Getting Started

About

About

Welcome to Connect, the messaging platform built by marketers for marketers, to make your life easier.

With Connect you can:

â€¢Gather content, contacts, and reporting analytics all in one place

â€¢Create and deploy digital messages in record time

â€¢Automatically access updated lists every day

â€¢See data such as opens, even while a message is deploying

â€¢Keep your audience interested and engaged with relevant messages

This guide will walk you through how to use Connect and give you the tools to succeed in your digital messaging efforts. It will take you through each step, including community set-up, uploading your content and contacts, deployment, and reporting and analytics.

If you need help with Connect or anything in this guide, contact us at:

Website: http://support.inboxmarketer.com

Phone (Toll Free): 1-888-544-5397

Email: support@inboxmarketer.com

You'll also find additional tutorials and how-to's through the Connect Support site Knowledge Center at support.inboxmarketer.com.

About

Getting Started

The first step to using CONNECT is setting up your digital messaging community. CONNECT Support will set up your community when you sign up. They will also contact you to discuss who should have access to your community.

If you need multiple communities (for multiple brands or departments, for instance), just ask Connect Support to set them up.

To access CONNECT, go to: app.teksideconnect.com and sign in with the username and password provided when your community was set up. If you have lost your log in credentials, please contact CONNECT Support.

System Requirements

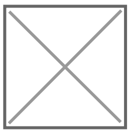
As CONNECT is a continually evolving software solution there are a few minimum system requirements required to ensure optimal user experience.

System Requirements:

- Internet connected computer. It is best to use a high-speed connection and a windows or mac based computer. While linux based computers may work, we do not actively support this platform.
- Modern web browser. It is recommended to use a minimum of Chrome v.54, Firefox v.48, Internet Explorer v10, Safari v.10
- Minimum screen resolution of 1280x720. CONNECT works better at larger resolutions with a minimum screen width of 1280 pixels.

About

Product update - 3.20.2018 - Data Extensions



Data Extensions allow you to connect values from your contacts with additional data, such as assigned agent information and preferred store information.

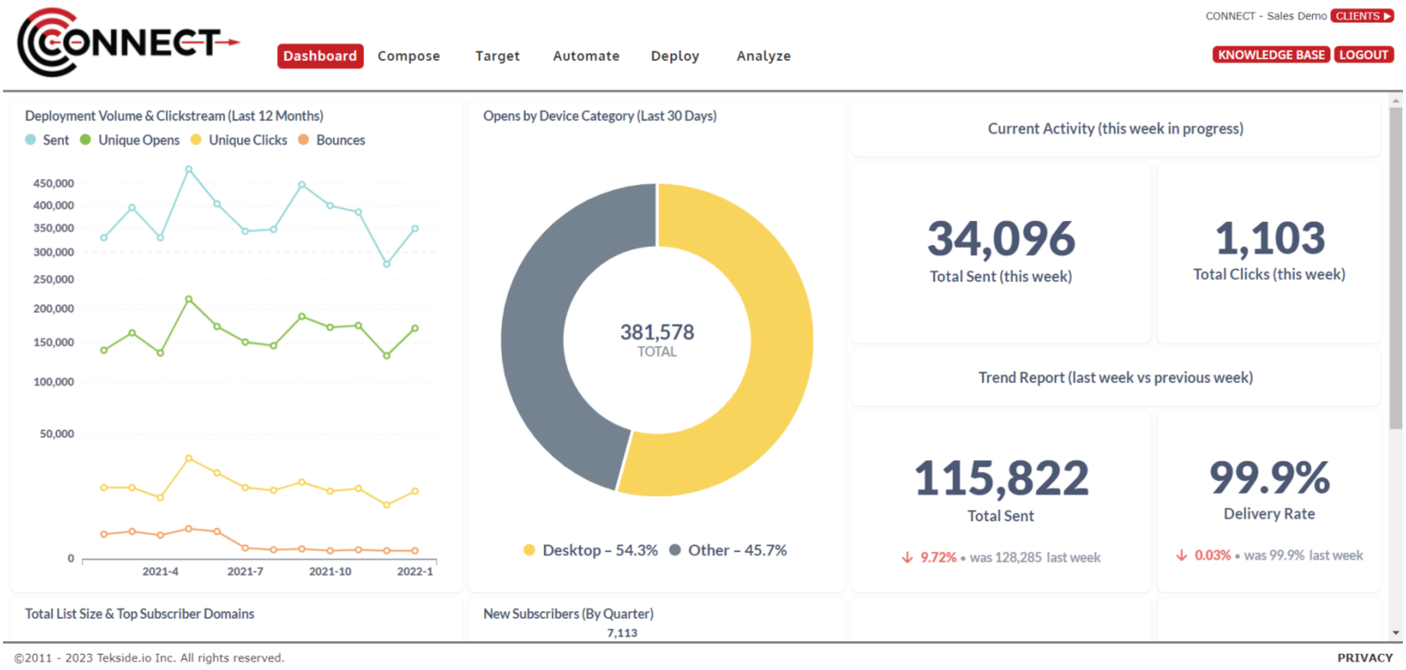
These extensions are a great way to not only manage your separate lists of information, but insert that information into your creative for more personalized content - the type that converts.

For example, let's say you have a contact with Vaughan Mills as their favourite store, ID #503. An extension gets created called Store Information, which has records that might look like the following:

Store_id	Store_name	Store_address	Store_phone	Store_email
503	Vaughan Mills	123 Street Rd.	123-123-1234	vmills@domain.com
208	Richmond at the Hills	536 Road St.	321-321-4321	rhills@domain.com

Using these records, you can display any of the information related to the Vaughan Mills store in your message.

Refreshed Interface



Along with Data Extensions, a refreshed user interface is coming to CONNECT. The changes include a new color theme, rounded header buttons and tabs.

Webinar: Overview of the new Drag and Drop editor

http://www.youtube.com/embed/yCxKd_mknT0?wmode=opaque

CONNECT Extended Service API

CONNECT Extended Service is a REST based interface for interacting with your CONNECT communities.

This documentation covers all details required to connect and interact with the various resources in a community.

https://docs.api.inboxmarketer.com

Tips and Tricks

HTML Coding Tips for Email

Coding HTML for email might sound easy, but there are a lot of industry best practices that you might want to know before you begin.

General

- Do not use <div> tags
- Do not use <p> tags
- Do not use padding anywhere
- All content must be tabled
- Do not use javascripting
- Do not rely on any content in the <header>
- Do not use external style sheets, or styling in the header
- Use spacer images to define blank space, or where possible slice the white space into the images
- Do not use border attribute â€“ if you need a 1px border is must be created by nesting a centered table inside another table that is 2px wider, that has a background of the border you want. The top and bottom parts of the border must be created using images.
- Avoid rowspan, and use colspans sparingly.

Text

- All text must be wrapped in a <span> that defines the color, font-family, font-size and font-weight (if bold)
- Do not rely on font styling put into the header, table or td
- Text alignment must be defined in the td
- Text should be either arial or verdana
- Avoid use of lists (either <ul> or <ol>). Instead use bullets, either text or images. Ideally table the bullet and text in separate <td>s
- Text size should not be less than 11px

Images

- Define height and width of all images
- Image "display" should always be defined (block or inline)
- Images with text should ALWAYS have alt tags
- Do not rely on aligned images. Always place the content in a table and align left or right

- White space should be sliced into the images (rather than relying on spacer images)
- No image (including spacer images) should have a height or width of less than 5px
- Do not use image maps

Links

- All links but mailtos should be targeted to a blank or new page
- Link color and text-decoration (if not underlined) should be defined in the <a> tag, and again in a <span> tag inside the <a> that wraps the linked text

Prioritized Sending: Ensure contacts Do Not Get Bombarded by Emails

There are plenty of times where marketers wish to send out several different deployments around the same time as each other. The biggest issue that arrives with this tactic is that the deployment lists/segments being used in the deployments, often have overlap between each other. Therefore, those recipients receive multiple deployments within a very short period of time. This creates a negative experience with your contacts and they are more likely to unsubscribe. Below is a way for you to help ensure that your contacts aren't being bombarded by emails.

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1. Determine your Sending Priority

- Before deploying, you want to choose the message you want recipients to receive above all others. This might mean planning out your deployments as far ahead as two weeks.
- For example, if you are sending out three offers (25%, 15% and 10% off) and you want to ensure that a specific group of contacts receives the 25% off discount, you would place that message at the highest priority.
- This prioritized list determines the order in which you will send out your deployments.

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2. Setting up your Segments or Lists

- This part is easy. All you need to do is ensure that you have a list/segment for each deployment.
- This means, if you are sending to an entire subscription for one of the deployments, you want to have a segment that has the criteria "Subscription equals X".
- You will use these lists/segments to not only deploy, but ensure that contacts only receive one message.

---

3. Setting up your Deployments

- This step is where you put your prioritized list of deployments to use. You will begin at the top of your list. The first deployment you will set-up like any other. Choose your message, your list/segment and deploy. The important step lies in the subsequent deployments.

- For the next deployment, you will select your message and select the list/segment for that deployment. The difference in this deployment is that, you will select the list/segment you chose for the first deployment, as a "Suppression" for this deployment. This means that anyone sent to in the first deployment, will be removed from this deployment.

- Once you have sent the second deployment, if you have another deployment, you will suppress the first AND second deployment's list/segment from the third deployment. Continue this process for all subsequent deployments.

- **EXAMPLE:** Emma first set's up a deployment sending out a message containing a 25% off discount to her newsletter subscribers (**10,000** contacts) for being loyal to her email program. Then she decides she wants to send out a 15% off discount to her Promotional email subscribers (**2500** contacts). She sets up the deployment by choosing her message and then select her "Promotional Subscribers" segment. Then as part of the set-up, she chooses the "Newsletter Subscribers" segment as a "Suppression". This removes 1000 contacts whom are both in her Newsletter and Promotional subscriptions. Therefore, she has a final deployment list of **1500** potential recipients. Finally, she wants to send a 10% off discount to her eFlyer subscribers (**1000**), so she sets up her deployment by choosing her message and selects her "eFlyer subscribers" segment. Then she selects the "Newsletter Subscribers" and "Promotional Subscribers" segments as suppressions. This removes 250 contacts whom are either in both the eFlyer and Newsletter subscriptions or in both the eFlyer and Promotional subscriptions. This gives her a final deployment list of **750** potential recipients.

Using Symbols in Subject Lines

Recently, you might have seen some interesting symbols appearing in your inbox. Unicode Symbols have started to make an appearance in subject lines and Digital marketers are using them to their benefit to get noticed in a sea of text based subject lines. We tested the symbols below in different email clients on both PC and Mobile.

If you would like to use any of the symbols below, you can copy and paste them into your subject line inside CONNECT.

If you are looking for other symbols, click here for a great search engine that will find symbols based on words.

Symbol	Description	Unicode	Outlook (2003+)	Thunderbird	iMail 4	Webmail *	iPhone (iOS 5)	Android 2.2	Android 4.0	Blackberry (OS 7.1)
â™	Spade	U+2660	Works	Works	Works	Works	Works	Works	Works	Works
â™£	Clover	U+2663	Works	Works	Works	Works	Works	Works	Works	Works
â™¦	Diamond	U+2666	Works	Works	Works	Works	Works	Works	Works	Works
â™¥	Heart	U+2665	Works	Works	Works	Works	Works	Works	Works	Works
?	Male Symbol	U+2642	Works	Works	Works	Works	Works	Works	Works	Works
?	Female Symbol	U+2640	Works	Works	Works	Works	Works	Works	Works	Works
¤	Sun	U+263C	Works	Works	Works	Works	Works	Doesn''t Work	Works	Works
?	Black Smiley	U+263B	Works	Works	Works	Works	Works	Doesn''t Work	Doesn''t Work	Works
?	White Smiley	U+263A	Works	Works	Works	Works	Works	Doesn''t Work	Works	Works
â—Š	Lozenge	U+25CA	Works	Works	Works	Works	Works	Works	Works	Works
?	Left Arrow	U+25C4	Works	Works	Doesn't Work	Works	Works	Doesn't Work	Doesn't Work	Works

?	Down Arrow	U+25BC	Works	Works	Works	Works	Works	Works	Works	Works
?	Right Arrow	U+25BA	Works	Works	Works	Works	Works	Doesn''t Work	Works	Works
?	Up Arrow	U+25B2	Works	Works	Works	Works	Works	Works	Works	Works
?	Single Music Note	U+266A	Works	Works	Works	Works	Works	Doesn''t Work	Works	Works
?	Double Music Note	U+266B	Works	Works	Works	Works	Works	Works	Doesn''t Work	Works
?	Sharp	U+266F	Works	Works	Works	Works	Works	Doesn''t Work	Works	Works
?	Clear Bullet	U+25CB	Works	Works	Works	Works	Works	Works	Works	Works
?	Black Bullet	U+25CF	Works	Works	Works	Works	Works	Works	Works	Works
®	Registered Symbol	U+00AE	Works	Works	Works	Works	Works	Works	Works	Works
â„¢	Trademark Symbol	U+2122	Works	Works	Works	Works	Works	Works	Works	Works
©	Copyright Symbol	U+00A9	Works	Works	Works	Works	Works	Works	Works	Works

Tips and Tricks

Personalize your Emails the Right Way

Personalization is a great way to engage your subscribers.

Do it right and your subscribers will feel that you know and care about them. We can help you do it the right way.

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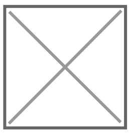
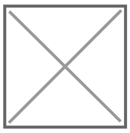
1. Create a New Segment with the definition "First Name is empty" and Save



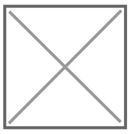
- This segment will target all contacts in your database that do not have a value entered in for the "First Name" field.
- This step will also help determine if it will be worth creating a secondary "Non-Personalized" version of your email.
- If the count for this segment is very low or 0 then you might not want to proceed with this tutorial.

Create a Personalized Email using Dynamic Variables

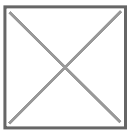


- In this example, we have used our own variable for "First Name".
- The variable you use must match the field name currently in your datamart.
- You can view your field names by navigating to the "Target" tab and then clicking on "DataMart fields",

Create a Duplicate of your Message by clicking "Save as..."



Edit the New Version to be "Non-Personalized" and Save



For the first deployment, select the "Non-Personalized" message and the segment that was built in the first step

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For the second deployment, select the "Personalized" message and as an additional step, add the segment as a suppression

- By adding the segment as a suppression, you will remove anyone who doesn't have a value for the "First Name" field, from the deployment.

Tips and Tricks

Copying Text Formating in the Template Editor

When using the template editor, you might come across situations where you want to use the same text formatting (color, size, font, etc.) in another part of your email.

This quick tutorial will show you the best way to copy text formatting from other parts of your email template.

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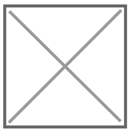
1. In the editor, highlight and copy a middle block of text at least 2 characters long (without spaces)



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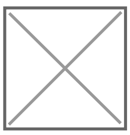
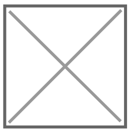
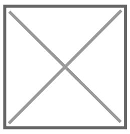
2. Paste that into the location you would like to use it



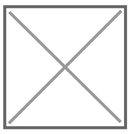
3. Place the cursor in the middle of the block you have created



4. Type in the text you wish to use



5. Delete the text you copied, from each end



- **Alert**: Make sure you do not press the delete key more then is necessary to delete the excess text.
- Over deleting could cause you to lose the formatting.

Tips and Tricks

Targeting your New Subscribers

When building your email program, you might find the need to target "New Subscribers" for use in your Welcome Program.

Using the CONNECT segmentation tool, you have the ability to segment on your subscriptions which allows you capture your new subscribers for use in a Welcome program.

The following tutorial will help you accomplish that.

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1. Create a New Segment

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2. Drag and release the Subscription you would like to Collect New Subscribers For

- **Note**: Ensure that the operator is set to "equals".

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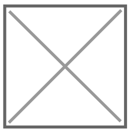
3. Name your Segment and click the "Save and Export to .CSV" button



- CONNECT should trigger a download in your browser.
- Save the file to your computer and descriptively name it (ie. Current Subscribers_01012013.csv).
- The file will contain all current subscribers for the subscription you selected earlier.

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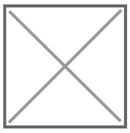
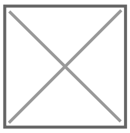
4. Upload the File you Downloaded



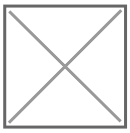
- If you are unsure how to upload a file, click here.

---

5. Navigate back to the Segment you Created Earlier

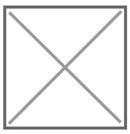


6. Drag and Release the "List Upload" Source over the Existing Criteria.

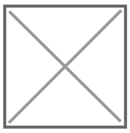


- This will create an AND statement

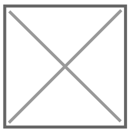
7. Select the list you recently uploaded from the drop down



8. Change the Operator from "equals" to "does not equal".



9. Click Save when finished. This should result in a segment count of 0.

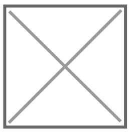


Dynamic editing of Envelope section

- CONNECT allows users to enter dynamic or static **from** and **reply-to addresses** in the envelope section.
- Go to Compose > Envelope.
- Here, you will see the following screen:

- Letâ€™s start off with **From address** and **From name**.
- Select next to the Form address text area.
- This will display a pop-up like the one shown below.

- Now, select the symbol next to the **From address** text area to insert a dynamic variable.
- ASIDE: means that options with must be filled in with appropriate values.
- The selection of the displays another pop up: **Insert a dynamic variable**. (shown below)



- Here select the appropriate field and personalize it by selecting a format of your choice.
- A default value is required so enter one. For example, if the user selected the format option â€œ**First letter capitalized**â€�. Then the default value has to have the first letter in Uppercase.
- Once all the options have been selected. Click insert to insert the dynamic variable.
- **NOTE:** Since, an email address is always followed by a domain name (for example - **@gmail.com**). In our case we must have a working domain name (setup by yourself or tech support team) entered at the end of our dynamic variable code.
- Also, for **From address** please take special care that there are no records in the field that does not follow the correct syntax of an email address mailbox name.
- Once the values have been inserted, finish the setup and follow the same steps for **reply-to address** or you could make a static one.
- In case of **From name**, follow the same steps as the one mentioned above.

Exporting CSV files from Microsoft Access 2007/2010

If you have an external database located in Microsoft Access 2007/2010, there is a special set of instructions you must follow in order to create a list (CSV File) that will upload properly into CONNECT.

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1. With your Database open in Access, right click on the Table name on the left and select "Export - - Text File".

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2. Click "Browse" to select which folder you would like to save to and change the ".txt" in the file name to ".csv". Click OK when finished.

3. Make sure "Delimited" is selected and click the "Advanced" button at the bottom left.

4. Select "Unicode (UTF-8)" from the "Code Page" drop down and click OK when finished. Click "Next" to move forward.

5. Make sure "Comma" is selected as the delimiter. Check "Include Field Names on First Row" and then click "Next" to move forward.

---

6. Click "Finish" to export your file.

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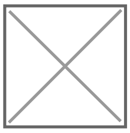
7. OPTIONAL: Check "Save export steps" to save the steps you followed in this tutorial so you can quickly repeat this type of export without the wizard.

8. OPTIONAL: To re-use your saved steps, navigate to the "External Data" tab and click "Saved Exports". Select the saved steps and click "Run".



Create a Meeting File for your Messages

When creating an Event notification to send out to your subscriber list, a create addition is to have a Meeting Invite file that users can use to automatically place the date in their digital calendars, whether it be on their smartphone or their computer. This quick tutorial shows you how to create one of these files.

One requirement for this is that you will have to have a way to host the file and create a URL to link to within the tool.

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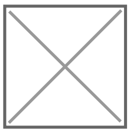
1. Navigate to www.pratie.tomodea.dev/lab/icalendar/default.asp and fill in the details of your event



- This tool is a 3rd party tool that we have found for you to use. CONNECT has no association with this tool.

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2. Right click on the "Add Event To Your Calendar" link and click "Save

Target As" (IE) or "Save Link As" (Firefox/Chrome)

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3. Once the file you saved has been hosted and you have a URL, Navigate to CONNECT and the Event message you are creating

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4. Highlight the Text/Image you wish to link and click the "Insert Link" button

5. Paste in the URL for the Calendar File and Change Target to "New Window"

Landing Pages and iFrames

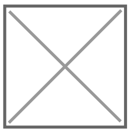
Landing Pages within CONNECT provides users with the opportunity to create hosted HTML pages that can be used in a variety of situations.

One use is iFrames within a website. This gives the user the ability to use the hosted content within CONNECT on their website.

One use that is very common is to use iFrames to load in a CONNECT Web Form onto a user's site so that they get to keep the look and feel of the website around the Web Form.

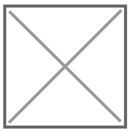
This tutorial goes over a few points in using iFrames with CONNECT Landing pages.

What are iFrames?



- iFrames are "containers" that you can place in a webpage that allow you to load a URL (web page or any other hosted item) and display them in the container.
- The example to the left shows inboxmarketer.com loaded in an iFrame within the CONNECT Support site. This container can also be given **other properties.** including width and height.
- If you are unfamiliar with HTML coding, please have your IT department or CONNECT support help you with setting up your iFrame.

Web Forms



- CONNECT gives each user the ability to create web forms within the tool to collect information from their customers and have it directly feed into their DataMart.
- However, web forms must be placed within a landing page, in order for them to appear in a live environment.
- This is where iFrames become very handy.
  - If you would like to load a CONNECT web form within your website, you can place and style the webform within a landing page within CONNECT and then load it in an iframe in your website (see " How to create a Web Form").
  - The example here is an unstyled webform placed in the CONNECT Support site.

Style Sheets

- If you are creating a web form or any other type of landing page within your website, you will most likely want it to match the website it's being placed within.
- In order for this to work, you must place an "embedded style sheet" in the <head> tag, inside the landing page you wish to load.
- Again, this requires a more advanced knowledge of HTML Coding and you might need to consult your IT department or CONNECT Support for help.

Styling your Web Forms or Unsubscribe Page

If you would like to be able to style your web forms or Unsubscribe page buttons and give it the look and feel of your branding and landing page design, you can use the CSS classes below in an embedded stylesheet within your CONNECT hosted landing page to alter the design.

The Web Form code

- **.UmpireWebForm -** The entire web form generated by CONNECT within the landing page is housed within a <form> tag which can be used to reference other tags in the form that might not have a class, such as the <table> tag.
- **.UmpireWebFormFieldLabel -** Use this class to alter the labels adjacent to each form field.
- **.UmpireWebFormRequiredLabel -** Use this class to alter the "Required" label adjacent to any form field that is required.
- **.UmpireWebFormField -** Use this class to alter the form fields themselves.
- **.UmpireSubmitButton -** Use this class to alter the Button used to submit the form entry. You can also use .UmpireSubmitButton:hover as a seperate entry to alter the button's look when a user is hovering over it.
- **.UmpireWebFormSubscriptionCheckBox -** Use this class to alter the checkbox located next to additional opt-in types.

-
    - **kBox -** Use this class to alter the checkbox located next to additional opt-in types.

    - **Note**: These classes remain the same regardless of the name you give the landing page or web form.

  Sample CSS

- Please copy and paste the code below into the <head> tag of your CONNECT landing page and see the difference a little CSS can make.

HTML

```
<style>
.UmpireWebForm table{
font-size:14px;
}
.UmpireWebFormFieldLabel {
margin-right:15px; font-size:14px;
}
.UmpireWebFormRequiredLabel {
display:inline-block;
font-size:9px;
color:red;
vertical-align: top;
}
.UmpireWebFormField {
width:192px;
border:1px solid #ddd;
background:#fff;
padding:3px;
}
.UmpireSubmitButton {
font-size: 14px;
color: #ffffff;
font-weight:bold;
background-color: #000000;
padding: 10px;
border: 0;
margin-right:25px;
margin-top:20px;
border-radius: 10px;
-webkit-border-radius: 10px;
-moz-border-radius: 10px;
}
.UmpireWebFormSubscriptionCheckBox {
margin-bottom:25px;
margin-top:20px;
margin-right:15px;
}
.UmpireSubmitButton:hover {
text-decoration:none;
background-color:#be100f;
```

```
</style>
```

The Unsubscribe Form Code

When building an unsubscribe landing page, you use a tag to place a button within the page that when clicked, will unsubscribe the user. In HTML code, form code is generated, very similar to how web forms are generated. To style the button that is created, you will want to select the following class in your CSS:

- `**.unsubscribe -** The entire web form generated by CONNECT within the landing page is housed within a <form> tag which can be used to reference other tags in the form that might not have a class, such as the <table> tag.`

HTML

```
<form action='{URL}' method='post'>
<input class='unsubscribe' type='submit' value='Unsubscribe'>
<input type='hidden' id='trackingCode' name='trackingCode' value='{CODE]'>
<input type='hidden' id='unsubscribe' name='unsubscribe' value='true'>
<input type='hidden' id='ConfirmationMsg' name='ConfirmationMsg' value='{CODE]'>
</form>
```

Sample CSS

- Please copy and paste the code below into the <head> tag of your CONNECT landing page and see the difference a little CSS can make.

HTML

```
<style>
.unsubscribe {
font-size: 14px;
color: #ffffff;
font-weight:bold;
background-color: #000000;
padding: 10px;
border: 0;
border-radius: 10px;
-webkit-border-radius: 10px;
-moz-border-radius: 10px;
}
```

```
.unsubscribe:hover {
background-color:#be100f;
text-decoration:none;
}
</style>
```

Tips and Tricks

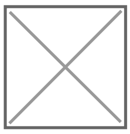
What are Content Rules and how to use them?

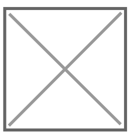
Content rules allow users to add dynamic content to email messages by mapping it relative to the recipient information from the Datamart.

What is the difference between Content Rule and Content block?

- The immediate difference is the way these two types of variables are displayed on the HTML document.
  - **##Variable##** (content rule variable)
  - **###Variable###** (content block variable)
- A Content Rule applies to the whole email and allows for 1 conditional rule to affect multiple variables in the message. A Content Block is a single condition and a single variable affecting a single block or object in the message.

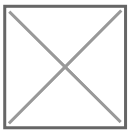
*I will explain the entire process by creation of a new email message with content rules applied

- Go to Compose > Email Message > Create new message > Standard > Details.
- In Details tab, click yes for Content Rules label. (This will turn on adding content rules properties to email).
- Add all other information needed for email message and click  .
- Since, this document primarily focuses on content rules, we will jump straight to the **HTML** tab.
- Here, the user could add their own HTML code with a small addition (**Very important**):
- Since, content rules map code snippets to dynamic variable, we will create a dynamic variable. For example: **##offer_header##**
- Look at the example below for usage:



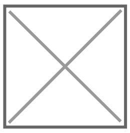
Here, three highlighted dynamic variables will be used to add specific code snippets according to recipient information stored under corresponding fields.

- Save the HTML code and generate a Text version.
- Click on **Content Rules** tab.
- At the bottom of page, following buttons are displayed:



Users can build rules manually or select a value quotes .csv file with content rules for corresponding dynamic variables

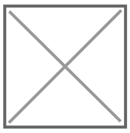
- We will go over building rules manually first.
- Select **Build rules manually** button.
- **Important:** the email message must have dynamic variables which could be used for content rules. Otherwise, a warning message will be displayed. User will not be allowed to access this property.



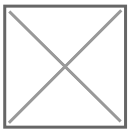
After selection of Build rules manually, the window is displayed (shown above).

1. **Edit criteria as text**: This provides users the freedom to write the rules from scratch for content rules. On the other hand **edit as builder** provides an interface for users to simply select the values and hides all the coding technicality. Example:
   Think of criteria as an IF/ELSE statement which results in application of underlying expression.
   - **Define criteria**: Clicking on this option will allow us to create a new criteria for defining content rules for data.
   - **Default rules**: When none of the criteria matches with the record in the Datamart then this final rule will be applied.

Edit criteria as Builder:

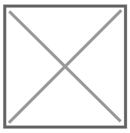


Edit criteria as text:



1. **Variable Name**: This provides a list of all the dynamic variables we created in our HTML document. The Content section provides us with a text area to add code snippet/ text/ images etc. based on the users preference which will be displayed in the final email message according to the criteria selected.
2. **Copy Criteria from Rule:** CONNECT makes it easier for using previously defined criteria as a template to create new ones.
3. **Cancel:** If the user is not satisfied with the criteria defined, by simply clicking this option it will discard that specific content rule.
4. **Done:** Clicking this option will create the content rule.

After content rules are defined, the User will be brought back to this screen:



CONNECT allows users to remove all the rules by simply clicking on the Clear rules button. Also, the rules could be exported as a value quoted .csv file for future use.

HTML

```
"Criteria","header1","body1","image1"
"(field[Division] equals "Food Services")","15% Off All Gloves","We have a wide selection of
gloves for the food services industry. FDA approved. wrist and elbow length.","<a
href="https://www.uline.ca/Grp_367/Vinyl-Poly-Gloves?keywords=Poly+Food+Service+Gloves"
target="_blank" title="Glove Sale"><img
src="https://portal.umpiredigital.com/Message/Image/Load/9" width="188" height="36"
alt="gloves" style="display:block" border="0"></a>"
"(field[Division] equals "Cleaning Services")","15% Off All Mops","Check out our new line of
```

```
microfiber mops! Wet mops, dry mops, dust mops. We have everything in stock","<a
href="https://www.uline.ca/Grp_123/Mops-Squeegees-Carts?keywords=mop"><img
src="https://portal.umpiredigital.com/Message/Image/Load/10" width="188" height="36"
alt="sale" style="display:block" border="0"></a>"
"_Default","15% Off Sale!","For the largest selection of cleaning supplies at unbeatable
pricing check our monthly flyer for the best deals.","<a
href="https://www.uline.ca/Promotion/Specials"><img
src="https://portal.umpiredigital.com/Message/Image/Load/11" width="188" height="36"
alt="sale" style="display:block" border="0"></a>"
```

Once the content rules are defined, we can test them in the preview section. A complete example from step 1 is shown below:

Add dynamic variables to HTML code map add content rules:

After defining the content rules:

In the preview tab.

When no input is provided in email:

When Division is equal to â€œFood Servicesâ€�:

When Division equals â€œCleaning Servicesâ€�:

When none of the criteria match we use the rules defined in default section:

Tips and Tricks

What are content blocks?

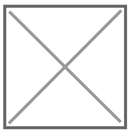
Content blocks allow users to insert dynamic content in their email by creating a dynamic variable that displays information relative to the information retrieved for a specific record type in Datamart. These variables are user created and defined.

What is the difference between a Content Rule and Content block?

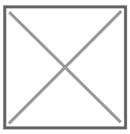
- The immediate difference is the way these two types of variables are displayed on the HTML document.
    - **##Variable##** (content rule variable)
    - **###Variable###** (content block variable)
- A Content Rule applies to the whole email and allows for 1 conditional rule to affect multiple variables in the message. A Content Block is a single condition and a single variable affecting a single block or object in the message.

How to use Content Blocks?

- Go to Compose > Email Message > Create new message > Standard > HTML.
- Since, this article primarily focuses on Content Blocks, we will deal with HTML, Preview and Test tab.
- In the HTML tab, select Insert **Dynamic Content button**.

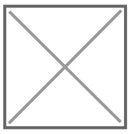


- A window will display like one shown below:



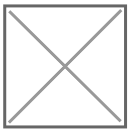
This helps users in customizing how the content will be displayed by the content block variable.

1. Name: Provide a name to dynamic variable. This will be inserted into the HTML section (Image shown below - highlighted by yellow border).

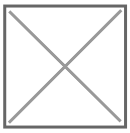


2. CONNECT allows users to program the entire logic by switching to **HTML** mode from **Design** mode. (Example shown below)

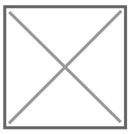
Design mode:



HTML mode:



3. Copy: New content blocks can be created from previously created ones simply by selecting the drop down list next to the Copy option.



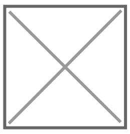
- **Important**: When copying previous variable logic, current logic will be discarded. Also, name the content block different than the parent block.

Insert: Click this button to insert the dynamic variable in the email message.

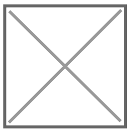
Cancel: Click this button to discard current dynamic variable creation.

Now, we have to add the logic for the insertion of content. This is done using if/else statements.

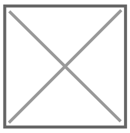
- If a record has the field Division equivalent to â€œFood Servicesâ€� then â€œGloves on Sale!â€� will be displayed in the email.



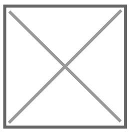
Result in preview tab



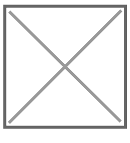
- Else if Division is equal to â€œCleaningâ€� then â€œNew Microfiber Mopsâ€� will be displayed.



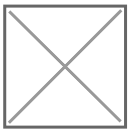
Result in preview tab:

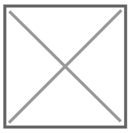


- Finally, an else statement which means if none of the above statement applies, then the following text is displayed: â€œ15% Off Select Itemsâ€�.



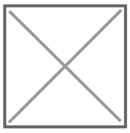
Result in preview tab:



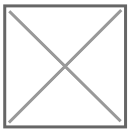
- Also, the else if, or else statement, could be removed by clicking 

Dynamic content block variables also support image, text and blocks of code.

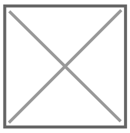
To insert an image:



To insert a block:



User could further edit the Block by selecting **Edit** button. The following window will be displayed:



- User has the option to test their block using Preview or by creating a test deployment.

Glossary

Field Data Types

When creating fields within your DataMart there are 4 different data types to make note of:

1. **Email Address -** This data type is for collecting email addresses for your contacts for use with segmentation and deploying email type communications. In most situations, this will also be your "Identifier" field.

2. **Text -** This is the most common field type. The majority of the data you collect will be text. Common uses for this type are First Name, City, or dynamic content you wish to have appear in your email messages.

3. **Date -** This data type is for collecting dates that you wish to use for segmentation purposes. Any date field information should be ordered according to standard North American format (month, day, year).

4. **Number -** This data type is for collecting numbers that you wish to use for segmentation purposes. Common uses for this type are Total Donations, Revenue or other monetary related numbers. UMPIRE stores these numbers up to 2 decimal places.

Deployment

Deployment indicates the act of combining a message with a list of recipients for the purpose of sending them content through UMPIRE.

This could mean that you are sending an email message to a list of 1000 recipients through UMPIRE or you have a Welcome program in operation and when a new subscriber enters your DataMart, it becomes a recipient and is sent the first message in your welcome program.

There are a few different ways of creating a deployment in UMPIRE.

1. The first is creating a Bulk deployment through the "Deploy" tab.
    - This allows you to select a subscription, segment, or list file as your list of recipients and select a message that you have created in the Compose tab.
2. The second option is to set up an AutoProgram in the "Automation" tab.
    - This allows you to define (using a segment) your recipients and if new subscribers will become recipients as well.
    - It also allows you to choose a path of messages that each recipient will receive.

Glossary

Fields

Behind every database is set of data points that you have decided to collect. These points provide not only a way to organise the data you collect, but also allow you an easy reference point to segment on.

Fields are data points that you have pro-actively decided to collect within your database.

Fields can be anything from email address to postal code to the last purchase you made. In order to utilise Fields properly in UMPIRE, this requires some pro-active thought.

It is recommended that you Map out each of the data points you will be collecting from your customers and then set up each field in your DataMart.

Once you have these fields set up, you are able to not only map incoming data to these fields so that your database stays organised, but you are also able to easily segment your data using these fields AND use the field names in your templates to pull in data.

Subscriptions

The driving force behind any email program is the Opt-in/Opt-out process that has been put into place. This will allow customers to start receiving your email campaigns or stop receiving them.

Subscriptions helps you manage this process.

Subscriptions are a collection of people who have decided at one point to receive or not receive, all or specific email communications from your company.

In a majority of cases, email programs only have one Subscription.

The customer either does or doesn't want to receive all email publications from you. However, some email marketing programs are little more sophisticated.

Many programs have a Monthly Newsletter, as well as Promotional email alerts. Then the option to opt-in or opt-out to one or both of the campaigns is presented.

This is where Subscriptions shine. They allow you to manage each opt-in/opt-out process in one Community.

You are able to see the total size of each subscription, segment on this subscription and deploy email marketing direct to it.

There are even users that have a preference page that Subscriptions can manage.

This preference page provides their customers to opt-in/opt-out of different types of alerts so they can customize their email experience with your company. UMPIRE Subscriptions provides each user the flexibility to manage the simplest of email programs to the most complicated.

Record Types

Record types give the user the flexibility to flag individuals in their DataMart as employees or account stakeholders so that they may be included in certain processes throughout the email campaign.

Listed below are the different types of records that can be flagged in the system.

---

1. Test Accounts

- Test Accounts are defined in UMPIRE as email addresses used solely for testing purposes.
- This might be Gmail or Hotmail accounts that would be used to see how a campaign is rendering in different email clients.
- They can also be individuals who want be included in all testing deployments such as the Campaign Manager.

---

2. Stakeholders

- Stakeholders are defined in UMPIRE as individuals who follow a campaign from start to finish and wish to be included in the process.
- You can add stakeholders to any testing that is being performed on a campaign and you can include them in the final deployment.
- For a company, Stakeholders might be department leaders or managers.
- For an agency, Stakeholders might be account managers or key client contacts.
- You may include Stakeholders at any time, so it is important to only choose to add them to a deployment/test when you are ready for them to see the campaign.

---

3. Seed List

- Seed lists are similar to stakeholders, however this separation is provided as Seed lists can only be used in final deployment and are added in with the regular customers.

- Seed lists tend to include executives and other individuals who wish to see final deployment as the customer sees it.
- **Note**: Records flagged as a Seed List will not be included in the final metrics

FAQs

Which From/Reply-To addresses can I use?

ANSWER: When your community is set up in CONNECT, we ask for a domain that you would like to use for your email messages. This domain is setup in the backend by our Connect Support team so that you may set up any email address that uses that domain. For example: If the domain you ask to set up is "acmewidgets.com" then any email address that has that domain (ie. email@**acmewidgets.com**) will be valid for sending email.

However, this rule only applies to the From Address. The Reply-To address can be any valid email address from any domain and does not need to match the From Address. The Reply-To address is used when the recipient replies to your email message and is placed in the "To:" field instead of the From Address.

FAQs

What are Subscriptions?

ANSWER: Subscriptions are a collection of people who have decided at one point to receive or not receive, all or specific email communications from your company.

In a majority of cases, email programs only have one Subscription. The customer either does or doesnâ€™t want to receive all email publications from you. However, some email marketing programs are a little more sophisticated. Many programs have a monthly newsletter, as well as promotional email alerts. Then the option to opt-in or opt-out to one or both of the campaigns is presented. This is where subscriptions shine. They allow you to manage each opt-in/opt-out process in one Community. You are able to see the total size of each subscription, segment on this subscription, and deploy email marketing direct to it. There are even users that have a preference page that Subscribers can manage. This preference page provides their customers to opt-in/opt-out of different types of alerts so they can customize their email experience with your company. Connect Subscriptions provide each user the flexibility to manage the simplest of email programs to the most complicated.

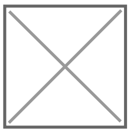
How Do I make my List Files CONNECT Compatible?

ANSWER: Lists files need to be saved as a .CSV (Comma delimited) file in Excel with UTF-8 encoding.

Each column should have a header that indicates what data is below it. See below for steps and examples.

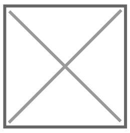
---

1. Open your list in Microsoft Excel



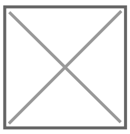
---

2. Right click on the first row and select Insert to add a row into the top of your list



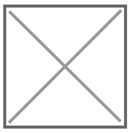
---

3. Type in header names for each column

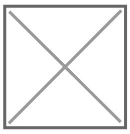


---

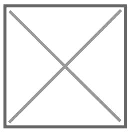
4. Once finished, click File - Save As.



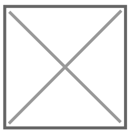
5. Select CSV (Comma delimited) under "Save as type" before saving the file



6. Click "OK" when given warning about "multiple sheets"



7. Click "Yes" when asked if you wish to keep workbook in current format



8. When exiting Excel, you will be asked if you wish to "Save changes" even though none were made. Click "Don't Save"