

Safemailer FAQ


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I already have an Excel Spreadsheet of users. What is the quickest way to get this information into Safemailer?

If you are not using Custom Fields, then you should have all the email addresses you wish to import in a single column within your Spreadsheet. If you are using Custom Fields, then each item should have its own column. Your spreadsheet can contain other columns with data that is not needed by this process: it will not prevent the import of the correct columns. It is recommended that each column has a descriptive term in the top row (a “header”) as this will help matching columns to fields in the import procedure.

First of all save your Excel spreadsheet as a “Comma Separated Values” file by choosing [Save As] from the File menu. Next, log into Safemailer, go to [Import Subscribers] in the [Subscribers] menu, select the Mailing List you wish to import people into, and click Next. You will now need to fill in the options for importing your file. Assuming your spreadsheet is in the format described above, you should set the options as follows: -

File Details	
Contains Headers:	<input checked="" type="checkbox"/> Yes, this file contains headers 
* Field Separator:	<input type="text" value=","/>
Field Enclosure:	<input type="text"/>
* Record Separator:	<input type="text" value="NEWLINE"/>

Click [Browse] and select the CSV file that you created earlier, and then click [Next]. You will now be presented with a list of the columns in your sheet, and asked to match the data in each column to a field in your Mailing List. Once you have matched them up, click Next, and finally click [Start Import].

I already have a HTML document with the content that I would like to send. What is the best way to upload it?

There are three ways. If the document is part of your website, you can import it from there by giving Safemailer the URL of it, or if it is on a local drive then you can upload it.

However, the suggested way of uploading the document is to copy and paste the code into the built-in editor. To do this, open your HTML document in a simple text editor (e.g. Notepad), copy all the text (in Windows you can use CTRL+A to select all, and CTRL+C to copy), navigate to the [Source] tab of the Safemailer built-in editor, delete all the text in there, and then paste the copied text in.

Finally, navigate to the [Design] tab of the editor and preview the content. When you navigate away from the [Source] tab, Safemailer reformats the code slightly, so it may not appear correctly unless you do this.

The reason that this method is suggested is as it is the only way to guarantee the source code stays ‘as-is’ and is not reinterpreted in any way by the HTTP transfer process. One problem is that any unsafe characters that have been encoded (e.g. a space being referenced with a ‘%20’) will no longer

be encoded after the transfer. This is usually not important for regular text content, but will break any links that rely on this encoding. For example: -

```
<a href="http://www.example.com/This%20File.doc">
```

would become

```
<a href="http://www.example.com/This File.doc">
```

and would no longer work.

Note that this applies for uploading templates you have designed too.

How do I set up a form on my website for people to sign-up with?

The easiest way for people to sign-up to your Mailing List (both for you and them!) is to have a form to fill in on your website that automatically adds people to the Mailing List. This means that you don't have to spend your time filling in details from emails you receive. Safemailer's integrated Website Forms do the following: -

- Provide a ready formatted or blank HTML form that can easily be inserted into your website.
- Automatically add the person to the Mailing List when they fill in their details without you having to do anything (you can request an email be sent to inform you).
- Provides the ability to require confirmation before adding, ensuring that the email address is valid.
- Provides the ability to include CAPTCHA functionality, requiring the user to enter a string of text from a picture. This prevents automated bots from abusing the Website Form.
- Allows you to request (via the use of Custom Fields) any data you like from the user, and specify which fields are required and which are optional.

To set this up, go to [Create Website Form] under [Forms]. Give your form a name (for your own reference) and choose a Design. Choosing [HTML only] makes it blank, which allows you to insert the form into a page you have already created and have it take on the formatting of that page. Choose [Subscription] under Form Type (you will see a list of the other types of Website Form available under this option. They all work in a broadly similar way to the subscription form, but with different functionality). Under [Choose Format] select HTML if you are only sending out HTML emails, Text if you are only sending out Text emails, or [Allow Subscriber to Choose] if you want them to have a choice which type they receive.

Choose your preference from the next set of options, including [Require Confirmation], [Send thank you email], [Contact Form], and [Include Captcha]. For more information on these options hover the mouse over the '?' icon to the right of each option.

Next select which Mailing List(s) you want this form to sign a person up to. If a selected Mailing List contains any Custom Fields then you will be able to select which of these are to be displayed on the form. The order that the selected fields appear on the form is chosen by altering the order in [Sort Custom Fields].

Click [Next]. The next set of options will allow you to customise the various pages and emails that the signup process will use. You can use the built-in editor for these, or, in the case of the web pages, enter a URL to point to a page on your website. See **“What should I use for “List Owners Name”, “List Owners Email”, “Reply-To Email”, and “Bounce Email”?”** in this document for details on what to fill in for those options.

When you have filled in all these details, click [Save]. You can now get the HTML for the form to insert into your website by navigating to [Manage Website Forms] and clicking [Get HTML] next to the form you have just created. This will display the HTML code for the form in a textbox, so you can copy the code out and paste it into your website.

How do I take advantage of the automatic bounce handling?

Firstly you will need to dedicate an email account within your organisation to this. If you are running Microsoft Exchange you will need to enable either the POP3 or IMAP service, open the required port in your firewall, and give access to the IP address that Safemailer will connect from. Next, in the [Edit Mailing List] screen, you must enter the email address of the account you have set up under [List Bounce Email]. Under [Bounce Email Server Name] enter a public DNS record (e.g. mail.safeserve.com) that points to your mail server, and under [Bounce Email User Name] and [Bounce Email Password] enter the relevant information for the account you have set up. Finally, if you chose to use IMAP, check [IMAP Email Account].

The program will now log into this account once an hour and check for bounce emails. These will be processed, and the email address they bounced from and reason they bounced will be listed in the Statistics section of the website for your information. Any ‘hard’ bounces (e.g. Email addresses that do not exist) or email addresses that have received a high number of ‘soft’ bounces will be flagged as “bounced” and will not be sent to again. The user (and any related information) will not be deleted though.

What should I use for “List Owners Name”, “List Owners Email”, “Reply-To Email”, and “Bounce Email”?

The Bounce Email should be set to the email address of the account that is to be used for bounce processing (see **“How do I take advantage of the automatic bounce handling?”** in this document) regardless of anything else.

The Reply-To address should be set to the address you would like any emails to go to if a recipient clicks on [Reply].

The List Owners Name and List Owners Email should be the email address and name that you wish the email to appear from. When an email is received, the sender is usually listed in the form: -

- A. N. Other <A.N.Other@example.com>

In the above example, the List Owners Name would be “A. N. Other” and the List Owners Email would be “A.N.Other@example.com”.

What are Autoresponders and how are they used?

Autoresponders are automatic emails you can have SafeMailer send out to people after they subscribe. Their primary use is as a marketing tool, to periodically remind people about you after they have signed up, and to entice them back to your website periodically. Autoresponders can be enabled for users that you are importing, but their primary use is for people signing-up using a Website Form.

Autoresponders can also be set up to filter by Custom Fields, so you could have one Autoresponder for females and one for males, or one for over 30 and one for under 30, etc.

A lot of the options to do with setting up an Autoresponder are similar to the options to sending an Email Campaign, so if you have any questions about any options, then you should find an answer by referring to the same question related to Email Campaigns. In fact, the only real difference between Autoresponders and Email Campaigns is when they are sent out.

I get an email telling me that somebody has unsubscribed. Do I need to take any action on this?

No. Safemailer will remove anyone who clicks on the [unsubscribe] link automatically. You can configure the system to notify you when this happens, which is why you received the email.

I know that an unsubscribe link is automatically inserted, but can I customise the location and formatting of this link using HTML?

Yes. If you would like to customise how the unsubscribe link appears in your email then insert a normal HTML link into the source code and use %%unsubscribelink%% as the 'href' property. For example, if you wanted an unsubscribe link in red, then the source code might look like this: -

```
<a href="%%unsubscribelink%%"><font color="#FF0000">Unsubscribe me</font></a>
```

This link can then be manipulated in the same way as any normal HTML link, including customising its position within the email and its formatting.

Note the [Insert Unsubscribe Link] under the Safemailer built-in HTML editor. This can be used as a convenient shortcut to insert a generic unsubscribe link for you to customise.

What are Custom Fields, what might they be useful for, and how do I use them?

By default Subscribers to Mailing Lists have three pieces of information related to them. Whether they are confirmed (if you use a confirmation system in your sign up form – see **“How do I set up a form on my website for people to sign-up with?”** in this document), whether they have chosen to receive their email in HTML or plain text (if you gave them a choice!), and their email address. The Email address is used as the “identity” of each Subscriber, so the same email address cannot be subscribed twice.

Custom Fields are basically extra pieces of information to store about each user. There are three primary reasons for doing this: -

1. Information gathering for other activities.

You may want to use Custom Fields to gather people's addresses or telephone numbers to use to contact them in different ways.

2. Filtering of recipients

You may want to send special promotions or more specific newsletters out to a sub-section of your Mailing List. Custom Fields can be used to sort which users should received this information. Examples range from a simple question such as "Would you like to sign-up to our specialised newsletter on xxxxxxx as well?", to gathering information such as their favourite football team, and then only sending information on a promotion involving a specific team to fans of that team.

3. Customising of emails

Gathering information such as a person's real name will enable you to start your newsletter with "Dear John" rather than "Dear Subscriber".

The first thing to do is to define some Custom Fields and apply them to one or more of your Mailing Lists. Custom Fields are defined separately from any specific Mailing List to allow you to reuse common ones, such as "First Name". In Safemailer, click [Manage Custom Fields] under [Mailing Lists], and then click [Create Custom Field]. Give the field a name (e.g. "Favourite Food", "Surname", "Sub-Newsletter Subscription"), and choose the type. Different types are used for different things. For example text fields are good for getting custom answers, drop down lists are useful if you want to specify a selection of answers to choose from, and check boxes are the best for one-off Yes/No questions. You can also choose if this field is mandatory or optional. This is particularly important for when you include a Custom Field in a Website Form (see "**How do I set up a form on my website for people to sign-up with?**" in this document).

Click [Next]. On the next page you will be given the options to set up your Custom Field. These will depend on the type you selected. For example, a text box allows you to set the default value, and maximum and minimum lengths, whereas a drop down list will ask you to set up the choices it presents and the Instructions (e.g. "Please select a value"). Click [Next] again. You will be presented with a list of Mailing Lists that this Custom Field can be applied to. Check the ones you want and click [Save]. Repeat this for as many fields as you would like.

Now you have defined your Custom Fields, you need to use them. If you are using them for reason 1 or 2 (see above), then you can filter when looking at Subscribers. Go to [Manage Subscribers] to see this in action and test it. If you are using them for reason 3, then you will need to follow the steps below.

When creating your Email Campaign, you will see a link below the Safemailer HTML designer window which says [Insert Custom Field]. Click on this link. This will take you to a page listing all the Custom Fields which may be inserted into this newsletter. The top set are generic fields, such as inserting the name of the Mailing List it is sent to, various useful links, and default fields such as the user's email address.

Below this first set you will see a list of all Custom Fields associated with all of your Mailing Lists. As an Email Campaign can be sent to multiple Mailing Lists, it displays all the possible options. However, you should be careful when adding these, as adding Custom Fields from one Mailing List that are not present in another will result in the Custom Field being left in its variable form if it is sent to this latter Mailing List. For example, if Mailing List A contains a Custom Field called "Favourite Colour", but Mailing List B does not, then if you created a Email Campaign and insert this Custom Field, if it was sent to Mailing List B, then rather than displaying their favourite colour, it would show "%Favourite Colour%". If a Custom Field is associated with multiple Mailing Lists, then it makes no difference which "version" of it you choose to add from this page: the Custom Field data will display correctly when you sent to any of the Mailing Lists with which it is associated.

The final thing you can do with Custom Fields is edit the "To" address when it is sent out. If you have a Custom Field for the recipients first name and/or surname, then you can use these in the "To" address, e.g. have the email appear that it was sent to "John Doe <J.Doe@example.com >" rather than simply "J.Doe@example.com". To do this edit the [Send To First Name] and [Send To Last Name] fields under [Email Campaign Details] when sending the Mail Campaign.

What are the pros and cons of embedding images?

When you are sending an Email Campaign, one of the options you are presented with is whether you would like to embed images. This has advantages and disadvantages. The advantage of embedding images is that people can view the images offline. A disadvantage is that it makes the emails much larger, and thus they can take longer to send.

However, the most important consideration is this: the way Safemailer tracks when people have viewed an email is that it inserts an invisible picture into the email which is not embedded and must be downloaded from the server. When somebody opens an email, this picture is downloaded, and the server registers that they have viewed the email. Due to security risks though, most email clients will not download anything from the internet without warning the user. In Outlook this warning usually appears in the form of the following message at the top of an email: -

[Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.](#)

Until the user has clicked this message Safemailer will not register that the email has been viewed. This message does not occur for embedded pictures. Therefore, one point of view is that embedding pictures is an advantage, as it means that people do not have to click a warning message to view them. This is likely to increase the number of people who see the email, as it means that nervous people will not be put off by having to click a warning message, and also people's eyes may be caught by the pictures before they have chance to delete it if they plan to do so.

A second point of view sees embedding pictures as a disadvantage though. This is because if the email appears with no pictures in it, people are likely to notice the warning message and remember to click it, thus enabling Safemailer to track the fact that they have viewed it. If the pictures are already there, then users are unlikely to click on the warning message as they have nothing to gain

by doing so. This means that Safemailer is unable to track the fact that the email has been viewed, and as such means that the statistics relating to the number of views is unreliable.

As such, the choice as to whether to embed the pictures depends on the sender's priorities: number of views, or ability to track who has viewed the email.

I am going to send out regular newsletters. What is the most efficient way to produce such emails?

Safemailer comes with the ability to create your own templates which can be saved to the system and then used as the starting point for any Email Campaign you like. This can save a lot of time in creating an Email Campaign, as all you will need to do is select your template and add the new content; no extra design work is required. To do this, click on [Create Template] under Templates. Templates are created in a broadly similar way to Email Campaigns.

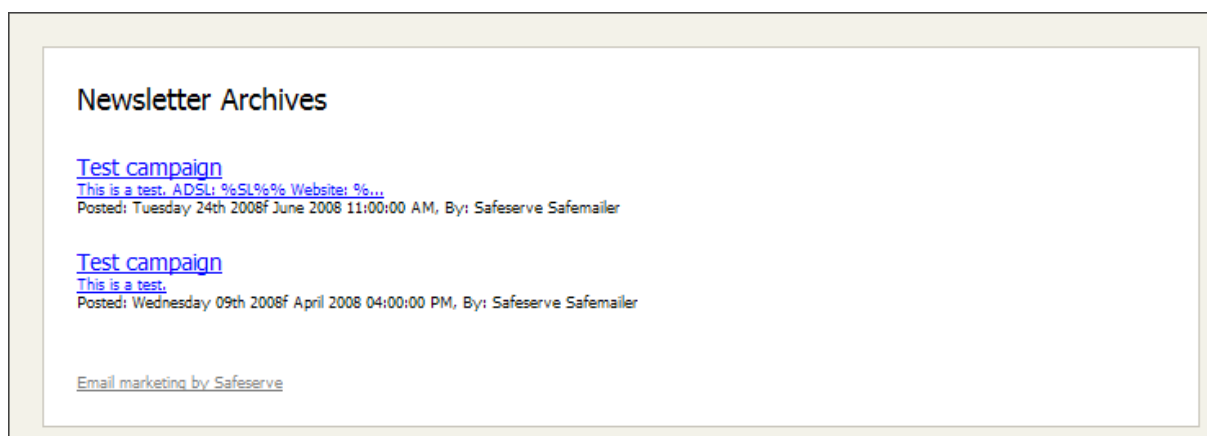
Safemailer also comes with some built-in templates. You may use these as the basis for your Email Campaigns, or even the basis for your own Template if required.

I send out regular newsletters. Is there a way I can have these newsletters automatically appear on my website?

Yes there is. If you choose to archive an Email Campaign when creating it, then whenever it is sent to a specific Mailing List, it is added to that Mailing List's 'archive'. These archives can be linked to your website, to provide clickable links to web-based versions of your newsletters which are automatically updated as soon as you send out a new newsletter.

To enable this functionality, SafeMailer can produce a PHP file that you can add to your website, either as a standalone page or in a frame. This page will display links to all of your past newsletters to any given Mailing List. It is customisable to allow you to edit the number of entries (i.e. the last 5 newsletters, or the last 50), and the length of the summary each one is given (i.e. does it display the first few words, or just the title). It is also possible to change the design to fit in with your website.

A sample page might look like this: -



To enable this functionality, you can contact us on support@safeserve.com, and request the PHP document.

Can I send out to a sub-section of my Mailing List, or will I need a separate Mailing List if I only want to send to certain people?

You can send out to a sub-section, so you will not need to create multiple lists for sub-sections of your main list. To do this, simply fill in the criteria of the people you wish to send to in the “Search Criteria” and “Custom Fields” sections whilst going through the “Send Email Campaign” process. On the page after these sections, you will see “This Email Campaign will be sent to approximately xxx Subscribers” with the number of Subscribers who met your criteria listed.

If you wish to see a list of the specific Subscribers who meet the criteria you have chosen, then this can be done by going through the same filtering process in Manage Subscribers or Export Subscribers.

When do emails get sent out?

The automatic process that sends out any emails on the system that are queued for delivery runs on the hour, every hour. If you send the Email Campaign out at 15:36 and choose [Send Immediately], then the delivery process should begin at 16:00. Likewise, if you schedule a send for 02:30, the emails will actually be sent out at 03:00.

This delay also counts for Autoresponders. If you set up an Autoresponder for six hours after sign-up, and a person signs-up at 16:01, then the Autoresponder will be sent at 23:00, i.e. the next send operation after six hours after sign-up.

Confirmation and Thank You emails associated with Website Forms are not affected by this delay. These are always sent immediately.

Which browser is the best to use to access Safemailer?

All up-to-date browsers should work perfectly well, but some features only work in Internet Explorer 7, and as such this is the recommended browser. None of these features affect the core functionality of the product.

I have sent out a preview of my newsletter, but it doesn't appear how it should. What is wrong?

The short answer is it could be a lot of things!!! The first thing to remember is that a preview is not identical to the actual email that is sent out. Several features within the actual emails sent out (as opposed to the preview email) are set depending on the Mailing List that it is being sent out to. Since the software does not know which list(s) an Email Campaign is going to be sent to while it is still being created these features cannot be filled in. Such features include: -

- Custom Fields
- Special links, e.g. Unsubscribe links
- The 'From' address of the email

However if the problem is with the appearance of the email itself rather than the dynamic content, then experience teaches that there are two main culprits.

Firstly, the HTML itself contains a problem. Due to the way HTML is most often produced (i.e. using completely or partially WYSIWYG editors), the code is created by interpreting what you do in the design window. However, this can more often than not be interpreted in several, equally correct ways. The trouble with this approach (as opposed to literally writing the source code yourself in a text editor) is that as you apply different layers of formatting to different parts in different orders, sections that should be encoded identically are encoded in slightly different ways to produce (supposedly) an identical effect. As a trivial example, consider the following two lines of HTML, which produce an identical effect, but are totally different: -

```
<strong><em><font color='red'>Text goes here</font></em></strong>  
<font color=#FF0000><i><b>Text goes here</b></i></font>
```

These both should produce something like this: ***Text goes here***

Sometimes these differences are obvious in the design section of your editor, but sometimes they are not, which brings us onto the second reason.

The second reason is that pretty much every product on the market that interprets HTML, interprets it in a slightly different way. Sometimes this means that your perfectly standard and meticulously coded HTML simply won't look the same on different platforms, no matter how hard you try. However, more often than not, this problem is associated with the first problem, mentioned above, in the way that two sections of HTML encoded in different ways but (supposedly) producing the same effect, can appear the same on some platforms, but not others.

This second problem can be very hard to troubleshoot if the platform you are developing on shows the two sections to be identical, only for you to send yourself the email and find that your email client has interpreted them in an entirely different way! Unfortunately experience shows that the only way to troubleshoot this is to dig into the HTML source code, investigate, change things, and experiment. Sometimes you just won't be able to make everything look the same everywhere.

One trick that may be useful is to use CSS to "reset" all default values to standards controlled by you. This is a good idea, as several of the differences can be caused by values that you have not specifically defined having different defaults in different clients. A good description of this functionality can be found [here](#).

Also, as a footnote, remember that you are sending to an email client, not building a webpage, and most email clients support far less HTML functionality than web browsers do. This is particularly important with functionality such as Flash. See "**Does Safemailer support more advanced HTML functionality in emails, e.g. Flash, Javascript, etc.?**" in this document.

Does Safemailer support more advanced functionality in emails, e.g. Flash, Javascript, CSS, etc.?

The short answer is that Safemailer does, but the recipients email client may or may not.

Basically Safemailer allows you to send emails containing any HTML content you wish, but once it leaves Safemailer, what happens depends very much on where it goes. The following considerations should be kept in mind: -

- Email clients are not web browsers. What works in a browser does not always work in an email client.
- People's security settings will vary, meaning that if the preview email looks fine in Outlook on your desktop, it might not on some recipients' machines, even if they are using the same version of Outlook.
- Scripting can be dangerous, and all but the laxest security will take some action on detecting it. This not only means that it is unlikely to work in the recipients email client, but that it may be removed by anti-spam measures (adversely affecting the email), or the email may be blocked entirely!
- At the time of writing CSS is generally supported, whereas Flash is supported in very few email clients.

Generally speaking, we recommend that if you want to include more advanced features, you put the content on your website and link to it in a standard way. It is likely that most browsers will not have a problem displaying it.