



Introducing Precision Central 7.0

Wednesday, October 07, 2009

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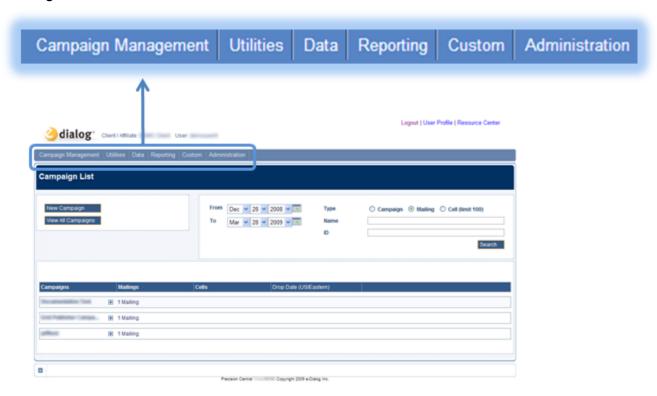
Introducing Precision Central

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About Precision Central

e-Dialog offers a comprehensive suite of tools for self-service clients through its Web-based portal, e-Dialog Precision Central™.



Precision Central Applications

e-Dialog Precision Central™ is a comprehensive suite of tools that let you create, manage, and track the success of your e-mail marketing campaigns.

Note: Your organization may not have access to all of the applications listed here. If in doubt, contact your account representative to review your application permissions.

The tools available in Precision Central include:

То	Application	Description	
Create and manage	Campaign Builder		
customer	Campaign Dulluel	Create and send highly relevant e-mails Campaign Management > Campaign Builder	
communication		Campaign Management > Campaign Duilder	
	Trigger Manager	Set up rules to automatically send e-mail to a dynamically generated audience	
		Utilities > Trigger Manager	
	Grid Publisher	Create complex mailings using table-drive logic	
	and rubiloner	Utilities > Grid Publisher	
	News Publisher	Create, send, and manage e-mail newsletters	
		Campaign Management > News Publisher	
	Poll Builder	Create simple polls to embed in or link to from e-mail or a Web site	
		Utilities > Poll Builder	
Create and manage	Content Library	Create and manage content objects to use and re-use	
content		Utilities > Content Library	
Create and manage audience lists	Insight Builder	Query customer data to cerate audience lists based on demographics, preferences, RFM (Recency Frequency Measure) scores and e-mail response history	
		Data > Insight Builder	
	Data Director	Seamlessly transfer data to and from e-Dialog systems	
		Data > Data Director	
Monitor campaign	eReports	Analyze the performance of campaigns	
results		Reporting > eReports	
	Pulse Reports	Get instant reports on vital statistics	
		Reporting > Pulse Reports	
	Precision Dashboard	See graphs that show how well your e-mail marketing is succeeding	
		Reporting > Precision Dashboard	
Assign and manage client and user permissions	User Management	Assign permission to users so that they can use specific applications, perform certain activities within those applications, and have some default values set in those applications	
		Administration > User Management	

Note: In addition to the tools listed here, your organization might have custom applications for specific user-defined purposes. Contact your e-Dialog account team if you need a custom application.

What's New in Precision Central 7.0.0

Precision Central Precision Central 7 has the following new and updated features:

Additional browser and platform support

You can now access Precision Central with:



Internet Explorer 7 on Windows XP and Vista



Firefox 3 on Windows XP, Vista, and MacOSX 10.4 and 10.5

Overall user interface refresh

The updated user interface design of Precision Central provides a consistent look and feel across all applications, along with improved navigation.

New tools and features

- Precision Dashboard lets you see charts of e-mail performance metrics
- User Management lets you assign permissions to users within your organization to use e-Dialog products and features
- Grid Publisher lets you use grid publishing to create complex e-mails with multiple, related symbols
- Quick Test lets you conduct tests to ensure that the audience of your message is receiving the most relevant, actionable messages

Note: Grid Publisher and Quick Test 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'". Press OK to return to the campaign list.

Updated tools and features

- ♦ Content Library now lets you perform some actions on multiple content objects, limit the permission to write selected content objects for selected users, view the list of content objects in pages of 25 items, insert content objects as templates in cells, and persist the search criteria for finding content objects
- Insight Builder although functionally the same, Insight Builder has a new look and feel

Online Documentation

The Precision Central toolbar now has a question mark (?) button in the upper-right corner of the page that takes you directly to the on-line documentation section.



What's New in Precision Central 7.0.1

Precision Central 7.0.1 is a patch release and has no new or changed features.

What's New in Precision Central 7.0.2

Precision Central 7.0.2 is a patch release and has no new or changed features.

What's New in Precision Central 7.0.3

Search for Cells by Status

You can now search for cells by their current status. For example, you can search for cells that are currently mailing. When it finds one, Campaign Builder displays information about the cell, including the number and percentage of e-mails that have been merged and mailed. For more information, see Searching for Campaigns, Mailings, and Cells in the Campaign Builder 7.0 User's Guide.

What's New in Precision Central 7.0.4

Precision Central 7.0.4 includes the following:

- ♦ Plugin support
- ♦ Default mandatory suppression lists
- ♦ Campaign level search permissioning
- ♦ Updated Content Library picker

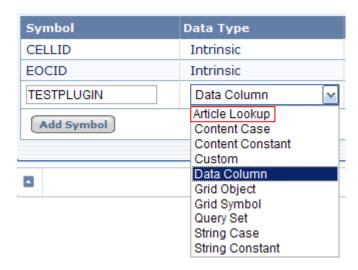
Plugin Support

Plugin symbols are created specifically for your organization. They let you merge data from a source other than the Master Database, for example a blog entry from your web site. Symbol type names in the drop-down list indicate the data gathering technique, for example Blog Lookup. 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**.

Mandatory Suppression Lists

Precision Central 7.0.4 lets you set mandatory suppression lists on a per user basis. When you create a new cell in Campaign Builder, any default suppression lists assigned to you are automatically added to that cell. The default suppression lists cannot be removed once applied to the cell; Campaign Builder displays a read-only list of these suppression lists.

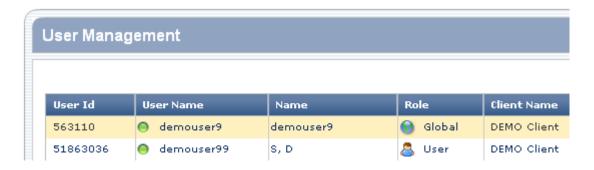
To specify mandatory suppression lists:

1 From the Precision Central menu, select **Administration > User Management**.

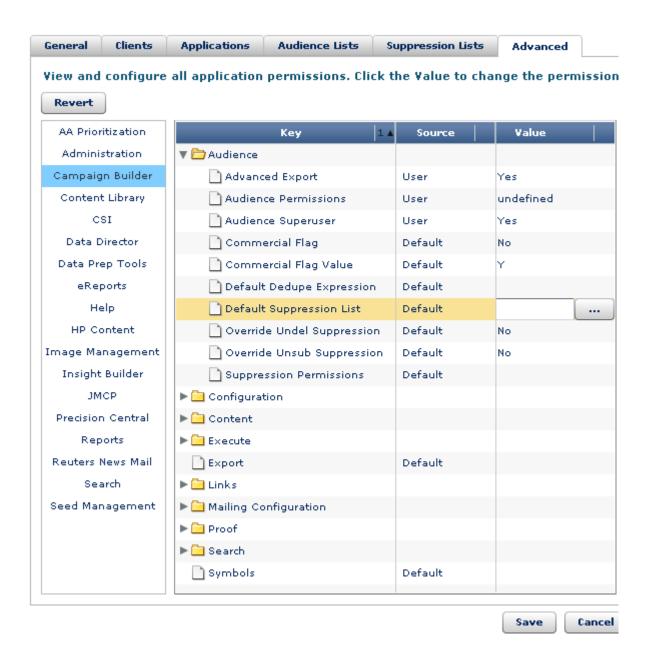


2 Select the user for whom you want to set mandatory suppression lists.

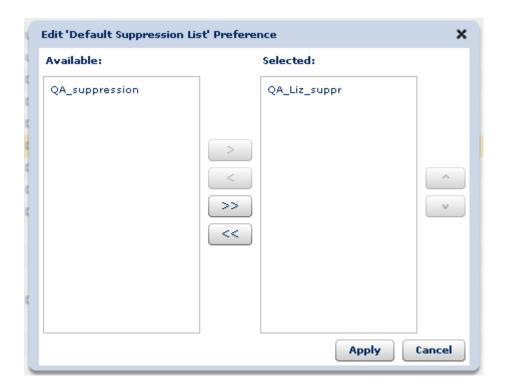
Introducing Precision Central 7.0



- 3 Click Edit User.
- 4 Click the **Advanced** tab.



- 5 Select Campaign Builder.
- 6 Select Audience.
- 7 Click in the Value column of the Default Suppression List row, and then click _____
- 8 Move the suppression lists that you want to make mandatory for this user from the Available to the Selected column using the arrows.



- 9 Click Apply.
- 10 Click Save.

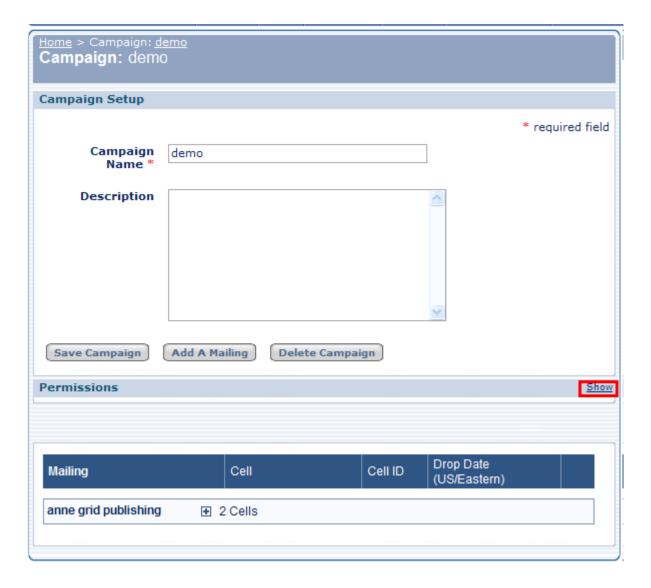
When the user creates a cell, the suppression lists you specified appear in the Audience Tab automatically. The user cannot remove the mandatory suppression lists from the cell.

Campaign Level Search Permissioning

In Precision Central 7.0.4, you can restrict visibility of a campaign so that only some users can search for and see the campaign.

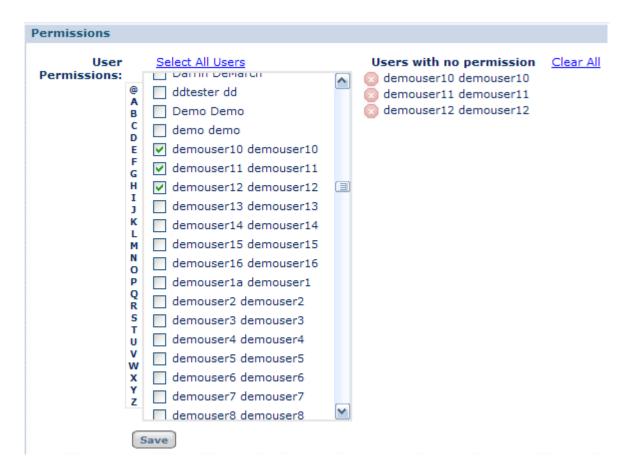
To set campaign level search permission:

- 1 Start Campaign Builder.
- 2 On the Campaign List page, click **Show** in the Permissions bar.



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

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



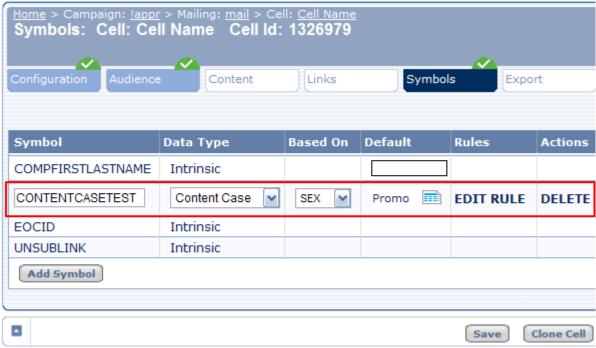
4 Click Save.

Updated Content Library Picker

When you create a Content Case symbol in Precision Central 7.0.4 and then edit the rules, the user interface to select the content object for each rule is significantly faster and more streamlined.

To see the new user interface:

1 Create a Content Case symbol in the Symbols tab of Campaign Builder.

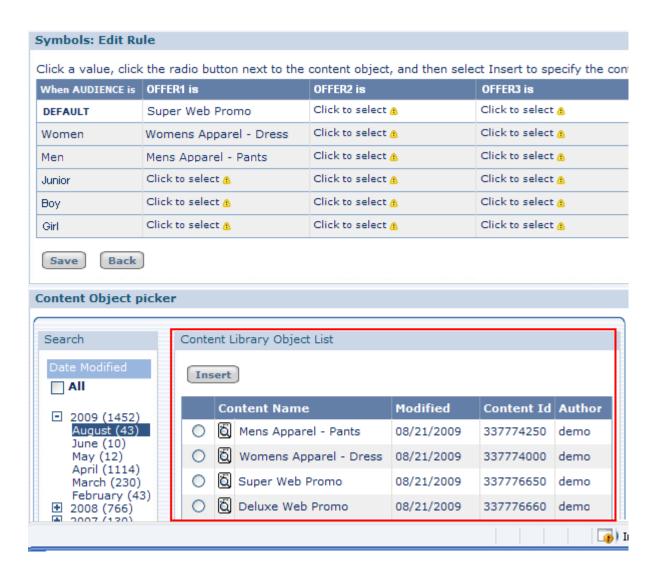


Precision Central 7.0.4.00906 Copyright 2009 e-Dialog Inc.

- 2 Click EDIT RULE.
- 3 Enter the value for the rule, and then click **Click to select**.



The Content Object Picker appears in the Edit Rule page. Because the list is cached, you will probably notice an improvement in performance.



4 Click the radio button next to the content to use for the rule, and then click Insert.



5 Follow steps 3 and 4 for each rule.

What's New in Precision Central 7.0.5

Precision Central 7.0.5 includes the following:

♦ Audience search capability in Insight Builder

Audience search capability in Insight Builder

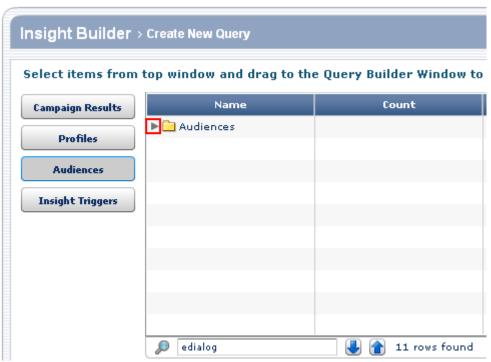
When you create a query in Insight Builder, you can now quickly search for audiences by name or list ID.

To search for audiences:

- 1 Start Insight Builder.
- 2 Click Create New Query.
- 3 Click Audiences.



4 Expand the Audiences folder, and then expand the subfolder in which you want to find an audience.

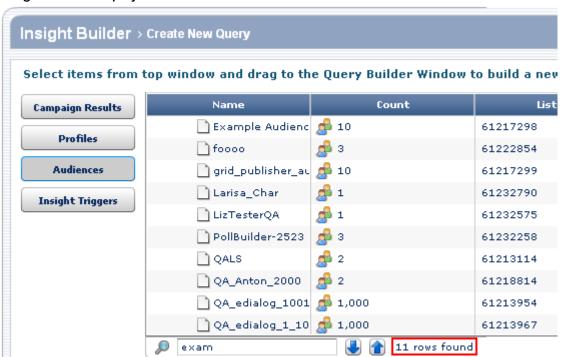


5 Enter a portion of the audience Name or List ID that you want to find in the text box.



The search is case-insensitive.

Insight Builder displays the number of audiences that match the criteria.



The first audience whose name or list ID contains the text you entered appears at the top of the list of audiences.





If no audiences match the criteria, the text box is shaded in red.

Note: The list of audiences continues to display *all* the audiences. The search scrolls the list to display the first audience that meets the search criteria at the top. When you click the down arrow to display the next audience that meets the criteria, the search scrolls the list again, to display the next audiences that meets the criteria at the top. The list scrolls continuously, so that if you reach the end of the list and then click the down arrow, it scrolls to display the first item in the list that matches the criteria at the top of the list.

To see the next audience that contains the text you entered, click the down arrow.

To see the previous audience that meets the criteria, click the up arrow.

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*

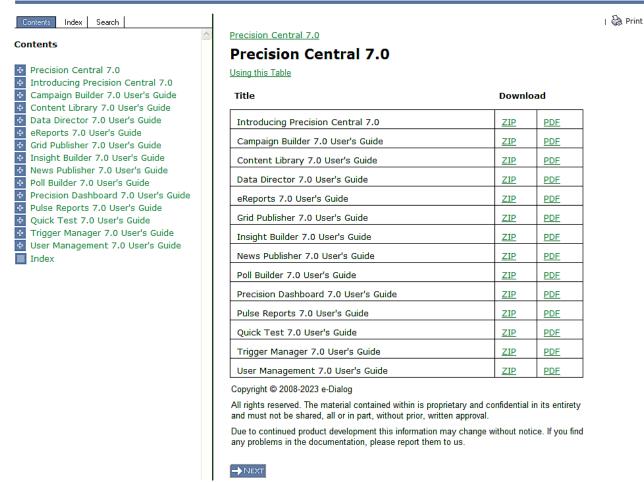
^{*} The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Getting Documentation

The Precision Central toolbar has a question mark (?) button in the upper-right corner of the page that takes you directly to the on-line documentation section. Please submit comments and corrections to *Technical Publications* mailto:TechnicalPublications@e-dialog.com".







Getting Technical Support

For all technical support issues, please contact support is available:

- 24 hours per day Monday Friday
- ♦ 7:00am 6:00pm EST (GMT-5) Saturday and Sunday

If you have an urgent issue during non-traditional business hours, call the support line at 781-372-3303 and a technician will respond to your voice message within 20 minutes.

Note: Scheduled maintenance takes place Sundays, 12:00am - 3:00am EST. Do not schedule mailings during this time period.

For product upgrades or special requests, continue to work through your Account Team.

If you encounter questions while using Precision Central, please search the *Precision Central documentation* (see "Getting Documentation" on page 23). If you cannot find the information you need, please describe the question to *e-Dialog Technical Publications* mailto:TechnicalPublications@e-dialog.com" in addition to contacting technical support.

Getting Started with Precision Central

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Logging In

To log into Precision Central:

- 1 Open a Web browser.
- 2 Go to one of the following URLs:

http://precisioncentral.e-dialog.com

http://pc.e-dialog.com

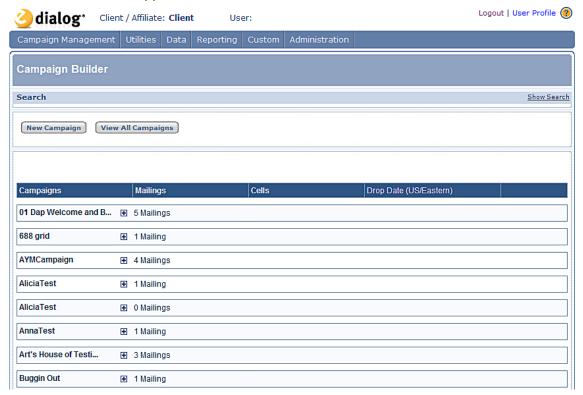
Your browser loads the Precision Central login screen.



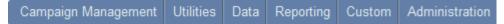
3 Enter your unique user name and password and click the Enter>> button.

Note: If you enter an incorrect password five times, your user name becomes disabled. Please keep your user name and password in a convenient place to ensure this does not happen. If you need assistance contact *Technical Support* (on page 23).

When you log in for the first time, your default application appears. You can change the default as described in *Setting Your Default Application* (on page 29). In the following illustration, Campaign Builder is the default application.



5 Use the toolbar to select the Precision Central tool to use.



See Precision Central Applications (on page 7) for descriptions of the tools.

Setting User Preferences

You can specify user preferences, including:

- Password
- User contact information
- ♦ Time zone
- How to sort campaigns and reports
- Date range for which to display campaigns and reports

To set user preferences:

1 Click User Profile.



2 Enter or edit the appropriate information.

Edit User Profile	
	* required field
General User Pref	erences
User Name:*	demo
First Name:*	
Last Name:*	1
Password Change:	Password: Re-enter Password:
	(leave blank unless changing your password) Password Criteria: Must be at least 9 characters long Must contain one character in at least 3 of the following types: Upper Case Letter, Lower Case Letter, Number, Punctuation Cannot contain your username, or be part of your username Cannot contain part of your business name
Phone:*	Extension:
E-mail Address:*	
eReports Preferen	ces
Sort Order:	Desc Sets your default eReports list order to either Ascending or Descending by date.
Date Range Start:	Number of days in the past for which to display mailings.
Campaign Builder	Preferences
CB Default Timezone:	(GMT-5:00) Eastern Time (US & Canada) Sets the timezone used in CB 6.0 for your account.
CB Date Format:	English (US) Sets the preferred format used to display dates in CB.
Save Profile	

3 Click Save.

Setting the Default Application

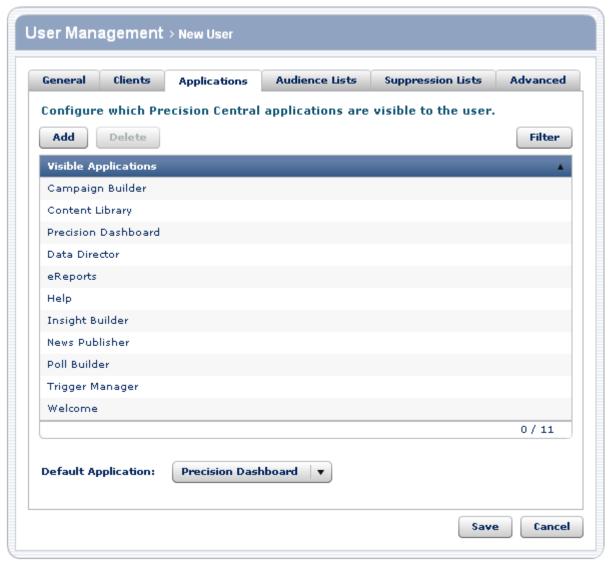
If you have access to the Precision Central User Management application, you can do this yourself. Otherwise, contact your e-Dialog Account Team.

To set the default application:

1 Select Administration > User Management.



- 2 Click to select your profile.
- 3 Click Edit User.



4 Click the **Applications** tab.

- 5 Select an application from the Default Application drop-down.
- 6 Click Save.

Logging Out

To log out of Precision Central:

- 1 Click the Logout link at the upper right corner of the display.
 Logout | User Profile | Resource Center
- Close your Web browser.Closing the browser ensures that your e-Dialog session ends.

Customization for Your Organization

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About the Onboarding Process

In setting up your organization to use e-Dialog Precision Central, your e-Dialog Account Team customizes a number of options to meet your organization's needs. Knowledge of these options is required in order to use the Precision Central applications effectively, particularly Campaign Builder.

User Account Security Profiles

Within your organization, you might want to:

- Restrict some users' access to specific Precision Central tools
- Restrict some users' ability to create audience and suppression lists
- · Restrict the types of mailings some users can send
- Allow only some users to edit content items
- Allow some users to send final e-mails, while not allowing others to do so

Note: As a result of customization for your organization, some of the Campaign Builder features described in this document may not be visible to all readers.

For example, your organization may want to provide manager-level employees with the ability to create mailings, but restrict authority to do the actual sending to director-level and higher. In this case, managers would have access to everything except the final send function. Directors would have access to everything, including the final send function.

For more information about setting permissions within your organization, see About User Management.

Database Configuration

The standard e-Dialog database configuration might be sufficient to meet all your needs. If not, you can ask your e-Dialog account team for any of the following customization options as part of your initial setup procedure.

Domain Names

Mailings require DNS values (addresses) for various functions, including:

- Mailbox DNS for the return address in e-mails
- URL redirection where to send profiling data
- Unsubscriptions where to send opt-out e-mails

Your account team sets up the appropriate domain names and IP addresses for these functions.

User-Defined Fields (UDFs)

User-defined fields, also known as categories, let you organize the elements of mailings to be able to organize Dashboard charts or to group rows of data in eReports and Insight Builder. The values of UDFs are defined by your organization.

Each of the following objects can include a number of user-defined fields:

- Audiences
- ♦ Campaigns
- ♦ Cells
- Content
- Mailings

Audience, Suppression, and Proof Lists

Your master database stores every e-mail address that you have ever loaded into your database, including addresses flagged as unsubscribed or undeliverable. By executing queries that extract only certain e-mail addresses from the database, e-Dialog can generate stored lists such as:

- Audience lists a set of addresses that are believed to be subscribed and deliverable
- Suppression lists a set of addresses that are believed to be unsubscribed and/or undeliverable
- Proof (and seed) lists the addresses of people responsible for proofreading or otherwise approving of an e-mail message before it is sent to an audience list

Your e-Dialog account team can create and manage these lists for you and/or you can use Insight Builder to create and manage them yourself.

Custom Columns and Tables

The e-Dialog standard database configuration might be sufficient to meet your organization's needs. However, your account team can create additional data columns and/or tables in your database for data that cannot be stored in the standard e-Dialog database configuration. Your account team creates and populates these columns and tables as part of your initial setup process.

Template Objects

Templates are frequently used objects that you can easily include in your mailings. Your e-Dialog account team can create customized templates for you as part of your initial setup process, including:

- Unsubscribe (opt-out) templates
- Forward-to-a-friend templates
- Content object templates

You should check with your e-Dialog Account Team for details on pricing for this service.

Custom Tools

In addition to the standard e-Dialog tools and applications, your organization might use additional custom tools. These appear on the Custom menu of Precision Central. For more information about your custom applications, contact you e-Dialog account team.

Default Values

After determining the needs of your organization, your e-Dialog account team sets default values for a number of elements and settings, including:

- Time the time zone to use and how to format time values
- Dates the start and end date to specify the range of mailing elements to display in lists
- DNS DNS values for the return address, for links in the mail, and unsubscribes
- ♦ Feeder risk default value
- Priority default mailing priority
- e-mail channel and type
- UDFs default values for UDFs associated with mailing elements
- ♦ URL redirect expiration number of days to keep URL redirection in effect
- e-mail address to send notification to when a data export is complete
- Default locations from which to upload data files and import data files
- Default application that the user sees after logging in to Precision Central

Default Permissions

After determining the needs of your organization, your e-Dialog account team sets default permissions to e-Dialog applications and features of applications. The Domain Administrator(s) in your organization can grant a subset of these permissions to users within your organization. For more information, see About User Management.

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