

# ContactRoom Quick Start Guide

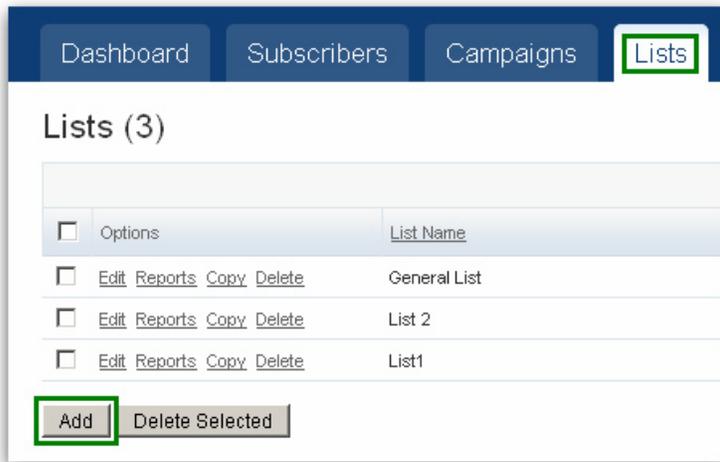
This document will cover the basics of using our ContactRoom Service.

Specifically:

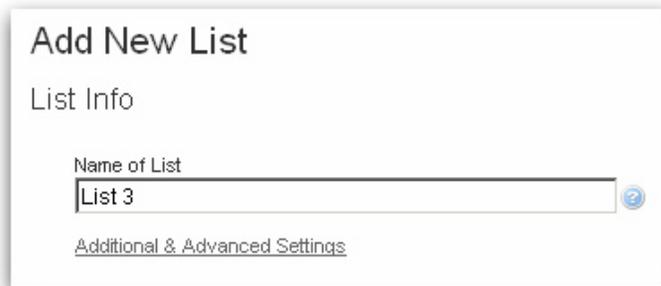
1. Creating lists
2. Importing subscribers
3. Sending campaigns
4. Viewing reports
5. Integrating with websites

## 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 title is 'Add New List'. Below the title is the section 'List Info'. There is a text input field labeled 'Name of List' containing the text 'List 3'. To the right of the input field is a blue question mark icon. Below the input field is a link labeled 'Additional & Advanced Settings'.

Then hit the "Add" button at the bottom:



The screenshot shows the bottom portion of the 'Add New List' form. It contains two checkboxes: 'Google Analytics Read Track' and 'Google Analytics Link Trackin'. Below these checkboxes is the text 'Twitter integration requires that cl'. At the bottom of the form 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

## 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:

**Subscribers (1)**

Dashboard **Subscribers** Campaigns Lists Reports Integration

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

Page 1 of 1 20 per page

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":

**Import Subscribers**

Import From

A File [?](#)

Copy/Paste [?](#)

Your File

es\desktop\import.csv  (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:

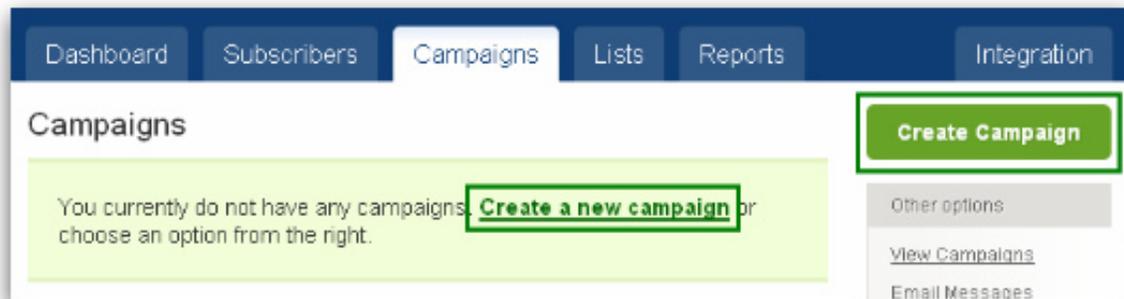
**Subscribers (1)**

List 3  All Subscribers

<input type="checkbox"/> Options	Email
<input 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:". The form has a text input field containing the text "My first campaign". Below the input field, there is a heading "Select the type of campaign you would like to create:". There are two options listed. The first option is "One-Time Campaign", which is highlighted with a green background. It includes an envelope icon 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 is "AutoResponder", which includes a clock icon and the text: "An email to subscribers after a specific number of hours or days from when they subscribed. [More Information](#)".

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

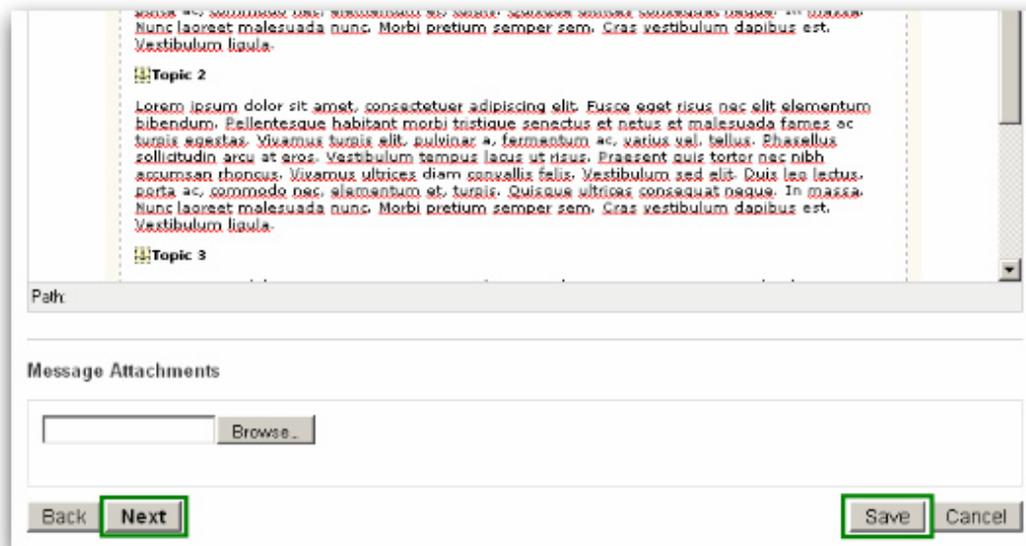
List 3

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, vulvar \* fermentum ac, varius vel, tellus. Rhassellus sollicitudin arcu at eros. Vestibulum tempus lacus ut risus. Praesent quis tortor nec nibh accumsan thonus. 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

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

**Campaign Report: My first campaign**

Campaign Reports > Campaign Report

Overview Message **Opens (1)** Links (0) Forwards (0) Bounces (0)

0 Total Opens (0.00%)    0 Unique Opens (0.00%)    0 Un-Opened (0.00%)

Opened ▾

Email

.....@gmail.com

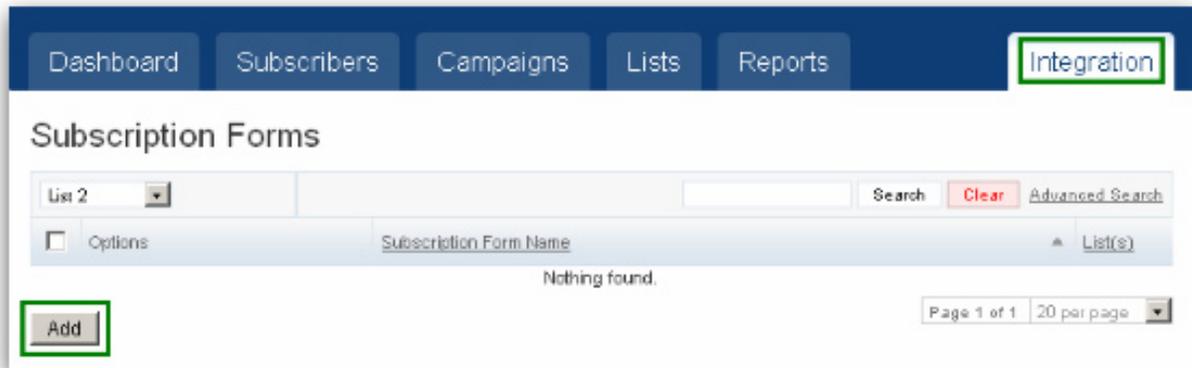
You can also print, export, or share your campaign reports:

[Print](#)   [Resend](#)   [Social Share](#)   [Share Report](#)   [Export](#)

Facebook   Twitter   Digg   LinkedIn   StumbleUpon

## 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:



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:

The screenshot shows the 'Subscription Form Settings' page. It includes the following fields and options:

- Form Name:** A text input field containing 'Form 1'.
- Form Options:** A dropdown menu set to 'Subscribe & Unsubscribe'.
- Lists:** A list of checkboxes for selecting lists: 'General List' (unchecked), 'List 2' (checked), 'List 3' (unchecked), and 'List1' (unchecked). Below this list is a 'Select: All · None' link.
- Fields to request:** A list of checkboxes for selecting fields: 'Email Address' (checked), 'First Name' (checked), 'Last Name' (checked), 'Birthday' (unchecked), and 'Use Captcha Image' (checked).

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