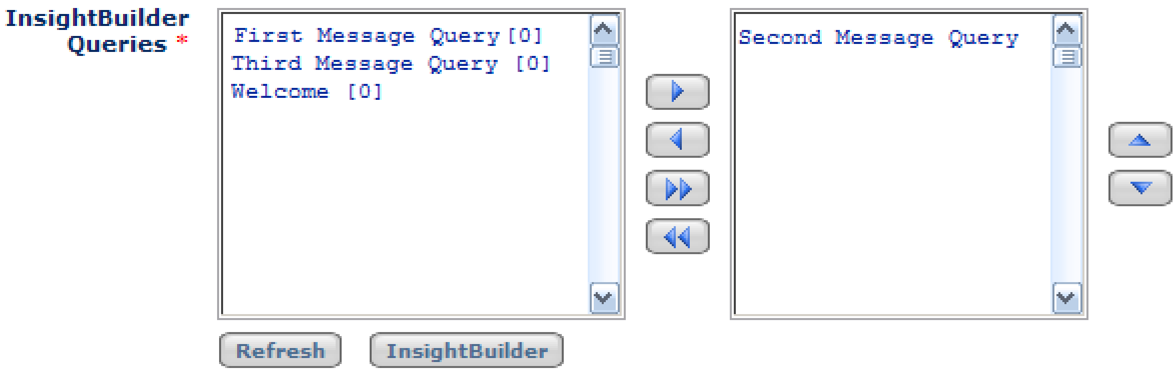
§ The second EXCLUDES operator prevents the message from being sent to any recipient more than once.

3 **Specify the Insight Audience**

a) Start Campaign Builder.

b) Create or edit the cell.

c) In the triggered cell's Insight Audience tab, select the **Second Message Query**.



4 **Execute the trigger**

In the cell Execute Trigger tab, select the **Second Message** Trigger Bucket.

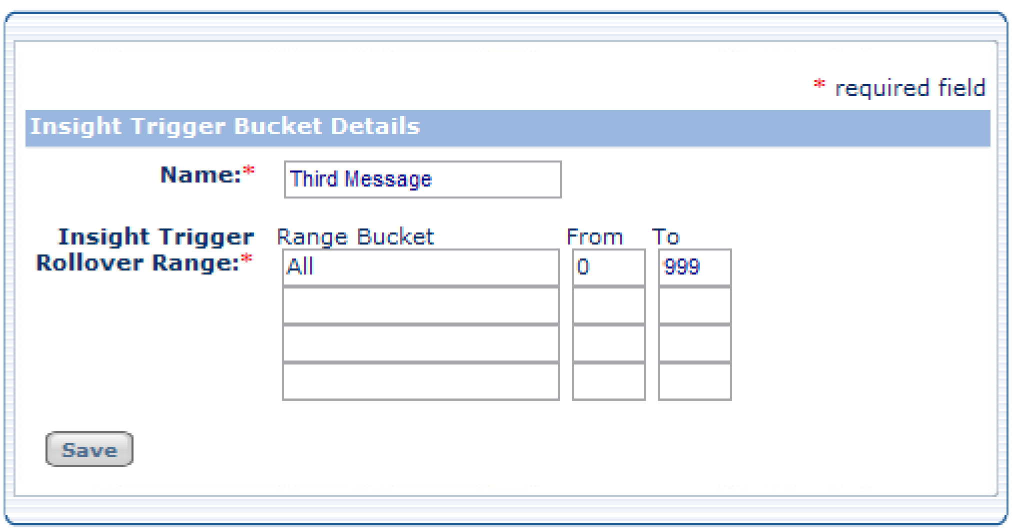
Note: There will be nothing for this trigger cell to do until 30 days after the First Message is sent for the first time. Thus, you can schedule it to start 30 days later.

Third Message

1 Create the Trigger Bucket

a) Start Trigger Manager.

b) Create the following Insight Trigger bucket:



This trigger bucket is identical to the trigger bucket used in the ***One-Time-Only Message*** (on page 126). No range buckets other than **All** are required because there is no fourth message to use them.

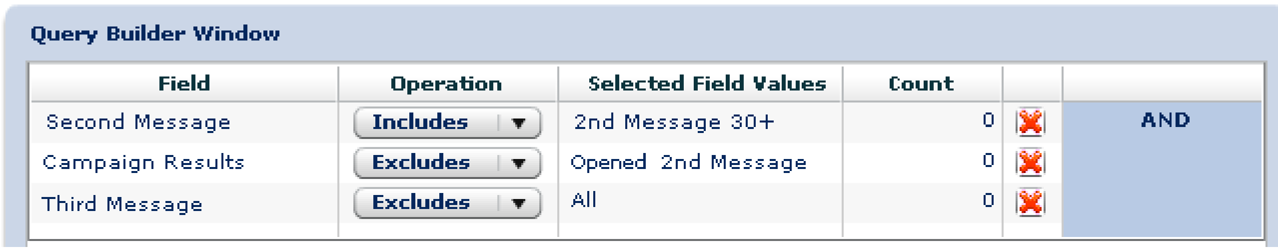
2 **Create the Insight Builder query**

a) Start Insight Builder.

b) Create the query.

The query for the Third Message is based on the **Second Message 30+** range from the Second Message trigger bucket.

The Second Message query must execute once (creating Campaign Results) before you can create the Third Message query.



§ The INCLUDES field causes the **third** message to be sent to recipients of the **second** message after 30 days have passed.

§ The first EXCLUDES field prevents the **third** message from being sent to recipients who **opened the second message.**

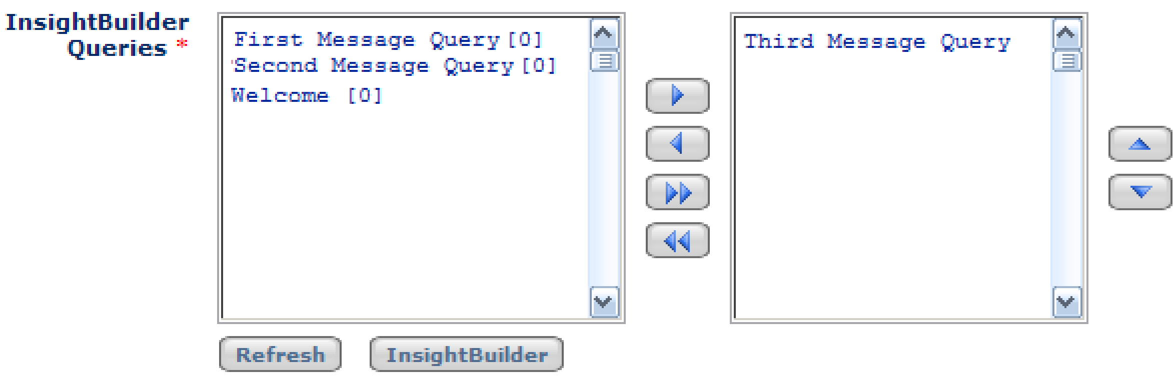
§ The second EXCLUDES field prevents the **third** message from being sent to any recipient more than once.

3 **Specify the Insight Audience**

a) Start Campaign Builder.

b) Create or edit the cell.

c) In the triggered cell's Insight Audience tab, select the **Third Message Query.**



4 **Execute the trigger**

In the cell Execute Trigger tab, select the **Third Message** Trigger Bucket.

There will be nothing for this trigger cell to do until 30 days after the Second Message is sent for the first time. Thus, you can schedule it to start 30 days later.

Chronology

Chronology

The following illustrates how the Insight Trigger bucket changes over the course of time:

Day	Action	1st Message		2nd Message		3rd Message
		All	30+	All	30+	All

	All buckets are empty	0	0	0	0	0
0	1st Message Trigger runs	0	0	0	0	0
	1000 new recipients identified	0	0	0	0	0
	1000 added to 1st Message All Bucket	1000	0	0	0	0
	1st e-mail sent to 1000	1000	0	0	0	0
1	1st Message Trigger runs	0	0	0	0	0
	300 new recipients identified	1000	0	0	0	0
	300 added to 1st Message All Bucket	1300	0	0	0	0
	1st e-mail send to 300	1300	0	0	0	0
2-29	No new recipients are identified	1300	0	0	0	0
30	1st Message Trigger runs	1300 (1000)	0	0	0	0
	1000 move to 1st 30+ range	1300	1000	0	0	0
	2nd Message Trigger runs	1300	1000	0	0	0
	400 did not open 1st message	1300	1000 (400)	0	0	0
	400 added to 2nd Message All Bucket	1300	1000	400	0	0
	2nd e-mail sent to 400	1300	1000	400	0	0
31	1st Message Trigger runs	1300 (300)	1000	400	0	0
	300 move to 1st 30+ range	1300	1300	400	0	0
	2nd Message Trigger runs	1300	1300	400	0	0

	150 1st 30+ did not open 1st message	1300	1300 (150)	400	0	0
	150 added to 2nd Message All Bucket	1300	1300	550	0	0
	2nd e-mail sent to 150	1300	1300	550	0	0
32 - 59	No new recipients are identified.	1300	1300	550	0	0
60	1st Message Trigger runs (nothing happens).	1300	1300	550	0	0
	2nd Message Trigger runs.	1300	1300	550 (400)	0	0
	400 move into 2nd Message 30+ range.	1300	1300	550	400	0
	3rd Message Trigger runs.	1300	1300	550	400	0
	65 did not read 2nd e-mail	1300	1300	550	400 (65)	0
	65 added to Third Message All Bucket	1300	1300	550	400	65
	3rd e-mail send to 65	1300	1300	550	40	65

The cycle continues for each triggered cell until 999 days have passed or the cell terminates when the End Date specified in the ***Execute Trigger tab*** (on page 120) is reached.

Conducting a Quick Test

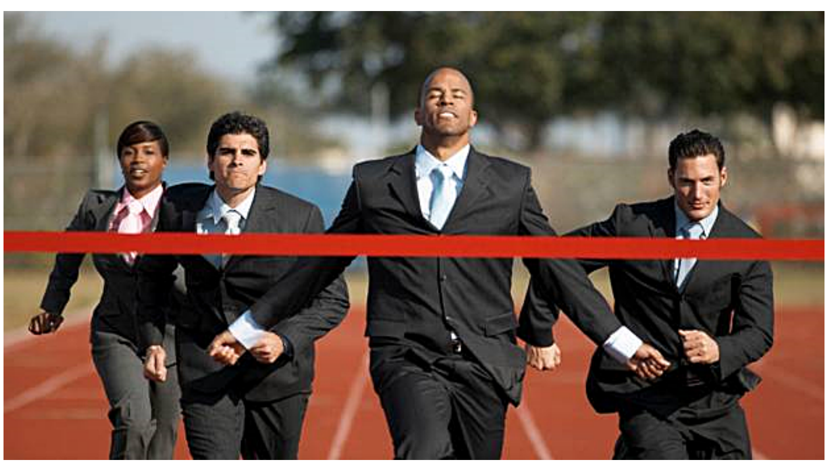
In This Chapter

About Quick Test

e-Dialog Quick Test™ provides the means to quickly and easily test audience response to a cell by sending several different test versions of the cell to sample audience lists taken from the full cell audience. A test version of a cell consists of a set of special quick test symbols (strings and/or content objects). These quick test symbols are very similar to Case symbols. The difference is that a quick test symbol's value depends on the test version, rather than a data column value.

You can use any number of quick test symbols anywhere in the cell that ordinary symbols can be used. For example, you can test the subject line, parts of the cell content, or the full cell content.

When you have enough quick test results to choose the winning version of the cell, you mail that version to the remainder of the full audience, knowing that you have sent the most relevant, actionable message possible, maximizing your e-mail marketing revenue. This process is sometimes called quick relevancy testing.



Quick Test Process Overview

Quick Test does not have a graphical user interface of its own. The process of setting up a Quick Test involves creating a special mailing, a special cell and affects four of the cell tabs in Campaign Builder:

1 

For reporting purposes, e-Dialog recommends that you create a separate mailing to contain each Quick Test cell.

2 

Create a new Quick Test cell.

3 

In the **Configuration Tab**:

a) Activate Quick Test.

b) Specify the number of test versions to send.

c) Specify the size of the total test audience as a percentage of the full cell audience.

Complete instructions are provided in ***Configuring a Quick Test Cell*** (on page 137).

4 

In the **Symbols Tab**:

a) Create one or more **Quick Test Content** and **Quick Test String** symbols.

b) For each symbol, define the rules to apply for each version of the test.

Complete instructions are provided in ***Creating Quick Test Symbols*** (on page 138).

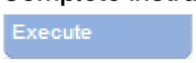
5 

In the **Proof Tab**

a) Create your sample data file as usual.

b) When you send one-up proofs and Iproofs, choose which versions of the test to send to each sample file proofreader.

Complete instructions are provided in ***Proofing a Quick Test*** (on page 139).

6 

In the **Execute Tab**:

a) Start the Quick Test (mail the test cells).

b) Use Pulse Reports to monitor the test.

c) Wait for the test to complete.

d) When you have chosen a winner, select that version of the cell.

e) Send the winning version to the remaining audience.

Complete instructions are provided in ***Executing a Quick Test*** (on page 141).

How Quick Test Works

When you start a Quick Test, Campaign Builder:

1 Creates a clone of the Quick Test cell for each test version.

2 Builds a sample data file for each clone.

3 Mails the clones.

4 When you choose the winning version, creates a final clone of the Quick Test cell.

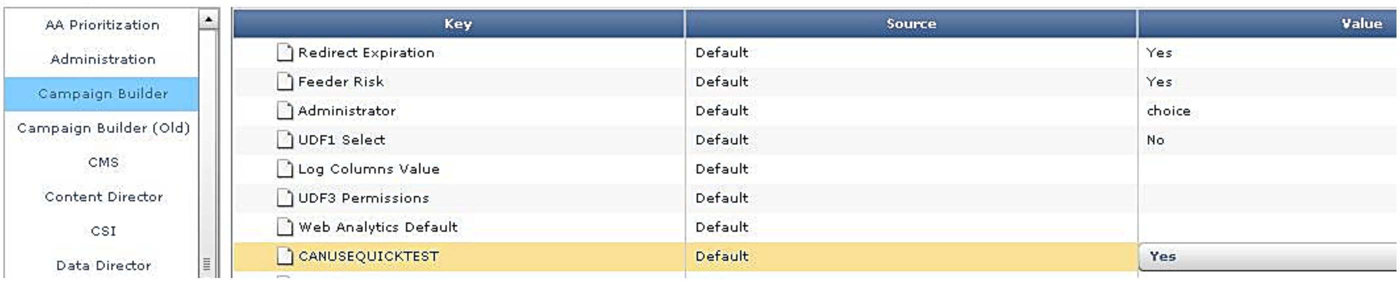
5 Mails the final clone to the remainder of the audience.

Enabling Quick Test

Quick Test is not enabled for any user by default. To determine whether or not it is enabled for your user account, look for the Quick Test check box on the Cell Configuration Tab in Campaign Builder.

If have sufficient permission to enable applications, change the value of the Campaign Builder **CANUSEQUICKTEST** permission to Yes. See User Account Security Profiles in Introducing Precision Central 7.0.

Otherwise, contact your local administrator or the e-Dialog Account Team about enabling Quick Test.



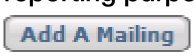
Key	Source	Value
Redirect Expiration	Default	Yes
Feeder Risk	Default	Yes
Administrator	Default	choice
UDF1 Select	Default	No
Log Columns Value	Default	
UDF3 Permissions	Default	
Web Analytics Default	Default	
CANUSEQUICKTEST	Default	Yes

Note: Quick Test is not supported in Campaign Builder 6. If you open a Quick Test cell, Campaign Builder 6 returns the message "This cell is only supported under Precision Central 7.0'". Press OK to return to the campaign list.

Configuring a Quick Test Cell

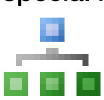
To configure a quick test cell:

1 Create a new mailing to contain a Quick Test cell. This step is optional but recommended for reporting purposes.

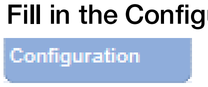


2 Create a new cell.

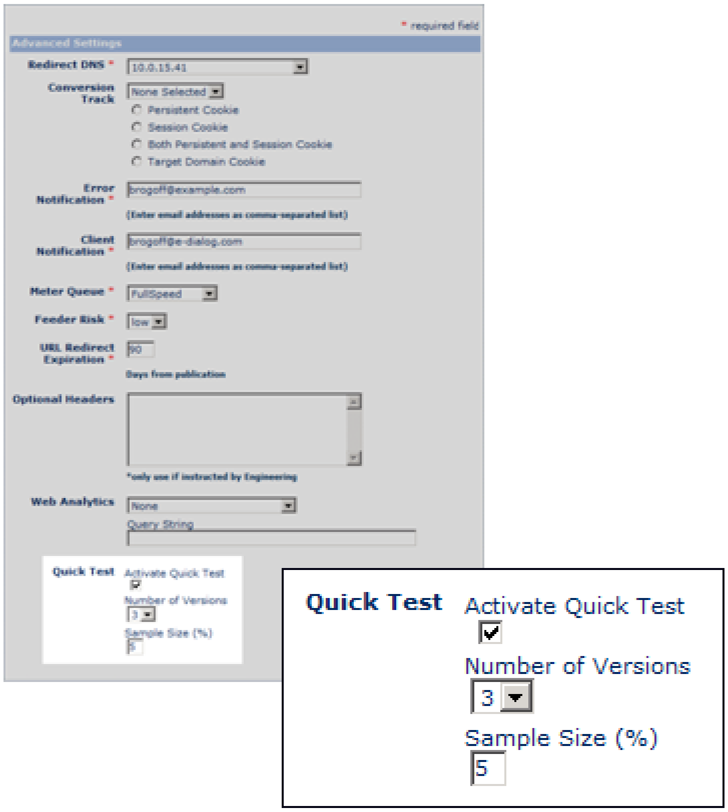
This cell is called the Quick Test master cell and is differentiated from other cells in lists by a special icon:



3 Fill in the Configuration tab.



4 In Advanced Settings, check **Activate Quick Test**:



5 Specify the **number of versions** to test. This number applies to all quick test symbols within the cell and represents the number of possible values for each symbol controlled by the quick test.

6 Specify the **size of the test audience** as a percentage of the full audience (1 to 99). Each version is sent to an equal share of the test audience.

For example, suppose that your sample size is 5% of 100,000 = 5,000 recipients. With three test versions, each version goes 1.67% of 100,000 = 1667 recipients. (Fractional recipients are rounded off.)

Best Practices: A test audience should include at least 10,000 recipients when basing your test results on metrics such as open rate and click rate. Use a larger test audience when using relatively infrequent metrics such as conversions and unsubscribes.

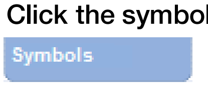
Creating Quick Test Symbols

Quick Test symbols are very similar to Case symbols in that they have multiple string and/or content object values. The value used for any recipient depends on the Quick Test version number rather than a data column.

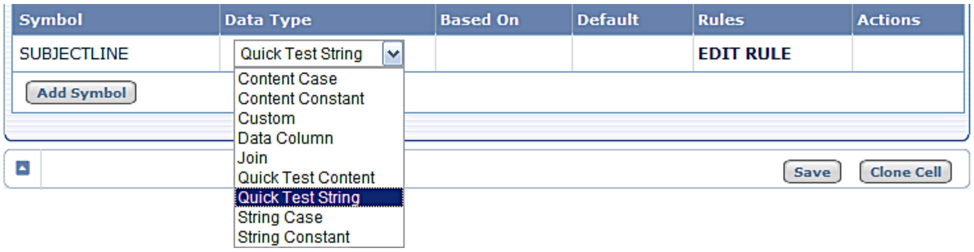
A Quick Test symbol has no default value because the version number is limited to the specified range. Thus, Quick Test symbols always have a blank Default column in the symbols tab.

To create quick test symbols:

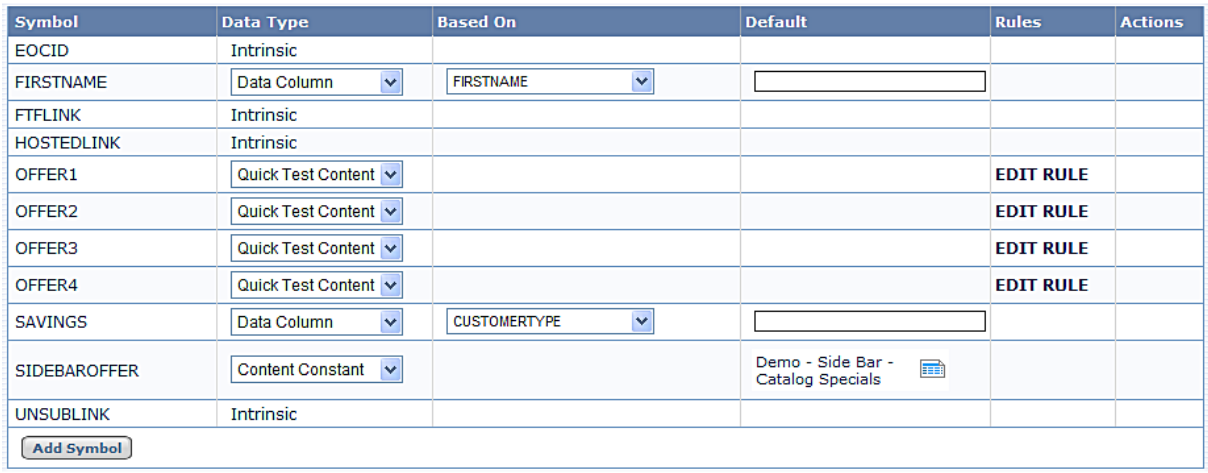
1 Click the symbols tab.



2 Within the Quick Test cell, create one or more symbols of data type **Quick Test Content** and/or **Quick Test String.**



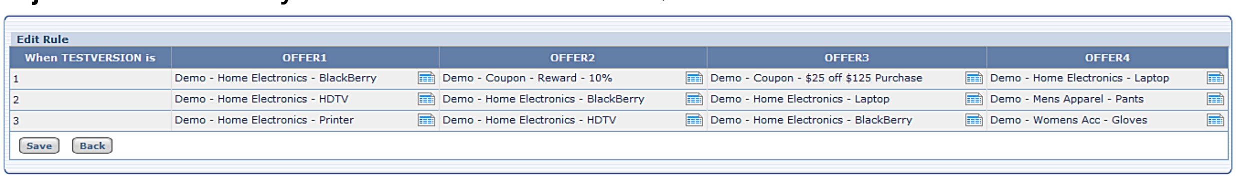
There is no limit to the number of Quick Test symbols that you can use in a cell.



3 For any **one** Quick Test symbol, click **EDIT RULE.** As is the case in Case symbols, this step can set the values for all Quick Test symbols and is only necessary once.

4 The Edit Rule panel is a matrix. The first column is the Quick Test version number. (The number of test versions is defined in the Configuration tab.)

The second and subsequent columns are Quick Test symbol names. Set the **string or content object value** for each symbol for each version of the Quick Test.



If you know the identifier number of a content object, for example _#337776620__, you can use that number in a Quick Test String symbol. Otherwise, use a Quick Test Content symbol and click the content object icon to select a content object from the Content Library.

5 Click **Save.**

6 When finished, click **Back.**

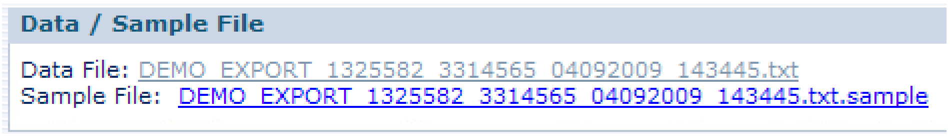
One-Up Proofing a Quick Test

Created a sample data file in the usual way but **do not filter the sample set based on the value of a quick test symbols.** You can then create a one-up proof of a quick test cell:

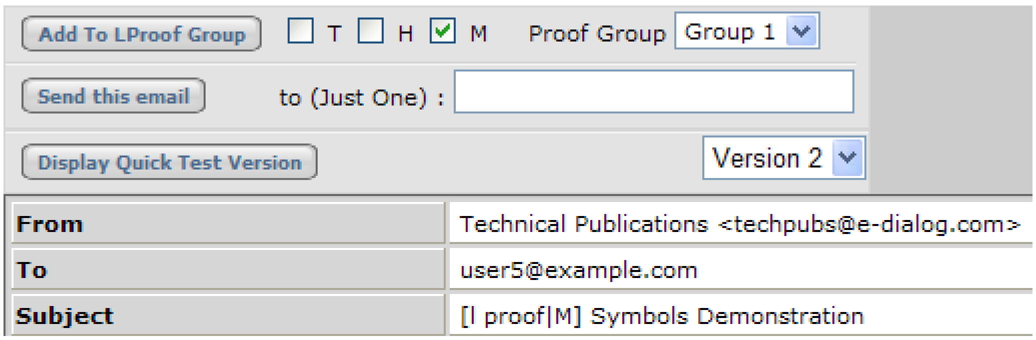
1 Click the Proof tab.

2 Build a sample file as you normally would.

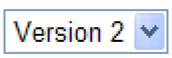
3 Click the name of the sample file.



4 Choose a row and click **Preview.**

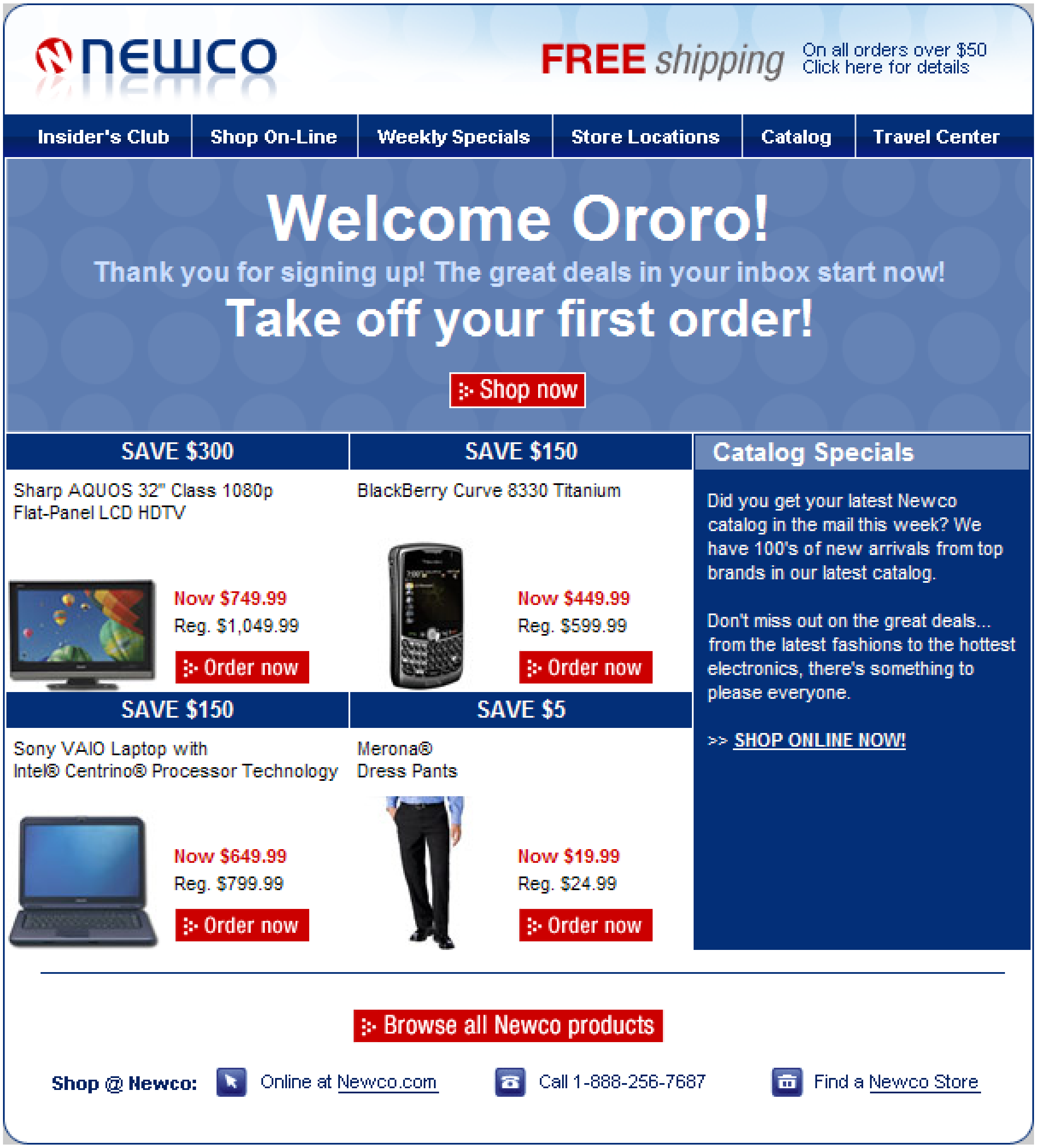


5 **Choose the test version** to send. The default is version one.



6 Click **Display Quick Test Version.**

7 Examine the page with all Quick Test symbols set to the selected version.



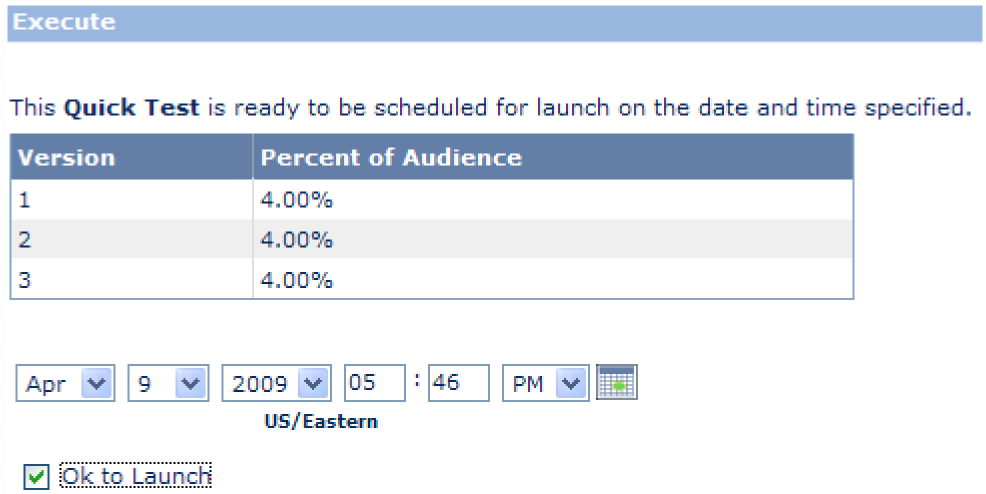
8 The rest of the proofing process is the same process that you would use for a standard cell except that **the number of rows selected for each Lproof Group is multiplied by the number of quick test versions** when the proofs are mailed.

Executing a Quick Test

To send a quick test mailing:

1 Click the Execute tab.

The Execute tab shows the percent of the total audience that will receive each version of the quick test. As planned in the example, each test version is sent to four percent of the audience.



2 Select the **date and time** to start the Quick Test.

3 Click **Ok to launch** to send the test versions of the cell at the designated time.

4 Click **Execute.**

Campaign Builder returns you to the Mailing Setup screen and displays a "**Quick Test Processing**" status message next to the master cell. This indicates that the e-mail engine is configuring test cells, splitting the export file, and/or building file samples for the newly created cells.

Cell	Cell ID	Status	Drop Date (US/Eastern)
Doc Test 01	1614	Quick Test Processing	Mar 6, 2009 4:36 PM
Version 1: Doc Test 01	1631	Setup	Mar 6, 2009 4:36 PM
Version 2: Doc Test 01	1632	Setup	Mar 6, 2009 4:36 PM
Version 3: Doc Test 01	1633	Setup	Mar 6, 2009 4:36 PM

As the test runs, you receive the same e-mail notifications sent by a standard cell except that each test version sends its own notifications as if it were a separate cell.

5 When the initial Quick Test has finished (all test versions have mailed), you will receive the **e-mail notification** shown below.

dialog® Quick Test

Quick Test Phase 1 Completed

Cell ID:1325582

The initial test has been completed successfully and the test cells have been scheduled to mail. You may select the final version for the remainder of the audience when you are ready.

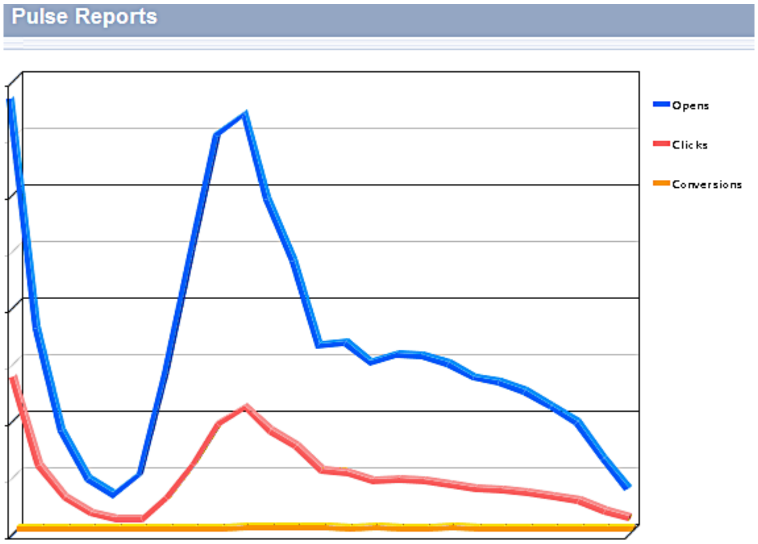
e-Dialog, Inc.

Boston | London | New York | Seattle

6 The master cell status message changes to "**Phase 1 Complete.**" This indicates that the Quick Test is ready to send the chosen version to the remainder of the audience.

Cell	Cell ID	Status	Drop Date (US/Eastern)
Doc Test 01	1614	Phase 1 Complete	Mar 6, 2009 4:36 PM
Version 1: Doc Test 01	1631	Mailing	Mar 6, 2009 4:36 PM
Version 2: Doc Test 01	1632	Mailing	Mar 6, 2009 4:36 PM
Version 3: Doc Test 01	1633	Mailing	Mar 6, 2009 4:36 PM

7 Use **Pulse Reports** or **eReports** to monitor the test results. You control the length of the test and the criteria for choosing the "winning" version.

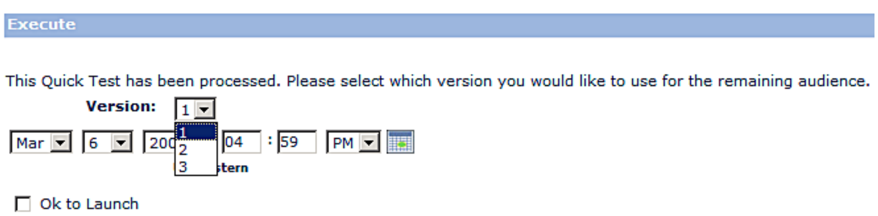


Keep in mind that eReports data is updated every 24 hours.

eReports

Opens (HTML Only)	Total Clicks	Unique Clicks	Unsubs	Total Conversions	Unique Conversions	Total Revenue
175,225	60,842	53,579	1,117	732	717	57,407
51,585	19,253	16,937	184	366	357	27,990
31,459	11,315	9,905	269	224	219	18,187
92,181	30,274	26,737	664	142	141	11,229

8 When you are ready to choose the "winning" version, edit the master cell and return to the **Execute tab.**



9 Use the drop-down control to **select the "winning" version** to send to the remainder of the audience.

10 Select the **date and time** to mail the cell.

11 Click **Ok to launch** to send the test versions of the cell at the designated time.

12 Click **Execute.**

Campaign Builder returns you to the Mailing Setup screen and displays a "**Quick Test Processing**" status message next to the master cell.

Cell	Cell ID	Status	Drop Date (US/Eastern)
Doc Test 01	1614	Quick Test Processing	Mar 6, 2009 4:59 PM
Final- Version 2: Doc Test 01	1642	Setup	Mar 6, 2009 4:59 PM
Version 1: Doc Test 01	1631	Mailed	Mar 6, 2009 4:36 PM
Version 2: Doc Test 01	1632	Mailed	Mar 6, 2009 4:36 PM
Version 3: Doc Test 01	1633	Mailed	Mar 6, 2009 4:36 PM

13 When the Quick Test has finished mailing the winning version, you receive an **e-mail notification** indicating that final processing is complete.

dialog®

Quick Test

Final Processing Complete

Cell ID:1325925

Your final cell has been successfully created, configured, and scheduled to mail.

14 The status of the master cell changes to "**Quick Test Finished.**" The status of the "winning" version (clone) changes from Setup to Mailing to Mailed.

The Quick Test is now complete. You can use **Pulse Reports** or **eReports** to observe the results.

Repeating a Quick Test

You cannot modify a Quick Test cell after it has been executed.

To repeat a Quick Test:

1. Clone the mailing containing the Quick Test cell.
   This step is optional but recommended.
2. Delete all cells except the master cell.
3. Clone the "master' cell and proceed as described in ***Configuring a Quick Test Cell*** (on page 137).

Migrating to Campaign Builder 7

In This Chapter

Migrating Permissions to Campaign Builder 7

The features of Campaign Builder that are visible depend on the permissions assigned to individual users. e-Dialog sets these permissions.

When a customer migrates to Campaign Builder 7 from Campaign Builder 5, some permissions can be migrated automatically. The following table lists the permissions in Campaign Builder 5 and the corresponding permissions in Campaign Builder 7.

This permission in Campaign Builder 5...	**Is equivalent to this permission in Campaign Builder 7...**
ACTIONS > send_mail	Execute > Send Mail
AUDIENCE > audience_permissions	Audience > Audience Permissions
AUDIENCE > audience_sudoselect	Audience > Audience Superuser
AUDIENCE > suppresslist_permissions	Audience > Suppression Permissions
MAILINGCONFIG > deliverability_monitoring_select	Configuration > Deliverability Monitoring Select
MAILINGCONFIG > deliverability_monitoring_default	Configuration > Deliverability Monitoring Default
MAILINGCONFIG > detect_expires	Configuration > Detect Expires
MAILINGCONFIG > feederRiskView	Configuration > Feeder Risk
MAILINGCONFIG > feederRisk	Configuration > Feeder Risk Value
MAILINGCONFIG > priority_view	Configuration > Priority
MAILINGCONFIG > priority_default	Configuration > Priority Value
MAILINGCONFIG > optionalHeaders	Configuration > Optional Headers Value
MAILINGCONFIG > url_expires_select	Configuration > Redirect Expiration
MAILINGCONFIG > url_expires	Configuration > Redirect Expiration Value
MAILINGCONFIG > showMeterqueue	Configuration > Show Meter Queue
MAILINGCONFIG > unsub_dns	Configuration > Unsub DNS
MAILILNGCONFIG > redirect_dns	Configuration > Redirect DNS
MAILINGCONFIG > ftf_permissions	Configuration > FTF Permissions

In addition to the permissions listed in the previous table, there are Campaign Builder 5 permissions that do not have a corresponding Campaign Builder 7 permission. Similarly, there are Campaign Builder 7 permissions for which there is no corresponding Campaign Builder 5 permission. In addition to migrating permissions automatically, you may need to specifically set some permissions.

You can determine whether to migrate the permissions automatically, whether to let the client migrate mailings, and set other permissions either using Precision Central 7 or CMS.

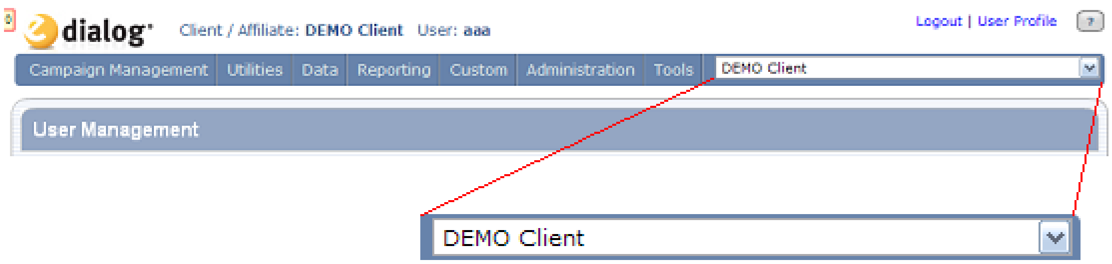
Using Precision Central 7

To set permissions using Precision Central 7:

1 Log in to Precision Central.

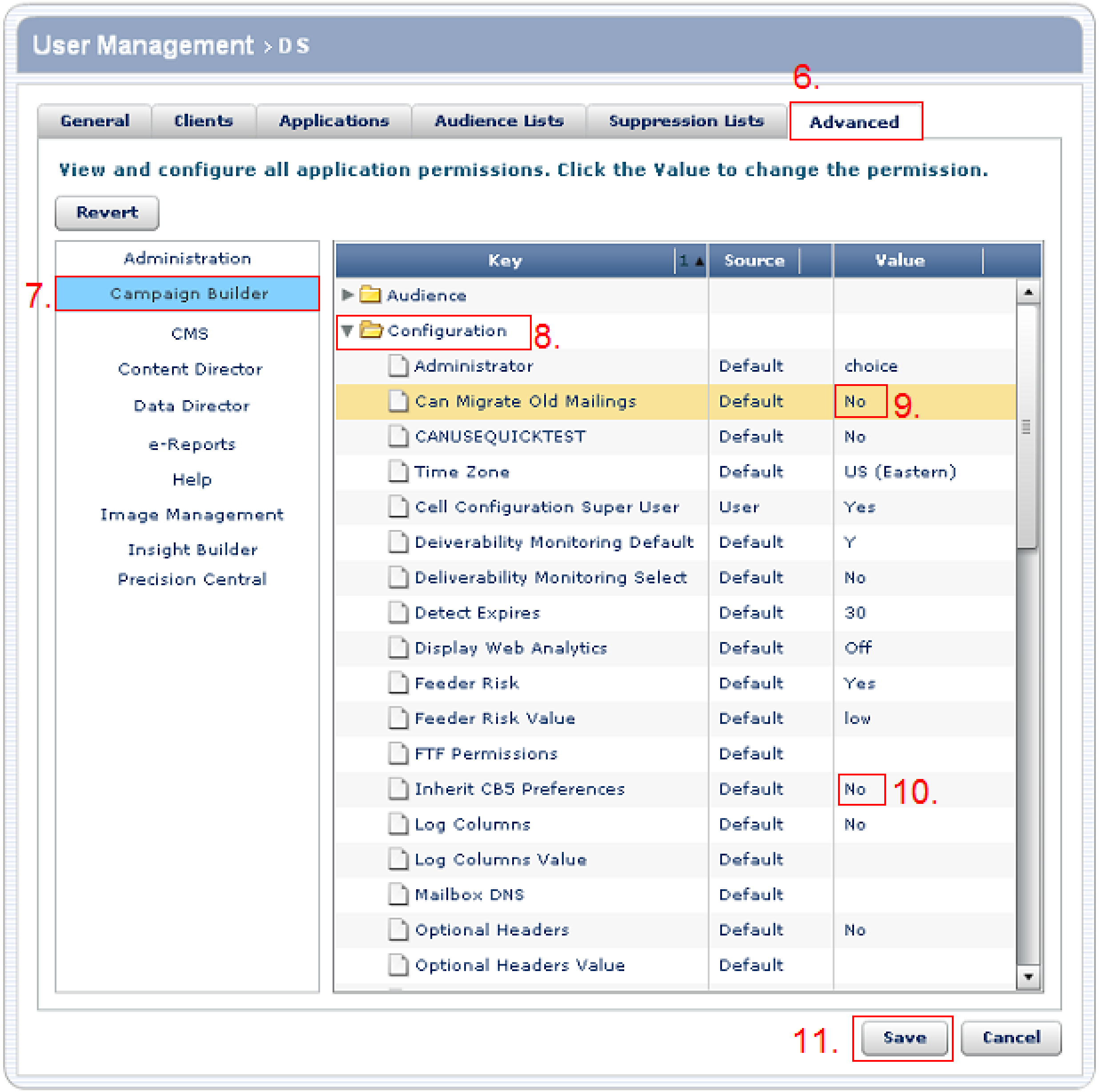
2 Select **Administration > User Management.**

3 Select the client for whom you want to set permissions.



4 Select the name of a user whose permissions you want to migrate to Campaign Builder 7.

5 Click **Edit User.**



6 Click the **Advanced** tab.

7 Select **Campaign Builder.**

8 Select **Configuration.**

9 To migrate old mailings, in the Can Migrate Old Mailings row, click **No** in the Value column and select **Yes.**

10 To inherit Campaign Builder 5 preferences, in the Inherit CB5 Preferences row, click **No** in the Value column and select **Yes.**

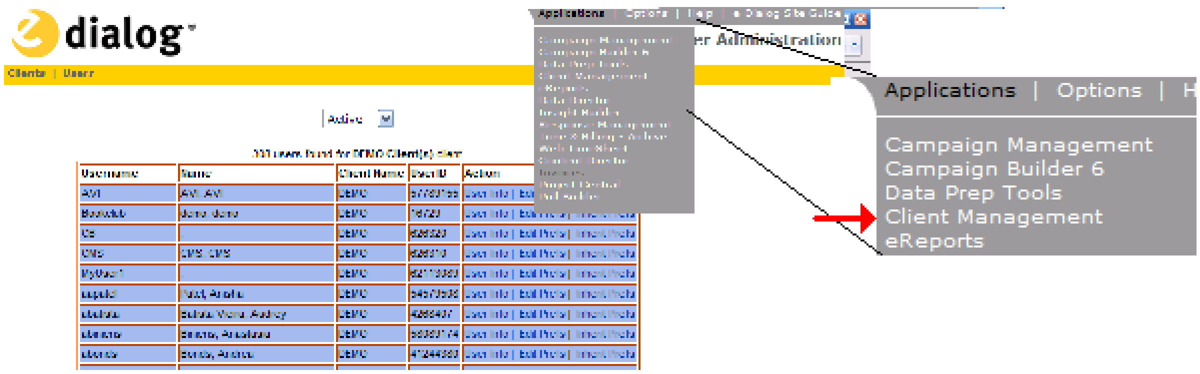
11 Click **Save.**

Using CMS

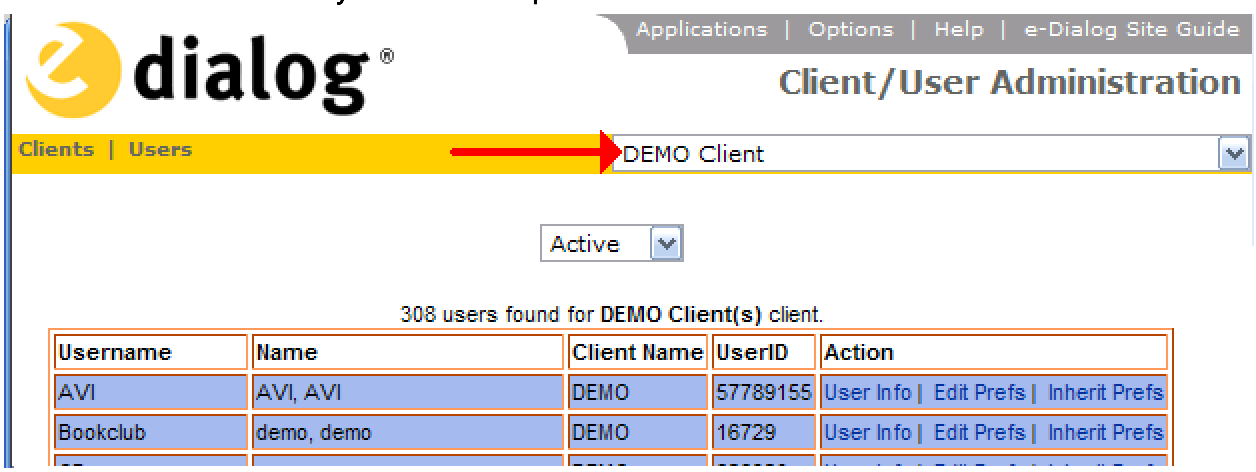
To set permissions using CMS:

1 Log in to CMS.

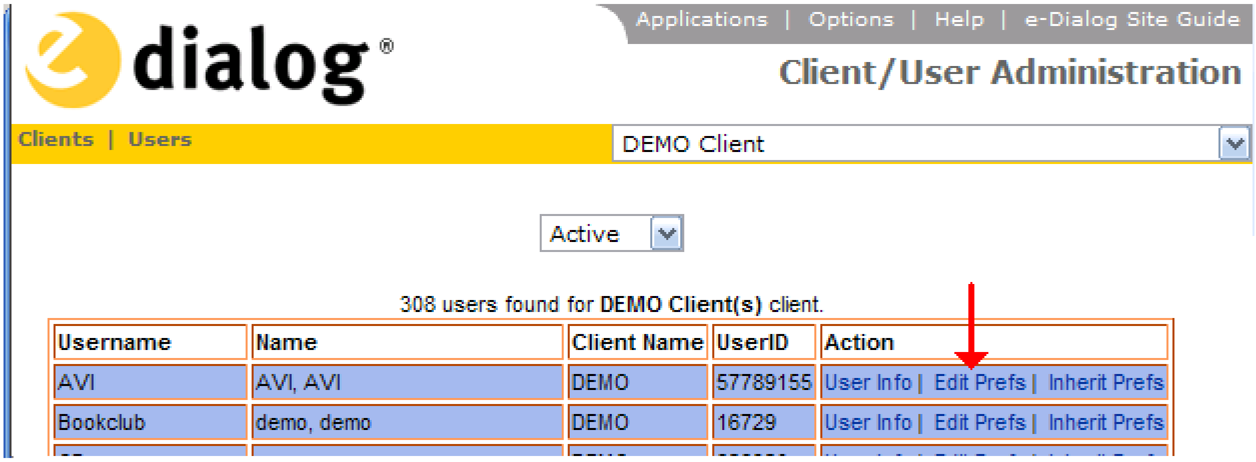
2 Select Applications > Client Management.



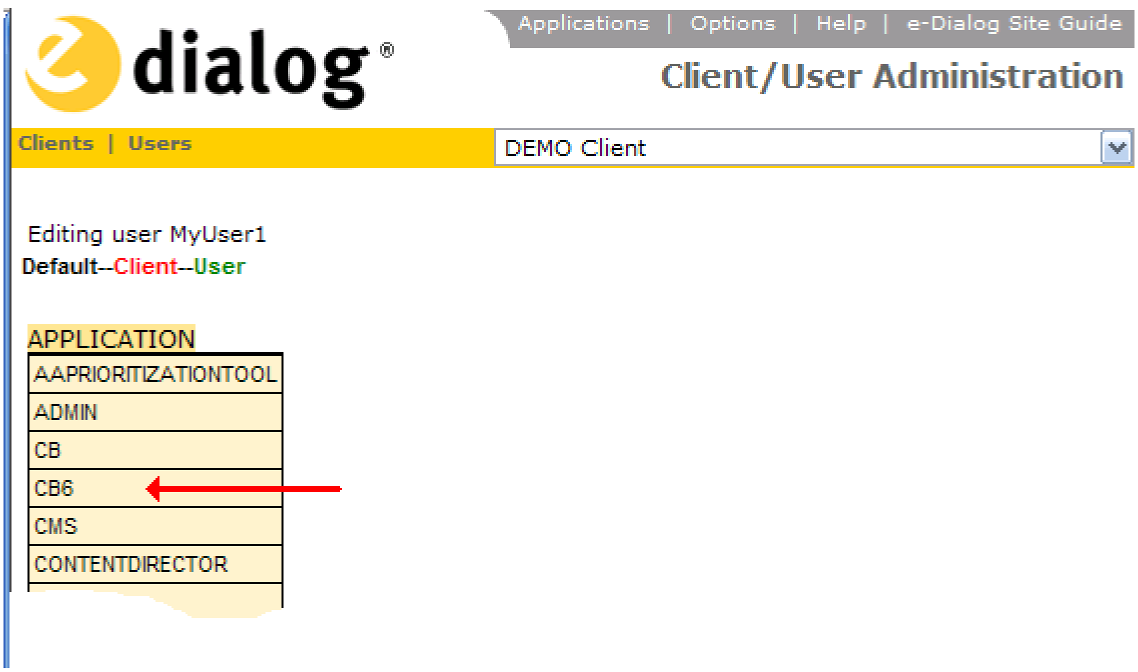
3 Select the client for whom you want to set permissions.



4 For a customer or user for whom you want to set the permissions, select **Edit Prefs.**



5 Click APPLICATION and select CB6.



6 Select CONFIG.

7 To let the client migrate Campaign Builder 5 mailings, select **Yes** for canMigrateOldMailings.

8 To have the client inherit the user permissions they were assigned in Campaign Builder 5, click **D** for inheritcb5prefs.

If you turn on inheriting permissions, but then the Campaign Builder 5 and Campaign Builder 7 permissions are not the same, the user inherits the Campaign Builder 5 permissions. For example, if the user was allowed to send final e-mails in Campaign Builder 5, but you turn off the ability to send final e-mails in Campaign Builder 7, the user is still allowed to send final e-mails because Campaign Builder 5 preferences take precedence.

9 Set other permissions by doing the following:

a) Select CB7.

b) Select the section you want to work on.

c) For each permission, do one of the following:

§ Click **D** to use the default value.

§ Click **C** to use the client value.

§ Click **U** to specify a value for the user, and then enter or select a value.

User takes precedence over client; client takes precedence over the default.

10 Click **Save.**

11 Repeat steps 8 through 10 for each section in which you want to set or change permissions.

Notes

- If the Campaign Builder 5 MAILINGCONFIG > priority_default permission is set to "None Selected," when you migrate to Campaign Builder 7, the Configuration > Priority Value permission is set to 5.
- After you allow migration to Campaign Builder 7 by setting the inheritcb5prefs=Yes, if the Campaign Builder 5 TEMPLATES > ftf_permissions is set to Y or N, you cannot add a cell. To avoid this issue, set Campaign Builder 5 TEMPLATES > ftf_permissions to be blank.

Migrating Mailings to Campaign Builder 7

When you migrate from Campaign Builder 5 or Content Management System to Campaign Builder 7, the features of Campaign Builder 7 that are visible depend on the permissions assigned to individual users. e-Dialog sets these permissions for you. When you migrate from Campaign Builder 5 to Campaign Builder 7, the migration process assigns the equivalent Campaign Builder 7 permissions to users. If you encounter issues related to the Campaign Builder 7 features that you can use, please contact your e-Dialog Account Team.

Migrating mailings

To be able to use Campaign Builder 7 to modify or clone mailings created using either Campaign Builder 5 or Content Management System, you migrate them to Campaign Builder 7. When you migrate to Campaign Builder 7, either your e-Dialog Account Team can perform the migration of mailings for you or you can do it yourself.

Migrating a mailing to Campaign Builder 7 is not reversible. When you have migrated a mailing to Campaign Builder 7, you cannot work with it in Campaign Builder 5 or Content Management System.

Because of this, before migrating a mailing to Campaign Builder 7, e-Dialog suggests that you clone the existing mailing in either Campaign Builder 5 or Content Management System, whichever application you use to manage and create mailings. Then, when you migrate the mailing, if you need to work with the mailing in Campaign Builder 5 or Content Management System, you can work with the cloned version.

You cannot migrate a mailing that:

- Has already been sent to customers

  If any cell in the mailing has been sent, you cannot migrate the mailing to Campaign Builder 7. Instead, you can clone the mailing, and then migrate the cloned mailing.
- Is of cell type newf2f, rental, trigger, or insight trigger
- Contains no cells

You do not have to migrate all your mailings to Campaign Builder 7 at once.

To migrate a mailing to Campaign Builder 7:

1. In Campaign Builder 5 or Content Management System, identify the mailings you want to migrate to Campaign Builder 7.
2. Clone the mailings you want to migrate.
3. Determine in which campaign(s) in Campaign Builder 7 you want to put the mailings you are migrating.
4. Start Campaign Builder 7.

5 When the Campaign List page appears, click **Migrate Old Mailings**.

6 For each mailing you want to migrate to Campaign Builder 7, click **Convert from CB5** or **Convert from CMS**, depending on the button that appears for that mailing.

Campaign Builder 5 mailings that were cloned do not list values in the Added By or Status columns. Those values appear only after you have saved the mailing in Campaign Builder 7.

7 Select the campaign in which you want to put the mailing and click **Go.**

The migration process generally takes 2 to 5 seconds per cell. If you use dynamic publishing in a cell, the migration process takes about 5 seconds. Thus, if your mailing contains twelve cells that use dynamic publishing, the migration process might take about a minute.

8 Repeat steps 6 and 7 for each mailing you want to migrate.

When the migration process is complete, you should ensure that the migrated cells appear as expected. Some of the areas to check include:

- The mailing categories that appear in the Mailing Setup page in Campaign Builder 5 appear on the Mailing List page in Campaign Builder 7
- Mailings whose content is based on JOINs might not be migrated and might need to be updated manually by a Campaign Developer
- Links that appear as a pound sign (#) followed by numbers in Campaign Builder 7, appear correctly in the proof e-mails. However, to edit the link, you locate the content object in which the link appears, and then open that object in the Content Library.
- A pound sign (#) in both the Format and Target fields represents an in-page link.

Migrating Content to Campaign Builder 7

If mailings that you have migrated to Campaign Builder 7 include content that also appears in mailings that you have not yet migrated, you can work with the content in both Campaign Builder 7 Content Library and Content Director. Any changes you make to the content in either application appears when you work with the content in the other application. As a result, your content is always current, no matter whether you are working in Campaign Builder 5, Content Management System, or Campaign Builder 7. However, if you create new content using Campaign Builder 7 Content Library, you cannot view or edit that content in CMS or Campaign Builder 5. The following table illustrates the availability of content.

If content was created in...	And modified in...	You can access it in...
Campaign Builder 5	Campaign Builder 5	Campaign Builder 5 Campaign Builder 7
Campaign Builder 5	Campaign Builder 7	Campaign Builder 5 Campaign Builder 7
Campaign Builder 7	Campaign Builder 7	Campaign Builder 7 only

Index