

# Mailprimer One-to-Many Campaign Email Manual

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Keep an eye out  
for these TOP  
TIPS on each  
page to save  
time and money!



## ONE-TO-MANY CAMPAIGN EMAIL

**Make your campaign email stand out and track results seamlessly** from the moment you send, then review detailed tracking data. With competitive pricing and NZ service support, this offering will change the way you send your email campaigns.

The in-built features allow you to communicate with your target audience, attach web forms, competitions, event invites or surveys with the response information automatically and conveniently stored on the system. Make manual processes a thing of the past! What's more, you can then measure the effectiveness of each and every campaign with automated reporting tools.

Cumulo9 offers training as well as a template design service to get you designing and sending with ease. There are three packages to choose from, each with their own level of integration,

customization and business support services.

## FEATURES

Key Features	Basic	SMB Pro	Enterprise Pro
Drag & Drop email and template design	✓	✓	✓
300+ pre-built templates	✓	✓	✓
Personalisation, wildcard and merge fields	✓	✓	✓
Free initial 1-1 training session	✓	✓	✓
Online subscriber forms, registration forms, surveys and email integration	✓	✓	✓
Create templates from website	✓	✓	✓
Full Spam & email platform/device rendering	✓	✓	✓
Real time reporting interface	✓	✓	✓
Bounce Management tools	✓	✓	✓
In-built social media tools and sharing buttons	✓	✓	✓
Invalid and Unsubscribed contacts tracking	✓	✓	✓
List spreadsheet view and functionality	✓	✓	✓
No fixed contract options	✓	✓	✓
Online resource centre and FAQ's centre	✓	✓	✓
Video tutorials	✓	✓	✓
Full Product support	✓	✓	✓
Multi language and character compatibility		✓	✓
Conditional Content		✓	✓
In built landing page capabilities		✓	✓
Unlimited sending		✓	✓
3 Hours FREE Labour (\$450 value) every month. Can be used for technical support, campaign design and send or copywriting.			✓

## OPTIONAL ADD ON'S\*

(\*These modules incur additional monthly costs. See ratecard)

Key Features	Basic	SMB Pro	Enterprise Pro
Campaign module with triggers and automated response emails and actions		✓	✓
Corporate accounts and parent/ child set up		✓	✓
E-billing and annual reminders			✓

Fully managed campaign design and send		✓	✓
A.P.I		✓	✓

## GETTING STARTED

This platform gives you the ability to inform and engage your audience with stunning email campaigns tailored to the individual or audience. In order to develop the most seamless email and deliver it to the most relevant audience, you must have a good grasp of how the system itself works.

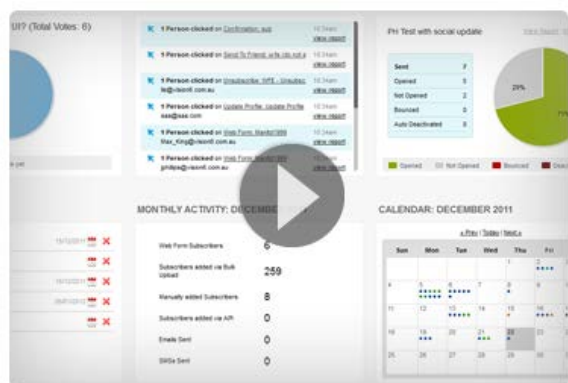
### Signing In

- Go to: [www.Cumulo9.com](http://www.Cumulo9.com)
- Sign in with your username and password using the One to Many category, sign in tab, top right hand side of the home page.
- Once you are signed in, save the dashboard page onto your toolbar so that you don't have to go through this process each time you use the system.

## FEATURES AND CAPABILITIES OVERVIEW

Please ensure that you take a moment to watch the following video before you begin. Unlock the potential of email marketing! Find out what's possible with your own email marketing.

### WATCH ME FIRST!

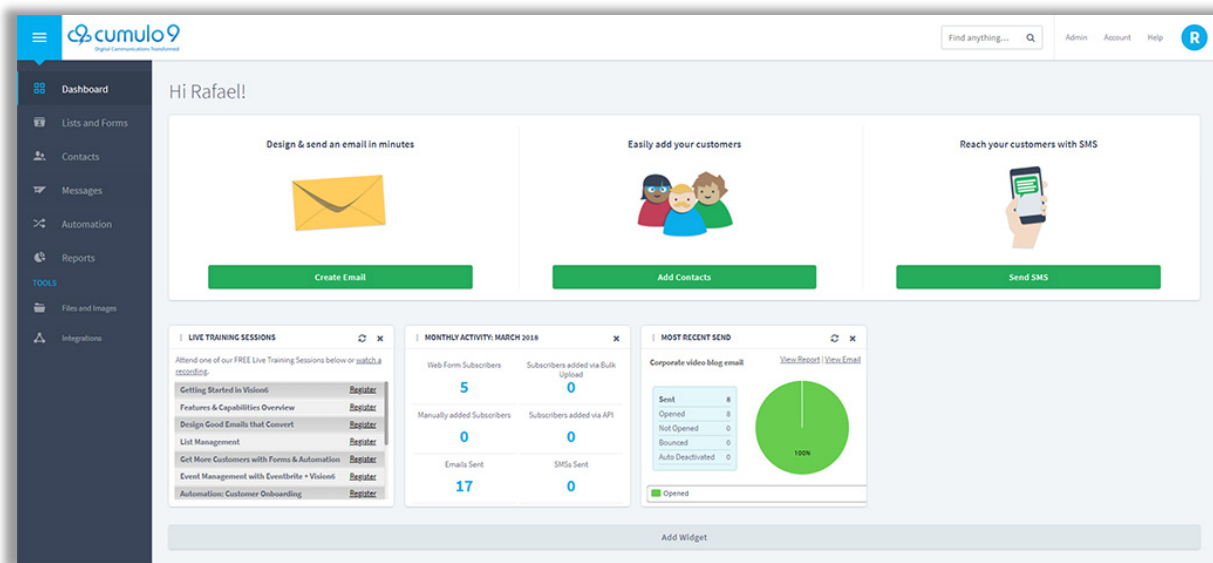


**TIP #1: Save time by viewing the online tutorials. They are available on your dashboard. There's a video for everything!**

## DASHBOARD

Your dashboard is the page you arrive at when you sign in to Cumulo9 One-to-Many campaign email. This dashboard can be personalised with up to 40 different widgets, each providing you with the most relevant and up to date information.





### Some of these include:

- Live feeds – allow you to see who is opening your emails at any given time and whether they have clicked through to anything.
- Live training – upcoming training sessions.
- Usage: Summary and reporting of your email sends.
- How to video tutorial library.
- To do list – Use this to keep track of your projects and progress within our system.
- Most recent send report – complete breakdown of last send and all associated statistics e.g. bounced, click throughs, opened, not opened, domains etc.
- Social media activity.

**TIP #2: Your access fees are based on LIST**

## LISTS & CONTACTS

Your lists tab is the most important area of the system when it comes to segmenting, personalizing and tracking your marketing communications.

### Best Practice tips before you begin:

#### Try to have 1 list only and separate segments by field.

- Your list/s will operate in much the same way as a database. Use a single list whenever possible so that any unsubscribes, update profiles etc will be maintained. This is important for several reasons:
  - a. If you have a person on several lists and they unsubscribe from one, this will not automatically remove them from any other lists they may already be on.
  - b. Your access fees can increase as your database/ list sizes get larger. It is in your best interests to use one list e.g. client database and as you continually update information or add people, simply tick this list and continue to upload to the same

one. In this instance – any new information will be updated, any previous unsubscribes will not be uploaded and duplicates will not be uploaded. This means that this one list stays completely accurate and up to date. Even better – any and all activities undertaken by anybody on the list e.g. click through's will stay on their records in the contacts section of the site.

- c. There are a couple of instances where you could have more than one list e.g. when you have an event invite list and you don't need the fields from that list, or the contacts in your main database.
- d. If you have more segmented databases with multiple client types e.g. Influencers, Prospects, Suppliers etc it is recommended that you use one list and separate them by type in separate spreadsheet fields. This way you can perform your email campaigns by advanced search as you would in a CRM system e.g. Send to all those where type = Influencer etc. See send by advanced search in the knowledge centre/ help section of the website.
- e. Please be aware before you delete ANY list – all associated contact information, click throughs and reports for those in the list will disappear. If for some reason (e.g. you will never send to them again) you want to delete a list, first use the download button and download all contact info, click through reports etc.

You can add your lists by uploading any excel file or csv database, or you can create one from scratch.

### Creating and uploading to a list

- To create a list, go to LISTS in the menu
- There are three ways to create a list in the system
  - a. The first method is to go to "New List" on the toolbar. You can choose from a range of list templates with pre-defined fields if you are planning on using web forms e.g. contact us, surveys etc. If you want to add a list of names and fields to send an email to, choose "blank list". Double click on this to rename it and add contacts to the list.
  - b. The second way to create a list is through a bulk upload of existing contacts from an excel or csv file. Simply tick on "upload contacts" and then browse for your file. Note: you will have to match up the spread sheet and list fields before the import command will work.
  - c. Alternatively, you can choose the Copy and Paste option and duplicate columns of contacts from a spread sheet. Great for updating the last few rows of contacts.



**Select a List Type**

**General**

**Blank List**  
A blank List to allow you to add Fields and settings to your own needs. Great for

**Newsletter Subscribers - Basic**  
A simple template to add newsletter subscribers to your list.

**Newsletter Subscribers - Detailed**  
A more detailed newsletter subscription template.

**Website Contact Us**  
Create a Contact Us list to use on your website.

**Quick Poll**  
Let people provide their

**Step 1 of 4 - Choose your upload type**  
You can upload your contacts either directly from Exoel, with a CSV, or if you like you can copy and paste directly from Exoel

**File Upload**  
☐ Upload a file containing contacts, either a CSV, XLS, XLSX or TXT. Perfect for loading in your first contact list.

**Copy and Paste**  
☒ Copy and paste columns of contacts from a spreadsheet. Great for updating the last few rows of contacts.

**Step 2 of 4 - Paste in your contacts**  
Simply copy and paste your tab or comma delimited contacts into the text area below.

Cancel

## Spreadsheet view

There is some impressive in-system spreadsheet functionality to add and remove fields, copy data and sort your list contents! This removes the hours spent in excel cleaning and copying data in preparation for upload.

- Go to the Lists tab, View contacts icon on the right hand side of the list name and then click on the pencil spreadsheet view icon.

	CELL PHONE	SUBSCRIBED
i.co.nz	64221835011	Yes
@gmail.com	64218377582	Yes
@linkconnect.com	64213086227	Yes
@mail.com	64274827003	Yes

- You will now be able to add fields and manipulate data within the system without having to alter your original excel spreadsheet.

## Spreadsheet View in "CUMULO9 MASTER LIST" List

	Email	Company name	First Name	Last Name	Products		
1	alan.paige@cumulo9...	Cumulo9 Test	Alan	Page	Livelihood Lan		
2	allan.page@cumulo9...	Cumulo9 Test	Alan	Page	Mailprimer One-to-On...		Blog,Technical
3	allan@cumulo9.com	Cumulo9 Test	Alan	Page	Mailprimer One-to-On...		commstype: Newslett
4	alan.page@cumulo9...	Cumulo9	Alan	Page	Mailpost		commstype: Newslett
5	tim.rosenbrook@cum...	Cumulo9	Tim	Rosenbrook	1-2-Many,Mailpost,On...	accounts person,tech...	Newsletter,Blog
6	chris.hogg@cumulo9...	Cumulo9	Chris	Hogg	1-2-Many,Mailpost,On...	accounts person,tech...	Newsletter,Blog
7	sarina.samuel@cumu...	Cumulo9	Sarina	Samuel	1-2-Many,Mailpost,On...	accounts person,tech...	Newsletter,Blog,Techn
8	leo.vandelden@cumu...	Cumulo9	Leo	Van Delden	1-2-Many,Mailpost,On...	accounts person,tech...	Newsletter,Blog
9	alan.page@cumulo9...	Cumulo9	Alan	Page	1-2-Many,Mailpost,On...	accounts person,tech...	Newsletter,Blog
10	rafael.marques@cum...	Cumulo9	Rafael	Marques	1-2-Many,Mailpost,On...	accounts person,tech...	Newsletter,Blog,Techn

**TIP #3: Some companies use this as an alternative to a CRM system. Add as many fields as you like and search based on any criteria!**

## Cleaning up your lists so that you can segment and send to groups within a list...

The best way to structure your lists is to have one list and separate by field as previously discussed. You can check our article about list management [here](#).

## GDPR

### What is GDPR?

GDPR stands for "General Data Protection Regulation", it applies to recipients who live in the European Union and its regulations are being enforced from May 25 2018. As you would expect, technology has changed significantly in the last two decades, especially in the way organisation's store and process personal data. GDPR expands on the General Protection Directive (1995), and addresses present-day digital storage solutions, and consumer privacy challenges.

Aside from providing guidelines for how organisations should store and collect personal data, GDPR also equips the customer with extended rights, one of which is the "right to be forgotten", which essentially grants the customer the right to have all of their data erased completely from the organisation which controls and processes it.

### How does this affect you?

It is important to note that the EU GDPR applies to you regardless of your geographic location if you are processing personal data of individuals located in the EU. If, for example, you're a New Zealand or Australian company that also collects and stores EU data, then for

those customers, you must remain compliant. These laws foster transparency and give individuals confidence that their privacy has been protected with careful consideration.

Here at Cumulo9, we think that these GDPR principles are best practice anyway, so we have in-system tools to help you ensure you are maintaining a database of recipients who want to hear from you and have the correct consents in place.

## Managing consent with GDPR

### **Maintain a database of contacts who want to hear from you**

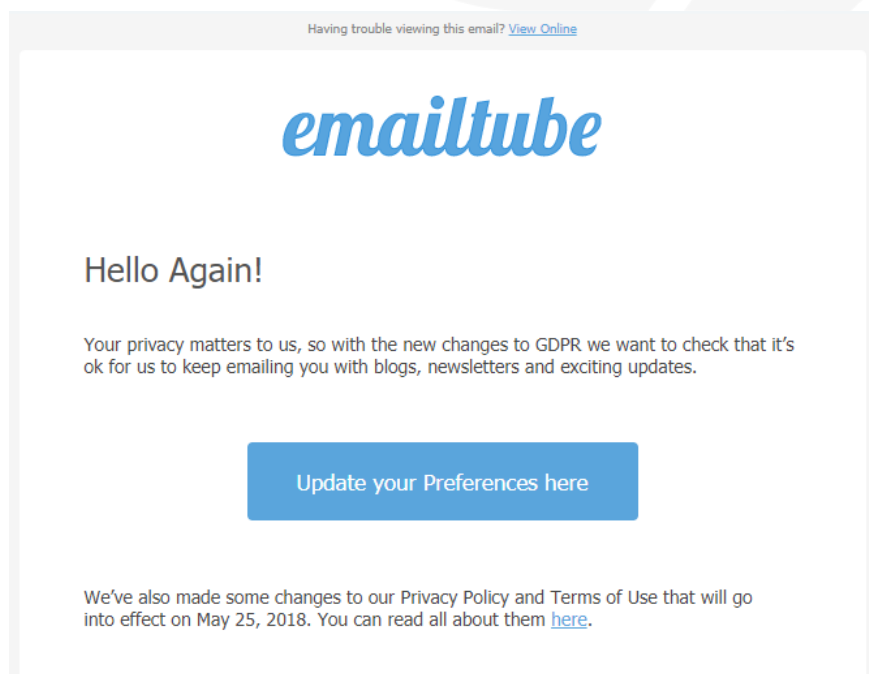
Having a clean list of contacts who are opted in to hear from you is best practice. It maximises your open rates and engagement with your recipients, boosts sales and builds a healthy sending reputation.

### **Running a re-consent campaign**

Having your database re-consent to receiving an email from you is a great way to maintain a healthy and engaged audience.

What this involves is creating an email to send to all of your contacts, asking if they still want to hear from you.

To make things easy for you, in the announcements folder you'll find template ready for you to use to run your own re-consent campaign. All you'll need to do is update the logo, add your colours and update any text. The button is also already linked, however, if you're setting up your own template, we have instructions below to help you link to the right form.




In this email, there needs to be a link or a button that links to a web form. To set this link up, insert a button component, click it so it is selected, then look over on the right-hand side for

the link options.


BUTTON ▾


Link: [Select a link](#)




Click here to consent

Horizontal Position:







Width: 

200

Height: 

40

Click the chain link icon and select 'web forms' on the left

# Insert Link

Web Link

Web Forms

Then choose the type of web form you want to link to.

Link To:

List:

Form Style:

Name:

Web Form

Web Form

Preferences Form

Update Profile Form

Unsubscribe Form

Send to Friend Form

Confirm Subscription Page

Tracking enabled. [Learn more](#)

☐ Open in a new window

Insert Link

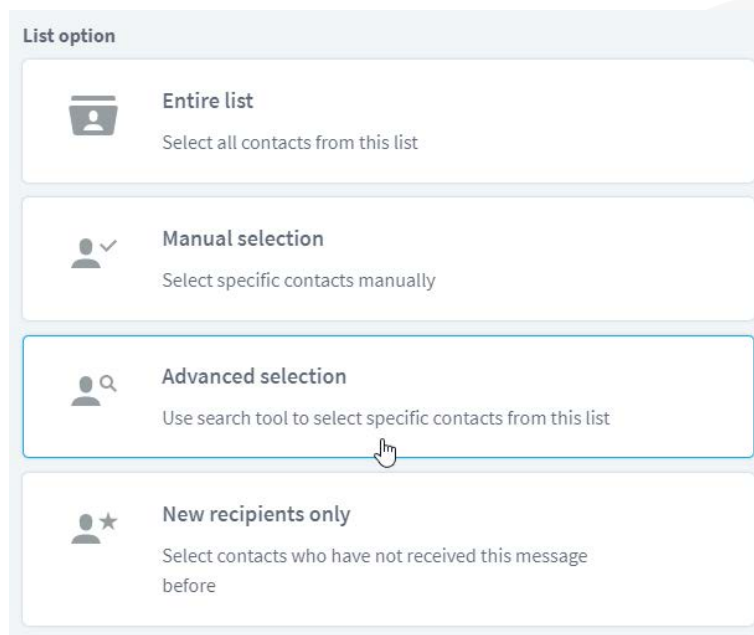
[Remove Link](#)

Click the green 'insert link' button and your link is now connected to your web form!

### [Learn how to make a dedicated consent form.](#)

After your re-consent campaign has been sent, the recipients can click the button in the message and choose their preference of content to receive. You're then able to target specific demographics of recipients by their preferences, during the sending process.

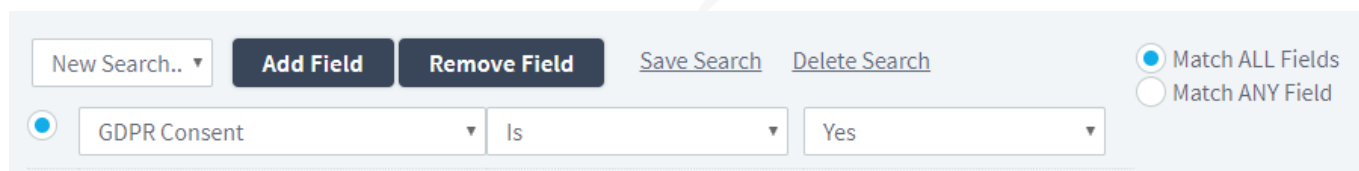
When you go to send a message, opt for the 'advanced selection'.



**List option**

- Entire list**  
Select all contacts from this list
- Manual selection**  
Select specific contacts manually
- Advanced selection**  
Use search tool to select specific contacts from this list
- New recipients only**  
Select contacts who have not received this message before

You have options to filter by whether or not consent has been given:



New Search.. ▾ **Add Field** **Remove Field** [Save Search](#) [Delete Search](#)

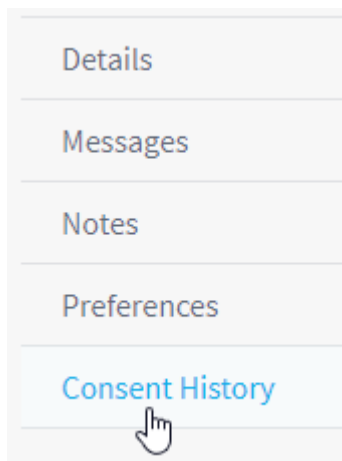
☒ ☐ Match ALL Fields  
☐ Match ANY Field

☒ GDPR Consent ▾ Is ▾ Yes ▾


### Consent History

You can view all the information regarding a individual contacts consent history. To access this, click 'contacts' on the left side, choose a list and then double click on a contact in that list.

On the right hand side in the pop up dialogue there are options to both view that contacts list preferences and their consent history.



In the consent history section, you're able to view all information regarding that contacts consent by clicking the 'view' icon.

DATE	CONSENTED	EMAIL	LOCATION	
<input type="radio"/> Fri, 4 May 2018, 9:36 am	Yes	[REDACTED]	Not recorded	 View

## Some other ways to remain compliant

### Bulk Unsubscribe

The unsubscribe features in Cumulo9 already go some way to complying with GDPR. For example, if someone unsubscribes, they will be automatically excluded from future email campaigns, giving you the peace of mind that you won't accidentally disturb anyone who has opted out. We're going to take it one step further and now allow you to upload a bulk list of contacts, and unsubscribe them from either one, or every single list in your account. This is particularly useful if you manage your lists as separate preferences. But if this isn't enough, then you have blocked contacts. [Read more here.](#)

### Blocked Contacts

Blocked Contacts will allow you to block email addresses, and entire domains, from receiving your emails. This can be used in a response to someone complaining and wishing to no longer receive any mail from you. Before adding them to this list, you must make it clear that they will no longer receive mail, even if they subscribe to the list again. That is the key difference between blocking a contact, and simply unsubscribing them - even if they're technically subscribed to your list, they will still not be sent any mail. [Read more here.](#)

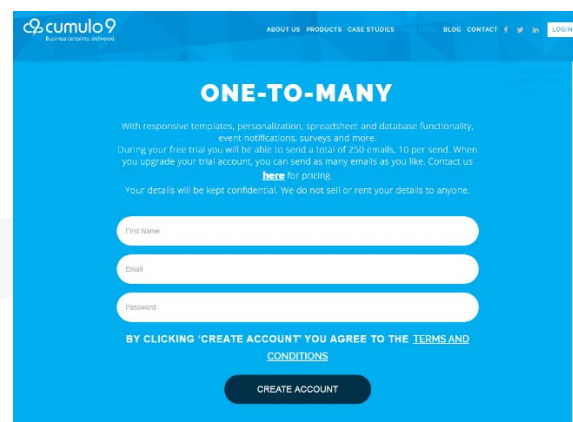
## WEBFORMS

One of the most useful parts of the system is the ability to quickly and easily create web forms that will self-populate and track event registrations/ changes in recipient details or any other



responses you would like to gather. By simply pasting the generated code for the form to your website, you can load any type of form (see below) onto your website and save thousands in web design and development costs!

**TIP #4: MONEY SAVER.**  
Don't spend money on website development, add any of our webform's to your website. Simply design the form and paste the code!



### New list e.g. Event Registrations

- The process couldn't be simpler – create a new list if you would like to have details populate this list. Choose from one of our templates e.g. Event Registration, Survey, Customer feedback etc, then apply your company colours and design and add, alter and remove fields.
- Once you have the form looking the way you want it – simply go to your email message and click on the hyperlink button where you would like to insert it e.g. within a paragraph, button etc.
- Insert web form, choose the web form and it is now sitting within your email. Each and every response will now populate the relevant field within your list. Go to the lists tab to check responses. View in spread sheet view or download a list in excel to pass onto your staff members.

### Existing list e.g. Update Subscription Preferences

- If you would like to track subscription details or use a web form for an existing list: You can add a new web form to that list, double click on the list name to access.
- New feature: You can add and remove any list fields within our system, spread sheet view. If you want to add an extra preference to your list and form e.g. would you also like to receive our specials newsletter, simply add a specials column to the list and this tick box will be available to your web form.

### Using the preferences form type

To give your recipients more control over the email they receive, you can utilise the 'Preferences' form type in your web forms. This form type works in conjunction with the 'List Preferences' feature. Using the 'List Preferences' feature, you're able to set categories of email content that are available to opt in or out of. The options are reflected in the preferences web form. You can read the full article [here](#).



<https://onetomany.cumulo9.com/help/article?id=201048680>

### Webform Auto-fill

Make life even easier for those filling in your web forms – click the auto-fill option when you set up the form and all of the existing field details from the list will auto-fill. This saves a lot of hassle for the respondent and increases the chances that they will update their details or respond favorably to the form. See the tutorial below:



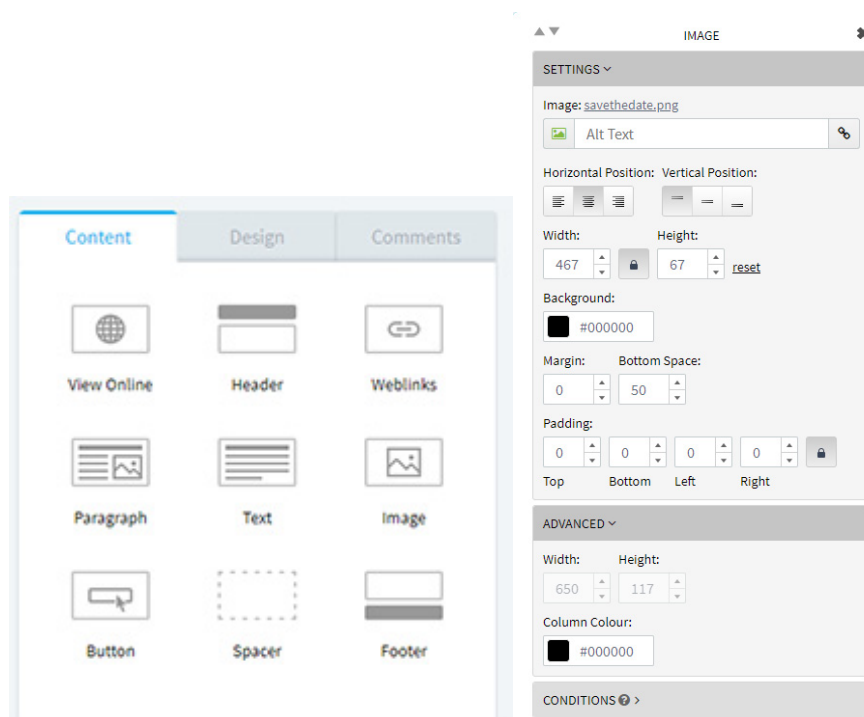
<https://onetomany.cumulo9.com/help/article?id=204000780>

## CREATING EMAIL MESSAGES – NEW INTERFACE

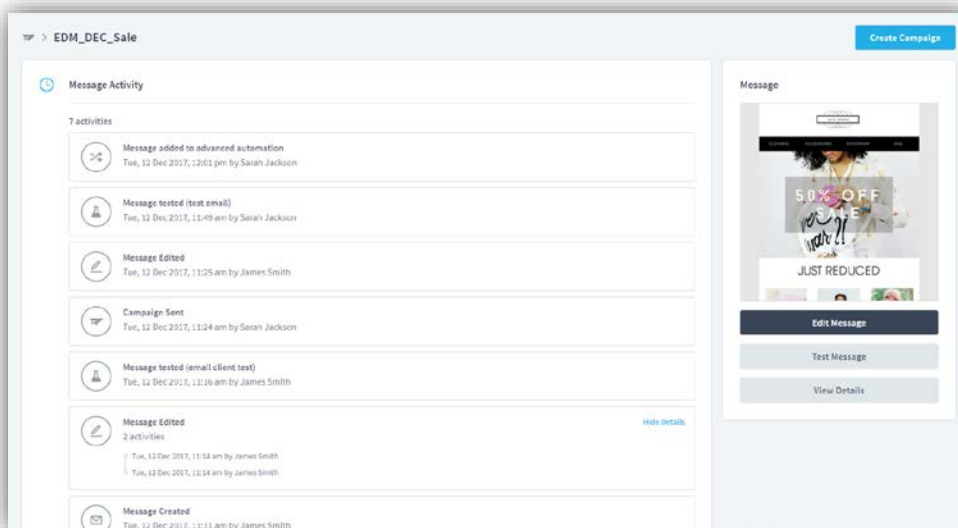
This is the fun part! You can create an email using a template and alter the components or use the drag and drop designer and do it from scratch.

- Go the Messages tab
- New message
- Decide whether you would like to use a template or blank document
- Use the drag and drop designer to insert placeholders.
- The Component Settings tab will give you the available settings for whichever component you are clicked on at the time:

- Adjust the size of images and paragraphs
- Determine the overall size of your email
- Choose background, paragraph, font and border colours
- Import images
- Insert personalised fields
- Choose read more links
- View corresponding video tutorials



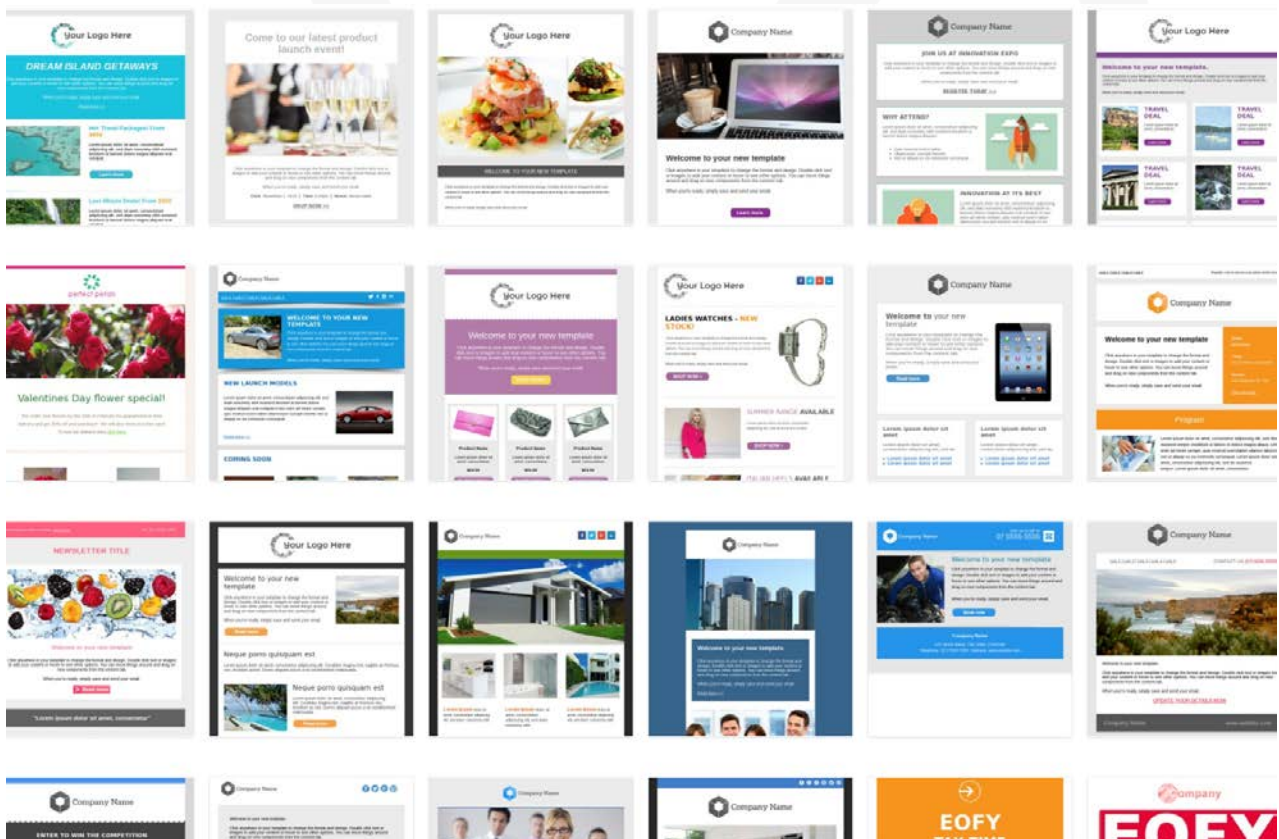
Once you save the new campaign a new interface will be displayed. This is our newly developed message overview screen, a summary of the history relating to your message will be displayed here along with the user that performed the action.



Check the video: <https://everythingemail.wistia.com/medias/eflk5kkzt5>

## Awesome new email templates!

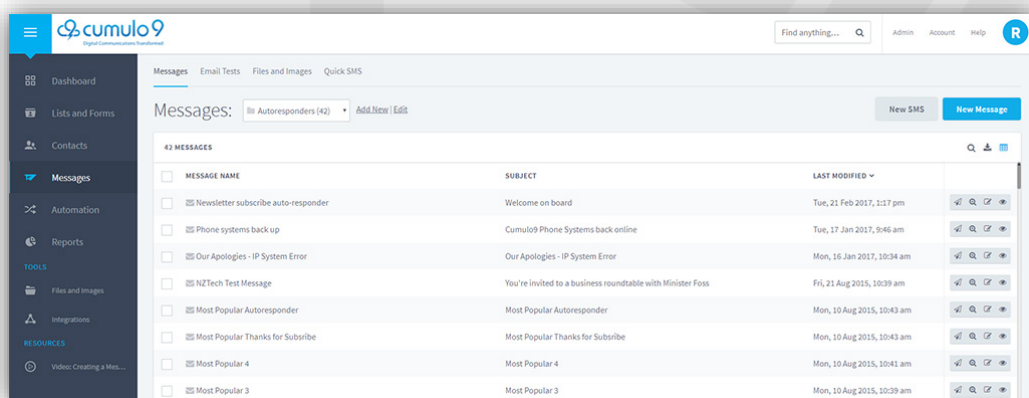
The system now includes 70+ professionally designed, mobile friendly templates! Login here to check them out.



## Things to consider:

Designing and setting up your email is the most important process you will go through. Be sure to WATCH the video tutorial on your dashboard “Watch this First” before you begin. Other things to consider as you go along:

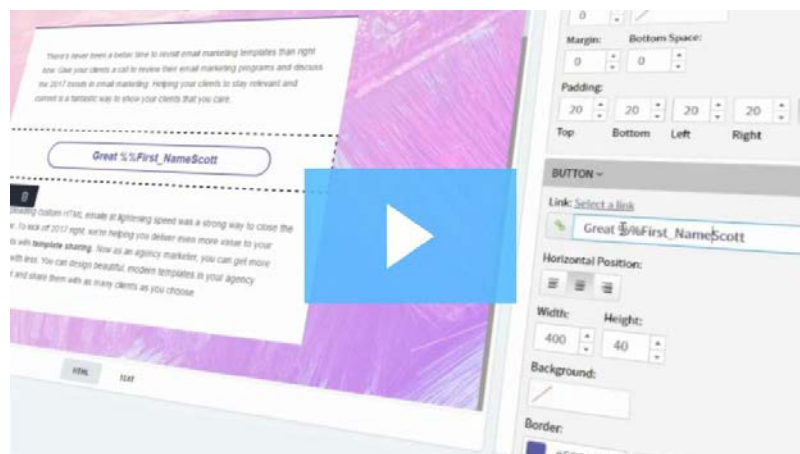
- We recommend the overall size of your email is no wider than 650pxls. This will allow for optimal viewing in preview panes and on computer and mobile devices and means reliable printing on most platforms. Go to the Design tab, type in 650pxls.
- Try to use placeholders before final content. It helps to drag and drop empty paragraphs and image placeholders to get a feel for how you would like your email set up.
- Be sure to re-size your images to the size you would like them to be WITHIN the email. If you choose to downsize very large files, the file sizes will still be large and loading will take a long time for the end recipient.
- Click on each component and work your way down the settings toolbar on the right hand-side to ensure that you have colours, margins, bottom spaces etc set up the way you want them.
- Use the outer and inner margin tool box settings so that your writing doesn't end up hard against the side of the page.
- If you are using a background colour – ensure that you have your paragraph and column colours set to white, or coloured gaps may show through when you send your email.
- THE KEY IS TO WATCH THE TUTORIALS AS YOU PROGRESS. The system capabilities are broad and a pro-active approach will see you maximise the tools and impact.
- TIPS: Aim to upload your images at 72dpi (saved for web/ gif, jpg or png).
- NEED TO RE-SIZE/ MANIPULATE YOUR IMAGES BEFORE INSERTING? Go to our in-system image editor! Simply hover over the image, and press “edit image”.
- NEED TO RE-SIZE ONLY – We have an image editor!
- Click on the image, edit image, re-size ...



First view the below tutorial to learn how to create and send your first email:  
<https://onetomany.cumulo9.com/help/article?id=201581964>



Check out the new email editor here!

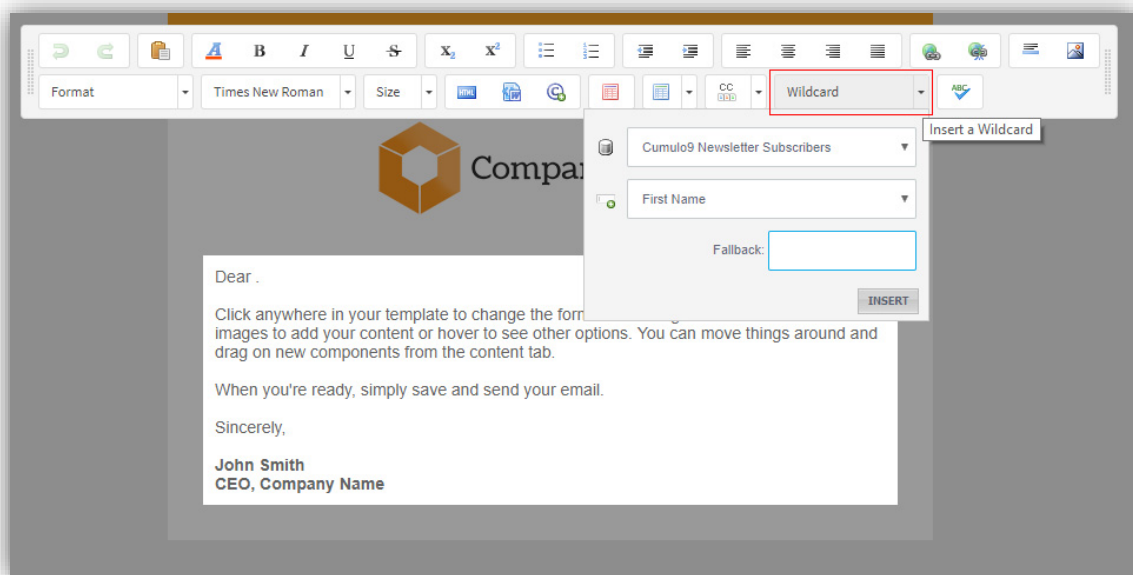


### Email Editor Update - Everything Email

#### Personalising your emails

The One-to-Many system has been designed to make personalisation easier than ever. Within our system the insertion of a “merge field” is referred to as a “wild card”.

You can insert as many personalised merge fields as you like, provided these fields exist on your send list. This tool is not only a great way to personalise an email with somebody's name or details, but also a clever way to update staff/client details. E.g. sending an email with contact fields, name, ph no etc already merged into the document so that the recipient can see their details and change them if necessary.



<https://onetomany.cumulo9.com/help/article?id=201129794>

### New file and images manager

We have a slick file and images manager, so you can do much more in less time.

- Select multiple images (great for bulk deleting / moving images)
- Drag files straight into the image manager
- Easily rename files
- A selection of free stock images and buttons

You can read the full article [here](#).

### In-built Image Editor

Don't forget about the in-built image editor where you can edit your images directly in your Cumulo9 account, no need to jump between different programs.

### Easily edit your images with Cumulo9 One-to-Many

Do you hate jumping between different programs on your computer? Maybe it slows you down, disrupts your concentration or causes you to lose focus? There's nothing more annoying than being eyeballs deep into an email campaign and then having to stop, patiently wait for Photoshop to open, find the image to edit, edit it and then resave.

Well, we have some exciting news. You can now easily edit all of your images within Cumulo9 One-to-Many.

### What exactly does the new image editor do?

Imagine finding the perfect image, uploading it into One-to-Many, cropping out the photobomber in the background, adding some clever text and then resizing it to fit your email perfectly. All within seconds. Now you can easily resize, crop, rotate, flip and add text to your

images all within One-to-Many.

<https://onetomany.cumulo9.com/help/article?id=201131350>

**Conditional Content – dynamic components & paragraphs to suit the recipient!**  
More relevant content means better open and click through rates.

Conditional content is a clever, automated way to allow your messages/ forms etc to serve different images and material based on the recipient's information. This allows you to send the same email, but serve tailored content and avoid multiple instances of duplication of emails, content etc. The following tutorial provides an overview of conditional content, while the next tutorial gives step by step instructions...

**TIP #6:** Send the same email with different content or promotions for different recipients just by clicking on “Add Condition”. Do this as many times as you like!

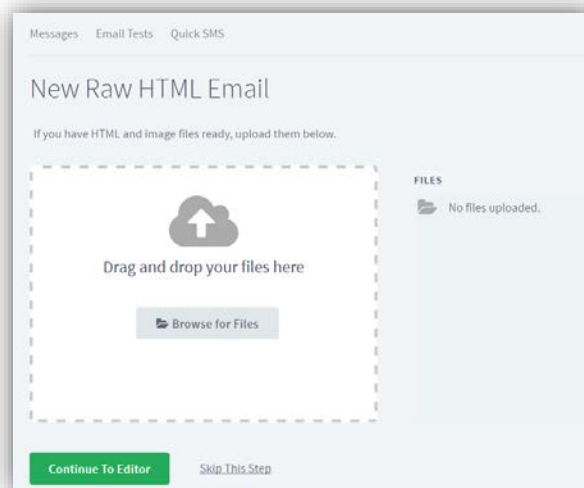
To add conditional content to the email once you have set up the fields, simply follow the instructions on this tutorial: <https://onetomany.cumulo9.com/help/article?id=215567528>

### Uploading html

You can also upload raw HTML using the system tool. For more information please check the images below and the link to the full article.

#### Additional Options

[Upload raw HTML code](#) [Create HTML + Text Email](#) [Create HTML Only Email](#) [Create Text Only Email](#) [Create SMS](#)



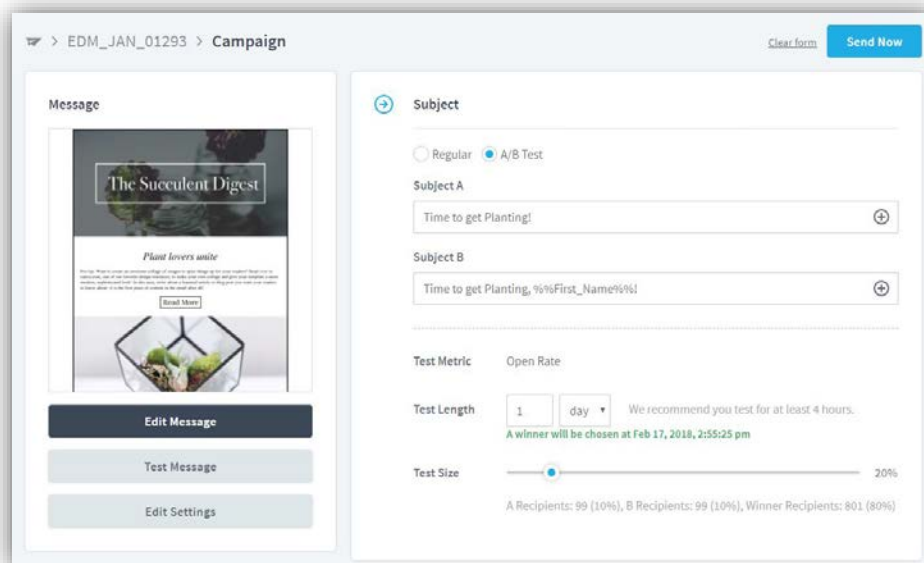
<https://onetomany.cumulo9.com/help/article?id=228390608>

## AB TESTING

A/B testing is where you send two variations of the same message to a small section of your customers. This is done to ascertain which variation will likely be engaged by your customers.

### How to set up A/B testing.

Once you have created a message and click the 'Send' button you will have the option to set up an A/B test. At the top of the send menu you will find a Subject section - it is in here that you can set up A/B testing. You can choose two different subject lines to run your A/B test. For example, you could test to see if your customers respond better to personalisation in the subject line.



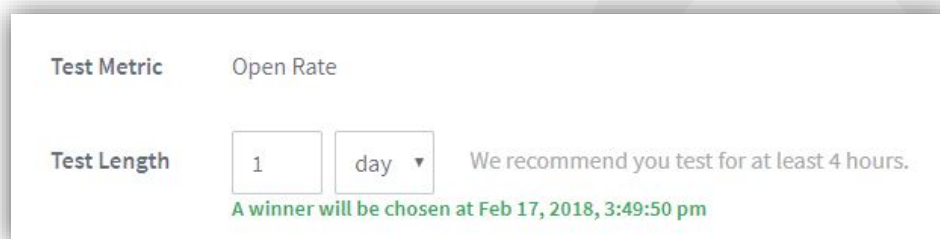
Note: To insert wildcards into your subject line, click the plus icon to the right of the subject line.

Alternatively, you could test different ways of saying the same thing. For example:

Subject A: February Sale on now!

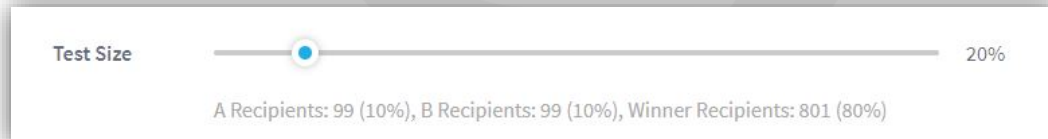
Subject B: Huge discounts all month!

The test metric for the AB testing is the open rate. You can choose how long you wish run your A/B test for before you send the winning subject line to the rest of your list. It is recommended that you run the test for a minimum of 4 hours. You can, however, run the test for as short as 1 hour.



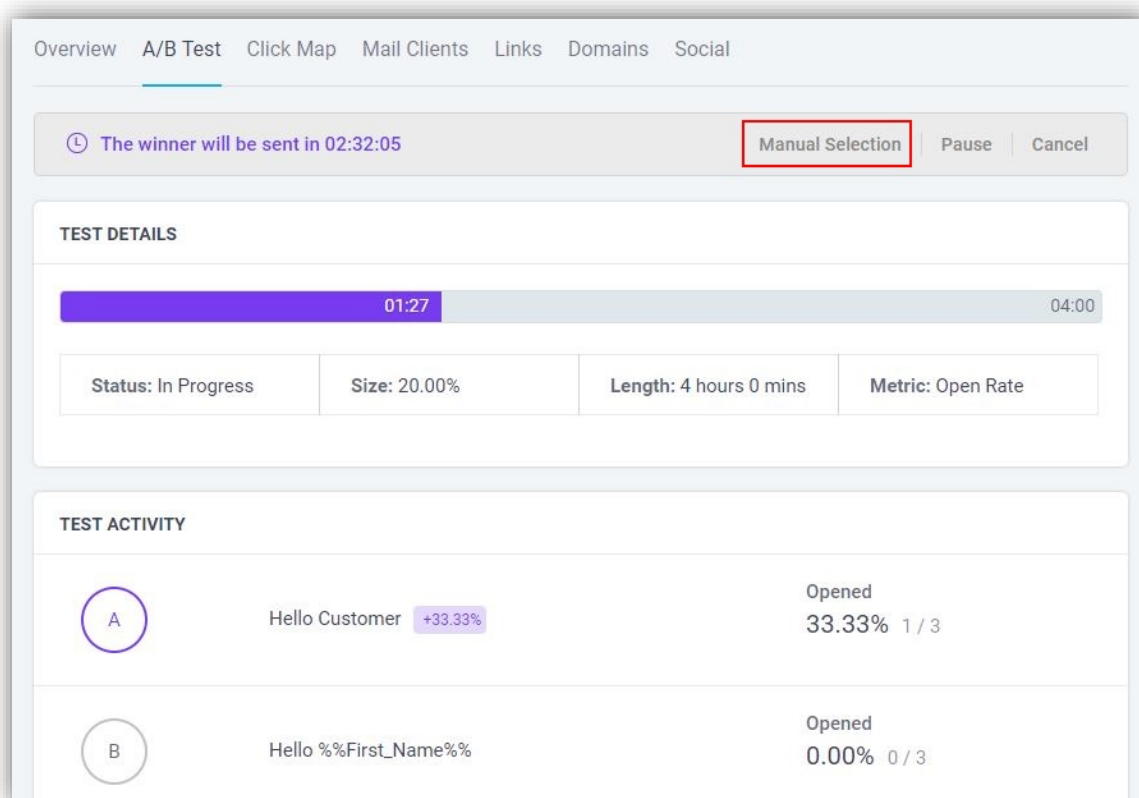
The screenshot shows a settings panel for an A/B test. The 'Test Metric' is set to 'Open Rate'. The 'Test Length' is set to '1' day. A recommendation states: 'We recommend you test for at least 4 hours.' Below this, a green message says: 'A winner will be chosen at Feb 17, 2018, 3:49:50 pm'.

You can adjust your Test Size. The default size for the A/B test is 20% of your list. The remaining 80% will receive the winning subject line.

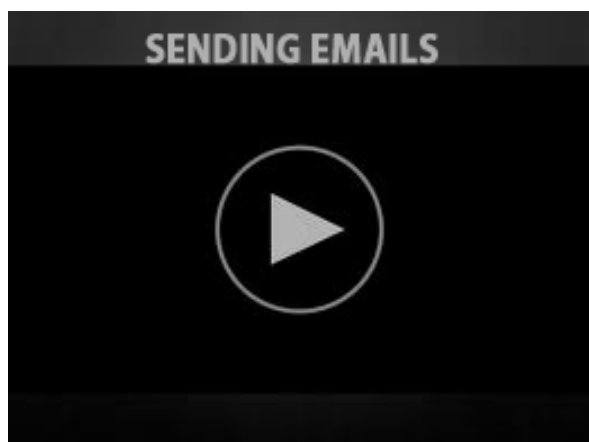


The screenshot shows a 'Test Size' slider set to 20%. Below the slider, the distribution is detailed: 'A Recipients: 99 (10%), B Recipients: 99 (10%), Winner Recipients: 801 (80%)'.

Once you have sent your message you can choose to go directly to the report where you can monitor the progress of your A/B testing. If at any point you wish to select the winner and send the rest of your messages, you can by selecting the 'Manual Selection' button and choosing the winning subject line.



## NEW PROCESS FOR SENDING EMAILS



**TIP #7:** Schedule your email sends using the send later option! Try for between Monday and Thursday round 7am...

TUTORIAL:

<https://everythingemail.wistia.com/medias/eflk5kkzt5>



Once you have your email looking the way you want it to and have inserted any webforms or merge fields you require, you are ready to send. This process is easy:

- Click on the messages tab
- Tick the square box next to the message you want to send
- Click send
- Choose Regular or A/B Test
- Select Contacts and choose the list you would like to send to from the dropdown menu
- Select the relevant option – send to “Entire List”, “Manual Selection”, “Advanced Selection” or “New recipients only”
- Click “Send now”
- Confirm the details before sending and then click “Confirm & Send”

The screenshot shows a web interface for creating a new email campaign. The title bar reads 'New process for sending emails > Campaign' with 'Clear form' and 'Send Now' buttons. On the left, a 'Message' preview shows an email with a header 'TECHNOLOGY TRENDS', a featured image of a camera underwater, and a headline 'Why Every Adventurer Should Own A Waterproof Camera'. Below the preview are buttons for 'Edit Message', 'Test Message', and 'View Details'. The main area has three sections: 'Subject' with radio buttons for 'Regular' (selected) and 'A/B Test', and a text field containing 'New process for sending emails'; 'Recipients' with a 'Select Contacts' button; and 'Schedule' with a toggle switch set to 'OFF'.

The screenshot shows a modal dialog box titled 'Confirm the details before sending'. It contains a table of campaign details:

Type	Regular
Subject	New process for sending emails
Recipients	2 contacts <ul style="list-style-type: none"><li>test database / Tests Rafael (entire list)</li></ul>

At the bottom of the dialog are two buttons: 'Confirm & Send' and 'Cancel'.

## Test Send

It is recommended that you always conduct a test send before sending the email to your final list. This allows you to check the layout of the email components, any personalised fields and ensure that everything looks the way you want it to. Conducting a test send is easy.

- Simply add your own details to whichever list you are sending to (or set up a separate test list with staff details in it).
- Then when you go to send – choose “Manual Selection” rather than the entire list. Search for your own name/email and tick this box.
- You will see that the email is now set to go to 1 recipient.
- Click send now.
- Confirm the details before sending and then click “Confirm & Send”
- The email will arrive in your inbox within a minute or two for you to check over

## IMPORTANT – Rendering on mobile devices and apple platforms

NB: It is VERY important that you check how your email looks on mobile devices such as Androids and iPhones, as well as your computer. Rendering on mobile devices is a common issue across all campaign email tools. Over 40% of all emails are now viewed on multiple platforms so this is something to be considered in the development of every email communication you send.

Emails can render differently based on the operating platform e.g. MS vs Apple platforms and you need to ensure that the appearance of the email is acceptable on both.

## Email tests

The One-to-Many system can test the rendering of these emails for you on all platforms. Each test costs \$10, simply contact your Cumulo9 team who can load test credits for you.

## Scheduling a send for later

If you would like to send your email at a later date/ time: You conduct the same first three steps as above, and then click on the Schedule tab (turn it on) and insert the date and time you would like the message to be sent on:

**Schedule** ON

Your current timezone is **Pacific/Auckland**

**Date** **Time**

11 Mar 2018 4 00 pm

☐ Include new contacts added between now and the time of send (entire list only)

## SEED LIST

At Cumulo9, we are very proud of our world class deliverability rates in all things digital. As you are probably aware however, email providers and clients are constantly changing their email environments, including their security settings, how they render emails and which emails they accept for delivery. Subtle changes within email clients can happen frequently and without notice, so we believe it is important to monitor these changes through a “seed list” of test mailboxes at the ISPs you most regularly deliver email to.

### Emails may render differently based on the email client used to open them

We have seen an increase in enquiries from our clients in the last few months around issues with delivery of email to certain domains, or emails not rendering the way they used to in a specific email client or webmail interface. The root cause of these issues can be varied and most often related to the user's email or security settings, or the sender's SPF records, the template or subject lines used; and more.

### Creating a seed list

To more easily identify and remedy any irregularities or issues around delivery or rendering, we strongly recommend that each of our clients have a “seed list”. A seed list is a list of email addresses at various email providers (e.g. Xtra, Gmail, Hotmail) that you have access to, on behalf of your organisation. Best practice would then involve sending an email to each of these addresses as part of your testing process, before you send your email campaign.

This seed list will allow you to test the email across different email clients and devices in a real world situation. This will give you the ability to measure the email's delivery and appearance, and in turn make adjustments where necessary. As many large ISPs also adjust delivery of emails based on recipient engagement and interaction with delivered emails, it is a good idea to regularly review these messages and move them to appropriate folders or the inbox, if they are placed in any less desirable location, such as the promotions or clutter folders.



The most commonly used domains in New Zealand are:

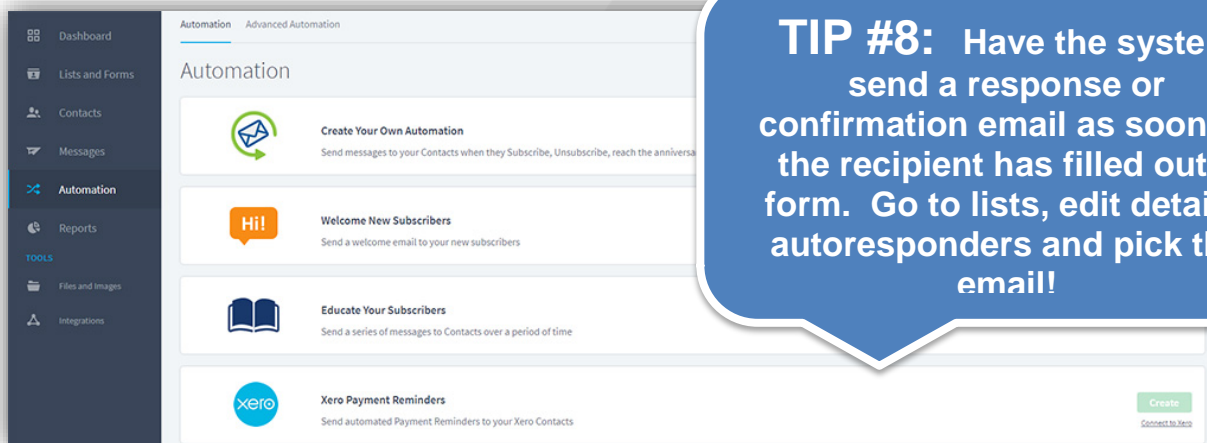
- 1) Gmail.com
- 2) Xtra.co.nz
- 3) Outlook.com
- 4) Hotmail.com

## 5) Yahoo.com

We encourage you to run a report or two on your most recent campaigns and determine which domains you are sending the most email to, then create your “seed list” of addresses at those domains so that you can incorporate these email addresses into your testing and send process.

## AUTO RESPONDERS

An Auto-responder is an automated reply from our system that is set up to occur when somebody undertakes a particular action, or a period of time elapses e.g. a Thank You for subscribing to the newsletter or a personalised Birthday or Anniversary email. Perhaps even a policy renewal reminder.... The following tutorial provides details of how this works:



<https://onetomany.cumulo9.com/help/article?id=200981454>

## REPORTS

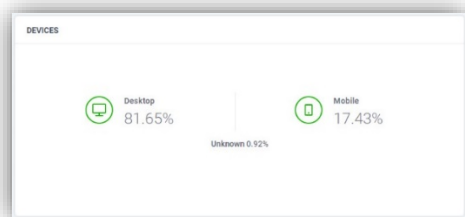
The Reports tab allows you to assess the impact of each and every campaign and better adjust and tailor your marketing messages to suit your audience.

- Measure opening rates and exactly who is opening your emails
- Measure email and clients and the breakdown of domains
- Measure each and every click through – including unique and totals
- See who has unsubscribed
- Measure bounces and reasons for bounces
- Use the ROI Return on Investment calculator to compare your cost vs return.
- Live feeds show exactly what recipients are doing with your emails in real time
- Measure social activity and the number of social click through's or “sharing” of your material.
- Get a great overview of what your audience is interested in and adjust each further message to be more suitable and more effective....



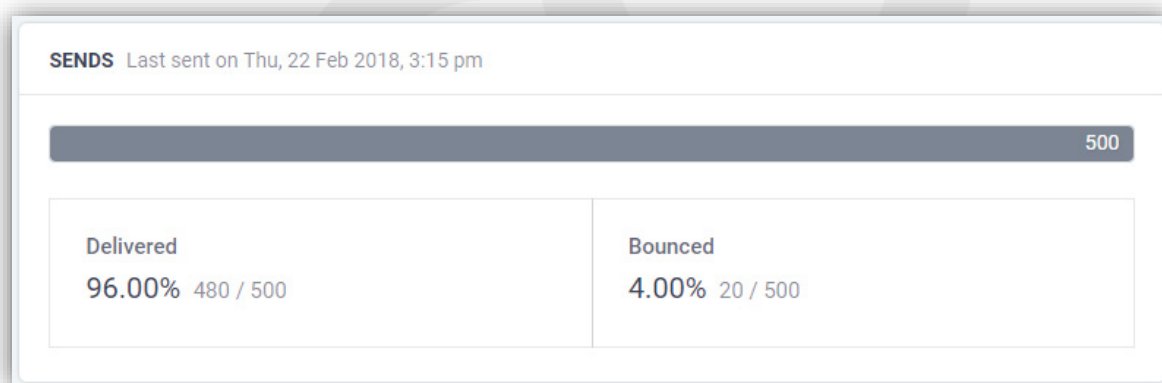
## Mobile vs Desktop

We have included some great reports like device statistics (how many people open your email with a desktop computer vs a mobile device) and mail client (outlook, gmail etc)



## Live results

To top off these extra insights you can now watch your campaign live as it unfolds, without needing to keep hitting the refresh button. You can track your campaign's performance day by day, hour by hour and even minute by minute.



## Show the boss your hard work

The new reporting features are going to make homing in on your campaign's result even easier. You can now neatly print out your reports to show the boss your great campaigns. Or simply press the "share button" at the top of the reports page and enter the email address you want to send it to!

## Downloading emails or lists from our system to archive or share with others

The process of downloading and entire folder of emails, lists or images couldn't be easier ...

- Click on the account tab when logged in
- Click the "download data" left menu item
- Select "Files and Images", "Lists and Contacts" or "Email Messages"
- Find and select the folder you want to download and click download. You will be taken to the download tab. The system will start generating an archive with all the data. You can be notified by email optionally.
- When your download is ready, you can select it from the list of downloads and download it via the download button



## ACCESS LEVELS

Cumulo9 has introduced a new feature to manage users and their access to different parts of the system. We recommend you read the full article of what the new feature is and how to set up the access levels.

To read about the new feature, click [here](#).

To read about how to set up the access levels, click [here](#).

## API

### Application Programming Interface (API)

The Application Programming Interface (API) is a powerful tool that enables marketers to automate many functions of their e-messaging. It does this by allowing third party systems to talk to and synchronise with our system, thus creating a highly streamlined and efficient method for handling data. Essentially, the API allows your computer to interact the system using a programming language - also known as 'code'.

For more information about the API, click [here](#).

### By using the API you can:

Create efficiencies by integrating disparate systems; save time by automating repetitive and laborious tasks and; reduce the potential for human error.

### What you can achieve:

**Synchronise:** Remove the requirement to manually export and import data between systems by synchronising your customer databases with the system.

**Integrate:** Automatically trigger targeted emails based on a customer's interactions with your shopping cart, by integrating with your e-commerce systems.

**Create:** Automatically create emails using content published to your website, by having the system talk to your CMS.

**Intelligence:** Create intelligent web forms that lookup a database to determine how best to handle the form submission. For example, update a record if it already exists, and create a new record if it doesn't.

**Tailor:** Create and tailor features and functionality to meet your specific e-messaging needs.

**What you need to know:** The API is a tool for programmers. The API does not provide direct access to the data that we hold. The Protocols we support are XML Remote Procedure Calls (XML-RPC) and JavaScript Object Notation (JSON).

**TIP #10:** Use our API so that unsubscribes and updated profiles are updated into your CRM systems!

### What you can do next

Do you have access to a programmer?

**Yes:** Great, simply let them know what you'd like to achieve by having our system talk with your systems. They'll be able to request our API Documentation and examples by contacting us.

**No:** Not to worry. Simply let us know what you'd like to achieve, and we'll refer you to someone that can help.

## THANKS FOR READING!

The team at Cumulo9 are excited for you to start using the system and are always on hand to help if you have any questions, or would like any custom work undertaken. In addition, we provide one training session for your staff free of charge! If you have any support queries, flick us an email at: [support@cumulo9.com](mailto:support@cumulo9.com) and we'll be in touch.

## OTHER PRODUCTS FROM OUR DIGITAL SUITE...

### Mailprimer One-to-One

One-to-One brand wrapped employee email – special offer for multiple seats....



## **CORE Features**

- Branded email
- Banner Mail
- Content Delivery Platform
- Real time email tracking – signature compliance

## **Mailpost**

The cost effective answer to digital transactional document delivery. World class deliverability of statements, invoices, payslips, contracts and updates. All personalised to the recipient and seamlessly branded.

With DKIM for enhanced security and POLI payment technology. Get your communications delivered, tracked and paid more efficiently.

