

eDM User Guide
ufosend



UFOSEND DRIVES THE RIGHT
MESSAGE TO THE RIGHT PEOPLE,
THROUGH THE RIGHT CHANNELS

Maximises Your
Message's Potential

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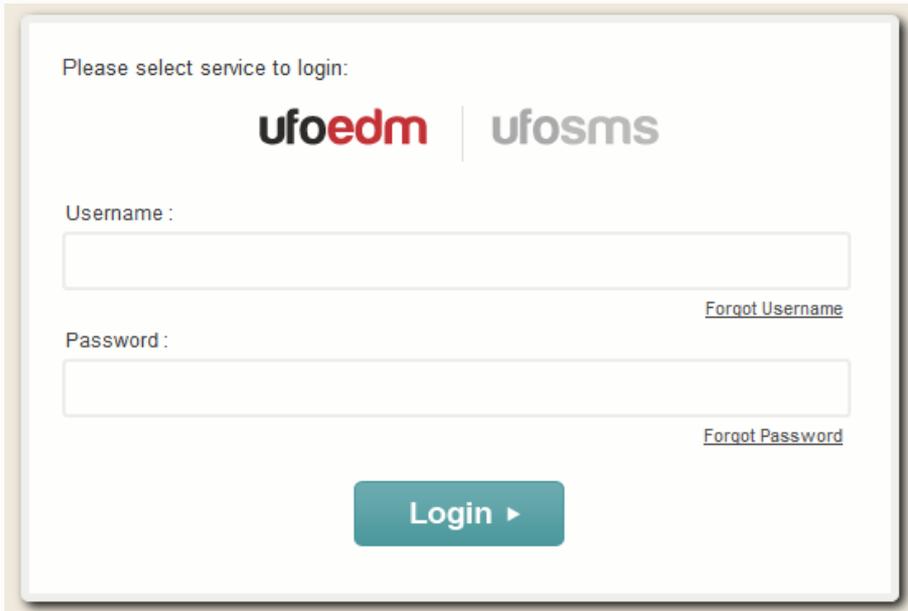
- Mail Merge

- How to import send list to UFOSSend?
- How to handle with problematic record?
- How to create online form?
- How to create welcome email?
- How to segment users?
- Where will hard bounce or unsubscription go?
- How to create eDM campaign?
- How to import eDM template?
- How to send out eDM?
- Can I send eDM to unsubscribers?
- How to upload images?

Answer

Part I - Introduction

Part I - Introduction



Please select service to login:

ufoedm | **ufosms**

Username :

[Forgot Username](#)

Password :

[Forgot Password](#)

Login ▶

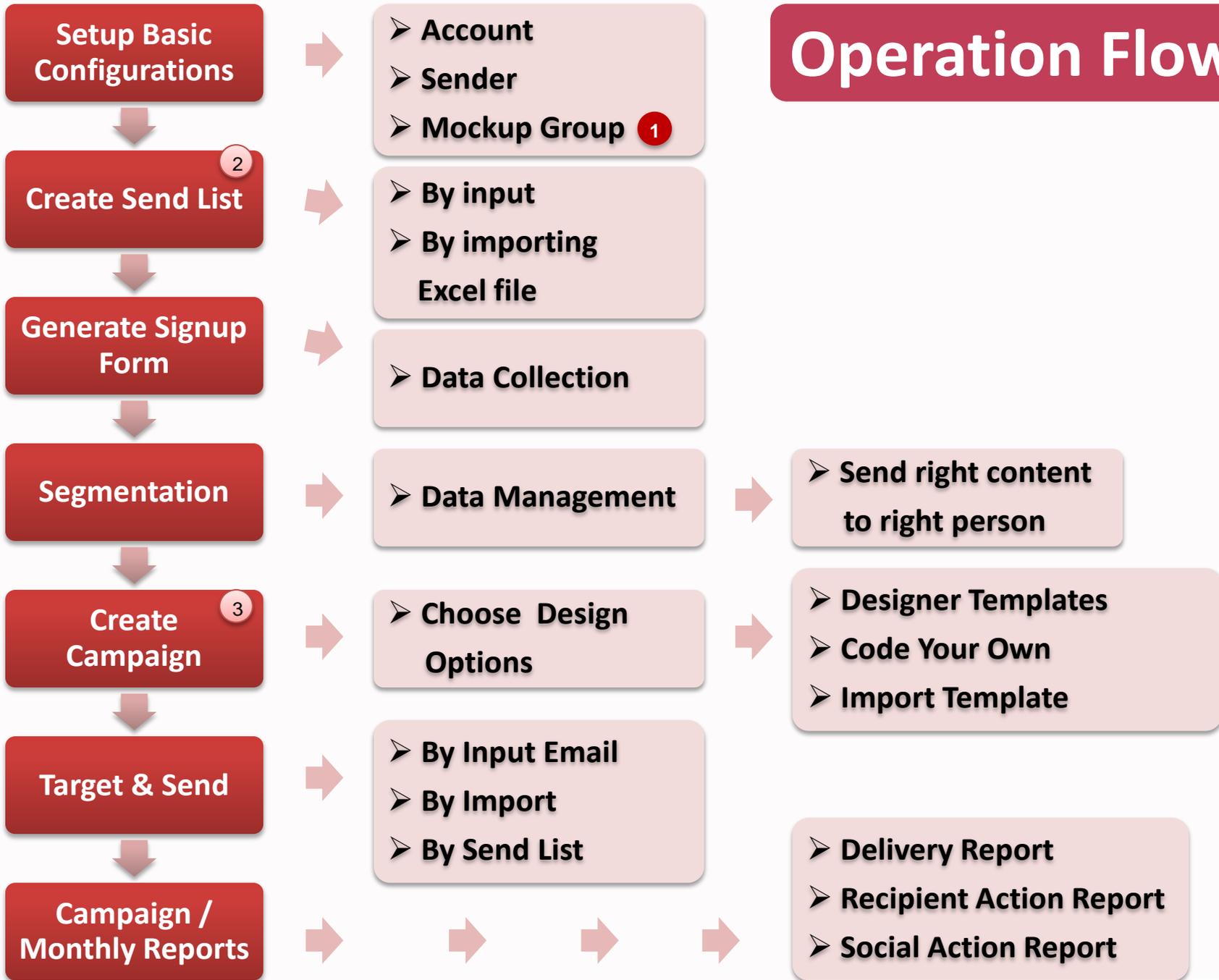
Note: Support IE10 or above, Firefox and Google Chrome

This user manual includes 6 parts guiding you through the eDM platform: Basic Configuration, List Management, Campaign Management, Target & Send, Reports and Functions.

According to Unsolicited Electronic Messages Ordinance [UEMO], recipients' permission is required before sending out promotional message. Opt-out (unsubscribe) channel must be provided in every eDM.

Please refer to email to retrieve login information.

Operation Flow



1

Mockup

- Send to internal users for review
- Not counted in report & usage
- Recommended to send mockup before sending eDM to users

2

Send List

- Basic categorization of stored users
- A user can belong to multiple send lists / not in any send list (user would be put in “Unassigned Users” list)
- 3 subscription statuses

3

Campaign

- Details of a newsletter
- Batch is per release of a campaign
- One campaign can be sent multiple times and contain different batches
- Each batch has own statistical report



Subscribed

- Users have declared they are willing to receive eDM

Unsubscribed

- Users have declared they are not willing to receive eDM

Not Subscribed

- Users have not declared they are willing to receive eDM or not

eDM Configurations - Sender Setup

Before you start,
please define a sender for your campaigns

Add New Sender

Sender Information

Before sending campaigns with the email you provided, we need you to verify that you have access to such email account. Please click "Verify Sender Email" below and enter an email address to receive a verification link.

1

Fill in the sender name and email here.

2

Verify sender email here and a verification email will be sent to the sender email. Follow the instruction of verification email to verify the sender email.

eDM Configurations - Sender Setup

ufoedm

eDM Sender Verification

Dear Customer ,

You have added your email address - **debbie@ufosend.com** as the eDM sender.

Please [click here](#) to verify your email address **debbie@ufosend.com**.
Or copy and paste this URL into your web browser:

http://u2.ufosend.com/admin/ufosend/login/mode:validate_sender/id:92

This mail is for the use of notification only, please do not reply to this mail directly.
Feel free to contact us at cs@ufosend.com.

Best Regards,
UFOSend eMarketing Inc. Ltd.

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Website: <http://www.ufosend.com> | Hotline: (852) 3524 7361
Address: Room 904, 9/F, Shui Hing Centre, 13 Sheung Yuet Road, Kowloon Bay

Click the link in the verification email to verify your sender email

eDM Configurations - Sender Setup

The screenshot displays the 'eDM Configurations' page in the ufoedm system. The top navigation bar includes 'Campaigns', 'Reports', 'Lists', 'Setting', and 'Account'. The 'Setting' menu is open, highlighting 'eDM Configurations' and 'Mockup Groups'. The main content area is titled 'Configure your eDM Settings' and contains two sections: 'Please configure your sender information:' and 'Please configure your preference to receive notification:'. The first section shows a table with columns for 'Sender Name', 'Sender Email', 'Verified Email', 'Edit', 'Delete', and 'vCard'. A table entry for 'Debbie Man' with email 'debbie@ufosend.com' has a green checkmark in the 'Verified Email' column. Below this table is an 'Add New Sender' button. The second section has a checkbox for 'I would like to receive notification after each campaign has successfully delivered' which is checked. Below this is a table for 'Add Notification Recipient' with columns for 'Name', 'Email', 'Edit', and 'Delete'. A table entry for 'Debbie Man' with email 'debbie@ufosend.com' is shown. Below this table is an 'Add Notification Recipient' button. A red arrow points from this button to a modal window titled 'Add New Receive Notification Email'. This modal has a red heading 'Enter the name of recipient' and two input fields for 'Name' and 'Email'. Below the fields is a red label 'Enter the email address' and 'Submit' and 'Cancel' buttons. At the bottom of the page, there is a 'Back to content' button.

Add New Sender

Sender Information

Before sending campaigns with the email you provided, we need you to verify that you have access to such email account. Please click "Verify Sender Email" below and enter an email address to receive a verification link.

3 Sender Name Sender Email

4 Verify Sender Email Cancel

- 1 Navigate to eDM Configurations page
- 2 Use the button "Add New Sender" to add new sender
- 3 Enter sender name and email
- 4 Verify the email: a verification email will be sent to the sender email, you will need to verify in the sender email
- 5  will be shown here if verify successfully
- 6 Edit sender information
- 7 Delete sender
- 8 vCard will be generated automatically base on the sender information entered
- 9 Tick this checkbox to receive notifications after the campaign is released
- 10 Add more notification recipient here

Mockup Groups Configurations

Mockup is the eDM send to internal user for review. It will not be counted in report and monthly usage. It is recommended to send mockup before sending eDM to users.

ufoedm Campaigns Reports Lists **Setting** Account Select service

1 eDM Configurations Mockup Groups Welcome to ufosend, im-ufosend! Logout

Mockup Groups

Create and Manage Your Mockup Groups.

2 Create Mockup Group

Manage Mockup Groups

Mockup Group

Mockup Group Marketing Department Created: 2014-12-19 11:19:52 | Modified: 2014-12-19 11:19:52 Edit Delete Emails: debbie@ufosend.com

7

Showing 1 to 1 records out of 1 total.

Create Mockup Group

Please name your Mockup Group:

3 Mockup Group Name

Please add users to Mockup Group:

4 Email

5 Add Mockup User

6 Submit Cancel

Edit Mockup Group

Name Marketing Department

Delete Email

8 debbie@

9 Add

10 Submit Cancel

[Back to content](#)

- 1 Navigate to the Mockup Groups page
- 2 Click "Create Mockup Group" to start creating mockup group list
- 3 Name the Mockup Group
- 4 Enter the email of mockup user
- 5 Add more mockup users
- 6 Submit the mockup group list
- 7 To edit or delete mockup group
- 8 Tick this checkbox to delete the mockup user
- 9 Add one more mockup user
- 10 Submit the changes

Basic Configuration - Account Setup

The screenshot shows the 'Account' page in the ufoedM system. The navigation bar at the top includes 'Campaigns', 'Reports', 'Lists', 'Setting', and 'Account' (highlighted with a red circle 1). Below the navigation bar, the 'Account' section is titled 'View Your Account Details and Billing Information'. The 'Account Information' tab is active, and the 'Company Information' section is expanded. The 'Company Information' section includes fields for Name, Address, Tel, Fax, Email, and Website. A 'Company Logo' field is present with a 'Browse' button (circled 4) and an 'Upload' button. Below the logo field, there is a note: 'Note: Support .jpg, .gif, .png files.' The 'Contact Person Information' section includes fields for Contact Person, Contact Tel, and Contact Email. The 'Service Plan' section includes fields for Service Plan, Annual Fee, Annual Quota, Service Start Date, and Service End Date. At the bottom, a 'Summary' section displays four metrics: Total Quota (999,999,999), Annual Sent (0, circled 5), Reserved for Schedule Send (0), and Remain Quota (999,999,999, circled 6). The 'Remain Quota' field has a link for '[Balance Details]'. At the bottom of the page, there are buttons for 'Upgrade / Renew' and 'Payment History'.

- 1 Navigate to the Account page
- 2 Click “Edit Account Information” to edit account information
(Refer to Page 13: Edit Account Information)
- 3 View account information in different languages by clicking the language you would like to view
- 4 Upload your company profile picture: Click “Browse” to select picture from your computer and click “Upload”
*** Company profile picture will be shown on some pages, i.e., unsubscribe page*
- 5 Click the figure to view details of sending report
- 6 Click “Balance Details” to view the remaining balance report

Edit Account Information

Edit Account Information

1 Company Information

| | | | |
|--------------------------------|--|----------|--|
| Name (English): | <input type="text" value="UFOSend eMarketing Inc."/> | | |
| Name (Traditional Chinese): | <input type="text" value="UFOSend 電子推廣顧問公司"/> | | |
| Name (Simplified Chinese): | <input type="text" value="UFOSend 电子推广顾问公司"/> | | |
| Address (English): | <input type="text" value="Room 904, 9/F, Shui Hing Centre, 13 Sheung Yuet Road, Kowloon Bay"/> | | |
| Address (Traditional Chinese): | <input type="text" value="九龍灣常悅道 13 號瑞興中心 9 樓 904 室"/> | | |
| Address (Simplified Chinese): | <input type="text" value="九龍灣常悅道13号瑞興中心9楼904室"/> | | |
| Tel: | <input type="text" value="35247361"/> | Fax: | <input type="text" value="23144328"/> |
| Email: | <input type="text" value="debbie@ufosend.com"/> | Website: | <input type="text" value="https://www.ufosend.com"/> |

2 Contact Person Information

| | | | |
|-----------------|---|----------------|---|
| Contact Person: | <input type="text" value="Debbie Man"/> | Contact Email: | <input type="text" value="debbie@ufosend.com"/> |
| Contact Tel: | <input type="text" value="35247361"/> | | |

3

1 Edit company information in corresponding columns

*** System would append your company name and address to each of the eDM sent by default*

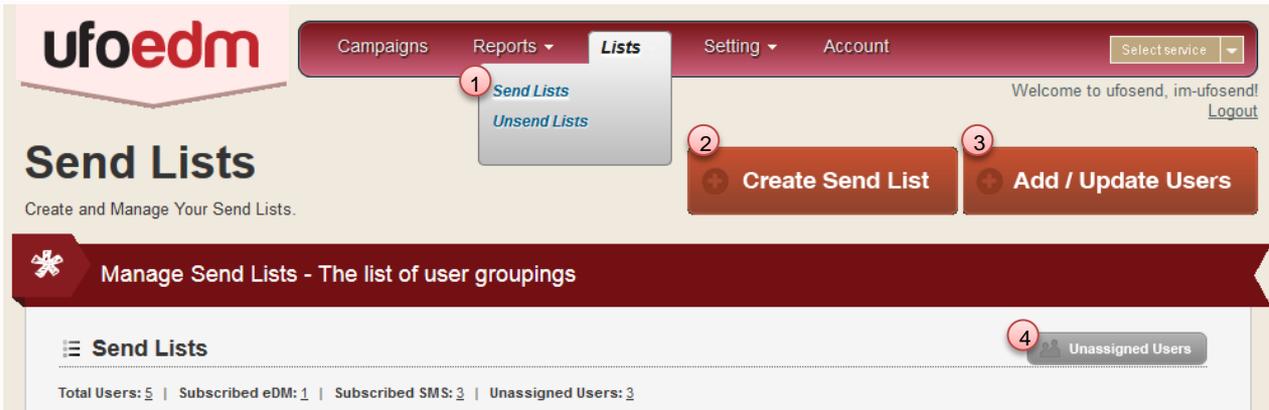
2 Notifications will be sent to this contact person, i.e. eDM delivered notification, reminder of service expiry and quota alert

3 Submit the account setting

Part II - List Management

Part II - List Management

A send list is basic categorization of stored users. A user can belong to multiple send lists, or not in any send list. In this case, user who is not in any send list would be put in “Unassigned Users” list.



- 1 Navigate to Send Lists page
- 2 Click “Create Send List” to generate send list
- 3 Add / Update Users in specific send list
- 4 View list of unassigned users who are not put in any lists

A user may have one of the 3 subscription status in database:

Commercial eDM cannot be sent to these users

Subscribed

- Users have declared they are willing to receive eDM

Unsubscribed

- Users have declared they are not willing to receive eDM

Not Subscribed

- Users have not declared they are willing to receive eDM or not

Create Send List

Create Send List

Please name your Send List:

1

Add Description Here

2

- 1 After clicking “Create Send List”, name the list and describe the send list for internal use
- 2 Submit the send list
- 3 Add users by clicking the button “Add / Update Users”
 - Add users By Manually Input ([Page 17](#))
 - Add users By Importing Excel file ([Page 18](#))
- 4 Return to Send Lists page

ufoedm Campaigns Reports Lists Setting Account Select service

Welcome to ufosend, im-ufosend! Logout

Send List Users

Create and Manage Your Send Lists

3 Add / Update Users

Manage Users

4 Back

Email Marketing Seminar > Users

Add users By Manually Input

Email Marketing Seminar > Users Back

Total Users: 0 | Subscribed eDM: 0 | Subscribed SMS: 0

[View Users](#) [View Stats](#) [Add Form](#) [Segments](#) 0

Please choose an option to add / update user

Add individual user Add and Update users by importing Excel file

eDM subscription --- please select --- Email

SMS subscription --- please select --- Country Code 852 (Hong Kong) Mobile

First Name

Last Name

Gender Please Select

Birthday

Company Name

Company Tel.

Company Fax

Company Email

Company Website

Registration Language Don't Care

I have permission from the added user who agreed to receive message from me. I understand using purchased, rented, third-party or appended user data will violate the terms of use.

- 1 Choose “Add individual users”
- 2 Input users general information
- 3 Update users’ subscription status
*** If no subscription status is updated, the users will be regarded as not subscribed (not declare willing or not to receive eDM or SMS)*
- 4 Select the language that subscriber prefer to read
- 5 This checkbox must be checked to declare that you understand users’ permission is required before sending promotional eDM to users
- 6 Submit users information

Add users By Importing Excel file

Please choose an option to add / update user

Add individual user Add and Update users by importing Excel file

Or select file from your computer...

By importing users to this list, if users already exists in database (i.e. having same email and mobile as your imported file), what action do you prefer?
 Do not overwrite Merge

When imported users are also in other send lists, what action do you prefer?

I have permission from the added member who agreed to receive message from me. I understand using purchased, rented, third-party or appended member data will violate the terms of use.

For most of the cases, default setting is recommended

1 Choose “Add and Update users by importing .xls file”

2 Sample of xls / xlsx can be downloaded here

3 Drag the file here or select the file from your computer

4 Choose “Merge” to update your current send list

Choose “Do not overwrite” to keep current send list constant, and only update new data

5 Choose “Add also to this list” to keep data being stored in other send lists

Choose “Please remove from other lists” to add new data in one send list only and remove data from other send lists

6 This checkbox must be checked to declare that you understand recipients’ permission is required before sending promotional eDM to customers

** If you have custom fields not included in sample Excel file, please refer to [page 20](#) to add fields

Preparing Excel

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|-----------|----------|--------|---------------------------|--------------|----------|------------|-----------|----------|----------|-------------|--------------|----------|-----|
| 1 | firstname | lastname | gender | email | country_code | mobile | birthday | comp_name | comp_tel | comp_fax | comp_email | comp_website | reg_lang | edm |
| 2 | 大文 | 陳 | M | chantaiman@domain.com | 852 | 91111111 | 1983-01-01 | | 23456789 | 34567890 | abc@abc.com | www.abc.com | en | 1 |
| 3 | Susan | Lau | F | susanlau@example.com | 853 | 92222222 | 1980-01-01 | DEF Ltd. | 23456789 | 34567890 | def@def.com | www.def.com | tc | 0 |
| 4 | Johnson | Hui | M | johnsonhui@myemail.com | | | 1981-01-01 | GHI Ltd. | 23456789 | 34567890 | ghi@ghi.com | www.ghi.com | sc | 1 |
| 5 | Christine | So | F | | 852 | 93333333 | | JKL Ltd. | 23456789 | 34567890 | jkl@jkl.com | www.jkl.com | | |
| 6 | Peggy | Cheng | F | peggycheng@yourdomain.com | | | 1982-01-01 | MNO Ltd. | 23456789 | 34567890 | mno@mno.com | www.mno.com | en | 1 |
| 7 | | | | | | | | | | | | | | |

- 1 Either email or mobile must be filled in
Country code is necessary if filling in mobile
- 2 If no relevant data, that column can be deleted
i.e. if no company name, delete that column
- 3 **reg_lang**: this column is for updating which language subscribers prefer to read
en > English; **tc** > Traditional Chinese; **sc** > Simplified Chinese
* If leave this column empty, eDM will be sent in the language you choose when creating campaign
(Refer to [page 43](#))
- 4 **edm**: this column is for updating users' subscription status
 - **1** means that users have explicitly stated they have subscribed
 - **0** means that users have explicitly stated they have unsubscribed
 - **Empty** means that users have not explicitly stated their subscription status or no email is provided, you may empty the email field if you leave the edm column empty
 - **SU** means to keep existing subscription status constant, and subscribe new email users

* **Recommend to use "SU" or simply delete whole column "edm" when importing users**

** To re-subscribe email users (when you have to manually re-subscribe email users who have unsubscribed themselves), put "1" in "edm" column

Managing Data Fields

If you have custom fields, please add fields before importing data

Send List Users
Create and Manage Your Send Lists

Manage Users

Email Marketing Seminar > Users

Total Users: 0 | Subscribed eDM: 0 | Subscribed SMS: 0

View Users | View Stats | Add Form | Segments

Enter Keyword to Search | Email, Mobile, First Name, Last Name | Subscription Status | in Email Marketin | Search

Bulk action for selected member: Subscribe | eDM & SMS | Apply

+ FIELD | FIELD

| Email | Country Code | Mobile | First Name | Last Name | Gender | Join In Date | Birthday | Company Name | Company Tel. | Company Fax | Company Email | Company Website | Registration Language | Registration Date |
|-------|--------------|--------|------------|-----------|--------|--------------|----------|--------------|--------------|-------------|---------------|-----------------|-----------------------|-------------------|
|-------|--------------|--------|------------|-----------|--------|--------------|----------|--------------|--------------|-------------|---------------|-----------------|-----------------------|-------------------|

Standard fields: Email, country code, mobile, first name, last name, gender, birthday, company name, company tel, company fax, company email, company website

Add custom field

Send List: Email Marketing Seminar

Choose a field type

Text Box: Pretty

Number: 739

Text Area: A warm smile is the universal language of kindness.

Radio Button: Lavender, Rose

Checkbox: Lavender, Rose

Selection Box: Product A, Product B, Product C

Date: December 18

Submit

Cancel

Choose the fields type here, selection box is recommended for segmenting purpose

Managing Data Fields

- ① Put in the field name, which is read by system
 - * Cannot be revised once submitted
 - ** Only support English characters
- ② Put in the field label, which is for internal use
 - * Can be revised later
- ③ For radio button, multiple option of checkbox, and selection box, put in the field options here
 - * Also put in the value in excel respectively

i.e. If the preference of that email user is shopping, then put in “1” in excel

Available Options:

<empty> - Please Select
 1 - Shopping
 2 - Running

| | A | B | C | D | E | F | G | H | I |
|---|-----------|----------|--------|---------------------------|-----------|----------|-------------------|-----|-----|
| 1 | firstname | lastname | gender | email | country_c | mobile | cust_2_preference | edm | sms |
| 2 | 大文 | 陳 | M | chantaiman@domain.com | 852 | 91111111 | 1 | SU | SU |
| 3 | Susan | Lau | F | susanlau@example.com | 853 | 92222222 | 1 | SU | SU |
| 4 | Johnson | Hui | M | johnsonhui@myemail.com | | | 1 | SU | |
| 5 | Christine | So | F | | 852 | 93333333 | 1 | | SU |
| 6 | Peggy | Cheng | F | peggycheng@yourdomain.com | | | 1 | SU | |
| 7 | | | | | | | | | |
| 8 | | | | | | | | | |

① Please give an unique name of this field (characters only)
 cust_2_preference

② Field label (EN)
 interest

③ Field options

| Value | Label (EN) | |
|---------|---------------|---|
| <empty> | Please Select | |
| 1 | Shopping | ✗ |
| 2 | Running | ✗ |

+ Add Option

Submit Cancel

Add users By Importing Excel file



Add / Update users to the list 'Email Marketing Seminar'

☰ Email Marketing Seminar > Users

Back

Total Users: 0 | Subscribed eDM: 0 | Subscribed SMS: 0



[View Users](#)



[View Stats](#)



[Add Form](#)



[Segments](#) 0

Match the file columns with your send list fields...

For each column of your send list data, select a field that it corresponds to.

Map the system fields with your Excel fields here
If no need to import part of data, choose "Nothing (skip)", system will not update that data

| Belongs to... | Belongs to... | Belongs to... | Belongs to... | Belongs to... |
|---------------|--|----------------|---------------------------|---------------|
| First Name | Last Name | Nothing (skip) | Email | Country Cod |
| firstname | <i>Profile Fields</i> Gender Last Name <i>Custom Profile Fields</i> <i>Send List Custom Fields</i> nickname | gender | email | country_cod |
| 大文 | | M | chantaiman@domain.com | 852 |
| Susan | | F | susanlau@example.com | 853 |
| Johnson | Hui | M | johnsonhui@myemail.com | |
| Christine | So | F | | 852 |
| Peggy | Cheng | F | peggycheng@yourdomain.com | |

Upload Another File

Cancel

Submit

Data Import Logic

- Successfully Added
 - >> Users are newly added to send list
- Merged
 - >> Users are added to in this send list before
 - >> Data which is different with previous record will be updated
- Problematic Record
 - >> Email or mobile is missing
 - >> Email format incorrect
 - >> Email is bounced or unsubscribed before

Import Member Result

✔ System has successfully updated 2,309 records with no error.

You will see this sentence when the email list is successfully updated.

Successfully Updated (2,309)

.xls (97-2003 Version) ▾

Export Result

| Row | Firstname | Lastname | Gender | Email | Country Code | Mobile | eDM | SMS | Reason |
|-----|-----------|----------|--------|------------------|----------------------|----------------|-----|-----|--------|
| 2 | | | | vinay@...ing.com | <Empty Country Code> | <Empty Mobile> | | | |
| 3 | Sonia | | | sonia@...co.com | <Empty Country Code> | <Empty Mobile> | | | |

✘ Error: System detected error in 241 entries and DID NOT add/update to database. Please export the result and try again after data correction.

Problematic Records (241)

.xls (97-2003 Version) ▾

Export Result

| Row | Firstname | Lastname | Gender | Email | Country Code | Mobile |
|-----|-----------|----------|--------|-------|----------------------|----------------|
| 5 | | | | | <Empty Country Code> | <Empty Mobile> |
| 69 | Jennifer | | | | <Empty Country Code> | <Empty Mobile> |
| 110 | Sonia | | | | <Empty Country Code> | <Empty Mobile> |
| 140 | | | | | <Empty Country Code> | <Empty Mobile> |
| 149 | | | | | <Empty Country Code> | <Empty Mobile> |

*** You do not need to handle duplicate record as the system will proceed the record automatically. The system will take the first one in record. The record will also be updated if they are added in another send list before.*

You will see this sentence when the email list fails to be updated. Please export the problematic record by clicking "Export Result" and correct the email format. Keep correcting the email list until you successfully update the list to the system.

Manage Send List

Edit Send List

Email Marketing Seminar

Add Description Here

Submit Cancel

ufoedm Campaigns Reports Lists Setting Account Select service

Welcome to ufosend, im-ufosend! Logout

Send Lists

Create and Manage Your Send Lists.

Create Send List Add / Update Users

Manage Send Lists - The list of user groupings

Unassigned Users

Send Lists

Total Users: 8 | Subscribed eDM: 4 | Subscribed SMS: 3 | Unassigned Users: 3

Enter Keyword to Search Email, Mobile, First Name, Last Name Subscription Status in Any Lists Search

Email Marketing Seminar

Total Users: 0 | Created: 2015-02-10 17:28:56

Subscribed eDM: 0 | Subscribed SMS: 0

View Users View Stats Add Form Segments

- 1 Navigate to send lists page
- 2 Mouse over the send list name and edit send list's detail
- 3 Delete send list

Online Form Management

Segmentation Management

*** Uses will be put to "Unassigned User" if the send list is deleted. If you would like to delete the users in the send list as well, you have to delete users from database first. Please refer to [page 26](#) for how to delete users from database*

- 4 You can view the users in the send list by clicking "View Users" (Please refer to [page 26](#) for details)
- 5 Statistic of updating data is available
- 6 Search users by keyword / subscription status and send list

Manage Send List

Email Marketing Seminar > Users Back

Total Users: 4 | Subscribed eDM: 3 | Subscribed SMS: 0

[View Users](#) [View Stats](#) [Edit Form](#) [Segments](#)

Enter Keyword to Search | Email, Mobile, First Name, Last Name | Subscription Status in Email Marketin | Search

Showing 1 to 4 records out of 4 total

Bulk action for selected member: **Subscribe** | eDM & SMS | Apply | + FIELD | + FIELD | Export Users

| | Email | Country Code | Mobile | First Name | Last Name | eDM | SMS | Manage Users |
|--------------------------|---------------------|--------------|----------|------------|-----------|-----|-----|--------------|
| <input type="checkbox"/> | amy@yahoo.com.hk | | | Amy | Chan | | | |
| <input type="checkbox"/> | debbie@ufosend.com | 852 | 91634567 | Debbie | Man | | | |
| <input type="checkbox"/> | debbie@yahoo.com.hk | | | | | | | |
| <input type="checkbox"/> | siuamchan@gmail.com | | | Siu Man | Chan | | | |

Bulk Action Menu:

- Subscribe
- Unsubscribe
- Move to list
- Copy to list
- Remove from list
- Delete from database

eDM & SMS Options:

- eDM & SMS
- eDM
- SMS

Here you can re-subscribe users who have unsubscribed before

- 1 Select users
 - A Tick the box and click the arrow to select all users on current page or on all pages
- 2 Manage users by applying various actions

Data of custom field will be missing if move to other send lists
- 3 Managing data fields, refer to [page 27](#)
- 4 Export users' data in Excel file

Select the fields you need and the excel type
- 5 Subscription status will be shown here
 - Users have subscribed
 - Users have unsubscribed
 - Users do not explicitly state subscribed or unsubscribed
- 6 Manage users
 - Click to view users' details
 - Click to edit users' profiles
 - Click to remove users from list
 - Click to delete users from database

Manage Data Fields



To add fields, refer to page 20



Managing fields..

Choose the fields to be displayed in send list

Select columns to show

Profile Fields

- Email
- Country Code and Mobile (count as 2 fields)
- Registration Language
- Company Website
- Company Email
- Company Fax

Custom Profile Fields

Send List Custom Fields

- Information
- date
- Interests  

Edit the field details

Delete the field

(Upgraded function) Create Registration / Subscription Form

After creating send list, it is recommended to generate signup form for that send list via UFOSend. Data collected from the signup form will be stored in the send list automatically.

The screenshot displays the UFOEDM web interface for managing send lists. At the top, there is a navigation bar with 'ufoedm' logo and menu items: Campaigns, Reports, Lists (highlighted with a red circle '1'), Setting, and Account. Below the navigation bar, the 'Send Lists' page is shown with the sub-header 'Create and Manage Your Send Lists'. There are two main buttons: 'Create Send List' and 'Add / Update Users'. A red banner below the buttons reads 'Manage Send Lists - The list of user groupings'. The main content area shows a list of send lists. The first list is 'Email Marketing Seminar' with 'Total Users: 2', 'Created: 2014-12-16 17:32:10', 'Subscribed eDM: 1', and 'Subscribed SMS: 0'. Below this list are four action buttons: 'View Users', 'View Stats', 'Edit form' (highlighted with a red circle '2'), and 'Segments'.

- 1 Navigate to the Send Lists page
- 2 Click “Create Form” next to the selected list

*** Form can only be generated after send list is created*

Create Signup Form (Upgraded function)

- 1 Standard fields will be included in the form by default
- 2 Create new field by dragging to the right
(Refer to [page 30](#) for details)
- 3 Customs fields are the saved custom fields which can be used on other signup forms (Refer to [page 32](#) for details)
- 4 You can add custom fields in the form by dragging the fields from left to the right side; you can also arrange the fields order by dragging the fields
 - * Make the field mandatory
 - Edit the field
 - Remove the field from signup form
- 5 Images or text can be added by selecting the elements

Create Signup Form – Add Custom Fields (Upgraded function)

Add Field **Field Setting** Form Setting

Unique field name (for internal use)
cust_2_frequency  Only supports letters, digits and underscores

Field label (display on the form)
How frequently would you like to hear from us?

Field options

| Value | Label | |
|---------|---------------|---|
| <empty> | Please Select | |
| 1 | Daily | ✗ |
| 2 | Weekly | ✗ |
| 3 | Monthly | ✗ |

[+ Add Option](#)

OK

Form Header

First Name

Last Name

Email

Country Code
852 (Hong Kong)

Mobile

How frequently would you like to hear from us?
Please Select

I would like to subscribe e-newsletter from your company

I would like to subscribe SMS from your company

**** Field Type & multiple options cannot be edited once the changes are submitted**

Create Signup Form – Custom Fields (Upgraded function)

| | Fields | Description |
|---|---------------|---|
| 1 | Text Box | Users can fill in sentence in the box |
| 2 | Text Area | Users can fill in comments in this area |
| 3 | Number | Users can fill in number in this box |
| 4 | Selection Box | Users can select option(s) from the dropdown menu |
| 5 | Radio Button | Users can select one option in the question |
| 6 | Checkbox | Users can tick the checkbox(es) to choose the answers <i>** Support multiple options</i> |
| 7 | Date | Click and select the date from the calendar |

1 Text Box

2 Text Area

3 Number

4 Selection Box

5 Radio Button

6 Checkbox

7 Date

** When importing “Date” field by Excel, choose “General Format” for cell format

Create Signup Form – Add Custom Fields (Upgraded function)

The screenshot shows the 'Manage eForm' interface for 'eNewsletter'. The main heading is 'eNewsletter > Edit Form'. Below this, there are sections for 'Form Language' (with options for EN, 繁, 簡) and 'eForm (EN)' (with options for URL and iframe code). The URL is 'http://u2.ufosend.com/ufosend/send_list_registers/form/4/form_lang:en'. There are also 'QR Code Access' and 'Form Code: 170592' fields.

The 'Add Fields' section is active, showing a grid of field types: Text Box, Text Area, Number, Selection Box, Radio Button, Checkbox, and Date (YYYY-MM-DD). A red box highlights the option 'copy a field from other forms' with a red arrow pointing to it. Below this, there is a section for 'Form Name: Email Marketing Seminar' with an 'Information' button.

The right side of the interface shows a preview of the form with the following fields: Form Header, First Name, Last Name, Gender (Please Select), and Email.

Click “Copy a field from other forms” to add custom fields created on other signup forms
Drag the field needed to right hand side

Create Signup Form – Customized Header (Upgraded function)

☰ Email Marketing Seminar > Create a Form

Total Users: 1 | Subscribed eDM: 1 | Subscribed SMS: 0

View Users View Stats Add Form Segments

Form Language
I would like my form be available in below language(s)
 EN 繁 簡

1

Add Field Field Setting **Form Setting**

Form Header

Form Title

2 Form Banner (width: 600px)
Drag and drop file here
Or select file from your computer...

Introduction Paragraph

3 **Duplicate Registration Settings**
 Do not allow duplicate registration
 Allow duplicate registration

4 **Registration Notification**
 Do not notify me after user registration
 Notify me every registration through

5 **Others**
 Show CAPTCHA to avoid spam registration

6 **Welcome Email**
A welcome mail yields high open rate.
Please select which option it takes when someone signs up the form.
Do not need a welcome mail

Form Header

1

First Name

Last Name

Gender
Please Select

Email

Country Code
852 (Hong Kong)

Mobile

Birthday

Company Website

I would like to subscribe e-newsletter from your company
 I would like to subscribe SMS from your company

4UIG3Y
Type the text above [Reload](#)

6 Activate welcome email

Do not need a welcome mail
Do not need a welcome mail
Send a simple welcome mail
Send a welcome mail requires double opt-in

** **Welcome email with double opt-in** is recommended to collect valid customers data. It helps to build up hygienic send list which in turn increases inbox deliverability

The welcome email is enabled
 The welcome email is disabled

Save Preview Exit

- 1 Click either one to edit the form header
- 2 Form banner with 600px width is supported
- 3 Allow visitors to register for more than one time
- 4 Activate the registration notification
- 5 Enable the CAPTCHA at the bottom of the form



- 6 Activate welcome email

** **Welcome email with double opt-in** is recommended to collect valid customers data. It helps to build up hygienic send list which in turn increases inbox deliverability

Welcome Email (Upgraded function)



Manage Autoresponder

Cancel

Save

Save & Exit

Welcome Mail for the Form 'Email Marketing Seminar'

Code: WM2

Send Time: Immediate after registered

Target: Send to those who registers this form

Type: Respond to Form Registration

Send Method: Send a welcome mail requires double opt-in [edit](#)
This email point is not activated

1 Campaign Info

2 Content

3 Confirm

[Using eDM Merge in Autoresponder Information >](#)

Now managing

EN

繁

Autoresponder Info

Email Subject

Welcome

Sender

Debbie Man (debbie@ufosend.com)

Use different Reply-To

Campaign Language

This welcome email is available in below language(s)

EN 繁 简

Should you need to add/remove available languages of this welcome mail, please go back to the ['Form Setting'](#) page

Preheader

Recommend around 50 characters

Next Step ▶

Choose the welcome email type

Manage different languages of the welcome email

If you wish to change the language of the welcome email, language of signup form should also be changed

Edit basic email information here

Welcome Email (Upgraded function)

Welcome Mail for the Form 'Email Marketing Seminar'

Code: WM2
Send Time: Immediate after registered
Target: Send to those who registers this form

Type: Respond to Form Registration
Send Method: Send a welcome mail requires double opt-in [edit](#)
This email point is not activated

1 Campaign Info 2 Content **3 Confirm**

Now managing EN 繁

Welcome Mail has been set up for people who fill in the form 'Email Marketing Seminar'
Please review details as below: [Edit Autoresponder Info](#)

| | |
|----------------|-------------------------------------|
| Campaign Name | Welcome for Email Marketing Seminar |
| Email Subject | Welcome |
| Sender | Debbie Man <debbie@ufosend.com> |
| Reply to Name | Debbie Man |
| Reply to Email | debbie@ufosend.com |

Content of Welcome Mail: [Edit Content](#)

| | |
|--------------------|--|
| HTML version | Preview HTML version |
| Plain Text version | Preview Plain Text version |

[Enable this welcome email](#) Send Mockup

After editing the welcome email content (*Refer to [page 43](#)*), enable / disable the welcome email here

(Upgraded function) Segmentation

The screenshot displays the 'ufoedm' web application interface. At the top, a navigation bar includes 'Campaigns', 'Reports', 'Lists' (highlighted), 'Setting', and 'Account'. A dropdown menu under 'Lists' shows 'Send Lists' (marked with a red circle '1') and 'Unsend Lists'. The main header area features the 'Send Lists' title, a subtitle 'Create and Manage Your Send Lists', and two large orange buttons: 'Create Send List' and 'Add / Update Users'. Below this is a dark red banner with a gear icon and the text 'Manage Send Lists - The list of user groupings'. The main content area is titled 'Send Lists' and includes a summary bar with 'Total Users: 5 | Subscribed EDM: 1 | Subscribed SMS: 3 | Unassigned Users: 3'. A search bar is present with a 'Search' button. Below the search bar, a card for 'Email Marketing Seminar' shows 'Total Users: 2 | Created: 2014-12-16 17:32:10 | Subscribed EDM: 1 | Subscribed SMS: 0'. To the right of this card are four icons: 'View Users', 'View Stats', 'Edit form', and 'Segments' (marked with a red circle '2').

Segmentation is recommended to target the right audience. It group the users according to their common features. You can send the right content to the right person by targeting users.

- 1 Navigate to the send lists page
- 2 Click “Segments” on the right

(Upgraded function) Segmentation

Create Segment for Send List 'Email Marketing Seminar'

2 Name

Submit Cancel

1 Create Segment

8 Manage View Users Delete 10

9

Total Users: 0
Subscribed eDM: 0 | Subscribed SMS: 0
Created: 2014-12-28 20:20:07 | Last Update: 2014-12-28 20:20:24

Showing 1 to 1 records out of 1 total

Manage Segment

The segment is saved

Email Marketing Seminar > Segments > Criteria Setup

Segment Name Daily Subscribers

4 How frequently would you like to h...

6 Has Chosen Daily Delete condition

3 Add new criteria

5 Has Chosen

7 Save

Has Chosen
Has Not Chosen
Is Empty
Not Empty

- 1 Create segment by clicking “Create Segment”
- 2 Name the segment
- 3 Start to build up criteria
- 4 Select the field from the signup form
- 5 Select the criteria of segment
- 6 Delete the condition of segment
- 7 Save the segment
- 8 Click “Manage” under the selected segment
- 9 View the users in selected segment group
- 10 Delete the segment

Unsend List

The screenshot displays the 'ufoedm' interface for managing unsend lists. At the top, there is a navigation bar with 'Campaigns', 'Reports', 'Lists', 'Setting', and 'Account'. The 'Lists' menu is open, showing 'Send Lists' and 'Unsend Lists'. A 'Welcome to ufosend, im-ufosend!' message and a 'Logout' link are visible. A 'Select service' dropdown is also present. Below the navigation, the 'Unsend List' section is titled 'Create and Manage Your Unsend List.' A red banner reads 'Manage eDM Unsend List'. The main content area shows 'eDM Unsend List' with a summary: 'Total Unsend Users: 1 | Unsubscribed: 1 | Hard Bounce: 0 | Report Spam: 0'. There is a search bar for unsend users by keywords and a dropdown for 'Please Select Unsent Status'. A table lists unsend users, with one user 'siumanchan@gmail.com' highlighted. A detailed view of this user shows 'Unsubscribed From: [Campaign]', 'Description: Webmaster unsubscribed user's edm service', 'Unsubscribe Date: 2014-12-28 16:47:33', and 'Remarks:'. The interface includes buttons for 'Export Users' and 'Add Unsend User'.

Unsend list holds all unsubscribed and bounced emails. Users who unsubscribed will be put in unsend list **automatically**. System would not send any eDM to them.

- 1 Navigate to the unsend lists page
- 2 Click “Add Unsend User” to add unsend users manually
- 3 Export the unsend list in Excel file
- 4 Search users by keywords or unsubscribed reason
- 5 Edit or delete users from unsend list

(Refer to [page 39](#))

Unsend List

Add Unsend User

1 Email

2 Unsubscribed From

3 Remark

To Add unsend user :

- 1 Input email
- 2 Select campaign which users unsubscribed

** Campaign ID can be retrieved on
"Campaigns" page

- 3 Fill in remark in the text box

Edit Unsend List

Email

Unsubscribed From

Description

Unsubscribe Date

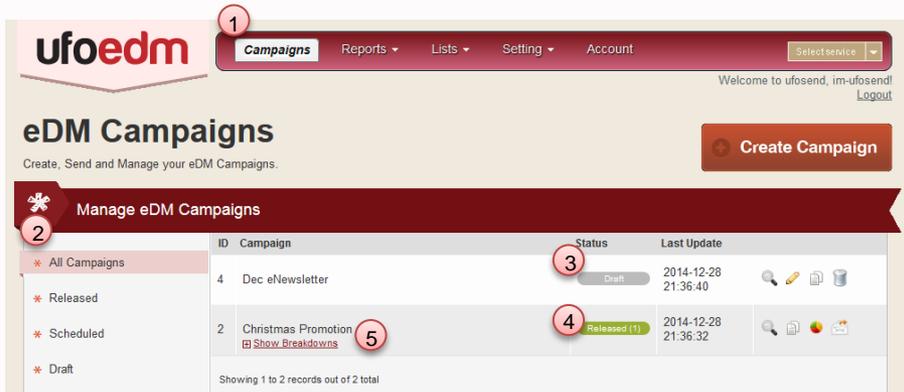
Remark

Only "Remark" can be edited

Delete or resubscribe users from unsend list, the users' subscription status will be updated automatically

Part III - Campaign Management

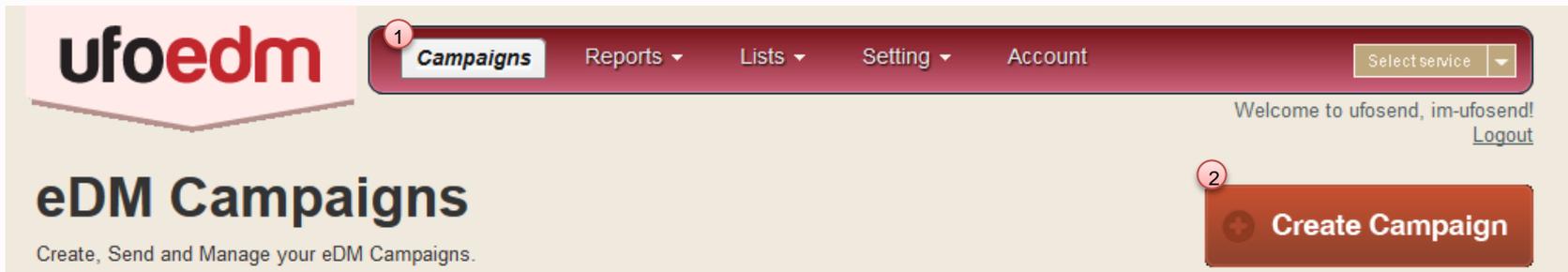
Part III - Campaign Management



- 1 Navigate to campaign page
- 2 Select campaign categories
- 3 The campaign will be in “Draft” status if eDM is not sent yet. You can edit the eDM during drafting.
- 4 The campaign will be in “Released” status if eDM is sent already. You cannot edit it anymore. The figure next to released is the number of times the campaign sent.
- 5 Click “Show Breakdown” to view the breakdown of campaign report, i.e. batch sent and individual batch report

| | |
|---|---|
|  | Edit the campaign |
|  | Delete the campaign |
|  | View the eDM |
|  | Duplicate the campaign if you need to edit the released eDM. You can edit the eDM in new campaign |
|  | View the summary statistic report of campaign |
|  | Resend the campaign |

Campaign Creation



A campaign is details of a newsletter. It can be sent multiple times, each of which is called a batch. In other words, batch is per release of a campaign. One campaign may contain different batches. Individual statistical report will be generated for each batch.

- 1 Navigate to the eDM Campaigns page
- 2 Start to create campaign by using the button “Create Campaign”

Basic Campaign Setting

Manage different languages of the eDM by selecting the language here, make sure to edit the eDM subject line in different versions

You are creating eDM campaign

Cancel Save Save & Exit

1 Campaign Info 2 Content 3 Target & Send

How you describe your Campaign?

Use Mail Merge in Sending Information >

Basic Campaign Info

1 Campaign Name
Dec eNewsletter

2 Email Subject
Dec eNewsletter

3 Sender
Debbie Man (debbie@ufosend.com)

4 +

5 Use different Reply-To

6 Reply-To Name
Debbie Man

Reply-To Email
debbie@ufosend.com

Now managing EN

Campaign Language

Need multiple language(s) of this campaign?

No need Yes, please let me define available languages

EN 繁 简

7 Preheader

Recommend around 50 characters

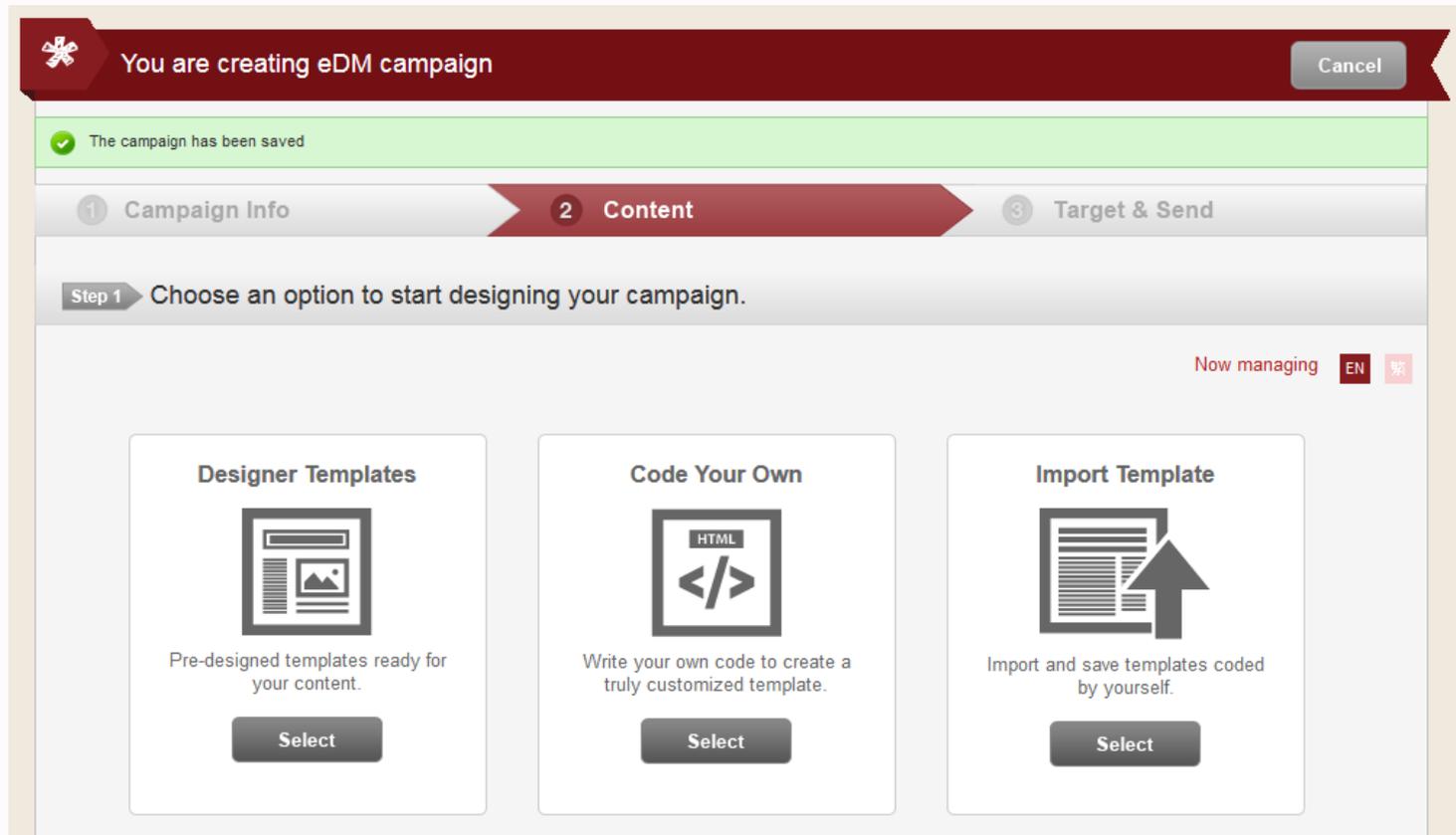
Next Step >

Email subject Preheader

7 Jan Seminar Click & See the details of Jan Seminar

- 1 Name the campaign for internal use
- 2 Fill in the email subject which will be viewed by recipients
*** Mail merge function is available, refer to page 72, Mail Merge*
- 3 Select the sender shown to recipients
- 4 Add sender by clicking 
(Refer to page 10, Sender Setup)
- 5 Tick the checkbox to use another email as reply email, which can receive reply from recipients, if this checkbox is not ticked, reply from recipients will be sent to the sender email by default
- 6 Fill in another user email & name to receive reply
- 7 Preview text will be shown next to email subject in recipient's mail box
*** The first readable sentence of the eDM will be shown next to the email subject if no preview text is entered*

Campaign Content Setting - Choose Design Options



Use pre-designed templates

Compose new template using our graphical editor

Import your own designed template

Designer Templates

You can zoom in the pre-designed template by clicking the magnifier and selecting the suitable templates. Responsive & Non-responsive templates are available.

** Responsive designs will fit both desktop computer and mobile phone. Email experience will be greatly enhanced by adopting responsive designs.

Step 2 Choose a template layout for your campaign.

Now managing EN

Responsive Designs Non-Responsive Designs

We endeavour to produce templates (responsive mobile-friendly templates) that fit for various devices. With this mobile-friendly functionality, your recipients do not need to stretch zoom your content with two fingers. As a result, this largely improves your click rate.

| | | | |
|---|---|---|---|
| <p>Wedding Cosmetic</p>  <p>Select</p> | <p>American Restaurant</p>  <p>Select</p> | <p>Welcome Letter</p>  <p>Select</p> | <p>Halloween celebration</p>  <p>Select</p> |
| <p>Birthday Surprise</p>  <p>Select</p> | <p>Halloween Dessert</p>  <p>Select</p> | <p>Wedding Promotion</p>  <p>Select</p> | <p>Mid-Autumn Festival Greeting - Light BG</p>  <p>Select</p> |

Designer Templates

Step 3 Edit your html content.

You have chosen Designer Templates with template: Welcome Letter

1 Use Mail Merge in eDM Content 2 Now managing EN

1

2

3

LOGO HERE View Online

WELCOME

Welcome to \$company_name_en\$!

Hi \$system_detect_name\$.

Thank you for joining \$company_name_en\$!

From time to time, we would share eTips on digital marketing to our friends / customers, do share with us your any ideas anytime. We love to provide free consultation to any enterprises or SMEs on how to strategically work out email marketing plans, and thus, increase ROI (Note : researches show that Email Marketing is the top media channel of generating ROI).

In the mean time, say hello on Facebook, where we frequently post little gems that entertain, inspire and educate. See you on the other side.

\$message_tag\$

Cheers!

By Your Name @ \$company_name_en\$

Visit Us >>

Find us on Facebook

You have received this email because you subscribed to our newsletters. To ensure our messages are delivered to your inbox, please add us to your address book.

Unsubscribe | Forward to friends | Contact Us

Copyright \$company_name_en\$. All rights reserved.

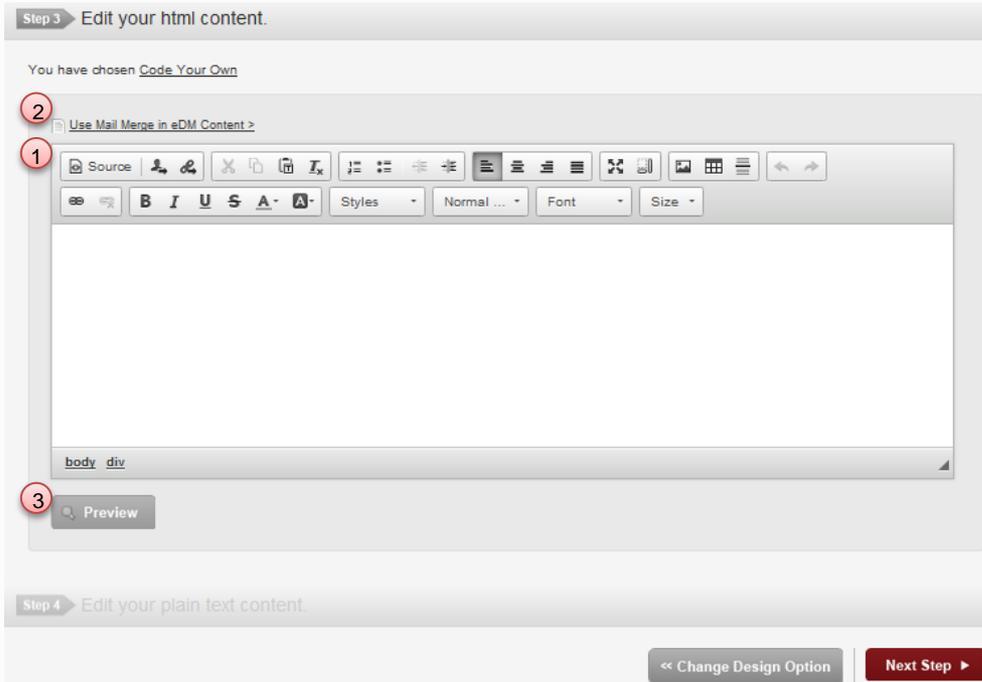
Preview

Step 4 Edit your plain text content.

<< Change Design Option Next Step >>

- 1 You can edit the eDM using the graphical editor (*Refer to page 74, Graphical Editor*)
*** Note: Please follow the layout of the template, or the responsive design may be affected*
- 2 Support Mail Merge function (*Refer to page 72, Mail Merge*)
- 3 Manage different languages of the eDM

Code Your Own



- 1 You can code the eDM using HTML
- 2 Support mail merge function
(Refer to page 72, Mail Merge)
- 3 Preview the edited eDM

Import Template

- 1 images
- 2 index.html

The screenshot shows a web interface for creating an eDM campaign. At the top, a dark red banner reads "You are creating eDM campaign" with a "Cancel" button. Below this is a progress bar with three steps: "1 Campaign Info", "2 Content" (the active step), and "3 Target & Send". Under "Step 2", the instruction is "Import template by zip / rar file." Below this, it says "You have chosen Import Template." and "Now managing EN W". A red circle with the number "3" is placed over the "Template (EN)" section. This section contains a text box with the instruction "Please include index.html, index.htm, main.html or main.htm, and upload the template by zip file." Below this are two file upload areas: "Template (EN)" and "Template (繁)", each with a "Drag and drop file here" prompt and a link to "select file from your computer...". At the bottom of the interface, there are two buttons: "<< Change Design Option" and "Next Step >".

- 1 Put all images required inside “images” folder
*** Make sure the path of images in the HTML file is correct i.e. “images/banner.jpg”
“images” will be the image folder name and “banner” is the image name*
- 2 Name the HTML file as “index.html” and zip it with images folder together
- 3 Drag the template here
*** Only support zip / rar file*

Convert Text From HTML

Step 4 Edit your plain text content.

*Since SPAM filter may mark you as spam if you only provide a html version, also there are still a number of device are not able to view the html version eDM. So we strongly recommend that you also send a plain text version of eDM – Click to retrieve a plain text version as well.

[Use Mail Merge in Plain Text Content >](#)

Somebody_name_en\$

Relative image path
Some description about your company here

Dear \$system_detect_name\$
This is from template 12

Heading 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla et neque magna. Morbi id nibh ligula, eget auctor dui. Nulla fringilla dictum leo, at condimentum mauris pretium in. Sed in massa magna. Cras a diam sem, nec vehicula purus. Quisque tempus auctor pellentesque.

Cras sit amet urna ut nulla hendrerit commodo ut nec ligula. Phasellus vel metus in sem venenatis pharetra id eget justo. Duis eu purus nec sem faucibus condimentum.

.....

The HTML will be converted into plain text automatically. This action is to provide plain text for some recipients who cannot read HTML format. This action increase inbox delivery rate and lower the chance of going to SPAM folder.

Part IV - Target & Send

Part IV - Target & Send

1 Campaign Info **2 Content** **3 Target & Send**

You are sending the following Campaign Info:

| | |
|----------------|-------------------------------------|
| Campaign Name | Marketing |
| Email Subject | Marketing |
| Sender | Debbie Man <debbie.man@ufosend.com> |
| Reply to Name | Debbie Man |
| Reply to Email | debbie.man@ufosend.com |

You are sending the following Content:

| | |
|--------------------|--|
| HTML version | Preview HTML version |
| Plain Text version | Preview Plain Text version |

Please choose a sending target:

Data Source

Send List Input Email Importing Excel File

You can still edit the campaign setting & eDM content in this step

- 1 Click “Edit Campaign Info” to edit the campaign setting
- 2 Click “Edit Content” to edit the eDM content
- 3 It is recommended to send mockup for internal review before sending eDM to customers. The mockup will not be counted in report and monthly usage.

3 Sending Methods for releasing campaign:

By Input

By Import
Excel file

By Send List

Send Mockup

A

Send Mockup

You may send multiple languages mockup at the same time, please choose below for your testing:

EN 繁 简

Send Mockup by Input Email Send by Mockup Group

For multiple recipients, please input one email per line

Send Mockup

Choose the language here

B

Send Mockup

You may send multiple languages mockup at the same time, please choose below for your testing:

EN 繁 简

Send Mockup by Input Email Send by Mockup Group

Marketing Department (Users to send: 1)

Email: debbie@ufosend.com Mobile:
Firstname: Debbie Lastname: Man

Send Mockup

A **By input:** Choose “Send Mockup by Input Email”, enter the email in the text box below, and click “Send Mockup”

B **By Mockup Group list:** Choose “Send by Mockup Group”, select the group below, and click “Send Mockup”

** If choose to send by mockup group list, you have to create the list first (Refer to page 11, Mockup Groups Configurations)

Send by Importing Excel file

Data Source

Send List Input Email Importing Excel File

Please upload excel file:

Or select file from your computer...

Smart detect user's preferred language

Exclude those you have sent this campaign (and it's parents) before

Also send to unsubscribed and not subscribed users

- 1 Choose "Send by .xls"
- 2 Send Mockup and review the eDM
- 3 Download the sample Excel file (Refer to [page 54](#))
- 4 Drag or select the file from computer and upload
- 5 Choose the language you would like to send out (Refer to [page 54](#))
- 6 Validate the file

Send by Importing Excel file

| | A | B | C | D | E |
|---|------------------------|------------------|-----------------|--------------------|---|
| 1 | Email | Firstname | Lastname | prefer_lang | |
| 2 | chantaiman@domain.com | 大文 | 陳 | en | |
| 3 | susanlau@example.com | Susan | Lau | tc | |
| 4 | johnsonhui@myemail.com | Johnson | Hui | sc | |
| 5 | | | | | |

*** If multi-lingual function is activated, **prefer_lang** is necessary field to be imported ***

- **prefer_lang**: this column is for updating which language subscribers prefer to read
- **en** > English; **tc** > Traditional Chinese; **sc** > Simplified Chinese
- If leave this column empty, eDM will be sent in the language you choose when sending out eDM

Which language of this campaign you are going to send?

Smart detect user's preferred language

i.e. If you choose “EN”, all subscribers will receive English version of the eDM

If you choose "Smart detect user's preferred languages", subscribers will receive the eDM in the languages you updated in Excel file

Send by Importing Excel file

Please choose a sending target:

Send by Send List Send by Input Email Send by Importing Excel File

[Send Mockup](#)

Please upload excel file:

 **Drag and drop file here**
Or [select file from your computer...](#)

Exclude those you have sent this campaign before

Also send to unsubscribed and not subscribed users

Unique Emails to send: 1

All entries are valid to send.



1 After validation, you will see the message:

- Emails are validated to send
- Emails are not validated to send

Correct the data according to the reasons provided

2 This figure is the effective email which will be sent. All duplicate email will be filtered and excluded

3 Send out eDM immediately

4 Send out eDM by schedule

Send by Manually Input

Refer to [page 54](#)

Which language of this campaign you are going to send?

EN ▾

Data Source

Send List Input Email Importing Excel File Send Mockup

Please input Email to send:

debbie@ufosend.com

Which language of this campaign you are going to send?

EN ▾

Exclude those you have sent this campaign (and it's parents) before

Also send to unsubscribed and not subscribed users

Unique Emails to send: 1

All entries are valid to send.

Send Now Schedule Send

Exclude those you have sent this campaign (and it's parents) before

Also send to unsubscribed and not subscribed users

Validate Email

- 1 Select “Send by Input Email”
- 2 Send Mockup and review the eDM
- 3 Fill in the email
- 4 If multi languages are activated, choose the language you would like to send
- 5 Validate the email
- 6 Emails are valid to send
- 7 Emails are not valid to send
- 8 This figure is the effective email which will be sent, all duplicate email will be filtered and excluded
- 9 Send out eDM immediately
- 9 Send out eDM by schedule

Send by Send List

Data Source

Choose "Send List"

Send Mockup and review the eDM

1

Send List Input Email Importing Excel File

2

Send Mockup

Please choose Send List (Effective Email):

Select All Send List

3

Email Marketing Seminar (1)

Saved Segment Group

Daily Subscribers (0)

Choose which send list / segment group to be sent

** Click "Show Segments" on the right to display the segment groups

Hide Segments (0 selected)

Add Segment

eNewsletter (0)

Add Segment

[+ Create Send List](#)

4

Which language of this campaign you are going to send?

Smart detect user's preferred language

Choose the language you would like to send out

- i.e. If choose "EN", all subscribers will receive English version of the eDM

Exclude those you have sent this campaign (and it's parents) before

Also send to unsubscribed and not subscribed users

- i.e. If choose "Smart detect user's preferred languages", subscribers will receive the eDM in the languages you updated in send list

Unique Emails to send: 1

Send Now

Schedule Send

Send by Send List

Data Source

Send List Input Email Importing Excel File

[Send Mockup](#)

Please choose Send List (Effective Email):

Select All Send List

Email Marketing Seminar (1) [Hide Segments \(0 selected\)](#)

Saved Segment Group

Daily Subscribers (0)

[Add Segment](#)

eNewsletter (0)

[Add Segment](#)

[+ Create Send List](#)

[? Which language of this campaign you are going to send?](#)

Smart detect user's preferred language [v](#)

Exclude those you have sent this campaign (and it's parents) before

Also send to unsubscribed and not subscribed users

[? Unique Emails to send: 1](#)

[2 Send Now](#) [3 Schedule Send](#)

Send out eDM immediately



2

3

1

This figure is the effective email which will be sent, all duplicate email will be filtered and excluded

Send out eDM by schedule

Exclude users / Send to unsubscribers

The screenshot shows a web interface titled 'Data Source' with three radio buttons: 'Send List', 'Input Email' (selected), and 'Importing Excel File'. A 'Send Mockup' button is in the top right. Below, a text area labeled 'Please input Email to send:' contains 'debbie@ufosend.com'. A dropdown menu for 'Which language of this campaign you are going to send?' is set to 'EN'. Two checkboxes are visible: 'Exclude those you have sent this campaign (and it's parents) before' (checkbox 1) and 'Also send to unsubscribed and not subscribed users' (checkbox 2). A red arrow points from checkbox 2 to the 'Validate Email' button. At the bottom, there are 'Send Now' and 'Schedule Send' buttons, and a green status bar that says 'All entries are valid to send.'

*** This function is available for every sending method ***

① Check the box to exclude the users you have sent eDM in this campaign before
* This option is available after first release of campaign

** If this campaign is duplicated from other campaigns, users who have been sent previously in other campaigns will be excluded also

② Check the box to send the eDM to unsubscribed & not subscribed users as well

*** Only non-commercial eDM can be sent to these users without permission

i.e. Event notification

Targeting recipients' activities

You are sending the following Campaign Info:

| | |
|----------------|-------------------------------------|
| Campaign Name | Marketing |
| Email Subject | Marketing |
| Sender | Debbie Man <debbie.man@ufosend.com> |
| Reply to Name | Debbie Man |
| Reply to Email | debbie.man@ufosend.com |

You are sending the following Content:

| | |
|--------------------|--|
| HTML version | Preview HTML version |
| Plain Text version | Preview Plain Text version |

Please choose a sending target:

Response Filter

Data Source

Once got recipients' response, you will be able to target recipients who have / have not read / click previous eDM

+ Add Condition

- Users who have read
- Users who have clicked
- Users who have not read
- Users who have not clicked

Targeting recipients' activities

Please choose a sending target:

Response Filter

+ Add Condition

Users who have read

[2] Marketing

AND

Users who have clicked

[2] Marketing URL Link: http://u2.ufosend.com/ufosend1/edm_campaigns/edm_browse/c_lang:en

- Remarketing recipients who have read and clicked another eDM
- Reengage recipients who haven't engaged with your eDM

Please choose a sending target:

Response Filter

+ Add Condition

Users who have not read

[2] Marketing

AND

Users who have not clicked

[2] Marketing URL Link: Any URL

Send by Schedule

The screenshot shows a form titled "Schedule Send". It contains two input fields: "Schedule Send Date" and "Schedule Send Time". The "Schedule Send Time" field is a dropdown menu showing "17" and "30" with arrows. Below the form is a dark red button labeled "Schedule Send". Three red circles with numbers 1, 2, and 3 are placed above the date box, the time dropdown, and the button respectively, indicating the steps to follow.

To send the eDM by schedule:

- 1 Click the date box and select the date from the calendar
- 2 Select the send time
- 3 Click "Schedule Send"

Part V - Reports - Campaign Reports

Part V - Reports - Campaign Reports

ufoedm Campaigns **Reports** Lists Setting Account Select service

Welcome to ufoed, im-ufoed! [Logout](#)

Campaign Repo

View your campaign and batch reports.

Manage Campaign Reports

Christmas Promotion View Report

Last Update: 2014-12-28 21:36:32 | Campaign ID: 2 | Total Emails to Send: 1

Release No. 1 Released Release Time: 2014-12-28 21:36:33 | Emails to Send: 1

Sent Details: • Successful: 1 (100.00%) • Bounce: 0 (0.00%) • Waiting Feedback: 0 (0.00%) View Batch Report >

Showing 1 to 1 records out of 1 total

- 1 Navigate to the campaign reports page
- 2 View summary report of all batches sent
- 3 View individual batch report

Delivery Report

Campaign Reports

Christmas Promotion Released (1) Scheduled (0)

Email Subject: Surprise to your beloved
 Campaign ID: 2 | Sender: Debbie Man <debbie@ufosend.com>
 Email to Send: Email Sent 1 + Email Scheduled 0 = Effective Email 1

eDM Delivery 1 email sent

Recipient Action: 1 email successfully sent

Social Action: 0 recipient engaged

Overall Report

Successful: 1

Successful Sent: 100.00% email successfully sent

Soft Bounce: 0.00% email soft bounced

Waiting Feedback: 0.00% email waiting feedback

Hard Bounce: 0.00% email hard bounced

Subject: Jan Seminar

Export Report

You are going to export Successful result, it may take several minutes to finish.

Format: .xls (97-2003 Version) Export

Email Filter

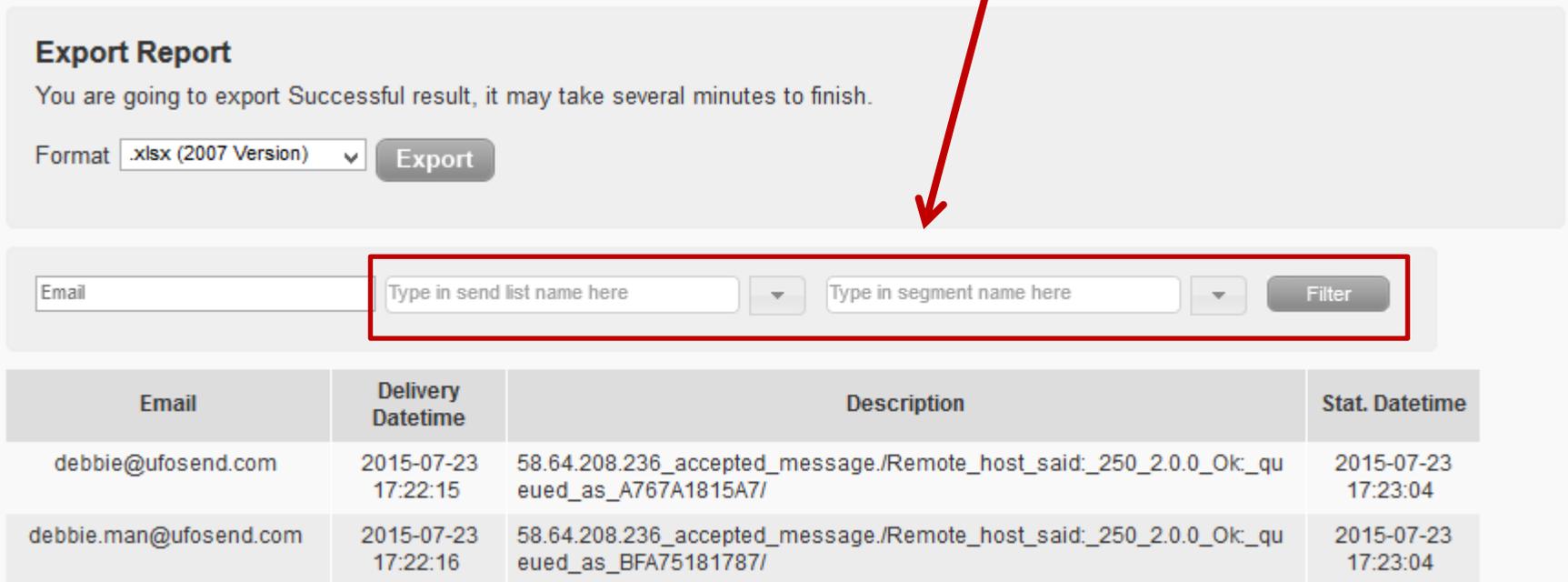
| Email | Delivery Datetime | Description | Stat. Datetime |
|-------|---------------------|---|---------------------|
| | 2013-12-02 16:41:00 | 74.125.129.26_accepted_message./Remote_host_said:_250_2.0.0_OK_1385973863_ot3si37030145pac.195_-_gsmtp/ | 2013-12-02 16:42:03 |
| | 2013-12-02 16:41:00 | 182.239.53.191_accepted_message./Remote_host_said:_250_OK_id=1VnP3v-00025e-98/ | 2013-12-02 16:42:03 |

- 1 View campaign
- 2 Print out the report
- 3 View custom report by selecting fields & data
*** Only fields of selection box can be viewed in custom report*
- 4 Select to view individual or summary report
- 5 View the delivery report
- 6 View the detail report of eDM in corresponding status by clicking the figure next to the status
- 7 Report can be exported in Excel file, select the file format and click export
- 8 Search email user

Delivery Report

** Soft Bounce records the email addresses which are temporarily unavailable while Hard Bounce records the email addresses which are no longer available

If sending by multiple send lists or segments, you can read the details by send lists or segments here



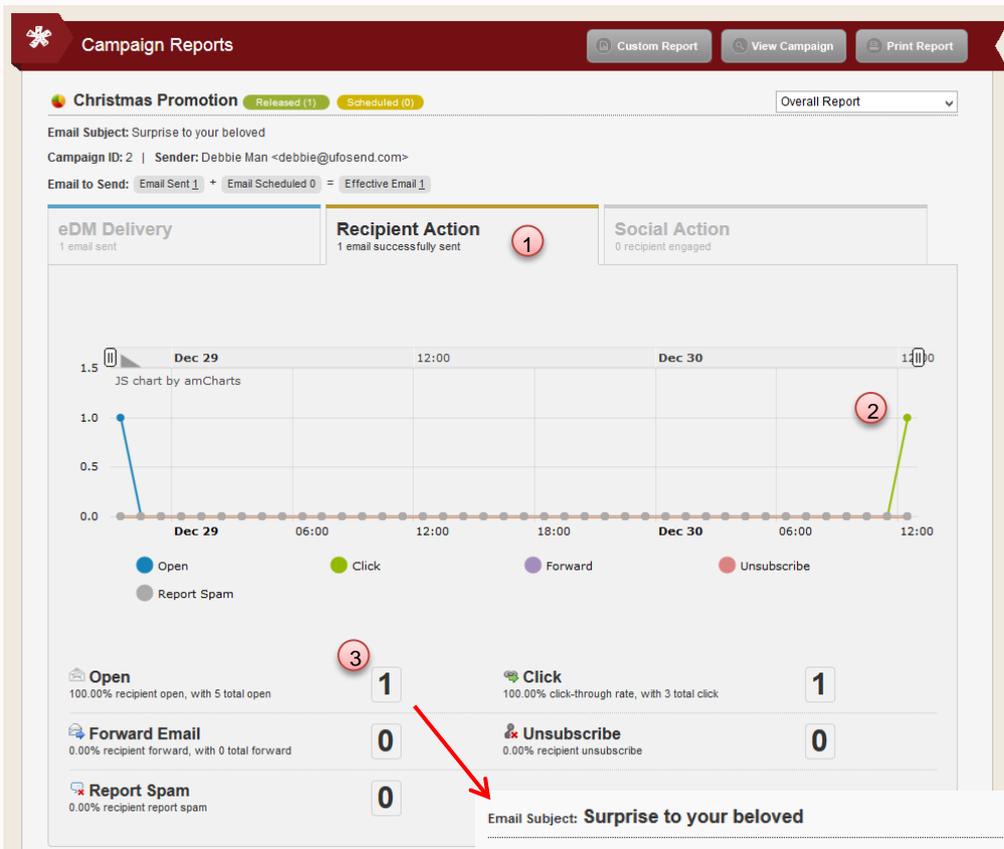
Export Report
You are going to export Successful result, it may take several minutes to finish.

Format

Email

| Email | Delivery Datetime | Description | Stat. Datetime |
|------------------------|---------------------|--|---------------------|
| debbie@ufosend.com | 2015-07-23 17:22:15 | 58.64.208.236_accepted_message./Remote_host_said:_250_2.0.0_Ok_qu eued_as_A767A1815A7/ | 2015-07-23 17:23:04 |
| debbie.man@ufosend.com | 2015-07-23 17:22:16 | 58.64.208.236_accepted_message./Remote_host_said:_250_2.0.0_Ok_qu eued_as_BFA75181787/ | 2015-07-23 17:23:04 |

Recipient Action Report



- 1 View the recipient action report
- 2 Point on the graph and view the action statistic at specific point of time
- 3 View the detail report of recipient action by clicking the figure
*** Statistic of recipients who do not download to view the pictures will not be included*
- 4 Report can be exported in Excel file, select the file format and click export
- 5 Search email user

Email Subject: **Surprise to your beloved** Unique Open: 1 Total Open: 5

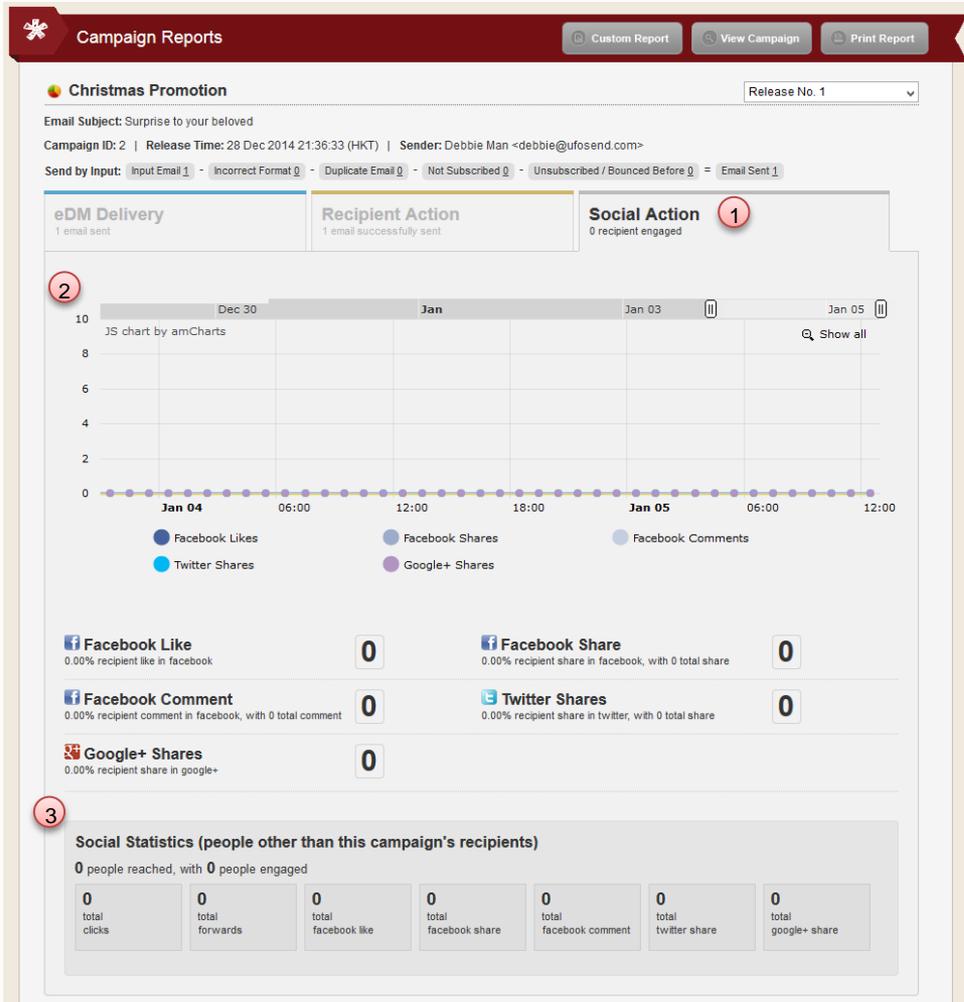
Export Report
You are going to export Open result, it may take several minutes to finish.

4 Format: .xlsx (2007 Version) **Export**

5 Email: **Filter**

| Email | First Open Time | Last Open Time | Total Open | IP |
|--------------------|---------------------|---------------------|------------|---------------|
| debbie@ufosend.com | 2014-12-28 21:36:52 | 2014-12-30 12:41:50 | 5 | 123.202.158.8 |

Social Action Report



- 1 View social action report
- 2 Point on the graph and view the recipient social action statistic at specific point of time
- 3 View the social action of other people (not campaign's recipients)

** Social Action Report records the interaction statistic via UFOSend social media buttons

That is, interaction driven by social media links generated by social medias themselves cannot be recorded here

Monthly Reports

The screenshot shows the ufoedm web interface. At the top, there is a navigation bar with 'Campaigns', 'Reports', 'Lists', 'Setting', and 'Account'. The 'Reports' menu is open, showing 'Campaign Reports', 'Monthly Reports' (highlighted with a red circle 1), and 'User Reports'. Below the navigation, the page title is 'Monthly Reports' with a subtitle 'Manage and view your monthly reports.' A 'Print Report' button is visible in the top right of the report area (circle 2). On the left, a calendar for 2014 is shown with 'Dec' selected (circle 3). The main report area is titled '2014 December Report' and shows 'Batch Released (2)' and 'Batch Scheduled (0)'. It includes a summary: 'Email to Send: Email Sent 2 + Email Scheduled 0 = Effective Email 2'. Below this, there are three sections: 'eDM Delivery' (2 email sent), 'Recipient Action' (2 email successfully sent), and 'Social Action' (1 recipient engaged). A pie chart shows 'Successful: 2' (100%). At the bottom, there are four summary cards: 'Successful Sent' (2, 100.00% email successfully sent), 'Waiting Feedback' (0, 0.00% email waiting feedback), 'Soft Bounce' (0, 0.00% email soft bounced), and 'Hard Bounce' (0, 0.00% email hard bounced). A red circle 4 points to the 'eDM Delivery' section.

- 1 Navigate to Monthly Reports page
- 2 Print out report
- 3 Select year & month
- 4 Select report type

User Reports

ufoedm

User reports

Campaigns

Reports

Lists ▾

Setting ▾

Account

Select service ▾

Welcome to ufosend, im-ufosend!

[Logout](#)

Campaign Reports

Monthly Reports

1 **User Reports** ←

Navigate to User Reports



Show user profiles, and how they interact with your campaigns

4 Enter Email to Search ← Search particular user here

Search

Email

First Name

Last Name

Country Code

Mobile

debbie@ufosend.com

Debbie

Man

2

3



You can check users' activities in User Reports

- 2 Click to view the profile of particular user
- 3 Click to view the activity history of particular user
i.e. Open / click history

Part VI – Functions - Mail Merge

Part VI – Functions - Mail Merge

Tips for Mail Merge

You can paste \$TAG\$\$ into your email, so you can personalize each recipient's message.

| | |
|--|--|
| Merge Field | \$TAG\$ |
| Display name by detecting the language of user's firstname and lastname (Eng) Mr. David Chan (Other Lang.) 陳大文先生 | \$system_detect_name\$ |
| First Name | \$firstname\$ |
| Last Name | \$lastname\$ |
| Salutation | \$salutation\$ |
| Birthday | \$birthday\$ |
| Mobile | \$mobile\$ |
| Email | \$email\$ |
| Company Address | \$company_address_en\$ \$company_address_tc\$ \$company_address_sc\$ |
| Company Name | \$company_name_en\$ \$company_name_tc\$ \$company_name_sc\$ |

Example : Dear \$salutation\$ \$firstname\$ \$lastname\$,

After mail merged, above sentence may show as:

Dear Mr. Leonardo Chan,

If salutation and lastname fields in database has no value, above sentence would show as:

Dear Leonardo,

- Mail merge function helps to personalize eDM which can increase engagement rate. This function can be used in campaign creation
- When using mail merge function, users' data must be provided in particular field, so that users' data will be merged to the content automatically. For example, if \$firstname\$ is used to merge the first name of recipients with eDM, the first name of recipients must be provided when inputting users' data.
- To test merge function, mockup can be used to test profile field merge, real blast is required for testing send list custom field
- To merge with send list custom field, send by only one send list
(Refer to [page 16, Create Send List](#) & [page 51, Target & Send for data import](#))

Part VI – Functions - Mail Merge

ufoedM Campaigns Reports Lists **Setting** Account Selectservice

Welcome to ufosend, im-ufosend1! Logout

eDM Configurations

Configure your eDM Default Settings.

Configure your eDM Settings

Please configure your sender information:

| Sender Name | Sender Email | Verified Email | Department | Edit | Delete | vCard |
|-------------|------------------------|----------------|------------|------|--------|-------|
| Debbie Man | debbie.man@ufosend.com | ✓ | Super User | | | |

[Add New Sender](#)

Please configure your preference to receive notification:

I would like to receive notification after each campaign has successfully delivered

Below emails will receive a notification email when a campaign has been successfully delivered

| Name | Email | Edit | Delete |
|---------------|---------------------|------|--------|
| Mr. Marketing | inquiry@ufosend.com | | |

[Add Notification Recipient](#)

2 Smart Personalization:

Inside any campaigns, you may add a merge tag `$$system_detect_name$` to name your members. Details please refers to here.

If a particular member has no firstname and lastname provided, you will show his name as:

| | | |
|----------------------|----------------------|----------------------|
| EN | 繁 | 简 |
| Display As | Display As | Display As |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Submit

If no data available for merging `$$system_detect_name$`, you may set the default merge value under “eDM Configurations”

For example,

- If no value for first name, or last name, you can set “Valued Customer” here
- Then “Values Customer” will be shown when you use `$$system_detect_name$`

Further support please email to support@ufosend.com