

# ContactRoom Quick Start Guide

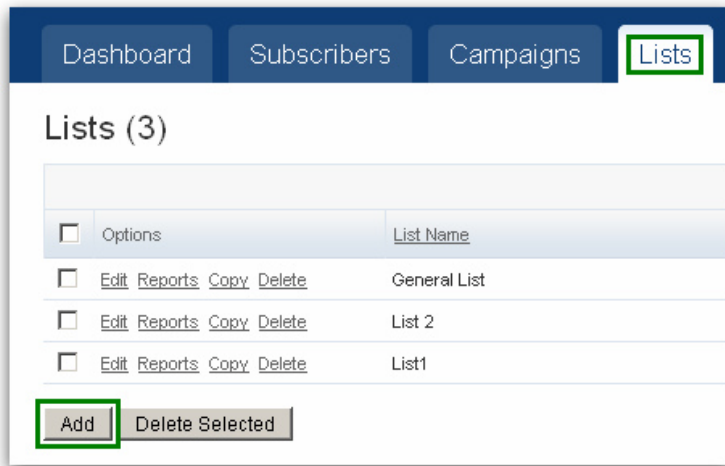
This document will cover the basics of using our ContactRoom Service.

Specifically:

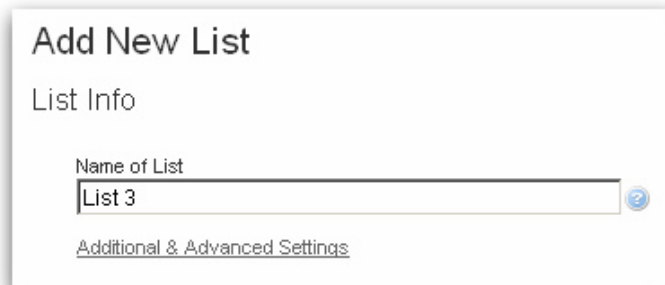
1. Creating lists
2. Importing subscribers
3. Sending campaigns
4. Viewing reports
5. Integrating with websites

## Creating lists

To create lists (which hold subscribers), click on the "Lists" tab along the top. Then click the "Add" button:



Provide a name for your list:



The screenshot shows the 'Add New List' form. The heading 'Add New List' is at the top. Below it, the section 'List Info' contains a text input field labeled 'Name of List' with the value 'List 3' entered. A blue question mark icon is to the right of the input field. Below the input field is a link labeled 'Additional & Advanced Settings'.

Then hit the "Add" button at the bottom:



The screenshot shows the bottom of the 'Add New List' form. It contains two checkboxes: 'Google Analytics Read Track' and 'Google Analytics Link Tracking'. Below these is a line of text: 'Twitter integration requires that cl'. At the bottom, there are two buttons: 'Add' (highlighted with a green box) and 'Back'.

Your new list is now in the system, and ready to accept subscribers:

Lists (4)	
<input type="checkbox"/>	Options
List Name	
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Reports</a> <a href="#">Copy</a> <a href="#">Delete</a> General List
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Reports</a> <a href="#">Copy</a> <a href="#">Delete</a> List 2
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Reports</a> <a href="#">Copy</a> <a href="#">Delete</a> List 3
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Reports</a> <a href="#">Copy</a> <a href="#">Delete</a> List1
<a href="#">Add</a> <a href="#">Delete Selected</a>	

## Importing subscribers

To populate your lists with subscribers, you can import directly from a file, copy/paste, or external source. Click on the Subscribers tab along the top, then the "Import" button, or "Import Subscribers" green button:

Dashboard

Subscribers

Campaigns

Lists

Reports

Integration

Subscribers (1)

List Filter... All Subscribers

Search

Clear

Advanced Search

<input type="checkbox"/>	Options	Email	Name	Date Added
<input type="checkbox"/>	<a href="#">View</a> <a href="#">Send Email Reminder</a> <a href="#">Delete</a>	test3@test.com		12/07/2010

[Add](#) [Delete Selected](#) [Import](#) [Export...](#) [Export to New List](#)

Page 1 of 1 20 per page

[Import Subscribers](#)

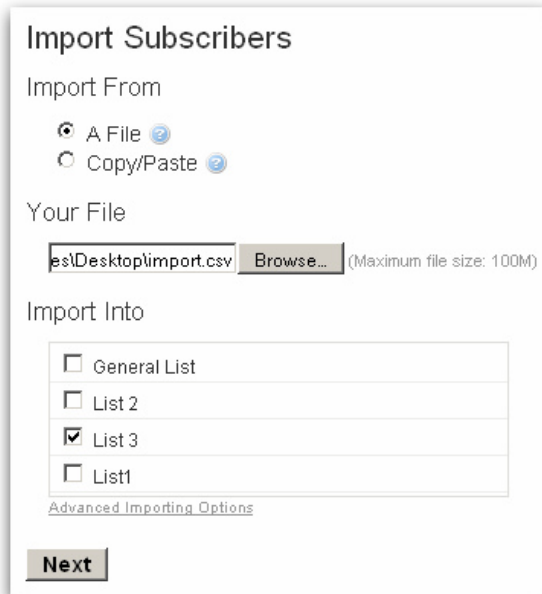
[Add Subscriber](#)

Other options

[View Subscribers](#)

[Search Subscribers](#)

On the Import Subscribers page, choose your file and the lists you want to import into, then click "Next":



The 'Import Subscribers' form is divided into three main sections. The 'Import From' section at the top has two radio buttons: 'A File' (selected) and 'Copy/Paste'. The 'Your File' section below it contains a text input field with 'esl\Desktop\import.csv', a 'Browse...' button, and a note '(Maximum file size: 100M)'. The 'Import Into' section features a list of four checkboxes: 'General List', 'List 2', 'List 3' (checked), and 'List1'. Below this list is a link for 'Advanced Importing Options'. At the bottom left is a 'Next' button.

**Import Subscribers**

Import From

☒ A File [?](#)

☐ Copy/Paste [?](#)

Your File

(Maximum file size: 100M)

Import Into

☐ General List

☐ List 2

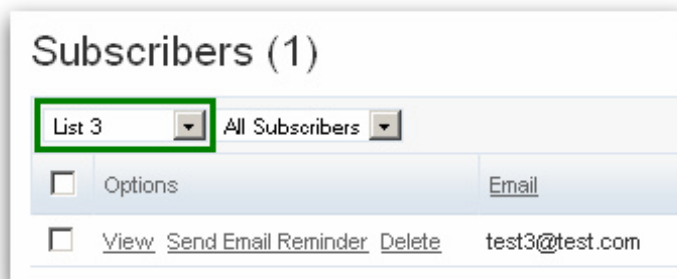
☒ List 3

☐ List1

[Advanced Importing Options](#)

You can also import using Copy/Paste, or from an external source.

Once imported, your subscribers will appear under each list that they are a part of:



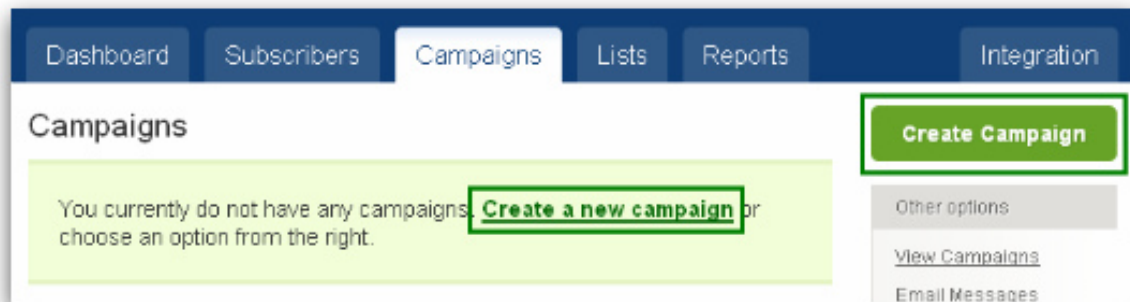
The 'Subscribers (1)' section shows a table of subscribers. At the top, there are two dropdown menus: 'List 3' (highlighted with a green box) and 'All Subscribers'. The table has a header row with a checkbox, 'Options', and 'Email'. The first data row shows a checked checkbox, links for 'View', 'Send Email Reminder', and 'Delete', and the email address 'test3@test.com'.

**Subscribers (1)**

<input type="checkbox"/>	Options	Email
<input checked="" type="checkbox"/>	<a href="#">View</a> <a href="#">Send Email Reminder</a> <a href="#">Delete</a>	test3@test.com

## Sending campaigns

Once you have lists with subscribers, you are ready to send campaigns! Click on the "Campaigns" tab along the top, and then "Create a new Campaign":



For simple, one-time campaigns, choose "One-Time Campaign," and provide an internal name (this name only appears internally - you'll have the option to provide an email subject later):

A screenshot of a form titled 'Name This Campaign:'. Below the title is a text input field containing the text 'My first campaign'. Below the input field is the instruction 'Select the type of campaign you would like to create:'. There are two options presented in a list. The first option, 'One-Time Campaign', is highlighted with a green background. It includes an icon of an envelope with a yellow tag and the text: 'Send a one-time email. Have the email sent right away or at a specific date and time. [More Information](#)'. The second option, 'AutoResponder', is not highlighted. It includes an icon of a server and an envelope, and the text: 'An email to subscribers after a specific number of hours or days from when they subscribed. [More Information](#)'. To the right of these options are two small icons: a calendar and a clock.

Next, choose the list that you'd like to send the campaign to:



Select the list(s) that this campaign is for...

☐ General List

☐ List 2

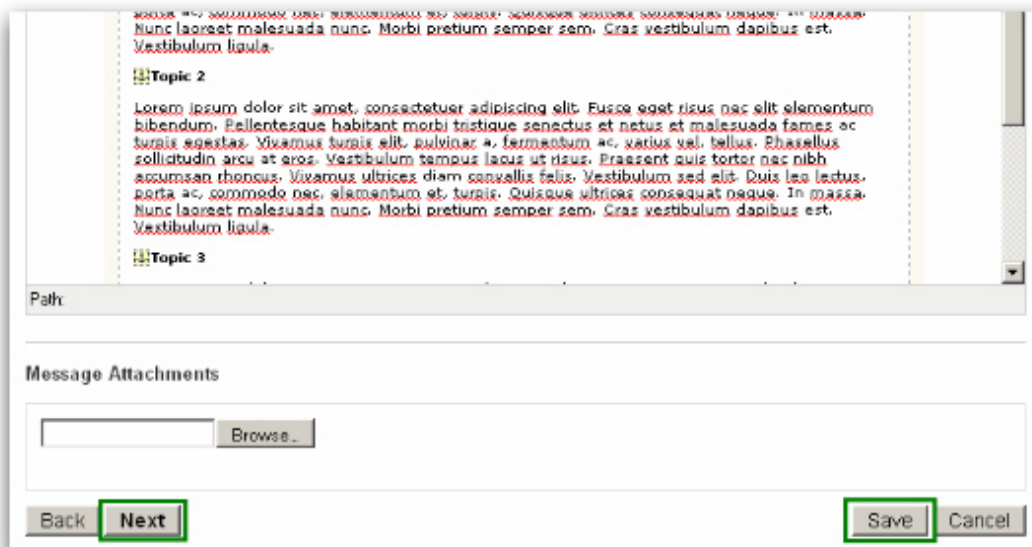
☒ List 3

☐ List1

Select: [All](#) · [None](#)

The next step lets you create your email message. Choose from a blank email (start from scratch), or a stock template. Once you choose a template (or blank email), you will be able to edit the message contents, as well as Subject, From, and additional email headers.

When you are ready to save your email message, hit "Next" or "Save" along the bottom:



Nunc laoreet malesuada nunc. Morbi pretium semper sem. Cras vestibulum dapibus est. Vestibulum ligula.

**Topic 2**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce eget risus nec elit elementum bibendum. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Vivamus turpis elit. Pulvinar a, fermentum ac, varius vel, tellus. Rhacellus sollicitudin arcu at eros. Vestibulum tempus lacus ut risus. Praesent quis tortor nec nibh accumsan thonsus. Vivamus ultrices diam convallis felis. Vestibulum sed elit. Quis leo lectus, porta ac, commodo nec, elementum et, turpis. Quisque ultrices consequat neque. In massa. Nunc laoreet malesuada nunc. Morbi pretium semper sem. Cras vestibulum dapibus est. Vestibulum ligula.






**Topic 3**

Path





Message Attachments

Continue hitting "Next" until you are on the page that provides a summary. Hit "Send Now" to initiate the campaign sending process.

Summary

	<b>Campaign Name</b>	My first campaign
	<b>List(s)</b>	List1
	<b>Segment</b>	None
	<b>Message(s)</b>	My first campaign ( <a href="#">Edit</a> )
	<b>Will Send</b>	Immediately
	<b>Recipients</b>	1

Before you send...

-  [Preview this campaign](#)
-  [Inbox preview](#)
-  [Send test email](#)
-  [Check against spam filters](#)

[Back](#) [Send Now](#)

Your campaign is now sending!

## Viewing reports

Once a campaign starts sending, you can view reports to see who has opened it.

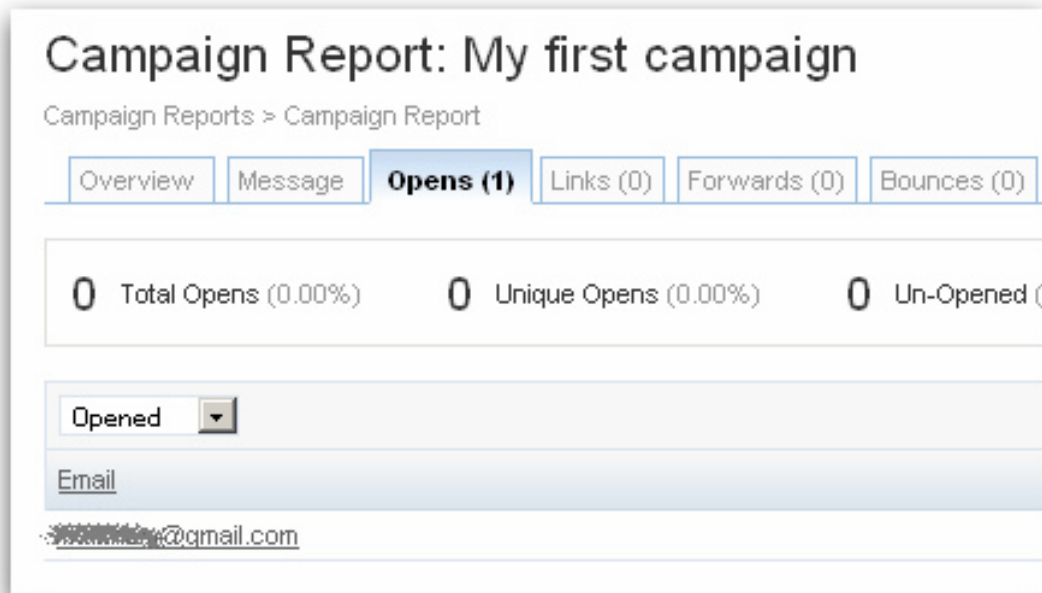
Create a New Campaign

Your campaign has been initiated. The sending process has started.

[Create Another Campaign](#) [View Campaigns](#) [View Report](#)

You can also see other stats such as:

- Forwards
- Links clicked
- Bounces
- Unsubscriptions



You can also print, export, or share your campaign reports:



## Integrating with websites

Lastly, you may wish to include subscriber integration on external websites. You can embed subscription forms directly on your own website. Click the "Integration" tab along the top, then the "Add" button:



Dashboard
Subscribers
Campaigns
Lists
Reports
Integration

## Subscription Forms

List 2
Search
Clear
Advanced Search

☐ Options
Subscription Form Name
List(s)

Nothing found.

Add
Page 1 of 1
20 per page

Add a Form Name (for internal use only - this will not show up on your webpage), and supply other options such as lists that are used, and fields that get displayed on the form:

## Subscription Forms

### Subscription Form Settings

Form Name
Form 1

Form Options
Subscribe & Unsubscribe

Lists

☐ General List
☒ List 2
☐ List 3
☐ List1

Select: [All](#) · [None](#)

Fields to request:

☒ Email Address
☒ First Name
☒ Last Name
☐ Birthday
☒ Use Captcha Image

You can then copy and paste the HTML code, which you can embed on any external website:

What type of integration would you like?



### HTML

To paste in your web site



### Link

Link to your form



### Popup

Form opens in a popup

Get Code

Copy the HTML source code in the text box below and paste it anywhere into your web site.

```
<form method="post" action="http://mthommes/em/box.php">

<table>
  <tr>
    <td>Email:</td>
    <td><input name="email" value="" type="text"></td>
  </tr>

  <tr>
    <td>First Name:</td>
    <td><input name="first_name" value="" type="text"></td>
  </tr>

  <tr>
```

Character Set:



Here is an example of a simple subscription form on an external website (you can customize this to fit your site design):

Email:

First Name:

Last Name:

Verify: 

Enter the text as it appears on the image

☒ Subscribe  
☐ Unsubscribe