Campaign Desktop User's Guide

Udated for Campaign Desktop Version 7

ARIAL SOFTWARE, LLC

Campaign Desktop User's Guide

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Step 1

Installing Campaign

Before you can use Campaign successfully there are two other components that need to be in place; access to a Database and an SMTP server.

Campaign Desktop is a stand alone program that sits on your computer. It connects to your database, merges your customer information with your email message and delivers it to your SMTP server. This manual will guide you through the steps of setting up Campaign Desktop to send your high volume email messages. This manual applies to all editions of Campaign Desktop: **Lite**, **Small Business** and **Professional**

The minimum requirements for all editions of Campaign Desktop are:

- 5GB free disk space
- Bandwidth to the Internet (dial-up, DSL, T1, etc.)
- Access to source database. (Supported databases include MS SQL Server, Oracle, FoxPro, MS Access, dBase, text files and any ODBC compliant formats. Campaign will not directly read ACT!, PIMs or Excel spreadsheets)
- Access to an SMTP server. (Campaign supports any standard SMTP server, including: SendMail, LSMTP, MS IIS, Post.Office, Exim, MS Exchange, etc).
- Operating systems Windows 2000 / NT workstation / NT server / 2000 Server / Windows XP
- 128MB RAM

Campaign does not store your contact information, instead it needs to link to your database where that information resides. By merging your message with your customer information, **Campaign SmartMerge™** can create truly unique correspondences that can greatly improve your message's effectiveness.

Campaign also needs information to talk to your SMTP server. SMTP stands for Simple Mail Transfer Protocol and is how your messages are delivered. Campaign does not deliver your mail directly to the recipient; it sends it to the SMTP, which is then responsible for getting the mail to the final destination. You will need to know the Domain Name or the IP address of your SMTP server to type into the appropriate field when setting up Campaign. If you do not know the Domain Name or the IP address, see your network administrator or contact your ISP (Internet Service Provider).

ICON KEY	
☒	Feature not available for Lite edition.

Desktop Lite: Many of the advanced features of Campaign Desktop are not available in the Lite edition. When discussing those features you will see the icon shown left.

Download Campaign

Campaign is delivered online as a .zip file. To open the file you will need the WinZip utility. You can download a free trial copy of WinZip at http://www.winzip.com. You can save the Campaign download in a temporary folder, or save it to a folder on your computer. (We recommend saving the downloaded file to your hard drive so it can be easily accessed again if necessary). Once you download, open the .zip file with the WinZip utility. Double click the Campaign Desktop .exe file to begin the installation.

Install Campaign

Follow the instructions of the installation utility. We recommend using the default settings.

Unlock Campaign

Campaign Desktop is fully functional in the evaluation mode except that it will only send 50 emails at a time, and each message is appended with the following advertisement for Campaign.

> This email was sent using the unregistered version of Arial Software's Campaign email automation product for professionals available at http://www.arialsoftware.com. Campaign is an auto-follow-up email system used by universities, businesses, government offices, non-profit

organizations and individuals to keep in touch with members, prospects, and customers in an automated, cost-effective way. Campaign is not spamming software and Arial Software does not send or encourage the sending of unsolicited email.

To unlock the full sending capabilities of Campaign and remove the advertisement you will need to purchase a user license online at www.arialsoftware.com. Once you purchase a user license you will be given a serial number. Simply enter the serial number in the registration window of your evaluation copy.

Step 2

Configuring Campaign

Now that you have installed Campaign successfully, you can open the program and start configuring email projects.

To Open Campaign click **Start > Programs > Campaign Desktop > Campaign Desktop**. If you have not yet registered Campaign, the registration window will open. Enter the serial number and other requested information at this time. Click Continue to open the main project window.

Live Updates
Occasionally it is necessary to update Campaign Desktop. Normally an announcement of a free update will be sent to you via email. To update Campaign Desktop click **Start > Programs > Campaign Desktop> Live update**.

The main project window will show you all of your existing projects. It will be blank when you first open Campaign. You can have as many projects as you want, but it may become cumbersome if you have too many. You will want to examine your list of projects periodically and delete any that are no longer in use. To delete a project simply highlight it and click the Delete button, you will be asked to confirm the deletion.

Create a New Project

In the main project window:

- Click on the **New** button.
- Enter the name of the project and click **OK**.

The project detail window will open automatically. At the top of the project detail window is the scheduler. We will cover the scheduling later in the manual. Below the scheduler are four tabs, which are set up in a logical sequence.

The Information Source tab connects Campaign to the database. The Message tab is where you compose your email message. The Sending tab

is where you specify the settings so that Campaign can talk to your SMTP server. The Project Completion/Bounce tab concludes with some various administrative functions and bounce handling.

- **Close:** Click the **Close** button at any time during the configuration to close the edit screen and save your changes.

- **Cancel:** Click the **Cancel** button at any time during the configuration to close the edit screen without saving your changes. Campaign will revert back to the previously saved project.

Step #1 – Information Source:

This is where you connect Campaign to your database.

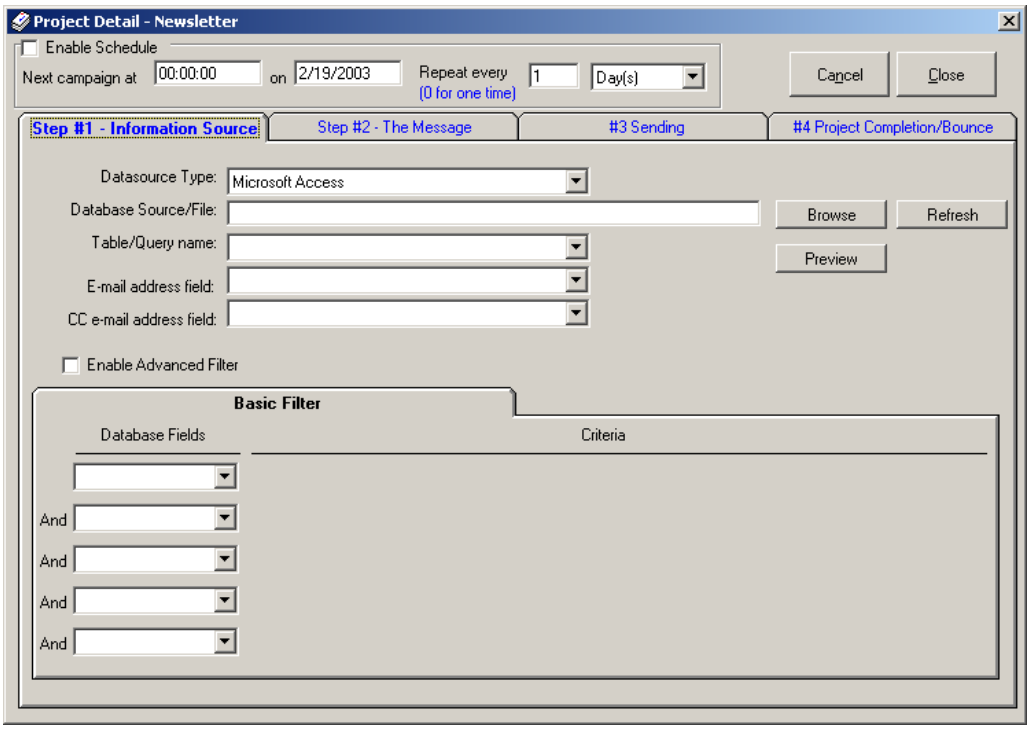

Figure 1 Project Detail Screen and Information Source Tab

- **Datasource Type:** Select the type of database to which you will be connecting from the drop down field. The options are; MS Access, MS SQL Server, Oracle, Sybase, AS400/DB2, PostgresSQL, Filemaker, Foxpro, Paradox, Dbase, Text File or ODBC connection. For all Datasource types other than MS Access you will need to create a DSN (Data Source Name) to and ODBC driver or use an OLE DB connection string.

Map Network Drive

Go to **My Network Places**.

Double Click Computers near Me.

Find the Network computer storing the database to which you want to connect.

Double click on that computer.

Find the folder where the database is stored and right-mouse click.

Click Map Network drive, you can select a drive letter, i.e. 'F' for this folder. Follow any other instructions in the Map wizard.

The 'F' drive will appear as one of your drive options when you browse for your database.

- If you select MS Access from the Datasource type, click **Browse** to find the database on your computer. If you are connecting to a Network database, you may first need to map the network drive to access the file (see inset).

☒ If you are connecting to a database that requires an ODBC connection, click the **Browse** for a list of available system Select the appropriate DSN (Data Source Name) from the list. If you do not have a valid DSN, you can follow the steps to create one. For more information go to "Creating an ODBC Connection" in Appendix A.

☒ To use and **OLE DB** connection string simply type the string in the Database Source/File field

- **Table/Query name:** Select the Table or Query name from the drop down box. This box is populated with information found in your database.

- **Email address field:** Select the email field from the drop down list of field names. This box is populated with information found in your table. If you do not see any information check your database and your table to ensure that the connection is correct.

☒ **CC email address field:** Select the CC email address field if desired.

- **Preview:** Click the Preview button to ensure that the database is being read correctly. If you do not see the expected data check your database.

- **Basic Filter:** You can use the basic filter, or the advanced filter to specify which records will be included in an email campaign. In the following example (figure 2) we will exclude all records that have more than four bounced emails indicated in the database. (The Where clause is implied).

☒ **Advanced Filter:** Check the box to enable the advanced filter. The advanced filter can incorporate SQL where clauses in a more elaborate manner if necessary. For this example (figure 3) we will do the same thing as we did in the basic filter above by using the advanced filter. (The Where clause is also implied when using the advanced filter).

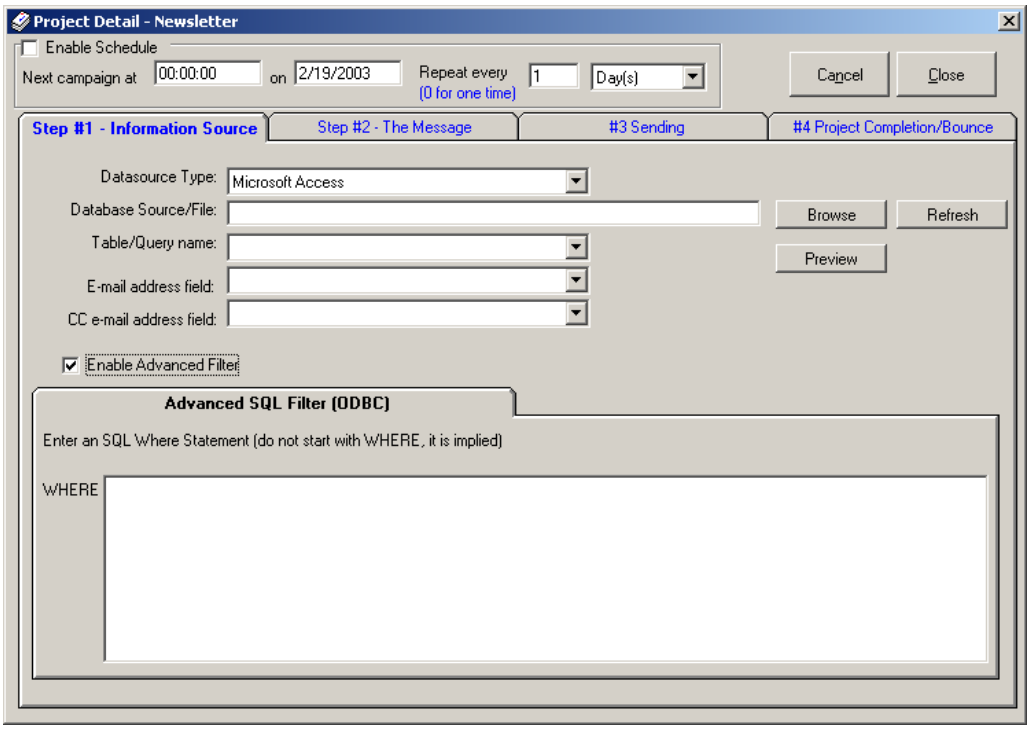

Figure 2 Advanced Filter

To ensure the filter is working correctly, preview the database again. The records that you excluded will no longer appear in the preview.

Step #2 – The Message:

This is where you compose or import your email message.

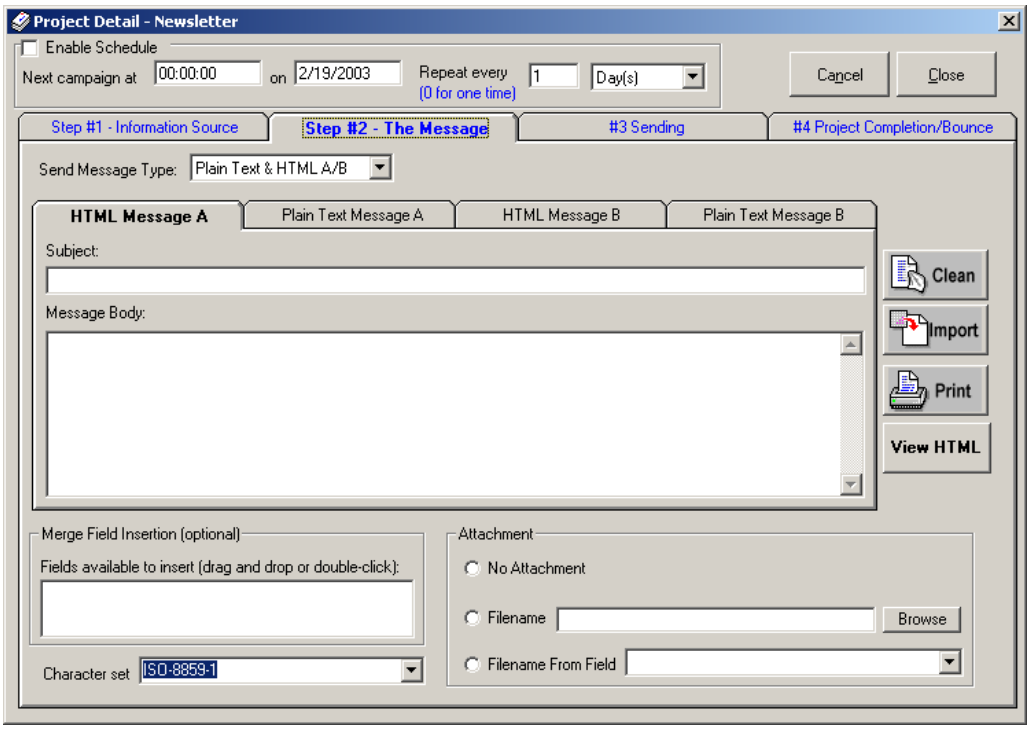

Figure 3 Message Tab

- **Send Message Type:** Select the message type from the drop down field. You have the following options Plain Text, HTML, Plain Text and HTML message or A/B Plain Text and HTML. Click on the tabs to switch messages.

- **Subject:** Enter the Subject of the message. You will need to enter a subject line for each message body. This will be the subject line for your email message.

- **Message Body:** Input the Message body for the specified message tab. You can also import a file from your local drive by clicking on the Import button, which will open up a standard browse feature. Any text already in the message body will be replaced upon confirmation.

- **View HTML:** When entering an HTML message, click the View HTML button to make sure it will be displayed properly.

- **Merge field Insertion:** To personalize the message use the merge fields listed in the Merge Field Insertion box. You can type the field directly, click and drag them into your message or double click on the merge field to insert it where you place your cursor. When the message is sent, the field will be replaced with the corresponding data for each record.

☒ **Attachments:** You can include attachments to the message in two ways.

  - **Filename:** Enter the pathway string for the attachment or click the **Browse** button. The same attachment will go out to all recipients.

  - **Filename From Field:** Select the field name for the attachment from the drop down list of your database fields. You can send different files to different records depending on what is entered in the attachment field.

Note: We do not recommend sending attachments over 70kb as this will greatly decrease Campaign's performance. If you want to distribute a file to your entire list, we recommend sending a link to a file on your website that can be downloaded.

☒ **Character Set:** To change the Character set, select from the drop down field. If you don't see the one you need, simply type it in. When the message is received it will prompt the recipient to download the correct language pack if it is not already installed.

- **Clean:** Click Clean to clean up any illegal characters that may be in the message body.

- **Print:** Click Print to print your message.

Step #3 – Sending:

This is where you configure the connection to the SMTP server and specify database write-back functions during the send.

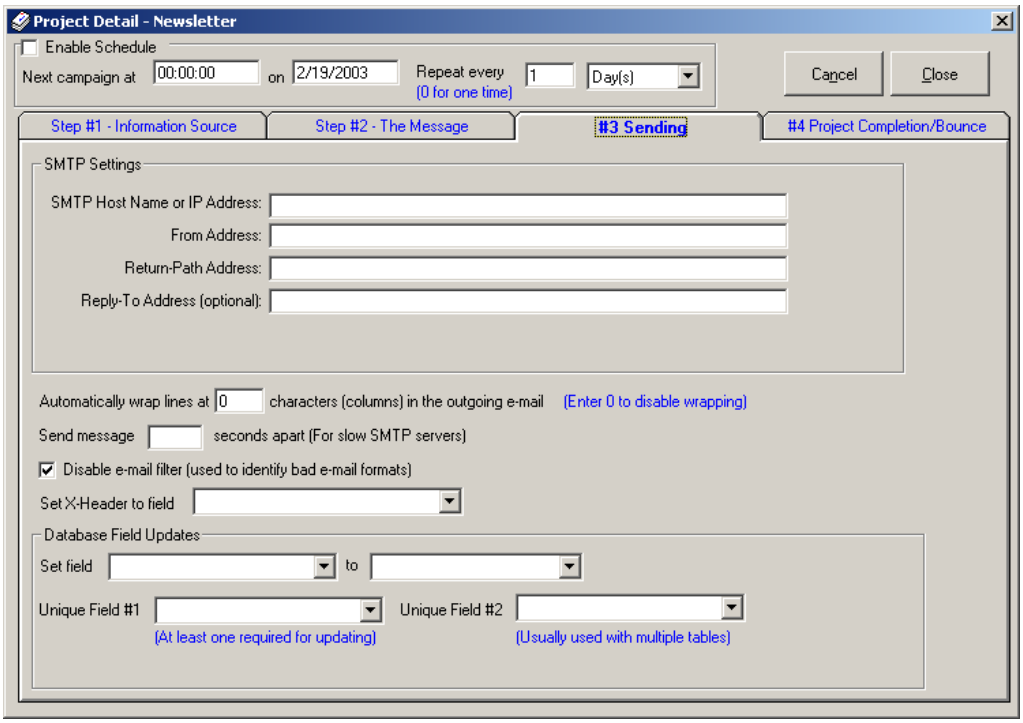

Figure 4 Sending Tab

- **SMTP Host Name or IP Address:** Enter the domain name or the IP address of the SMTP server to which you will be connecting.

- **From Address:** Enter the email address that you want to appear in the "From" field of the recipient's message.

- **Return Path Address:** Enter the return path address. If you are using the bounce handling features, this will be the bounce POP account you set up, i.e. *bounce@yourcompany.com. (For additional information on POP Server bounce account setup see page 14.)*

☒ **Reply-To Address:** This is the address to which any reply will be sent. You can use this feature if you want the "Reply-To" address to be different than the "From" address.

☒ **Error-To Address:** Some mail servers will send error messages to the originating mail sender. These typically will automatically be sent via the "Return Path" address above.

Note: The Reply-to and Error-to addresses are optional.

Other Features.

- **Automatically wrap lines at __ characters:** Some very old email clients may not automatically wrap your plain text messages, making them difficult to read. You can force the break by specifying a number in this field.

- **Send messages __ seconds apart:** Some SMTP servers are not able to process the emails as quickly as Campaign can send them. There may also be some restrictions imposed that would require you to space the emails out. Enter the time in the blank to allow the SMTP server to catch its breath or to comply with restrictions.

- **Disable email filter:** If your database is already free of bad emails you can turn off the filter to increase performance. (Depending on the size of the database, the increase may be slight).

☒ **Set X-Header to __:** This allows you to include a custom X-header in your emails. The headers are the pre-message information of your email, which are normally not seen by the recipient. You may want to set a custom X-header to track the emails that come back to you. Many SMTP servers strip these extra X-Headers out of the message.

When sending your projects it is sometimes useful to write-back to fields in the database. For example when you send an email, Campaign can write-back the date to the "Date" field, indicating when the email was sent.

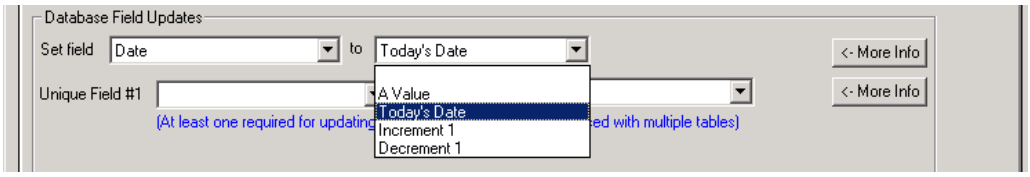

Figure 5 Database Field Updates

☒ **Set Field:** Select the field you want to update from the drop down list of fields in your database.

- **To:** Select the value you want to write-back. If you selected a numeric field you can increment by 1 or decrement by 1, these fields must have a default value of “0” in order to write-back to them. You can also choose the current date or a text string. If you choose the date, make sure you are using a proper date field in your database.

- **Value:** When you specify "A Value" above, this field option appears. Enter the text string you want to write to the selected field.

- **Unique Field #1:** In order to use these write-back features, you must identify a unique id used in your database.

- **Unique Field #2:** You may need to specify another unique id if you are using views and joins. This feature will most likely not be necessary.

Step #4 – Project Completion/Bounce (Handling):

This is where you complete the process, including scheduling a project and handling bounced emails.

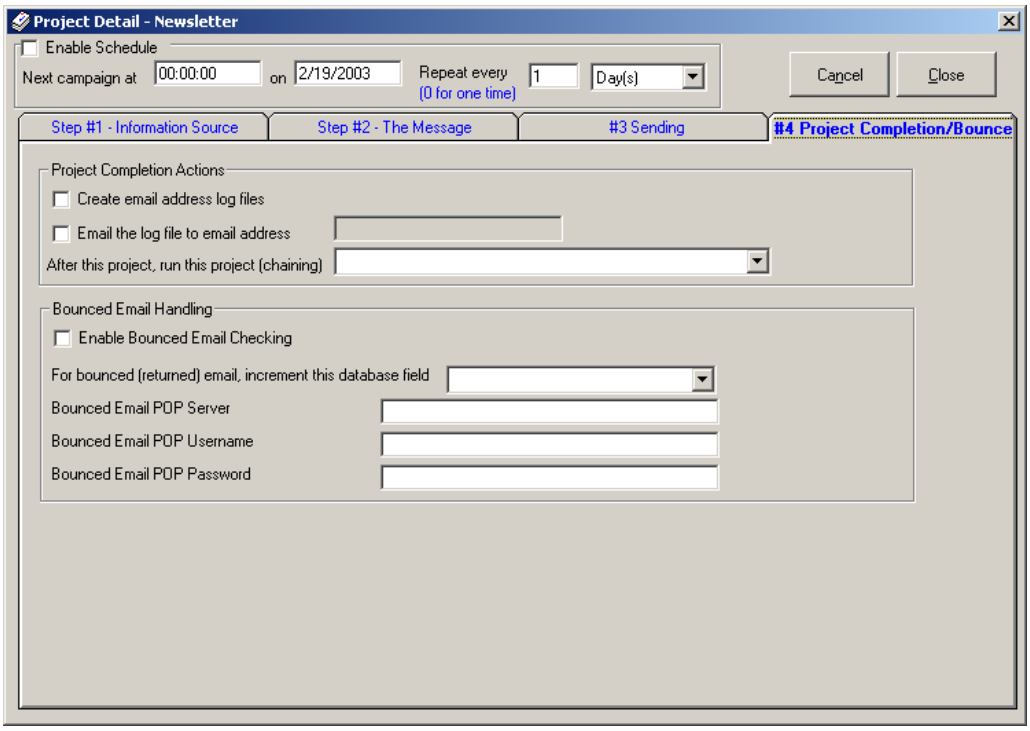

Figure 6 Completion/Bounce Tab

- ☒ **Enable Schedule:** Check this box to make the schedule active.

- ☒ **Next Campaign at:** Enter the Time, and the Date you want this project to be sent. Allow enough time for you to complete your work on it.

- ☒ **Repeat every:** If you want to run the same project on a set schedule, specify the interval number and select the time period from the drop down box.

Note: You must have Campaign open in order for a scheduled project to be sent.

- **Create email address log files:** Check this box to create success/fail logs of your projects. These log files are stored in the Campaign Desktop directory.

- **Email the log file to email address:** Enter the email address of the person you want to receive the log summary.

☒ **Chaining:** Select the project you want to run after this project is completed. Make sure you do not chain the project to itself, or chain the following project back to this one or you will create an endless loop. Also ensure that any scheduling does not conflict with your chained projects to prevent them from going out unexpectedly.

The Bounce Handling feature will require you to set up a bounce POP account specifically for Campaign. This will be the email address you enter in the Return Path email on the Sending tab.

☒ **Enable Bounced Email Checking:** Check this box to activate the bounce-checking feature.

☒ **Bounce Field:** Select the bounce field from your database. This needs to be a numeric field with a default value of zero. When a bounced email is received in the bounce account, Campaign will increment this field by one.

☒ **Bounced Email POP Server:** Enter the POP server name or IP address so Campaign can log in to read the bounce account.

☒ **Bounced Email POP Username:** Enter the username of the Bounce POP account.

☒ **Bounced Email POP Password:** Enter the password of the Bounce POP account. If you do not know the username and password you will need to contact your network administrator or the ISP managing your POP account.

Step 3

Using Campaign

Now that Campaign is configured you can start using it to contact your customers and keep them informed in a more personal manner.

Message Personalization Features with Campaign Software

Successful email marketing is all about creating lasting, profitable relationships with customers, and effective relationship building starts by addressing your customers by name! After all, nameless "bulk" email is hardly impressive. But when customers or prospects receive an email addressed specifically to them, the mail gets read.

Campaign Smart Merge allows you to automate the personalization of your outbound messages. In the industry, it's called "mass customization," and it means that you're sending a unique email to each recipient. Using Campaign software, you can insert an unlimited number of data fields into your messages. Those data fields are then replaced with the actual data from the recipient's record as the mail is merged and sent.

For example, your outbound message might say, "Hello, {firstname}, thank you for your purchase." As this message is merged and mailed by Campaign, the person's actual first name will be inserted into the message and it will read, "Hello, Bill, thank you for your purchase." Here's an example of how companies automate order confirmation emails:

Hello, {firstname}, thank you for your purchase. This is an order confirmation courtesy email. Your order total was ${total} and will be shipped to:

{firstname} {lastname}
{address1} {address2}
{city} {state} {zip} {country}

Message personalization is one of Campaign's most powerful features. Thanks to strong database connectivity, you can easily merge fields from almost any source database.

Current customers of Campaign use this feature in a variety of ways:

- To simply address recipients by name
- To insert dollar figures for sales order confirmations
- To insert addresses for postal mail verification
- To insert passwords or tokens
- To insert and verify information entered by the person in a web form

Database Considerations

Campaign is a powerful email marketing tool. Every edition of Campaign software uses the direct connection method. Simply tell Campaign where your database resides, choose a table (and apply filters, if desired), then utilizing Campaign's **Dataways Connector** the software will read and merge the data in real time.

Many of the issues that may arise are due to peculiarities in the database, not Campaign. Make sure you know your database or have access to a database administrator. Some databases like Filemaker need to be open when you send your projects. If the database is not open when you attempt to edit or send, you may get timeout errors generated by Campaign, or Windows. These problems also may occur for databases that are deleted, but still being referenced by a project you are editing.

If you modify your database or add or delete a field, you should not assume that Campaign will read it automatically. You will want to edit the project that references the database and do a preview. If you do not see the changes reflected in the preview you may need to refresh, or reconnect to the source data.

Campaign does not remove any information from your database. If you use the bounce handling or database write-back features Campaign will only increment or insert a specific value to a field. Campaign cannot remove records; you will need a separate process using your database's features to remove records.

One way to take advantage of the write-back capabilities with Campaign is to use the filters found on the Information Source tab. These can filter out

records in your database in the manner you specify. If you want to send emails to everyone in your database with fewer than four bounces, simply enter that criterion into the filter. All of the records with four or more bounces recorded will be skipped. There are many reasons an email may bounce, that is why we recommend using a number larger than one for your filtering.

The best thing you can do to keep Campaign running smoothly is to manage your database prior to Campaign referencing it. If you can eliminate all the bad emails, bounces and unsubscribe records, this will lighten Campaign's workload. Also make sure that your database fields appear the way you want, for example capitalize the names in the name fields, Campaign only merges the information that you input, it cannot modify it.

Naming Your Projects

You can name your projects anything you want, but if you are using several contact databases or tables, you may want to include that information in the name. This will help you keep track of which projects go with a particular database or table.

You may also consider including the date the project was created in the name so you can delete older projects. The project window can fill up quickly. To keep Campaign running smoothly you will want to delete old, unused projects periodically.

SMTP Server Considerations

Not all SMTP servers are created equal, some work better than others. One of the two major bottlenecks in sending out large volume email projects is the SMTP server (the other is bandwidth). Campaign will send out emails just as fast as your SMTP server will accept them, usually under one per second under optimal conditions. If it is slower than that, it is likely due to the size of the message and the amount of bandwidth available. If it seems inordinately slow it is likely due to the SMTP server. Many SMTP default settings will not allow large volumes of email to go through. You may need to contact your network administrator to find out what those settings are and if they can be modified.

If you are using someone else's SMTP server to send your email you might consider installing your own. Many ISPs, if they allow sending email at all, severely limit the amount you can send. You will need to contact them to find out what those limitations are. If they are limiting the number of emails per second, you can modify the rate at which you send in Step #3 the

Sending tab. Usually, however, they limit the number you can send at one time.

Many ISPs and SMTP entrepreneurs are now requiring that you authenticate when you try to access their SMTP server. Since there is no standard authentication protocol yet in place, Campaign does not have this functionality. We recommend you investigate SMTP servers that you can install and manage on your own network.

A/B Message Testing Features for Email Marketing

One of the most important keys to successful marketing is knowing the effectiveness of your outbound messages. If you're only sending one message to prospects, you may not be optimizing your projects. By sending two versions of the same offer, even with just a small change in the headline or text, you can determine which message works best.

Campaign supports A/B messaging capabilities that allow you to accomplish this. Simply enter two messages (an "A" and a "B" message) with different variations of your offer. Campaign will automatically alternate the two messages as it sends the mail, sending "A" to half the recipients and "B" to the other half.

By comparing the response results, you can instantly see which message works best. Using "message evolution," simply take the winning message and try a new variation on it for the next round. After several rounds of evolving your message, you'll find the impact of your campaign to be greatly improved!

Campaign's A/B message feature works with both plain text and HTML message content types.

Bounce Handling Features of Campaign Software

Campaign Bounceback™ handles 99% of all bounces automatically. Simply create an email account, use that email account as your return email address, and tell Campaign the login name and password of that email account. From then on, Campaign reads the email for you, finds bounced emails, tracks them back to the original source, and even updates the records in your database automatically.

Just because an email bounces once, it does not necessarily mean that it is a bad address. There are many reasons an email may bounce: the receiving SMTP server could be down,; routing tables on the Internet backbone could be in the middle of a hiccup; the user's mailbox might be full, for example.

Campaign lets you decide how to handle the bounces. You can have bounced emails marked to be skipped right away, or you can configure Campaign so that emails have to bounce two times, three times or ten times before they get ignored.

People change domains, jobs and email accounts very frequently. The older your list, the more bounces you're likely to get. But thanks to Campaign's bounce handling automation, you can literally walk away and let Campaign do the work.

No technology can grab 100% of the bounces. Some recipient email servers adjust the email headers before they send them back. Even Campaign can't catch them all. Campaign does catch 99% of all bounces, and most email marketing professionals choose to just ignore the remaining 1%.

Appendix A

Appendix A

Connection Strings

Creating a DSN - ODBC Connection

Set up the DSN for the ODBC Connection on your system: In this example we are connecting to a SQL database.

- Go to your Database connection utility. On Windows 2000 this can be found in the **Control Panel > Administrative Tools > Data Sources**.

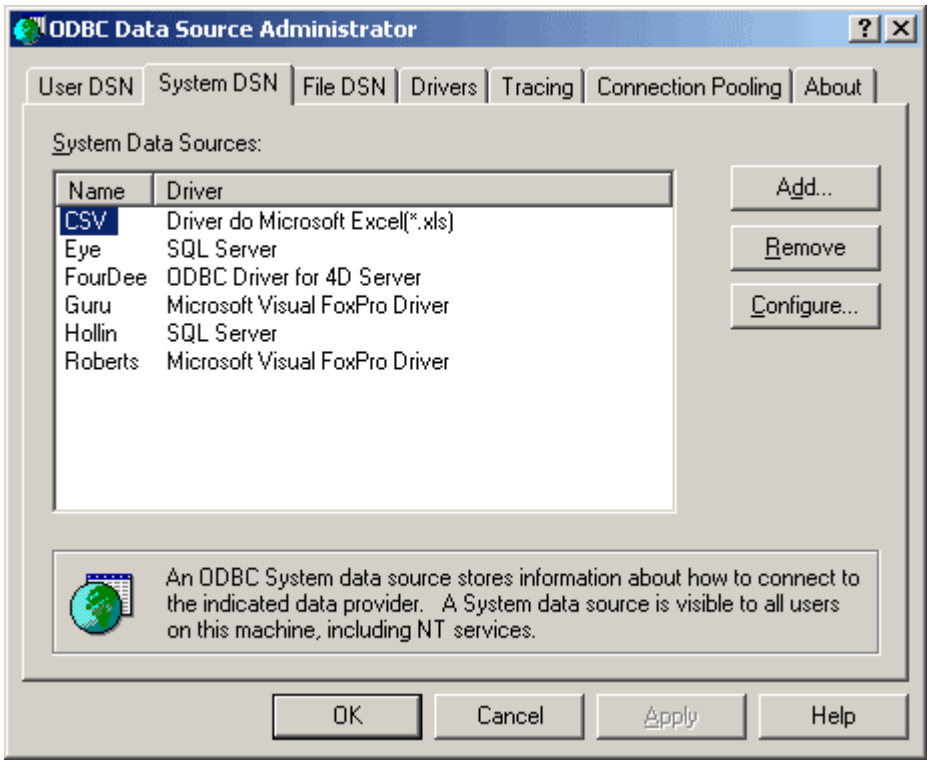

Figure 7 Data Source Administrator

- Click on the System DSN connection tab.
- Click Add. You will see the list of drivers available. (If your database driver is not listed, consult your database software and install the drivers).
- Choose the driver you will be using. In this Example we will create a SQL Server DSN.

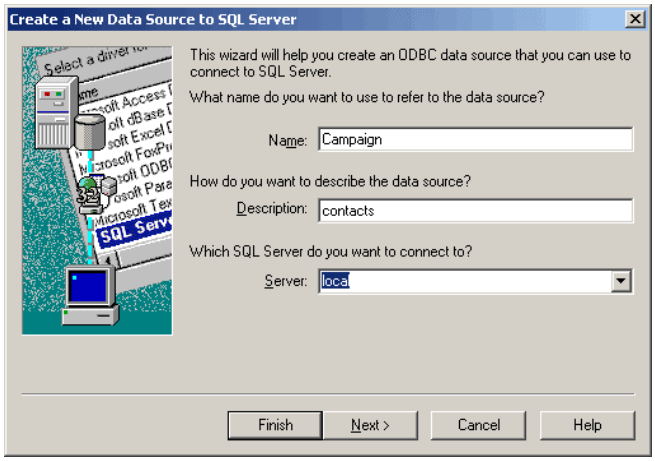

Figure 8 Create New Data Source

- Give the DSN connection a name.
- Give the DSN connection a description (optional).
- Specify to which SQL server you will be connecting.
- Click Next.

Set up the verification for the login permissions.

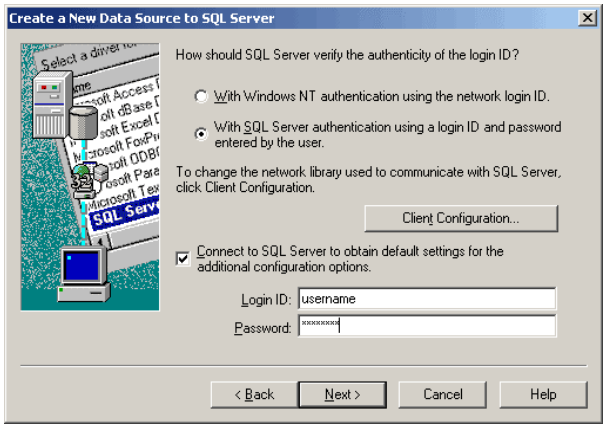

Figure 9 Set Password for DSN

- Depending on your network security policy, you can choose:
  - Windows NT authentication using the network login ID.
  - SQL Server authentication using login ID and password entered by the user. (What we will use in this example).
- Check the Client Connection, this should be TCP/IP.
- Enter the login ID and password you want to use for this connection. (If using the Windows NT authentication, this option is disabled).
- Choose the default database.
- Click Next
- Click Finish

A summary of the ODBC connection will appear. Click Test Data Source, you should be rewarded with a "Tests Completed Successfully!" message.

Connecting to the ODBC Connection with Campaign

- In your project, click on **Step 1 - The Data Source Tab**
- Select any database type other than MS Access from the Database Type drop down menu.
- Click browse on the database source line and highlight the new DSN ODBC connection you just created. You will see a database connection string at the top of the page.

- If required by the ODBC Driver, you must enter the User ID (UID) and Password (PWD) here. If it is incorrect, the connection will fail. If no UID or PWD is required then do not enter any.
- Click Select.
- Select the Table/Query name.
- Select the Email field.

You have now connected to a database using the ODBC connection.

Using an OLE DB Connection String

If you have a very large database and are using complex filters to coordinate your campaigns, we recommend that you use an OLE DB connection string for your database connection.

The Microsoft OLE DB Providers are included in the MDAC (Microsoft Data Access Component), which will be installed, with Campaign if your system is not up to date.

How to Connect to a Database Using an OLE DB String

- In Step #1 Data Source, select the Database Type
- Enter (by typing) the string with the username and password information already entered. (See the examples below).
- Click enter, or tab to the next field. The connection will be executed, and the Table/Query name populated with the appropriate information.

Sample OLE DB Connection Strings

MS Access

For Standard Security:

```
Provider=Microsoft.Jet.OLEDB.4.0;Data
Source=C:\\DatabasePath\\MmDatabase.mdb;
User Id=Username;Password=Password;
```

Using a Workgroup:

```
Provider=Microsoft.Jet.OLEDB.4.0;Data
Source=C:\\DataBasePath\\mydb.mdb;Jet
OLEDB:System Database=System.mdw;
```

MS SQL Server

For Standard Security:

```
Provider=sqloledb;Data
Source=ServerName;Initial
Catalog=DatabaseName;
User Id=Username;Password=Password;
```

For Trusted Connection security: (Microsoft Windows NT integrated security):

```
Provider=sqloledb;Data
Source=ServerName;Initial
```

Catalog=DatabaseName;Integrated Security=SSPI;);

To connect ta a "Named Instance" (SQL Server 2000) you must to specifiy Data Source=ServerName\InstanceName like in the following example:

Provider=sqloledb;Data Source=ServerName\InstanceName;Initial Catalog=DatabaseName; User Id=Username;Password=Password;

To connect with a SQL Server running on the same computer, you must to specify the keyword (local) in the Data Source as in the following example:

Provider=sqloledb;DataSource=(local);Initial Catalog=DatabaseName;User ID=Username;Password=Password;

To connect to SQL Server running on a remote computer (via an IP address):

Provider=sqloledb;Network Library=DBMSSOCN;Data Source=90.1.1.1,1433; Initial Catalog=DatabaseName;User ID=Username;Password=Password;

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